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## Overview

User Acceptance Test (UAT) Release #21 Cycle 2 has been deployed to the SIU UAT environment. Security constraints for this environment will require a login through the State Login Portal. When you follow the link to the UAT environment, the system will route the user to the State of Illinois Login. After a successful login, the user will be returned to the UAT environment where IWDS-2.0 is running.

## Purpose

This UAT cycle is designed to validate the end-to-end eligibility workflow within the application and eligibility certification process. Testing will focus on ensuring that eligibility tracks are correctly determined, required criteria are captured, and that document upload functionality, both during application (optional) and within certification (required), is working as intended.

Additionally, this cycle will confirm that key features on the Eligibility Certification screen, including phases, appointment scheduling, application review, and Eligible Programs and Criteria, function accurately and support staff in making consistent eligibility determinations.

## UAT Release 21 – Cycle 2 Expectations & Homework

**Homework Areas** - For this week, your UAT tasks will focus on the following key area listed below. More information on these areas can be found in the next section of this document.

- **Application – Document Upload Page**
  - Test eligibility triggers and document upload through the **Career Planner** view
    - Career Planners can see all criteria and source document options
  - Test eligibility triggers document upload through the **Customer** view
    - Customers see a limited set of eligibility criteria and document options appropriate for self-service
- **Eligibility Certification Page**
  - Phases - Review movement between phases.
    - *Notes –*
      - *The phase bar is different for Youth.*
      - *Triggering the enrolling service is not yet hooked up.*

- **Appointment Scheduled** – Validate data is populated if previously entered and new dates can be added or edited.
  - *Note - Data entered into the application submit page will be pulled in. This information will also be used by the dashboard to flag when action is needed for submitted applications.*
- **Application Review** – Ensure progress is aligned with career planner review of application
  - *Note –*
    - *If the career planner is logged in facilitating the completion of the application the review is simultaneously taking place.*
    - *If a customer completes the application on their own the career planner will use the Open Review option to complete their own review of the application to help communicate needs and expectations for the appointment and will then use these pages again at time of appointment to complete the application.*
- **Eligible Programs and Criteria** - Review how programs are determined based on information entered in the application. Validate criteria evaluation and documentation alignment
  - *Note – Work is still being done on the Show All Programs (programs a customer does not meet) to better align uploaded documentation that matches other areas as well as showing as Met = Yes in those programs where not everything was met.*
- **Complete Certification** – Validate that the programs display for certification after the application has been signed and all supporting documentation has been uploaded.

## Due Date

Please complete your testing in these areas and submit your feedback by **End of Day on June 3.**

## Access to UAT Environment

To access the UAT environment in your browser, follow the link provided here.

<https://testapps.illinoisworknet.com/iwdst-Preview>

## Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook - [UAT Notebook Link](#). (Note – the notebook is also linked on the IWDS Transition Project Resources Page linked here: [IWDST Full Resources](#). The main purpose of using a shared notebook is for collaboration between members of the UAT team and the business analysts. This will cut down on duplicate issues being reported.

- **When logging your entries:**
  - You should document this information as you are completing your UAT work.
  - The top section in the notebook is labeled Example Issue Reporting. Please refer to that page to get an idea of how you can report an issue.
  - In the notebook you will find a section labeled Test Customers with all available test customers. Use a customer from that table for your testing. Testers can share customers. Once a service has been added to trigger MSG, multiple testers can add MSGs from the same customer without causing errors.
  - In the notebook you will also find a section labeled MSG where you should document your feedback.
  - Be concise but detailed.
  - If multiple issues arise in one area, log each one separately for clarity.
  - Please provide the name of the customer you are using when you log an issue so we can easily go in and take a look at what is going on to troubleshoot.
  - Log the URL of the page where you ran into an issue.
- If you have issues accessing the OneNote notebook - Please contact one of the business analysts (BA) on the team. The business analysts are:
  - Kelly Trimble – [Kelly.trimble@siu.edu](mailto:Kelly.trimble@siu.edu)
  - Olivia Miller - [olivia.miller@siu.edu](mailto:olivia.miller@siu.edu)
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  - Al Menke – [al.menke@siu.edu](mailto:al.menke@siu.edu)

## Expectations for UAT

As you test these areas, please keep in mind the following best practices:

- **Test Thoroughly:** Ensure that you navigate through all functions and features within these areas. Pay attention to any discrepancies between expected and actual results.
- **Detail-Oriented:** When reporting issues, provide as much context as possible, including:
  - Steps to reproduce the issue
  - Screenshots or recordings, if possible
  - Browser or device used during testing
  - Expected vs. actual outcomes
- **Feedback Categories:**
  - **Bugs** - When the system does not perform as expected, and the system is not performing according to the requirements, then a bug will be reported, tracked, fixed, and retested.
  - **Issues** - If the system is performing according to the requirements, but the user feels that the requirement was not captured correctly or now the user feels like the requirement is just not working as expected, then this is recorded as an issue. Issues are tracked and prioritized for change.
  - **Enhancements**- Once we are in UAT and the users recognize an area that could be improved, then this will be also logged as an issue and tagged as an enhancement.

## Best Practices for Effective UAT

- **Think like the end user:** Approach your testing from the perspective of someone unfamiliar with the system. This will help you identify usability issues and areas for improvement.
- **Be specific and thorough:** The more specific your feedback, the easier it will be to address. Include specific steps, expected outcomes, and actual results.
- **Provide context:** Always give context for your feedback. For instance, explain why an enhancement would improve the user experience or system performance.

By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

## Overview of Application Document Upload

The Application Document Upload page allows customers and staff to provide documentation that supports eligibility criteria during the application process. At this stage, document upload is optional and is intended to begin collecting information that may be needed later during eligibility certification.

Customers and Career Planners experience this page differently. In the **Customer view**, users see a simplified set of eligibility criteria and a limited list of document types appropriate for self-service upload. In the **Career Planner view**, staff have access to additional eligibility criteria and a broader set of source documentation options, including items that require staff validation or cannot be reasonably provided by the customer alone.

The system normalizes document source types across criteria, meaning that when the same type of documentation is used for one criterion, the system carries it forward and applies it to other criteria where that source doc type is allowable. This reduces duplicate data entry and ensures consistency in how documentation is used throughout the eligibility process.

The system is designed so that documentation collected here can support eligibility decisions later in the process, while ensuring customers are only presented with options that are relevant and appropriate for them to complete independently.

**NOTE – ONLY UPLOAD TEST DOCUMENTS TO NOT UPLOAD ANY DOCUMENTS WITH PII.**

### UAT Expectations

- Test the page from both the Customer and Career Planner perspectives
- Validate that document upload is optional and does not prevent application submission
- Confirm that eligibility criteria displayed to customers are simplified and appropriate for self-service
- Verify that Career Planners see additional criteria and expanded source document options
- Ensure the expected source document matches what you would expect for the criteria you are uploading
- Ensure normalized items are shared across criteria (Example: A birth certificate used to validate US Citizen/Authorized to Work in the US is passed through to be used for DOB)

- When documents have the possibility of being shared but it is not guaranteed the system will present a blue certificate circle icon with a check that can be selected to verify the criteria with potential matching document(s). (Example – Self Attestation will never auto verify for all areas that allow self-attestation because the system does not know exactly which items were self-attested to on the uploaded document.
- A blink upload process is used for the customer view. They can upload them into the system but cannot download documents from it after they have been uploaded.
- Stay within realistic scenarios when testing the eligibility triggers and document upload features.

## Overview of Eligibility Certification Page

The Eligibility Certification page is where Career Planners review, verify, and finalize a customer's eligibility for programs. This page brings together information collected during the application and supports staff in moving customers through certification in a structured and trackable way.

The page is organized into key workspaces that guide the eligibility process, including phases, appointment scheduling, application review, program determination, certification. Information entered during the application flows into this page, allowing Career Planners to validate, update, and complete eligibility decisions.

### Phases

The Phases section provides a visual indicator of where the customer is in the eligibility process and supports movement between stages.

#### Notes:

- The phase bar will display differently for Youth participants
- Triggering of the enrolling service is not yet connected and should not be validated at this time

### UAT Expectations

- Review how customers move between phases and how status updates are reflected
- Validate that phase progression aligns with actions taken during certification

## Appointment Scheduled

### Appointment Scheduled

The Appointment Scheduled section captures and displays key appointment details needed to move the customer through the certification process.

#### Notes:

- Data entered during the application (Submit page) flows into this section
- This information is used by dashboards to indicate when action is needed on submitted applications

### UAT Expectations

- Validate that previously entered appointment information is pulled into this section
- Confirm new appointment dates can be added and existing ones can be edited
- Ensure accuracy and usability of displayed appointment details

## Application Review

The Application Review section supports Career Planners in reviewing and validating application information before and during the eligibility determination process. Additionally, this section provides a space for applications to be closed if it is determined the customer will not move forward with enrolling into services.

#### Notes:

- When a Career Planner assists with the application in real time, review occurs simultaneously
- When a customer completes the application independently:
  - The Career Planner uses **Open Review** to conduct a pre-review
    - This helps prepare for the appointment by identifying needs and expectations
  - The same sections are revisited during the appointment to finalize application details

## UAT Expectations

- Ensure application data displays accurately and supports review activities
- Validate that progress reflects the Career Planner's review of the application
- Confirm workflows align depending on how the application was completed
- Confirm you can close and re-open applications as needed
  - Note to open a closed application you will go into the review and click the Re-Open button in the top right corner of the page.

## Eligible Programs and Criteria

This section displays program eligibility results based on information provided in the application and documentation collected.

### Notes:

- Enhancements are in progress for **Show All Programs** (including programs not currently met)
- Improvements will better align shared documentation across programs
- Some scenarios may show **Met = Yes** even if not all criteria are fully satisfied—this is known behavior under refinement

## UAT Expectations

- Review how eligible programs are determined based on entered data
- Validate that criteria are evaluated correctly and supporting documentation types align with criteria.
- Confirm that normalized documentation pass through to other documents as expected.
- Confirm that actions like download, upload and verify are available when triggered and work as expected.

## Complete Certification

The Complete Certification section finalizes the eligibility process and confirms program enrollment readiness.

## UAT Expectations

- Validate that programs are available for certification after:
  - The application has been signed
  - All required supporting documentation has been uploaded
- Confirm the system accurately reflects readiness for certification