
IWDS-2.0 UAT Release 23 Cycle 2_Referral Integration

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Overview

User Acceptance Test (UAT) Release #23 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

The purpose of this UAT cycle is to validate referral integration functionality, accuracy, and usability within IWDS 2.0. Testers will referrals and services to ensure they reflect expected program activity and align with business rules and reporting requirements.

This testing will also help confirm that the home page supports day-to-day decision-making for staff and provide meaningful insight into customer participation and outcomes as the system prepares for MVP go-live on July 1.

UAT Release 23 – 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.

- Refer Services from Customer Career Plan
- Referrals Tab in Participant Summary Tools
- Refer a Non-Enrolled Customer

Due Date

Please complete your testing in these areas and submit your feedback by **End of Day on June 18.**

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 also find a section labeled with this Release and Cycle, please document your findings there.
 - 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
 - Olivia Miller - olivia.miller@siu.edu
 - Lynette Tritz - lynette.tritz@siu.edu
 - Andi Grabemeyer – Andi.Grabemeyer@siu.edu
 - Al Menke – 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.

UAT Expectations

July 1 MVP Considerations:

As part of system readiness for MVP go-live on July 1, testing should prioritize core functionality that supports immediate business needs. Not all desired features will be available at go-live. Testers should clearly distinguish between:

- **Defects** that impact required functionality
- **Enhancement opportunities** for future releases

Enhancement requests will be captured and prioritized for post-go-live improvements.

During testing, users should:

- Add and Refer a Service from a customer Career Plan
- Select various services and view and select providers for that service

- Test adding or updating Referral Consent
- Review the Referrals Tab of the Customer Profile
- Refer a Non-Enrolled Customer from the Customer Profile

Overview of Referral Integration

Included in IWDS 2.0 is the referral system. Career planners will be able to provide referral services without leaving the system.

There are two ways to refer a customer to external service providers in IWDS 2.0:

- Referring an enrolled customer in services
- Referring a non-enrolled customer via the referral menu

Referral Integration Screenshot and Quick Start guide

The Quick Start guide gives directions on page use:

[Referring an Enrolled Customer Quick Start Guide](#)

[Referring a Non-Enrolled Customer Quick Start Guide](#)