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## Overview

User Acceptance Test (UAT) Release #23 Cycle 3 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 the customer profile, customer information display, editing, navigation, and customer characteristics.

This testing will help confirm these features are functioning correctly and are ready for the MVP go-live on July 1.

**Note:** Due to ongoing migration work, some migrated customer data may display incorrectly. These discrepancies are known and will be addressed as part of continued data realignment efforts. Testers should still document any issues observed but understand that some variances may be tied to migration adjustments currently in progress.

## UAT Release 23 – Cycle 3 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. Customer Profile
  - a. Title Bar – Verify customer name, pronouns, contact details, and expand/collapse behavior.
  - b. Program Summary – Verify Open and Closed Items tabs function as expected, you are able to access Case Management Tools and sections expand and collapse as expected, and that application and corresponding services are shown accurately.
  - c. Customer Information – View and edit customer demographics, contact information, and address. Verify all sub-sections contain correct information and are editable (where appropriate).
    - i. Private information
    - ii. Veterans information
    - iii. Additional Contacts

- d. Left-Hand Navigation – Verify page section jumps and Participant Summary Tools links.
  - i. In Program Updates
    - 1. Co-enrolled Across Partner Programs
    - 2. Customer Characteristics
- e. Profile Information – Review overall profile data accuracy and usability.

## 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](mailto:Kelly.trimble@siu.edu)

- Olivia Miller - [olivia.miller@siu.edu](mailto:olivia.miller@siu.edu)
- Lynette Tritz - [lynette.tritz@siu.edu](mailto:lynette.tritz@siu.edu)
- Andi Grabemeyer – [Andi.Grabemeyer@siu.edu](mailto:Andi.Grabemeyer@siu.edu)
- 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 Customer Profile

The Customer Profile is the landing page for each customer in IWDS 2.0. It provides a universal profile used across all programs and applications, offering a snapshot of customer information that is easily accessible and allows authorized users to update information as needed. The profile also enables users to access different tools, add new applications, and view existing ones.

The Customer Profile is accessible by clicking on a customer's hyperlinked name from either the Customer List or the Application List. A "Back to Customer List" button allows users to return quickly.

### Title Bar

The Title Bar is fixed at the top of the Customer Profile and displays key identifying information including the customer's first and last name, pronouns, preferred name, preferred communication method, primary phone number, email, zip code, and date of birth. A blue plus/minus button allows expanding or collapsing the bar.

### UAT Expectations

- Verify customer name displays correctly in both expanded and collapsed views
- Confirm the expand/collapse toggle works as expected
- Validate that optional fields (pronouns, preferred name, preferred communication method) display correctly when populated
- Ensure the title bar remains fixed/locked at the top when scrolling

### Program Summary

The Program Summary provides a consolidated view of all active and closed items associated with the customer. It is organized into two tabs – Open Items and Closed Items – allowing Career Planners to quickly see what is currently in progress versus what has been completed. Within each tab, sections can be expanded or collapsed to manage

visibility. The Program Summary also provides access to Case Management Tools and displays the application and its corresponding services.

## UAT Expectations

- Verify the Open Items tab displays all currently active items and the Closed Items tab shows completed items
- Confirm sections within each tab expand and collapse as expected
- Validate that Case Management Tools are accessible and functional
- Ensure the application and corresponding services display accurately under each tab
- Confirm switching between tabs maintains data accuracy and does not cause unexpected behavior

## Customer Information

The Customer Information section displays customer demographics, contact information, and address details. It defaults to a view-only mode with an Edit button at the top right. When Edit is clicked, a separate “Edit Customer Information” page opens with Save and Cancel buttons. Fields auto-populated from the Create Customer Record include First Name, Middle Initial, Last Name, Date of Birth, Primary Phone Number, Email, and Zip Code. The LWIA field is auto-populated based on the zip code entered.

← Back to Customer List
Customer Profile: Abby Normal >

Program Summary

Customer Information

Profile Information

Participant Summary Tools

Case Notes

Self Services & Information Only Services

Referrals

Assessments


In Program Updates

Uploads

Resumes & Work History

Logs

Customer Information



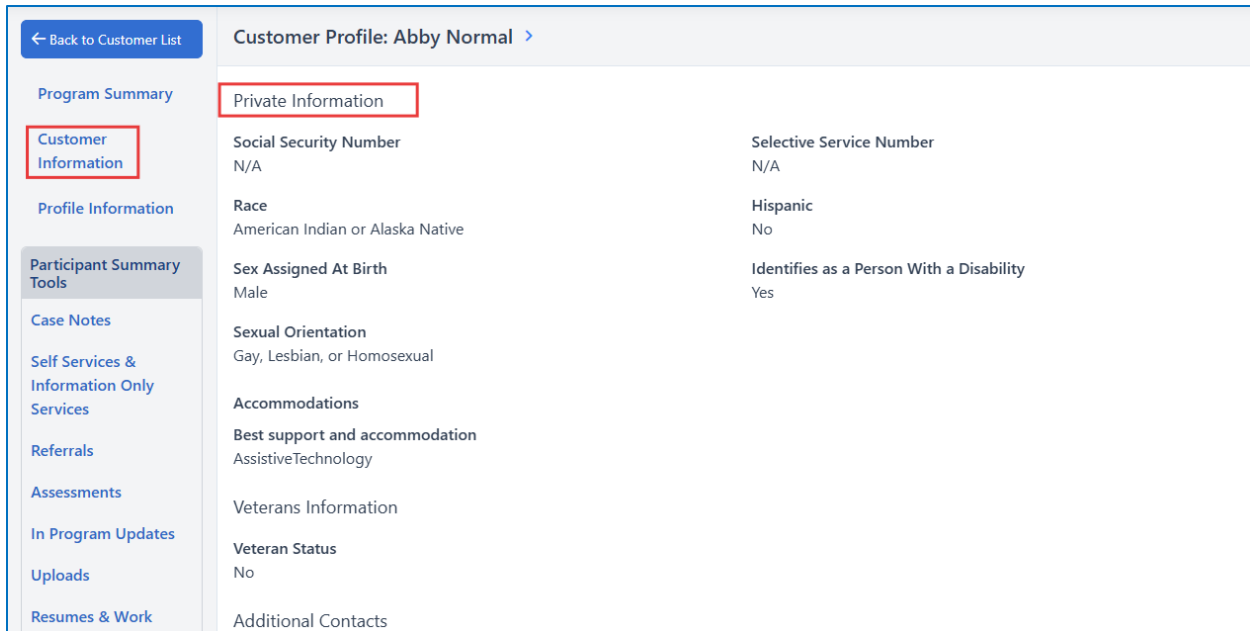
First Name	Middle Initial	Last Name
Abby		Normal
Preferred Name	Primary Phone Number	Address
Abby	(877) 888-9999	PEORIA, IL 61603
Pronouns	Primary Phone Receives Text Messages	Email
N/A	Yes	anormal@fakemail.com
Date of Birth	Secondary Phone Number	Preferred Communication Method
04/13/2001	(888) 777-9999 x123	N/A
Age	Secondary Phone Receives Text Messages	LWIA
25 years, 1 month, 20 days old	No	N/A
IwN ID	IwN Username	
39040	ANormal	

## UAT Expectations

- Confirm view mode displays all fields in a read-only grid layout
- Validate the Edit button opens the Edit Customer Information page
- Test editing fields and verify Save and Cancel work correctly
- Verify auto-populated fields carry over from the Create Customer Record
- Confirm LWIA auto-populates based on zip code
- Validate dropdown options for pronouns, phone type, state, and preferred communication method
- Ensure required fields (First Name, Last Name, DOB, Email, Zip Code) are enforced

## Private Information

The Private Information sub-section within Customer Information contains sensitive demographic and personal data that is restricted to authorized users. This includes information such as Social Security Number, race, ethnicity, disability status, and other protected data elements.



Customer Profile: Abby Normal >

Program Summary

Private Information

Customer Information

Profile Information

Participant Summary Tools

Case Notes

Self Services & Information Only Services

Referrals

Assessments

In Program Updates

Uploads

Resumes & Work

Social Security Number	N/A	Selective Service Number	N/A
Race	American Indian or Alaska Native	Hispanic	No
Sex Assigned At Birth	Male	Identifies as a Person With a Disability	Yes
Sexual Orientation	Gay, Lesbian, or Homosexual		
Accommodations	Best support and accommodation		
	AssistiveTechnology		
Veterans Information			
Veteran Status	No		
Additional Contacts			

## UAT Expectations

- Verify private information fields display correctly for authorized users
- Confirm data is editable where appropriate and read-only where restricted
- Validate that sensitive data is properly masked or protected as expected
- Ensure changes to private information save correctly

## Veterans Information

The Veterans Information sub-section captures military service details for customers who are veterans. This data supports priority of service determinations and veteran-specific program eligibility.

Customer Profile: Abby Normal >	
<a href="#">← Back to Customer List</a> Program Summary <b>Customer Information</b> Profile Information Participant Summary Tools Case Notes Self Services & Information Only Services Referrals Assessments In Program Updates Uploads Resumes & Work	<b>Private Information</b> Social Security Number N/A Selective Service Number N/A Race American Indian or Alaska Native Hispanic No Sex Assigned At Birth Male Identifies as a Person With a Disability Yes Sexual Orientation Gay, Lesbian, or Homosexual Accommodations Best support and accommodation AssistiveTechnology <b>Veterans Information</b> Veteran Status No Additional Contacts

## UAT Expectations

- Verify veterans information fields display and are editable
- Confirm data saves correctly and persists after navigation
- Validate that veteran status indicators reflect accurately across the profile

## Additional Contacts

The Additional Contacts sub-section allows staff to add and manage secondary contacts associated with a customer, such as emergency contacts, guardians, or other relevant individuals.

Customer Profile: Abby Normal >

Sex Assigned At Birth Male	Identifies as a Person With a Disability Yes
Sexual Orientation Gay, Lesbian, or Homosexual	
Accommodations Best support and accommodation AssistiveTechnology	
Veterans Information Veteran Status No	
Additional Contacts	<a href="#">+ Add Contact</a>

Name	Relationship	Phone Number	Receives Text Messages	Email
No additional contacts have been added for this customer.				

## UAT Expectations

- Verify ability to add, edit, and view additional contacts
- Confirm all contact fields display correctly (name, relationship, phone, email)
- Validate that multiple contacts can be managed for a single customer
- Ensure delete or remove functionality works as expected