

IWDS-2.0 UAT Release 23 Cycle 5_Training & Education Assessment

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Overview

User Acceptance Test (UAT) Release #23 Cycle 5 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 testing is to validate the Training & Education Assessment (TEA), which guides Career Planners through a structured conversation with customers to evaluate career interests, training program alignment, and readiness for WIOA-funded training. The TEA is a 9-section sequential workflow within the Career Plan that must be completed before training services can be activated.

Testing will focus on ensuring that data from Prescreen, the Getting Started Assessment (GSA), and the Application prepopulates correctly into each section's grey summary boxes, that conditional logic and stop/block rules fire appropriately when a customer does not meet requirements, and that the assessment can be completed end-to-end resulting in training service approval.

UAT Release 23 – Cycle 5 Expectations & Homework

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

- **Your Career Interest & Choices**
 - Verify Prescreen and GSA data displays in grey summary boxes
 - Test occupation search, restriction review logic, and stop conditions
- **Check Job Demand and Outlook**
 - Verify demand status indicator and employment outlook links
 - Test preference and salary alignment questions and stop conditions
- **Explore Training Options**
 - Verify bookmarked programs display and ETPL exploration workflow
 - Test program selection, alignment checks, and local policy gate
- **Understand Training Cost & Financial Aid**

- Verify program cost data pulls from ETPL
- Test FAFSA, financial aid, and cost discussion gates
- **Check Reading & Math Requirements**
 - Test exemption selection and documentation upload
 - Verify program entry requirements display and entry-level gate
- **Plan Your Transportation**
 - Verify intake transportation data in grey boxes
 - Test distance comparison and transportation concern workflow
- **Plan for Childcare and Family Support**
 - Verify childcare/dependent care data from GSA
 - Test schedule manageability questions and support plan
- **Review Your Income and Budget**
 - Verify income and public assistance data from intake
 - Test budget worksheet and financial feasibility questions
- **Summary and Training Approval**
 - Verify all section summaries display correctly

Test recommendations, petition confirmation, and approval action.

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.

Your Career Interest & Choices

This is the first section of the TEA and serves as the foundation for the entire assessment. It presents career interest data collected during Prescreen and the Getting Started Assessment, including top career field selections, the participant's thoughts on job options, and Interest Profiler results. The Career Planner reviews this information with the customer, then uses the occupation search to select the job the customer has chosen to pursue.

This section also surfaces intake data about the customer's transportation, health, and legal needs in a grey summary box, along with a link to the O*NET Job Occupation Page. The Career Planner reviews identified restrictions and work requirements with the customer to determine if they can meet the occupation's demands.

If restrictions cannot be overcome, the assessment cannot proceed until a different occupation is selected.

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Training & Education Assessment: Loretta Lynne >
Assessment progress 11%

Your Career Interest & Choices

Check Job Demand and Outlook

Explore Training Options

Understand Training Cost & Financial Aid

Check Reading & Math Requirements

Plan Your Transportation

Plan for Childcare and Family Support

Review Your Income and Budget

Summary and Training Approval

Your Career Interest & Choices

Please review the information collected during Intake regarding their career interests before answering the questions on the bottom of the page:

Top career selections

- Construction Managers
- Civil Engineers

Participant's thoughts on job options

Not Answered

[+ Start New Quiz](#)

Completed	Holland Code	Actions
Jun 11, 2026	REI	View Results View Illinois Careers

After having a conversation with the customer regarding the career information above please answer the following questions:

What job has the customer chosen?

Type at least two characters to search...

During intake the customer shared information about their transportation, health, and legal needs. To identify work requirements and restrictions, please review this information along side the Job Occupation Page, linked below, to help guide the next part of the conversation.

Areas for consideration when reviewing restrictions and work requirements can include the following:

- Driving and Transportation - Does the occupation require a valid drivers license, a clean driving record, reliable transportation, or endorsements (CDL, HazMat) etc.
- Legal & Occupational Licensing - Are there mandatory background checks, finger printing, legal requirements, occupational licensing requirements, etc.
- Health and Safety - Are there any physical or medical requirements such as lifting, vision, hearing, work settings, drug screening, immunization, etc.
- Work Requirements - Non traditional hours, prior experience, travel, on-call, or extended time away from home, probationary periods, industry credentials, etc.

Intake Summary

Transportation

Car

Health Needs

I have a disability

Legal Needs

I do not have any legal needs

[Click Here to Review \[Job\] Occupation Page](#) and identify any restrictions.
You can use the descriptors in the orange boxes (Activities, Knowledge, Abilities and Skills) to help guide this conversation.

Have the identified restrictions or work requirements been reviewed with the customer to ensure they meet the requirements for this occupation?

Select ▼

What job-related skill or credential is the participant missing, and how will training help them get or keep a job?
Use the Occupation Page career descriptors in the orange boxes to help guide this conversation.

Characters remaining: 500

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Assessment progress
11%

Save and Exit
[Next →](#)

Prepopulated Data (Grey Boxes):

This section displays read-only data pulled from earlier stages of intake:

- **Occupations of Interest** — Top 3 career picks from Prescreen (O*NET search)
- **Fields of Interest** — Top 3 career field selections from Prescreen
- **Participant's Thoughts on Job Options** — From GSA
- **Interest Profiler Results** — RIASEC scores and matching careers (if completed)
- **Intake Summary** — Transportation, Health Needs, and Legal Needs from Prescreen

UAT Expectations

- Verify that Prescreen and GSA data displays correctly in the grey summary boxes at the top of the page
- Test the occupation search field — type at least two characters and confirm results appear
- Select an occupation and verify it populates correctly throughout the assessment
- If the selected occupation is NOT on the demand occupation list, verify the warning message displays
- Test the restriction review question with all three answer paths:
 - “Yes, they meet requirements” — allows progression
 - “Yes, but they do not meet requirements” — triggers follow-up questions about services/actions
 - “No” — blocks progression with a message requiring the discussion
- Verify the link to the O*NET Job Occupation Page opens correctly
- Confirm the Interest Profiler “Start New Quiz” button functions if no results exist
- Verify the assessment progress bar updates as you complete questions

Check Job Demand and Outlook

This section evaluates whether the customer’s selected occupation is in demand and whether the employment outlook aligns with their expectations. The system automatically displays a demand status indicator (High Demand, Moderate Demand, or Not on the Demand List) based on the occupation chosen in the previous section.

The page also presents the customer’s employment preferences and desired salary range from intake, alongside employment outlook links. If the occupation is not on the demand list, the Career Planner must indicate whether a petition is being pursued through the Local Workforce Investment Board (LWIB). Multiple stop conditions exist that require selecting a new occupation if the customer cannot proceed.

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- ✓ Your Career Interest & Choices
- Check Job Demand and Outlook
- Explore Training Options
- Understand Training Cost & Financial Aid
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Training & Education Assessment: Loretta Lynne >

Assessment progress 22%

Check Job Demand and Outlook

Demand Occupation Status for **Construction Managers**

✓ This occupation is classified as demand.

Employment expectations from Getting Started (intake summary):

Type of employment: Full-time

Preferred schedule: Day shift (Morning to afternoon)

Job preferences: I am looking for a job close to home, I am looking for a job with flexible hours

Employment Outlook

Please review the employment outlook information for your selected occupation. This includes projected job growth, demand trends, and wage data. Use the resources below for more details:

[IDES Help Wanted Online](#)

[Construction Managers Job Details Page](#)

Based on the employment outlook for this occupation, does it align with the customer's preferences above?

Does the average wage for this occupation align with the customer's desired salary range?

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Assessment progress 22%

← Previous Save and Exit Next →

Prepopulated Data (Grey Boxes):

- **Demand Occupation Status** — Automated indicator based on selected occupation (High/Moderate/Not on list)
- **Employment Outlook Links** — IEBS Help Wanted Online, Job Details Page, Career/Wages/Trends
- **Customer Employment Expectations** — Type of employment, preferred schedule, and job preferences from GSA/Prescreen
- **Desired Salary Range** — From GSA

UAT Expectations

- Verify the demand status indicator displays correctly for the selected occupation
- Test with occupations at each demand level (High, Moderate, Not on list) and confirm appropriate messaging
- For non-demand occupations, verify the petition question appears and test both paths:
 - “Yes, petitioning” — allows progression
 - “No, will not petition” - triggers stop requiring new occupation selection

- Verify employment outlook links open correctly to external labor market data
- Verify customer employment preferences and salary range display from intake data
- Test the preference alignment question - answering “No” should trigger a follow-up asking if the customer wants to proceed or select a different occupation
- Test the salary alignment question - answering “No” should trigger the same proceed-or-change workflow
- When “No, select a different occupation” is chosen, verify the stop message displays and the system provides a way to return to a new occupation selection
- Verify that choosing to proceed despite misalignment requires an explanation text field

Explore Training Options

This section guides the Career Planner and customer through exploring and selecting a training program from the Eligible Training Provider List (ETPL). It displays any programs the customer has bookmarked from their Illinois workNet account, provides options for exploring the ETPL together or sending a link, and confirms that the full state ETPL was discussed (a WIOA requirement).

After a program is selected, the system displays program details and checks whether the training aligns with the customer’s selected occupation and local training/ITA policy. Stop conditions prevent progression if the program does not align.

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- ✓ Check Job Demand and Outlook
- ✓ Explore Training Options
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- Summary and Training Approval

Assessment progress 33%

Training & Education Assessment: Loretta Lynne >

Explore Training Options

Together, you'll review training opportunities that align with the customer's career goals. You will start by exploring the Eligible Training Provider List (ETPL) to identify programs of interest. Once the customer decides, select the training program they plan to move forward with.

Customer's bookmarked programs

If the customer has already bookmarked programs in their Illinois workNet account, they'll appear below. The customer hasn't bookmarked any programs yet.

How would you like to move forward with exploring the ETPL?

[Print a form to complete your review](#)

Was the full state ETPL discussed and provided to the customer?

Select the program the customer plans to move forward with:

Which location will the customer participate at?

Provider & Program Overview

Provider Name: Capital Area Career Center

Program Name: Skilled Trades Program

Program Description: The CACC Skilled Trades Essentials Program (STEP) will focus on industry safety and introduction to the trades, welding, building trades, HVAC and electrical systems. Participants will also participate in financial literacy and entrepreneurship training, GED prep (if applicable), and development of soft skills. Participants will have the opportunity to earn the following credentials: OSHA 10, EPA 608, Employment Ready Certification for basic refrigeration and charging procedures, NCCER Core and Level 1 Carpentry, and American Welding Society certifications. In addition, participants will build a fairy house to be donated to a local program for Veterans. They will receive cash incentives for attaining program goals, support services as needed, and placement into paid WBL opportunities based on performance, progression, and goal attainments, and follow up services.

Program Address: 2201 Toronto Road, Springfield, 62712

Program Outcomes:

- NCCER Core and Level 1 Carpentry for the Building Trades, EPA 608, OSHA 10, and American Welding Society Certifications
- Employment
- Measurable skills gain leading to a credential
- Measurable skills gain leading to employment

The training program needs to align to the customer's selected occupation. Use the information below to ensure that the customer's training program will support their path to their selected occupation.

Customer's selected occupation (TEA): Construction Managers

Training program's identified occupations (preview): Carpenters (47-2051.00); Construction Laborers (47-2061.00); Helpers, Construction Trades, All Other (47-3019.00); Heating, Air Conditioning, and Refrigeration Mechanics and Installers (49-9021.00); Welders, Cutters, Solderers, and Brazers (51-4121.00)

Does the training program align to the customer's selected occupation?

After reviewing your local training/ITA policy does this training program meet the policy requirements?

Please define why this program was selected for the customer:

Characters remaining: 500

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Assessment progress 33%

Prepopulated Data:

- **Customer's Bookmarked Programs** — Programs bookmarked from Illinois workNet ETPL (if any)
- **Provider & Program Overview** — After selection: Provider Name, Program Name, Description, Address
- **Program Outcomes** — Occupations the program trains for, compared to customer's selected occupation

UAT Expectations

- Verify bookmarked programs display if the customer has saved any from Illinois workNet
- Test both ETPL exploration options: “Explore Programs Together Now” and “Email Customer a Link”
- Verify the ETPL discussion gate - answering “No” to whether the full state ETPL was discussed should block progression
- Select a training program and verify provider/program details populate correctly
- Verify the occupation alignment check - system should auto-populate “Yes” when O*NET codes match
- Test with a program that does NOT align to the occupation and verify the stop condition fires
- Test the local training/ITA policy question - answering “No” should block progression
- Verify the justification text field for why the program was selected

Understand Training Cost & Financial Aid

This section presents the cost breakdown for the selected training program, pulled from the ETPL, including tuition, books, fees, tests, and other expenses. It also displays financial assistance available, purchasing procedures, and cancellation/refund policies.

The Career Planner confirms whether the customer has applied for FAFSA (WIOA is the funding of last resort), documents financial aid received, and discusses remaining costs the customer may need to cover.

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Understand Training Cost & Financial Aid

Program Cost & Financial Information

Selected program: Skilled Trades Program — Capital Area Career Center

The following information reflects the expected costs associated with the selected training program, along with available financial assistance and related policies.

Cost Breakdown

Tuition ⓘ	\$5,969
Books ⓘ	\$0
Fees ⓘ	\$0
Tests ⓘ	\$0
Other expenses ⓘ	\$0

Total program cost: \$5,969

Costs listed reflect in-district resident rates. Out-of-district residents may incur higher costs. Programs offered by proprietary schools have the same costs for all students.

Procedure for purchase
Not Answered

Financial assistance available
Not Answered

Program cancellation & refund policies
Not Answered

Family income calculator (prescreen): Not Answered

Has the customer applied for financial aid through the Free Application for Federal Student Aid (FAFSA) for their selected program?
 Yes No

Have you discussed with the customer the cost WIOA will cover and if there is remaining cost the customer will have to cover?
 Yes No

Does the customer want assistance applying for financial aid?
 Yes No

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Assessment progress 44%

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Prepopulated Data:

- **Program Cost Breakdown** — Tuition, Books, Fees, Tests, Other Expenses, Total Cost (from ETPL)
- **Financial Assistance Available** — Types of aid available for the program
- **Procedure for Purchase** — How items are obtained
- **Cancellation & Refund Policies** — From program information

UAT Expectations

- Verify that program cost details pull correctly from the ETPL for the selected program

- Test the FAFSA question - answering “No” should trigger the discussion requirement message about WIOA as last resort
- If “Yes” to FAFSA, verify the financial aid type selection appears (Pell Grant, MAP, Loans, Scholarships, Other)
- Test the cost discussion gate - answering “No” should trigger a message requiring the discussion
- Verify the financial aid assistance question displays and functions correctly

Check Reading & Math Requirements

All customers entering WIOA-funded training must complete approved Reading and Math assessments as outlined in WIOA Policy 5.9.5 unless they meet a defined exemption. This section captures the exemption status or assessment results, and also displays the program’s entry-level requirements from the ETPL.

If the customer does not meet the program’s entry requirements, the assessment cannot proceed with this training program.

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Assessment progress 56%





Check Reading & Math Requirements

All customers entering training must complete approved Reading and Math assessments as outlined in [WIOA Policy 5.9.5](#) if they do not meet one of the defined exemptions.

Does the customer meet any of the allowed exemptions from completing a Math or Reading assessment as defined in WIOA Policy 5.9.5?

The customer does not meet any exemptions

Please add the customer's assessment results for both Reading and Math + Add Assessment

Assessment Name	Date Completed	Type	Area	Action
CASAS Reading Goals 2	6/9/26	Adult Basic Education - ABE	Reading	 
CASAS Math Goals 2	6/9/26	Adult Basic Education - ABE	Math	 

2 Entries Page 1 of 1 << < 1 > >> 10

Program Entry Requirements

The following requirements must be reviewed with the customer prior to enrollment to ensure eligibility and readiness for participation in the selected training program.

Entry Requirement Details

Other (Specify) Age 16-24

Entry requirements may vary by provider or program track. Additional documentation or testing may be required prior to enrollment. Review these requirements with the customer to confirm readiness and identify any supports needed to meet them.

Does the customer meet the entry level requirements for the program?

Select

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Assessment progress 56%

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Prepopulated Data :

- **Program Entry Requirements** — Education, Skill Level, and Physical Exam Requirements (from ETPL)
- **Assessment Results** — If previously completed, Reading and Math scores display

UAT Expectations

- Test the exemption question with each available exemption reason:
 - Passed entrance/placement exam within the last year
 - Other defined exemptions per WIOA Policy 5.9.5
 - Does not meet any exemptions
- If an exemption is selected, verify the documentation upload prompt appears

- If no exemption applies, verify the system prompts to add assessment results
- Verify program entry requirements display correctly from the ETPL
- Test the entry-level requirements gate - answering “No” should block progression and require selecting a new training program
- Verify that the transportation mode display (“How the Customer Plans to Get to Work or Training”) appears correctly

Plan Your Transportation

This section presents transportation-related data collected during intake, including driver’s license status, concerns about driving or public transit, and additional notes. It also calculates and displays a distance comparison between the customer’s stated travel distance preference and the actual distance to the training location.

If the training location exceeds the customer’s preferred distance, the Career Planner documents whether the customer wants to proceed and how transportation will be addressed.

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- ✓ Your Career Interest & Choices
- ✓ Check Job Demand and Outlook
- ✓ Explore Training Options
- ✓ Understand Training Cost & Financial Aid
- ✓ Check Reading & Math Requirements
- ✓ **Plan Your Transportation**
- Plan for Childcare and Family Support
- Review Your Income and Budget
- Summary and Training Approval

Assessment progress 67%

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Plan Your Transportation

During intake, the customer shared information about their transportation. That information is displayed below. Review it along with the training program's location to help the customer plan how they will get to training and identify any additional transportation support they may need.

How the Customer Plans to Get to Work or Training: Car

Driver's License Status: I have a valid driver's license.

Concerns About Using Their Car: Not Answered

Concerns About Using Public Transportation: Not Answered

Additional Transportation Notes: Not Answered

Career planner notes and observations: Not Answered

Distance preference	Distance to training	Status
Up to 25 miles	178.8 miles	⚠ Outside distance

Has the customer agreed to move forward with this training program despite the distance?

Yes, the customer wants to move forward with this training program. ▼

Please explain why the customer has decided to move forward.

Characters remaining: 500

How will the travel to and from training be addressed to support the customer's successful participation and completion of the training program?

Please take into account how local support service policy might affect this.

Characters remaining: 500

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Prepopulated Data (Grey Boxes):

- **How Customer Plans to Get to Work/Training** — From Prescreen (Car, Get a Ride, Bus, etc.)
- **Driver's License Status** — From GSA
- **Transportation Concerns** — Car concerns, public transit concerns, additional notes from GSA
- **Distance Comparison** — Customer's preferred distance vs. actual distance to training program

UAT Expectations

- Verify transportation data from Prescreen and GSA displays correctly in the grey summary boxes
- Verify the distance comparison calculation is accurate for the selected training program location

- If distance exceeds the customer’s preference, verify the follow-up question appears asking if the customer wants to proceed
- Test the “No” path - should trigger the stop condition
- Test the “Yes” path - verify the explanation and transportation plan text fields appear
- If distance is within preference, verify the section completes without the follow-up questions

Plan for Childcare and Family Support

This section presents childcare and dependent care data collected during intake, including care needs, barriers to finding care, past arrangements, and specific situations. It also displays the training program’s schedule and format so the Career Planner can assess whether the customer’s care responsibilities are manageable alongside training.

If the training schedule does not align with the customer’s care availability, the Career Planner documents whether the customer wants to proceed and how care will be addressed.

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Assessment progress 78%

Your Career Interest & Choices

✓ Check Job Demand and Outlook

Explore Training Options

✓ Understand Training Cost & Financial Aid

Check Reading & Math Requirements

✓ Plan Your Transportation

Plan for Childcare and Family Support

✓ Review Your Income and Budget

✓ Summary and Training Approval

Plan for Childcare and Family Support

During intake, the customer shared information about their childcare and dependent care needs. That information is displayed below. Review it along with the training program’s schedule to help the customer plan how they will plan their childcare and dependent care and identify any additional support they may need.

Childcare or Dependent Care Needs: I do not have any childcare or dependent care needs, I share custody or co-parent

What makes it hard to find childcare: Not Answered

Program Structure & Schedule

The following information describes the structure and expected timeline for the selected training program.

Program Details

Instructional Hours 0 credit / 148 clock hours

Weeks to Complete 23 weeks

Program Format Not Answered

Additional Format Information Part-Time Enrollment, Internships, Classroom Instruction, Night Classes, Day Classes, Other(Specify)

Program structure, schedule, and format should be reviewed with the customer to ensure alignment with availability, work commitments, childcare, transportation, and other support needs.

Required fields are marked with an asterisk (*).

Considering their childcare or dependent care responsibilities, does the training’s schedule and format (in-person, virtual, or hybrid) feel manageable to the customer? *

Yes No

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Assessment progress
78%

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Prepopulated Data :

- **Childcare/Dependent Care Needs** — From Prescreen
- **Barriers and Past Arrangements** — What makes it hard, who helps, how arranged in the past (from GSA)
- **Program Structure & Schedule** — Training days, times, hours, weeks, format (from ETPL)

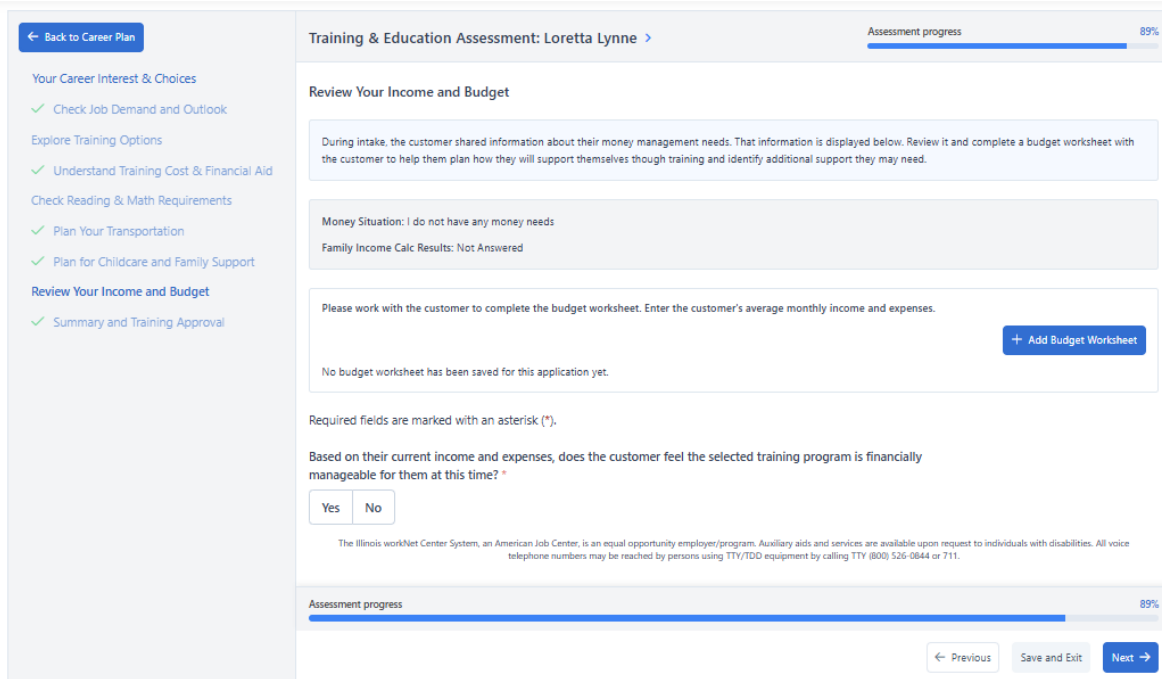
UAT Expectations

- Verify childcare/dependent care data from Prescreen and GSA displays correctly
- Verify program schedule and format information displays from the ETPL
- Test the manageability question - answering “No” should trigger the proceed-or-stop workflow
- Test the “No, do not proceed” path - verify the stop condition fires
- Test the “Yes, proceed” path - verify explanation and support plan text fields appear
- Verify the section completes normally when the schedule is manageable

Review Your Income and Budget

This section presents the customer’s financial situation data from intake, including money concerns, public assistance, housing needs, and the Family Income Calculator results. It includes an embedded budget worksheet where the Career Planner works with the customer to document monthly income and expenses.

The Career Planner assesses whether the customer’s financial situation supports training enrollment and documents a plan if concerns exist.



← Back to Career Plan

Training & Education Assessment: Loretta Lynne > Assessment progress 89%

Your Career Interest & Choices

- ✓ Check Job Demand and Outlook

Explore Training Options

- ✓ Understand Training Cost & Financial Aid

Check Reading & Math Requirements

- ✓ Plan Your Transportation
- ✓ Plan for Childcare and Family Support

Review Your Income and Budget

- ✓ Summary and Training Approval

Review Your Income and Budget

During intake, the customer shared information about their money management needs. That information is displayed below. Review it and complete a budget worksheet with the customer to help them plan how they will support themselves through training and identify additional support they may need.

Money Situation: I do not have any money needs
Family Income Calc Results: Not Answered

Please work with the customer to complete the budget worksheet. Enter the customer's average monthly income and expenses.

+ Add Budget Worksheet

No budget worksheet has been saved for this application yet.

Required fields are marked with an asterisk (*).

Based on their current income and expenses, does the customer feel the selected training program is financially manageable for them at this time? *

Yes No

The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711.

Assessment progress 89%

← Previous Save and Exit Next →

Prepopulated Data:

- **Money Situation** — Selected items from Prescreen
- **Public Assistance** — From Application
- **Other Income Items Flagged** — Housing needs, high poverty area, foster care (from Prescreen/Application)
- **Family Income Calculator Results** — From GSA
- **Money/Credit Concerns** — Bankruptcy, managing money, bonding (from GSA)
- **Housing/Utilities Concerns** — From Prescreen

UAT Expectations

- Verify all financial data from Prescreen, Application, and GSA displays correctly in the grey summary boxes
- Test the budget worksheet - enter income and expense amounts and verify calculations are correct
- Verify the system calculates Total Income, Total Expenses, and Net Income correctly
- Test the financial feasibility question - answering “No” should trigger the proceed-or-stop workflow
- Test the “No, do not proceed” path - verify the stop condition fires
- Test the “Yes, proceed” path - verify explanation and support plan text fields appear
- If budget is already completed, verify results display rather than a blank worksheet



Illinois
Department of Commerce
& Economic Opportunity
OFFICE OF EMPLOYMENT & TRAINING
JB Pritzker, Governor

UAT Release 23 Cycle 5 - Guide

Author: SIUC CWD

Created: 6/10/2026

Updated: 6/12/2026

Summary and Training Approval

This is the final section of the TEA. It presents a consolidated summary of all information reviewed across the previous eight sections. The Career Planner provides a written recommendation regarding the customer's readiness for training, confirms any pending petition status, and takes the final approval action.

Upon approval, the system unlocks training services so start dates can be added to the customer's Career Plan.

← Back to Career Plan
Training & Education Assessment: Loretta Lynne >
Assessment progress 100%

Based on the employment outlook for this occupation, does it align with the customer's preferences above?
Yes, it aligns with the customer's expectations

Does the average wage for this occupation align with the customer's desired salary range?
Yes, it aligns with the customer's desired salary range

Explore Training Options

← Back to Explore Training Options

Was the full state ETPA discussed and provided to the customer?
Yes

Select the program the customer plans to move forward with:
5280

Which location will the customer participate at?
Capital Area Career Center — Springfield

Does the training program align to the customer's selected occupation?
Yes

After reviewing your local training/JTA policy does this training program meet the policy requirements?
Yes

Understand Training Cost & Financial Aid

← Back to Understand Training Cost & Financial Aid

Has the customer applied for financial aid through the Free Application for Federal Student Aid (FAFSA) for their selected program?
Yes

What types of financial aid has the customer previously received?
Pell Grant

Have you discussed with the customer the cost WIOA will cover and if there is remaining cost the customer will have to cover?
Yes

Does the customer want assistance applying for financial aid?
Yes

Check Reading & Math Requirements

← Back to Check Reading & Math Requirements

Does the customer meet any of the allowed exemptions from completing a Math or Reading assessment as defined in WIOA Policy 5.9.5?
The customer does not meet any exemptions

Does the customer meet the entry level requirements for the program?
Yes

Plan Your Transportation

← Back to Plan Your Transportation

Has the customer agreed to move forward with this training program despite the distance?
Yes, the customer wants to move forward with this training program.

Please explain why the customer has decided to move forward.
They will move.

Plan for Childcare and Family Support

← Back to Plan for Childcare and Family Support

Considering their childcare or dependent care responsibilities, does the training's schedule and format (in-person, virtual, or hybrid) feel manageable to the customer?
Yes

Review Your Income and Budget

← Back to Review Your Income and Budget

Based on their current income and expenses, does the customer feel the selected training program is financially manageable for them at this time?
Yes

Required fields are marked with an asterisk (*).

Based on the information reviewed in this assessment, please provide comments and a recommendation regarding the customer's participation in the selected training program.*

Customer is a good candidate for certification with supportive services for transportation.

Characters remaining: 400

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Assessment progress 100%

← Previous
Save and Exit
Approved →

Summary Sections Displayed:

- Career Interest & Choices — Selected occupation, restrictions review
- Job Demand & Outlook — Demand status, preference/salary alignment
- Training Options — Selected program, alignment, policy compliance
- Training Cost & Financial Aid — Costs, FAFSA, aid discussion
- Reading & Math Requirements — Exemptions or assessment results
- Childcare & Family Support — Care plan
- Transportation — Distance, travel plan
- Income & Budget — Financial feasibility

UAT Expectations

- Verify that all nine summary sections display accurately, reflecting the data entered throughout the assessment
- Test the recommendation text field - confirm it accepts and saves the Career Planner's comments
- If a demand petition was initiated, verify the petition confirmation question appears and test both paths:
 - "Yes, petition approved" - allows final approval
 - "No, petition not approved" - triggers stop condition
- Test the Approve action and verify that training services are unlocked in the Career Plan
- Verify that after approval, the Career Planner can add start dates to training services
- Navigate back to earlier sections and verify you can review but not inadvertently break the approval

Cross-Cutting: Stop Conditions and New Selection Logic

The TEA includes seven stop/block conditions that prevent the customer from moving forward. When a stop fires, the system displays a message explaining why the customer cannot proceed and provides a path to select a new occupation or training program. Testing these stop conditions across sections is critical.

Stop Conditions to Test

- **Occupation not in demand** (Section 2) - Occupation is not on the Demand Occupation List and the Career Planner indicates they will not petition.
- **Job preferences misalignment** (Section 2) - Customer declines to proceed despite mismatched employment preferences.
- **Salary range misalignment** (Section 2) - Customer declines to proceed despite mismatched salary expectations. System should clear data back to occupation selection.
- **Occupation restrictions not met** (Section 1) - Restrictions cannot be overcome and no services/actions are available.
- **Training schedule vs. childcare** (Section 7) - Customer declines to proceed with training due to childcare/dependent care constraints.
- **Financial concerns** (Section 8) - Customer declines to proceed due to financial barriers.
- **LWIB petition not approved** (Section 9) - Demand petition was denied at the Summary & Approval stage.

UAT Expectations

- Trigger each of the seven stop conditions and verify the correct message displays
- When a stop requires selecting a new occupation, verify the system provides navigation back to the appropriate section
- When a stop requires selecting a new training program, verify previous program data is cleared appropriately
- After selecting a new occupation or program, verify that dependent sections update to reflect the change
- Test the assessment progress bar throughout - verify it accurately reflects completion percentage
- Test the left-hand navigation - verify you can navigate between sections and that completed sections retain their data