Contents

Overview

User Acceptance Test (UAT) Release 2 is deployed to the SIU UAT environment. There are no security constraints for this environment. It is important not to enter any personal identifiable information (PII). The purpose of release 2 is two-fold. First, we want to move into a regular repeating process of user acceptance testing and general validation of the system early and often in our project lifecycle. This will allow us to catch any issues with the releases compared to the requirements. Second, we want to put our UAT process into practice. We would like to introduce everyone to the system and agree upon expectations.

UAT Release 9 – Cycle 1 Expectations & Homework

Homework Areas - For this week, 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.

- Prescreening

Due Date - Please complete your testing in these areas and submit your feedback by **December 16th at noon.**

Access to UAT Environment – To access the UAT environment in your browser, follow the link provided here. https://testapps.illinoisworknet.com/lwdst-Preview/testing

Reporting Issues- Please document any issues, bugs, or enhancement requests you identify in our shared notebook - UAT Notebook IWDS2 Release 9. 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 second 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 Prescreening. The section is divided into several pages, each page is specific to a specific page of the prescreening. Ensure that each item is tracked under the correct page you are providing feedback on.
  - 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.
- 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
  - 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.

Prescreening

Prescreening is one of the first steps in the intake process for WIOA Title I programs, including Adult, Youth, and Dislocated Worker services. This high-level screening helps determine potential program eligibility before completing a full intake.

The prescreening adapts based on customer information:

1. Pages and questions adjust dynamically, so customers only see what's relevant to their situation.
2. For example, someone outside the Youth age range will not see Youth-related questions, and certain answers may trigger additional questions or skip unnecessary ones.

The prescreening can be completed in several convenient ways:

- Staff-Assisted: An intake staff member completes the prescreening with the customer during an initial interaction.
- Staff-Initiated Link: An intake staff member sends a secure link to the customer, allowing them to complete the prescreening remotely.
- Self-Service: Customers can access a public web page to request a secure link and complete the prescreening independently.

This flexibility ensures that customers can begin the intake process in a way that best fits their needs, while providing staff with essential information to guide next steps.

Important Note: A customer can only have one prescreening open at a time.

Identified Updates:

1. The emojis on the Getting to Know You Better page for the Job Preference, Work Experience, Health, etc. will be updated with icons.
2. On the Getting to Know You Better page, if the customer indicates they have an occupation in mind a question appears that has them select up to their top three occupation choices. The modal that opens is being redone to remove references to O*Net, remove codes, and improve the UI so you can more easily see the list of occupations to select from.

Accessing the prescreening

There are two ways you can start/access the prescreening, as a customer through the self-service path or as a career planner through a customer IWDS profile.

Option 1 - Self-service Prescreening

A public facing page is being designed that will provide information to individuals interested in WIOA. Additionally, they will be able to complete a short prescreening form to receive an email with a secure link to the prescreening. We are working to extend this to sending a text message that will provide them with a link to the prescreening as well. While we work to develop the public facing page, we have built out our test page with the request form to get the link to the prescreening.

Important Notes for Using the Self-Service Form

1. **Email**
    - Using your real email sends you a link to access the prescreening.
    - Adding **@fakemail.com** to your email skips the email step and takes you directly to the prescreening.
    - Emails must be unique. If the email is already used, you'll see a duplicate error message.

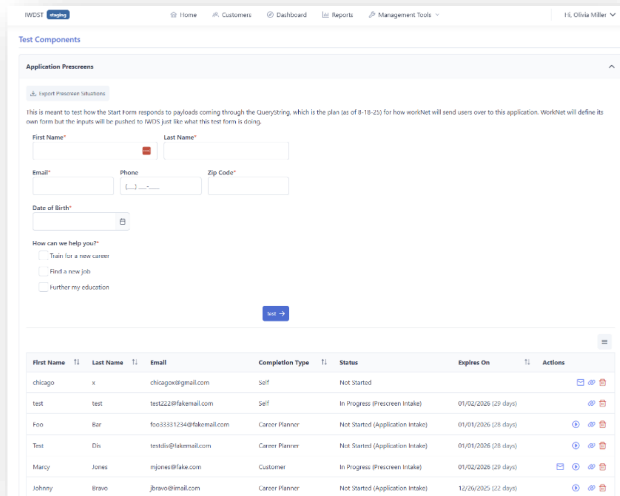
2. **Re-Accessing Your Prescreening**
    - If you used a real email, you can return anytime using the link sent to you. Your progress is saved.
    - Use the table below the form to find your prescreening. Click the **link icon** to copy your prescreening link and paste it into your browser.
    - The **play icon** appears only for prescreenings started through an IWDS profile. It opens the prescreening via the customer's profile.

Direct Link Access:

URL: https://testapps.illinoisworknet.com/Iwdst-Preview/testing?tabId=application-prescreens

Open the Application Prescreens section at the top.

Navigating via the menu:



1. Log into IWDS 2.0
2. Select Management Tools
3. Select Testing
4. Selecting Testing Page
5. Open the Application Prescreens section at the top.
6. Complete the required fields and click **Test**.
7. You will receive an email with a link to the prescreening OR if you use @famkemail.com you will be directed to the prescreening.
8. Once you get to the Next Step page you will have completed the prescreening UAT. The application is still under development and is not ready for UAT at this time.

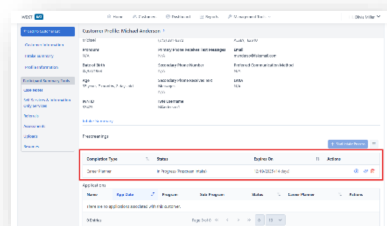
Option 2 – Prescreen through IWDS Customer Profile

Once a customer has an IWDS profile, a prescreening can be initiated through it. Please note that we are currently working on redesigning the User Interface (UI) for the Intake Summary portion of the IWDS customer profile. When engaging the prescreening through the customer profile you will first have to create the profile in IWDS.

Important Notes for Using the Prescreening through the Customer Profile

3. **Re-Accessing Your Prescreening**

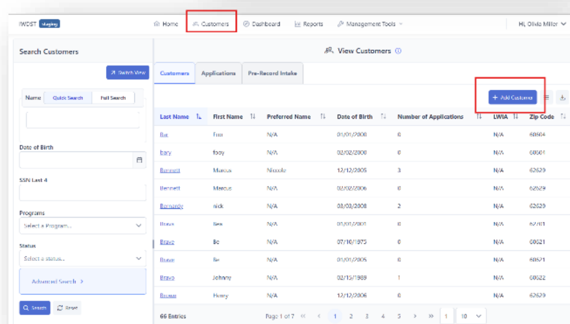
    1. Once a prescreening has started, you cannot create a new one. Only one open prescreening record can exist at a time.
    2. The Intake Summary section will update under Prescreening to show the active record in the table.
    3. To re-access the prescreening, click the play icon next to the record.



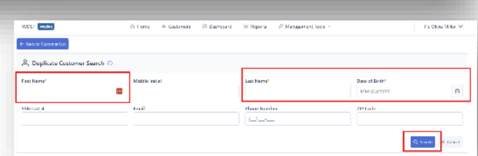
Note: The current interface uses a table format, but we are working on updating this to a more actionable, user-friendly UI.

Navigating to the Customer Profile Prescreening:

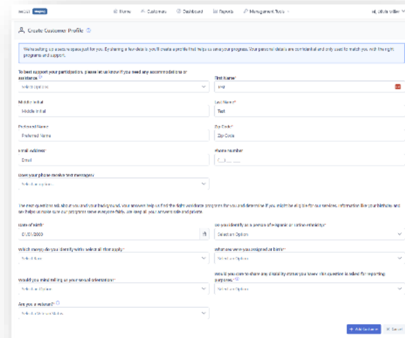
1. Log into IWDS 2.0



2. Go to the Customers Page
3. Click the **Add Customer** button
4. Complete the duplicate search process



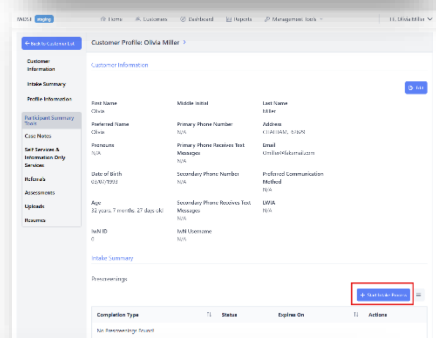
    - Enter First Name, Last Name, and DOB then click **Search**
5. Click **Add Customer**
    - If a match was found verify you are not creating a duplicate customer and move forward with creating a new customer.



6. Complete the required fields

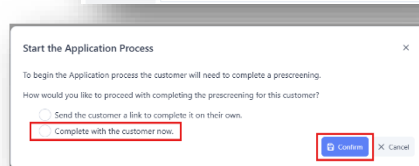
7. Click **Add Customer**.

8. A modal will pop up alerting you on if a new IwN account was created or if a match was found and synced. Click **Continue**.



9. You will be directed to the customer profile.

10. Click **Start Intake Process** under the Intake Summary section.



11. In the modal that opens, select **Complete with customer now.** Then select **Confirm.**

12. You will now enter the prescreening.

13. Once you get to the Next Step page you will have completed the prescreening UAT. The application is still under development and is not ready for UAT at this time.

Completing the Prescreening

Personas

To help staff and stakeholders test the prescreening process, we've created **customized personas** that represent different customer scenarios and eligibility types across WIOA programs (Adult, Youth, and Dislocated Worker). *Please note that you may need to change the name for these customers as there will be several testers who may be using these personas.*

Each persona includes:

- **General Customer Information**: Age, employment status, education level, and other relevant details.
- **Eligibility Alignment**: Personas are designed to reflect various program eligibility pathways.
- **Comprehensive Data**: While not all information may apply to the prescreening, each persona contains everything needed to complete it successfully.

Using these personas ensures consistent testing and helps validate that the prescreening adapts dynamically to different customer situations.

Link to Persona List:
https://www.illinoisworknet.com/partners/Documents/IWDS%20and%20Monitoring/Prescreening%20Personas_2025.docx

General Navigation and Information

Side Panel
The side panel shows all prescreening pages and highlights your current page. You can use it to navigate back to previous pages at any time.

Responsive Questions
Questions adapt based on your responses. Additional questions may appear, or unnecessary ones may be skipped, creating a dynamic and intuitive experience.

Customer-Centered Design
The prescreening uses customer-centered, asset-based language at a 5th–6th grade reading level to ensure clarity and accessibility for all users.

- **Customer-Centered**: Focuses on clarity, respect, and ease of understanding.
- **Asset-Based**: Highlights strengths and opportunities rather than deficits.