UAT Release 20, Cycle 1 - Getting Started Assessment

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Overview

User Acceptance Test (UAT) Release #20 cycle 1, 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 Release #20 cycle 1 is to review the Getting Started Assessment question set. The UAT cycle will be open from **April 22nd – April 30th, 2026**. This provides you with 7 working days to complete the review. Your participation is appreciated.

UAT Release 20 – Cycle 1 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.

- Getting Started Assessment

Due Date

Please complete your testing in these areas and submit your feedback by **April 30th at end of working day**.

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. 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 **Release 20- Getting Started Assessment**. The section is divided into several pages, each page is specific to a specific page of the assessment. 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.
    - 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
        - 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.

Overview for Completing Getting Started Assessment Testing

This section provides an overview of how to access and complete **Getting Started Assessment testing** during User Acceptance Testing (UAT). Detailed, step-by-step instructions are available in the linked **Quick Start Guides** referenced throughout this section.

Important System Rules to Keep in Mind

- An adult or dislocated worker customer must have completed Eligibility Certification before a Getting Started Assessment record can be started.

- The Getting Started Assessment is accessed from the **Intake** section of the Customer Profile under the **Getting Started Assessment** tab.
- Data from the customer's profile (e.g., health needs, transportation, housing, legal, and money situation) will be **pre-populated** on the Introduction page from previously entered prescreening and application information. Testers should review this data for accuracy.
- **The Getting Started Assessment is personalized for each customer.** At the top of each section, a grey box displays key information pulled from the customer's prescreening and application record. The question sets shown throughout the assessment are **driven by those pre-populated answers**, making the assessment targeted and relevant to each individual. As a result, testers may see different questions depending on which customer profile they are using. This is expected system behavior and should be validated as part of UAT.

Test Data Prep

Career planners will complete the assessment with the customer. Use the IWDS Profile entry point to access the Getting Started Assessment on a customer's behalf. There are a few options for selecting a customer.

- Use a customer from the **UAT Notebook "Test Customers"** list Put your name next to the selected customer to "claim" it.
- Select an **existing customer** from the customer list. Confirm the customer has completed Eligibility Certification and does not have an open Getting Started Assessment record.
- Or **add a new customer** to the customer list. It is recommended you use your first name and the type of customer you plan to trigger as the last name. Example: Lynette Adult or Lynette DW. If you choose this method, you will have to complete a prescreen and application for the customer first. If you'd like, you can use a persona from this list. **Link to Persona List:** https://www.illinoisworknet.com/partners/Documents/IWDS%20and%20Monitoring/Personal%20List_Intake.pdf

Once you have selected your customer and confirmed Eligibility Certification is complete, navigate to the **Intake** section of the Customer Profile. Select the **Getting Started Assessment** tab and click **Start** to begin the assessment.

General Navigation and Information

Assessment Progress Bar

A progress bar is displayed at both the top and bottom of each assessment page, showing the percentage of questions answered across all sections. The bar will fill incrementally as testers answer questions throughout the assessment. Testers should verify that the progress bar updates correctly as responses are entered and reflects overall completion across sections, not just the current page.

Side Panel

The side panel shows all assessment 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 assessment 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.

UAT Reminder

The goal of Getting Started Assessment testing is to ensure users can successfully **navigate and complete each section** of the assessment. Users should focus on validating system behavior, section navigation, pre-populated data accuracy, and data capture across all sections. The priority is **how the system behaves**, not whether the test data looks perfect.

Completing the Getting Started Assessment

After clicking **Start Assessment** on the Introduction page, users will navigate through the sections of the assessment. All fields are optional and sections can be completed in any order using the left-side panel. Use **Save and Exit** at any time to save progress and return later. Use the **Previous** and **Next** buttons to move sequentially between pages.

The sections below describe the content and key fields found on each page of the assessment.

Introduction

The Introduction page provides guidance for Career Planners and displays a summary of pre-populated information pulled from the customer's prescreening record, including health needs, accommodation needs, transportation, childcare situation, housing, legal situation, money situation, public assistance, family income calculator results, and basic skills screening tool responses. Testers should review this data for accuracy before proceeding.

Employment Expectations

Pre-populated data from prescreening is displayed at the top of the page (e.g., job preferences, urgency of finding work, top career selections). The question set displayed is determined by answers provided during prescreening.

Skills Assessment

This page displays Interest Profiler results and Illinois career matches when available. It contains two tabs: **Results** and **Illinois Careers**. If no Interest Profiler results exist for the customer, a message will display: "Results not found. Please retake the assessment." Testers should confirm the page loads correctly and both tabs are accessible.

To test this page, use customer LYNETTE TRITZ and navigate to the Skills Assessment page. You should see the results of the survey and the tab for Illinois Careers to conduct a conversation with the customer regarding jobs that may be a good fit.

Goals

Pre-populated data from prescreening is displayed at the top of the page (e.g., identified goals, career goal status). The question set displayed is determined by answers provided during prescreening.

Education History

Pre-populated data from prescreening is displayed (e.g., highest level of education, current school status). The question set displayed is determined by answers provided during prescreening.

IDES System Check

The IDES System Check appears within the Education History section. **Testers do not need to complete or validate the IDES System Check for this UAT cycle.** This feature is still in progress and will be included in a future release. If you encounter the IDES section during testing, you may skip it and continue to the next field.

Employment History

Pre-populated data from prescreening is displayed (e.g., current employment situation, dislocation job information). The question set displayed is determined by answers provided during prescreening.

Health

Pre-populated data from prescreening is displayed (e.g., health needs, accommodation needs). Questions on this page are **dynamic** and will display based on the customer's identified health and accommodation needs. The questions displayed are driven by the customer's pre-populated prescreening data.

Transportation

Pre-populated data from prescreening is displayed (e.g., how the customer gets to work or school). The question set displayed is determined by answers provided during prescreening.

Childcare & Dependent Care

Pre-populated data from prescreening is displayed (e.g., childcare or dependent care situation). Questions on this page are **dynamic** and will display based on the customer's identified childcare situation. The questions displayed are driven by the customer's pre-populated prescreening data.

Legal Needs

Pre-populated data from prescreening is displayed (e.g., legal situation). The question set displayed is determined by answers provided during prescreening.

Money Needs

Pre-populated data from prescreening is displayed (e.g., money needs, public assistance, other income items flagged, family income calculator results). The question set displayed is determined by answers provided during prescreening.

This section also includes **Extra Income Assessments** that Career Planners may use when additional income review would help a customer access the right services. These are optional tools and should only be completed when clearly needed. The Expense

Worksheet helps customers review monthly expenses such as rent, food, and transportation costs. Career Planners can complete the worksheet in the system or email it directly to the customer. **This item is currently in progress and not ready to test**.

Veteran Information

Pre-populated data from prescreening is displayed (e.g., veteran status, reason for discharge, transitioning service member status, qualified spouse status). The question set displayed is determined by the answers provided during prescreening.

Additional Demographics

Pre-populated data from prescreening is displayed (e.g., age, ethnicity, race, sex at birth, sexual orientation, English Language Learner status). The question set displayed is determined by answers provided during prescreening.

This is the last section of the assessment. For this UAT cycle, **Save and Exit** is the expected endpoint. Click **Save and Exit** to save progress and return to the Intake summary.

Note – Features planned for a future release (not in scope for this cycle):

- Complete button – A dedicated completion action that will transition the customer to the Recommendations page once the assessment is finished.
- Assessment off-ramp – An option for the Career Planner and customer to mutually agree to end the assessment before enrollment if it is determined to be the best course of action.
- Enrollment status indicator – A clearer indication of when a customer has been enrolled through the achievement of initial and comprehensive services.