

Florida Department of Agriculture and
Consumer Services

UAT Engagement Plan

For Florida PALM Financials, Payroll, and
Data Warehouse/Business Intelligence

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Overview

The Florida Planning, Accounting, and Ledger Management (PALM) Project is replacing the State of Florida's current accounting and cash management systems with an integrated, enterprise financial management solution that will allow the State to organize, define, and standardize its financial management processes. The Florida PALM Project Vision is to implement a statewide accounting system that enforces standardization, acts as a scalable foundation to evolve as business needs change, and positions Florida for future innovation as it considers a true enterprise-wide solution.

All agencies are expected to participate in User Acceptance Testing (UAT) to prepare for the next major implementation of Florida PALM. Preparing for and participating in UAT activities will be used to establish our Agency Readiness Certifications. Upon ESC approval of *Stage Gate #3 – Ready to Begin UAT* agencies have had access to the UAT environment, which began in February 2026. UAT provides the opportunity to complete comprehensive end-to-end testing of Florida Department of Agriculture and Consumer Services (FDACS) business processes, including integration of necessary agency business systems and enterprise partners within the Florida PALM testing environment. UAT ensures that FDACS change impacts on people, processes, technology, and data have been addressed and verified to allow for a successful transition to Florida PALM at go-live in January 2027.

The 2027 implementation includes Financials Wave, Payroll Wave, and the Data Warehouse/Business Intelligence (DWI/BI). FDACS participated in Florida PALM project-hosted UAT session(s) with our selected initial load of end users and targeted end users for end of year testing to support our agency-specific training and readiness approach.

The department met the Project identified readiness criteria to begin PALM UAT in February 2026, which included readiness to begin Cycle 3 – integrated full end-to-end Interface Testing in the PALM UAT environment. This UAT Engagement Plan was created based on the Florida PALM Project schedule as of July 2026. Any amendments to the Florida PALM project schedule may impact our internal agency specific UAT plan and associated activities.

User Engagement Approach

Department PALM UAT key resources were identified based on their current department roles and responsibilities and the anticipated future roles and responsibilities they will maintain within PALM. Department UAT participants are prepared for their testing roles by reviewing internal business process documents, Florida PALM Business Process materials, and/or participating in department training sessions. All agency end users granted access to PALM UAT have/will complete the required prerequisite PALM courses. These courses were assigned to end users as they apply to their role within department agency business systems and/or expected role(s) in PALM. Most of the participants are department staff that have been involved in various capacities with the department's readiness activities and understand Florida PALM functionality and related change impacts for the department. Finance and Accounting staff who are business experts for the department's current operational processes will be key users of the department. Data managers and agency business system administrators, along with OATS staff will serve as technical support to assist with any issues during testing. Project stakeholders will provide

additional review and approval of UAT results as required.

Department SMEs will incorporate what they have learned during PALM hosted UAT sessions and hands-on UAT with department-specific training needs to facilitate and lead agency-hosted UAT sessions with department end users to ensure end users are trained and prepared to use Florida PALM prior to Go-live in January 2027.

Additional people may be considered or deemed necessary to include in UAT once Florida PALM Role mapping impacts are understood in the UAT environment and initial testing activities occur and/or business process impacts and workflow adjustments are determined during role-based testing during UAT.

Testing Scope

As part of Florida PALM UAT, the department will follow a testing plan to ensure all updated agency business processes, system integrations, and configurations are thoroughly tested and validated before the implementation of Florida PALM. Testing will cover end-to-end testing of business processes; integration with agency business systems and enterprise systems; and validation of business system remediation, end-user role assignments, and reporting needs. Florida PALM UAT includes the ability for testers to complete online transactions and spreadsheet uploads. All agency UAT also includes Interface Cycle 3 testing and a fully enabled batch schedule.

UAT participants are primarily drawn from internal resources within the Division of Administration, ensuring that knowledgeable personnel who understand the organization's systems and processes contribute to testing and validation activities. The involvement of internal resources emphasizes accountability and familiarity with operational procedures during UAT. Additional agency stakeholders may be brought in to participate in UAT as part of the ongoing testing activities, ensuring broader input and validation.

The business processes to be tested are developed in part by incorporating the agency-developed Business Process Inventory, identified change impacts in the Change Analysis Tool and updated business process, and remediated systems documentation. As the design of Florida PALM business processes have been finalized and remediation efforts for REV and AIMS are implemented, the full impacts on agency business processes have been conceptually understood. There is potential for updates to be made to this inventory as remediation efforts and integration with Florida PALM is comprehensively understood through hands on experiences and testing of the Florida PALM application. Test cases and user stories were developed to support the Project recommended standard scenarios and business processes for end-users to test in UAT. These test cases will incorporate the Florida PALM Provided Process Steps to test each change that is implemented per the requirements.

Technical testing will ensure that the technological components of the Florida PALM system are reliable and meet the requirements of the agency. Testing will be comprehensive and include basic system access, navigation and system security, as well as more in-depth technical testing

as it pertains to connectivity and performance testing. UAT will provide an opportunity to conduct performance testing on the Florida PALM system and the integrated remediated internal business systems. During UAT, the agency will verify that the interfacing files (inbound and outbound) provided by the Florida PALM system function correctly and support integration with the impacted agency systems identified. During UAT the agency will test the Florida PALM and impacted agency systems for performance to ensure all systems can handle the expected load and response times.

Test cases are comprised of necessary data and will incorporate agency specific configured data values to support testing efforts. During UAT, participants test full end-to-end business processes and validate both converted and configured data, including reports. They perform several types of data testing: data integrity testing to ensure accuracy and consistency across PALM modules, data migration testing to confirm legacy data transfers correctly, and data security testing by reviewing user role assignments. The DACS Change Analysis Tool guides which processes and reports to test. Participants verify that business process models, reports, and agency business system data accurately reflect the intended processes, expected outputs, and anticipated data results. These test cases will also be used for quality assurance and user acceptance testing to verify the application is working. Changes to agency specific configurations have been documented and provided to the Project, as applicable. Agency data is cleansed based on scheduled conversion results and activities. Department source documents to support UAT scenarios have been identified and updated as needed.

Roles and Responsibilities

UAT execution will be completed by several critical roles as identified in the Roles and Responsibilities section of this plan. Through UAT preparation and full integration testing additional roles and levels of support may be identified. Every role will have at a minimum one primary and a backup identified. Additional support may be leveraged from department stakeholders who are not yet identified.

Table 1: Agency UAT Roles and Responsibilities

Role	Responsibility	Resources
Agency Sponsor	• Certify readiness to participate in UAT. • Regularly monitor agency UAT progress. • Monitor agency risks, issues, and mitigation plans and communicate them to the Project. • Request, provide and assign appropriate resources as needed, and remove obstacles to successfully complete UAT activities.	Alan Edwards Derek Buchanan
Agency Liaison	• Collaborate closely with UAT Coordinator and provide updates to the Agency Sponsor. • Report agency-specific Florida PALM	Thomas Poucher Joey Hicks

Role	Responsibility	Resources
	risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	
Business Liaison	- Identify and confirm all agency business processes to be tested. - Confirm the creation of User Stories and updated documentation for processes and procedures. - Ensure that end-to-end testing of agency business processes is conducted. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Jim Lewandowski Trisha Williams
Technical Liaison	- Identify and confirm all agency business systems to be tested. - Confirm agency business systems are ready for full integration testing. - Coordinate agency business system remediation as needed, based on the results of testing. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Luis Herrera Jordan Vernon
Project Management Liaison	- Capture and track both Project- and internal agency-driven UAT activities and maintain awareness of progress and due dates. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	James Johnson Kim York
Change Management Liaison	- Develop and maintain UAT communication plan - Support the identification and tracking of agency UAT participants. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Kim York Joseph Smith III
Training Liaison	- Identify and track agency UAT participants. - Support agency hosted UAT sessions with end users. - Coordinate or lead the agency training material development.	Trisha Williams Jennifer Dobbs Kim York

Role	Responsibility	Resources
	Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	
UAT Coordinator	- Track and confirm testing progress. - Lead the Testing Error Triage Team. - Serve as the primary point of contact with the Florida PALM Project team for reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline.	Kim York James Johnson
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	PALM Remediation Team
Subject Matter Experts (Assigned per Business Process Grouping)	- Support UAT planning (e.g., user stories/script development, agency-specific materials development). - Participate as first end users in UAT. - Conduct agency hosted UAT session with end users. - Serve as primary point of contact for end user business process, data, and technical questions. - Support agency training material development. - Report testing errors and testing progress to UAT Coordinator. - Support end user understanding during UAT and after go-live. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Smeley Aboite Tonya Asbell Channcen Bell Stephanie Bergozza Dee Boerger Claudia Brown Michelle Faircloth Steffenie Hancock Emily Koon Jim Lewandowski Alissa Perdue Thomas Poucher Dana Purtell Elaine Sloan Ashley Sweet Pam Swiger Brian Terry Trisha Williams
Security Access Manager	- Perform and track role assignment changes for SMEs and end users during UAT. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Kim York Jazmin Williams
Identity Provider Subject Matter Expert	- Add end users to the active directory (or applicable tool) for access to UAT. - Maintain active directory for access throughout UAT (adding new end users or removing end users as needed).	Bob Tiller Cody Arrant
File Manager	Serve as the primary point of contact for interface testing.	Luis Herrera Andres Castellon

Role	Responsibility	Resources
	Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM.	
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	FDACS Batch Exception Listserv
End Users	- Practice related job processes. - Confirm end user role assignment(s). - Report testing errors and testing progress to SME or UAT Coordinator, as appropriate.	Included in Table 2 below. Identified and maintained in FDACS Implementation End User worksheet.

User Story Testing Progress

FDACS has ensured complete coverage of all Activities that are Project-identified and Agency-determined. The department has been able to complete the first round of testing by UAT Refresh, scheduled as August 7th, 2026. Agency staff continues to maintain adequate time management to meet PALM UAT testing requirements while also completing agency fiscal responsibilities.

Table 2: User Story Testing Progress

Number of Activities	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Number of Times the User Stories Have Been Tested	Status Comments
Account Management and Financial Reporting (AMFR)				
17	57	53	85	Unable to test Year End scenarios. Pending PALM provided user materials.
Accounts Receivable (AR)				
21	33	33	100	
Asset Accounting and Management (AAM)				
14	21	21	46	
Banking (BK)				
6	6	6	7	
Budget Management and Cash Control (BM/CC)				
7	18	18	110	
Contracts Management (CT)				
2	2	2	3	
Disbursements Management (DM)				
22	30	30	195	
Data Warehouse/Business Intelligence (DW/BI)				
7	10	10	41	
Grants Management (GM)				
5	6	6	6	
Inter/IntraUnit Transactions (IU)				

Number of Activities	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Number of Times the User Stories Have Been Tested	Status Comments
11	24	23	148	Unable to test Carry Forward scenarios. Pending PALM provided user materials.
Payroll Management (PR)				
25	29	27	381	Unable to test Carry Forward scenarios. Pending PALM provided user materials.
Projects Management (PM)				
10	12	5	10	Testing will be completed during PALM UAT.
Revenue Accounting (RA)				
2	4	4	4	
System Access and Controls (SAC)				
3	4	4	101	

Agency Business System Testing Progress

The Bureau of Finance and Accounting in the Division of Administration uses the Revenue Receipts System (REV) for managing Accounts Receivable and the Administrative Image Management System (AIMS) for managing Accounts Payable and contracts. These applications currently interface with the State's Florida Accounting Information Resource System (FLAIR) managed by the Department of Financial Services (DFS) to record revenue and disbursements for payables. Most of the Florida PALM Chart of Account (COA) fields will be different than FLAIR values along with some additional data elements that will be different in Florida PALM. There will be completely new interface files for interfacing with Florida PALM.

Conducting comprehensive interface testing is pivotal for the department's UAT plan. FDACS will use UAT to:

- Test and validate:
 - all updated business processes from end-to-end, including processes that integrate with FDACS agency business systems (REV and AIMS) and other enterprise systems (STMS, People First, MFMP, etc.);
 - business system remediations for REV and AIMS; the functionality exercised by one part of the REV and AIMS systems does not cause conflicts or issues elsewhere in the systems (integration testing);
 - to verify that REV and AIMS systems are suitable for release to user;
 - end user role assignments;
 - agency-specific configurations; and
 - reporting needs and solutions
- Develop agency-specific end-user training and education materials as applicable for their respective business process needs within the agency.
- Provide end user exposure to and practice in Florida PALM as applicable for their respective business process needs within the agency.

- Participate in Project hosted in-person UAT sessions for initial agency testers in UAT and for targeted audiences for end of year testing.
- Confirm agency change impacts to people, processes, technology, and data.
- Confirm end-user acceptance of REV and AIMS remediation and their integration with Florida PALM.

The REV and AIMS systems are being updated for compliance with Florida PALM's COA and other data fields. The FDACS PALM Remediation Team (PRT) successfully conducted numerous live end user testing sessions with department SMEs to test and confirm system remediations. Remediated Agency Business System end user testing is on-going as department SMEs continue to conduct end user testing independently as part of UAT.

The department has successfully completed multiple tests for Cycle 3 Inbound (8/9) and Outbound (20/21) interface testing. The department plans to complete Agency Business System testing by September 2026 to align with the PALM project schedule. System remediations for REV and AIMS are in progress and on schedule to be ready to participate in fully integrated Florida PALM UAT activities scheduled through November 2026. Cycle 3 Interface testing is in progress.

Table 3: Agency Business System Testing Progress

Business System Name	Cycle 3 Status (Not Started, In Progress, Complete)	End User Testing Needed (Y/N)	Status of End User Testing (Not Started, In Progress, Complete)	Planned or Actual Completion Date of End User Testing
AIMS	In Progress	Y	In Progress	September 2026
REV	In Progress	Y	In Progress	September 2026

End User Testing

The department has incorporated SMEs from within Finance and Accounting, the Office of Policy and Budget, the Bureau of Personnel Management, and various other divisions devoting time to testing User Stories. The department continues to prioritize and dedicate sufficient time to testing User Stories relative to the expected impact to department processes. It is recognized that any time spent conducting User Story tests is beneficial to the agency and continues to expect and support additional testing time as department resources are able to do so.

Table 4: End User Testing by Business Process Grouping

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Organization(s) or Agency Business System	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Account Management and Financial Reporting (AMFR)			
10	1-2 hrs. every week (min)	Financial Management	February 2026 through October 2026
Accounts Receivables (AR)			

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Organization(s) or Agency Business System	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
14	1-2 hrs. every week (min)	Revenue Management Unit	February 2026 through October 2026
Asset Accounting and Management (AAM)			
8	2 hrs. every week (min)	Property Section	February 2026 through October 2026
Banking (BK)			
7	30 mins month	Chief's Office, Finance and Accounting	February 2026 through October 2026
Budget Management and Cash Control (BM/CC)			
11	1-2 hrs. every week (min)	Office of Policy and Budget	February 2026 through October 2026
Contracts Management (CT)			
11	1-2 hrs. per month	Finance and Accounting collective	February 2026 through October 2026
Disbursements Management (DM)			
19	1-2 hrs. every week (min)	Disbursements Section; Travel/Research/Vouchers Section	February 2026 through October 2026
Data Warehouse/Business Intelligence (DW/BI)			
7	1-2 hrs. every week (min)	Finance and Accounting collective; Bureau of Personnel Management; Office of Policy and Budget	February 2026 through October 2026
Grants Management (GM)			
12	1-2 hrs. every week (min)	Grants Management Section	February 2026 through October 2026
Inter/IntraUnit Transactions (IU)			
12	1-2 hrs. every week (min)	Finance and Accounting Collective	February 2026 through October 2026
Payroll Management (PR)			
11	1-2 hrs. every week (min)	Bureau of Personnel Management	February 2026 through October 2026
Projects Management (PM)			
15	1-2 hrs. every week (min)	<i>Financial Management Section</i>	February 2026 through October 2026
Revenue Accounting (RA)			
5	1-2 hrs. every week (min)	Revenue Management Unit	February 2026 through October 2026
System Access and Controls (SAC)			
15	Continuous for end user support	Chief's Office, Finance and Accounting	February 2026 through October 2026

UAT Engagement Risks

Throughout PALM UAT, the department has identified risks and issues for executing and completing testing of agency business systems, of which there are two risks that currently remain open. These risks are both in the Primary Risk Category: Interface.

The department created a risk based on the generalized dependency on the ongoing PALM UAT batch processing testing. FL PALM must be running regular batch processing during UAT to allow FDACS to interface Agency Business System test scenario data (API002, ARI007, ARI009, ARI011, IUI002, POI002, POI006, SDI009) to PALM during the testing window. Failure to successfully test batch processing is detrimental to the departments planning and preparation for go live fiscal operations. Internal management and mitigation of this risk is dependent on continued thorough information about Florida PALM UAT batch testing details from the PALM Project. Our Agency CCN collectively continues to monitor any updates related to testing (PALM Technical Team communications, AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing timeline. Mitigation for failure of batch schedule to run as expected will result in the department having to conduct manual activities for impacted business process functions.

The department created a risk about the ongoing UAT Interface batch processing that has been utilizing PALM's Inbound Encumbrance interface POI002 to send agency Encumbrances to PALM. PALM has successfully processed new Encumbrances and Dispatched them. However, updates to the Dispatched Encumbrances have experienced numerous issues which critically impacts the downstream processes like Change Order and Vouchers. The turnaround time for the issue resolution from PALM is taking time which impacts the successful testing of the Encumbrance loads to PALM. The department has open SNow tickets associated to this risk. If this risk becomes an issue during UAT, FDACS will be unable to complete the required testing of Encumbrances, which in turn prevents successful testing of Change Orders and Vouchers. Because both processes depend on Encumbrance updates being processed correctly in PALM, continued failures and delays impacted the Agency Certification #3 and has the potential to impact the overall UAT completion deadline of 10/2/2026. Inability to successfully test and validate these transactions within the required timelines will delay critical UAT deliverables, limit readiness for any subsequent testing cycles, and impact overall project scheduling.

The department continues to execute Cycle 3 Interface Testing with PALM as PALM UAT progresses.