

Agency for Health Care Administration
UAT Engagement Plan
For Florida PALM Financials, Payroll, and
Data Warehouse/Business Intelligence

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Overview

The Agency for Health Care Administration (AHCA) plans to test all updated business processes during end-to-end testing, including scenarios that involve enterprise application transactions. The Agency-Unique Process, known as the Weekly Medicaid Run, is executed using the Agency Business System (SunFocus) along with transactions processed in Florida PALM. During testing, the agency plans to simulate weekly Medicaid cycles.

Invoicing functionality and automated journal transfer modules are planned to be tested within the remediated SunFocus system, generating transactions for the Florida PALM inbound interfaces.

Tier 2 Agency Business Systems are planned to undergo regression testing in early fall.

Beginning at the refresh, the Bureau of Financial Services end users plan to perform parallel operational activities in both FLAIR and Florida PALM.

Year-end testing is scheduled to start in August 2026.

Weekly Medicaid Run (WMR) cycles are planned to be conducted starting in August 2026, producing the spreadsheet upload for disbursements and the monthly burn report.

Disbursement testing from the WMR is scheduled to start in August 2026.

Florida PALM inbound interface creation is planned to take place throughout the refresh beginning in September 2026.

User Engagement Approach

The Business Areas have identified the appropriate end users and their assigned Agency Business Processes including test data flowing to and from Enterprise Business Systems to SunPALM.

Testing Scope

The Agency Business Systems identified to be part of the testing effort (including Regression) are as follows:

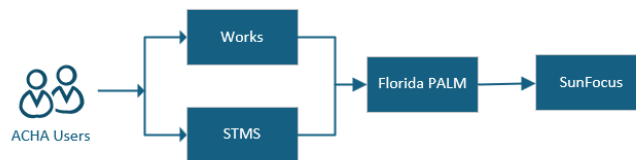
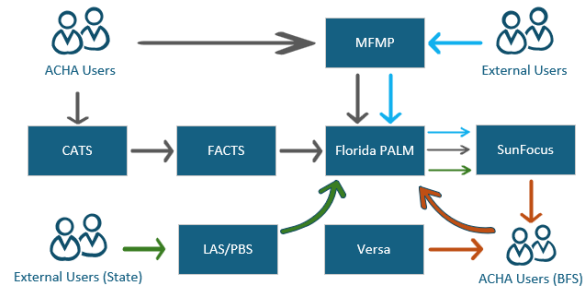
1. SunFocus (Rebranded as SunPALM)
2. Versa - Creation of ARI010 Spreadsheet Upload
3. RARA - Revenue and Accounts Receivable
4. OPC Power App - Office of Planning Construction
5. FMMIS - Florida Medicaid Management Information System
6. FHURS - Florida Hospital Uniform Reporting System
7. FACTS 3.0 - Fraud Abuse Case Tracking System
8. ePAR - Electronic Personnel Action Request
9. CATS - Contracts Administration Tracking System
10. eNAF - electronic Network Access Form
11. AD Group - Active Directory

The Enterprise Business Systems identified for testing are as follows:

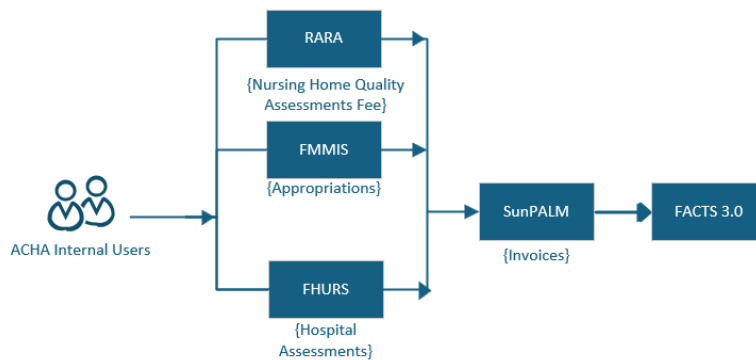
1. People First
2. MFMP/AOD - My Florida Market Place
3. FACTS - Florida Accountability Contracts Tracking System
4. STMS - Statewide Travel Management Service

5. Works - Bank of America
6. LAS/PBS - Legislative Appropriations System/Planning and Budgeting Subsystem

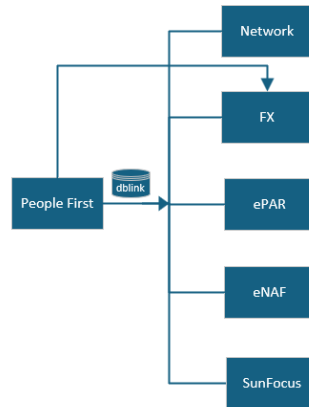
End-to-End AHCA Testing



Regression Testing (No remediation required to the ABS)



Enterprise Business Systems Testing



NOTE:

- * ePAR - Does not require AHCA PALM Project Team (also referred to as AHCA PALM Team) end-to-end testing. Requires testing from Human Resources.
- * CATS - CATS is not required to be completed and tested before Go Live. Contract information can be entered directly into FACTS.
- * FACTS 3.0 - Testing environment is required.
- * RARA, FMMIS, OPC, FHURS - No special testing environment is required, but test data from Production (previously processed) will be required.
- * VERSA – Beta environment is required for testing.

Roles and Responsibilities

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.	Jon Manalo, Deputy Secretary for Operations
Agency Liaison	• Collaborate closely with UAT Coordinator and provide updates to the Agency Sponsor. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Phyllis Wander
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.	Gale Smith-Johnson

Role	Responsibility	Resources
	Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	
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.	Lori Freeman / Phyllis Wander
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.	Phyllis Wander
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.	Katrina Derico-Harris
Training Liaison	- Identify and track agency UAT participants. - Support agency hosted UAT sessions with end users. - Coordinate or lead the agency training material development. - Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Lynn Smith
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.	Lynn Smith

Role	Responsibility	Resources
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	*AHCA IT PALM Team, SME's (one from each unit), Lynn Smith
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.	Gale Smith-Johnson, Loralyn Morgan, LaShonna Austin, Katrina Derico-Harris, Dean Rohe, Pamula Griffin, Kimberly Jordan, Joan Sutton, Alan Donaldson, Brie Volpe, Krystina Lowder, Calvin Anderson, Shenita White, Christine Byrd, Patricia Williams, Alice Wilkins, Sharon McCloud, *AHCA IT PALM Team
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.	Alicia Rumlin
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).	AHCA Help Desk, Ryan McCranie
File Manager	- Serve as the primary point of contact for interface testing. - Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM.	Ryan McCranie, Allen Davis (Lead Developer)
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	AHCA Help Desk
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.

*AHCA IT PALM Team consists of the following members: Phyllis Wander, Bruce Wolin, Juilee Thakur, Mohana Sree Boddu, Cheryl Dudley.

User Story Testing Progress

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)				
16	29	11	1	Half of the remaining stories to be tested are dependent on year-end data which will be addressed after the refresh date. The remaining half to be tested have interdependencies with other agencies and will be completed after the refresh date, ensuring thorough validation and quality.
Accounts Receivable (AR)				
19	34	18	1	With the exceptions of failed items due to Agency Business System issues currently being addressed, testing has been completed. Agency is committed to resolve failed items after the refresh date.
Asset Accounting and Management (AAM)				
14	24	18	1	Remaining stories to be tested are dependent on year-end data which will be addressed after the refresh date.
Banking (BK)				
3	5	5	1	Completed Testing.
Budget Management and Cash Control (BM/CC)				
7	30	27	1	Testing effort has been focused on PALM-recommended stories. Agency is committed to completing the remaining agency-specific tests after the refresh date.
Contracts Management (CT)				
0	0	0	0	This module is not being tested as AHCA manages contracts through FACTS.
Disbursements Management (DM)				
21	82	76	1	Testing effort has been focused on PALM-recommended stories. Those tests pending completion

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
				will be resolved after the refresh date.
Data Warehouse/Business Intelligence (DW/BI)				
6	25	25	3	Completed testing.
Grants Management (GM)				
3	2	2	1	Completed testing.
Inter/IntraUnit Transactions (IU)				
11	69	64	1	The remaining stories to be tested are dependent on other state agencies' data. We are working closely with other agencies as their input is necessary for completion. Agency committed to completing the remaining tests after the refresh date
Payroll Management (PR)				
18	34	25	1	The remaining stories to be tested are dependent on year-end data which will be addressed after the refresh date. Agency is committed to completing the remaining tests when year-end data is available.
Projects Management (PM)				
0	0	0	0	This module is not being tested as AHCA does not use the Projects module.
Revenue Accounting (RA)				
0	0	0	0	Activity to manage Customer is performed in Agency Tier 1 application and will not be tested in Florida PALM.
System Access and Controls (SAC)				
3	18	17	1	We are committed to completing testing by August 7, 2026.

Agency Business System Testing Progress

End users from multiple business areas have already been engaged and are actively participating in testing. The time committed is sufficient to date, and the agency is on track to complete all required testing by the end of UAT. Continuous monitoring and adjustment of schedules ensure that testing remains thorough and timely.

Below are the Agency Business Systems included in End-to-End Testing.

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
SunFocus	In Progress	Y	In Progress	10/30/2026
VERSA	In Progress	Y	In Progress	10/30/2026
CATS	Not Started	N	Not Started	10/30/2026

Below are the Agency Business Systems that need Regression Testing only.

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
RARA	Not Started	N	Not Started	10/30/2026
OPC Power APP	Complete	N	Complete	05/22/2026
FMMIS	Complete	N	Complete	02/27/2026
FHURS	Not Started	N	Not Started	10/30/2026
FACTS 3.0	Not Started	N	Not Started	10/30/2026
ePAR	Not Started	N	Not Started	10/30/2026
eNAF	Not Started	Y	Not Started	10/30/2026
Network	In Progress	N	In Progress	10/30/2026

End User Testing

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)			
14	3hrs. per week	Bureau of Financial Services, Policy & Systems Unit	February 2026 through October 2026
Accounts Receivables (AR)			
12	3hrs. per week	Bureau of Financial Services, Revenue Unit/SunPALM (ABS)	February 2026 through October 2026
Asset Accounting and Management (AAM)			
5	3hrs. per week	Bureau of General Services	February 2026 through October 2026

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)
2	3hrs. per week	Bureau of Financial Services, Policy & Systems Unit	February 2026 through October 2026
Banking (BK)			
6	3hrs. per week	Bureau of Financial Services, Revenue Unit	February 2026 through October 2026
Budget Management and Cash Control (BM/CC)			
4	3hrs. per week	Bureau of Financial Services, Trust Fund Unit	February 2026 through October 2026
6	3hrs. per week	Bureau of Budget Management	February 2026 through October 2026
Contracts Management (CT)			
	N/A	AHCA uses FACTS for contract Management	February 2026 through October 2026
Disbursements Management (DM) 3hrs. per week			
18	3hrs. per week	Bureau of Financial Services, Disbursements Unit	February 2026 through October 2026
Data Warehouse/Business Intelligence (DW/BI)			
3	2hrs. per week	Bureau of Financial Services, Policy & Systems Unit	February 2026 through October 2026
2	2hrs. per week	Bureau of Human Resources	February 2026 through October 2026
1	2hrs. per week	Bureau of Financial Services, Disbursements Unit	February 2026 through October 2026
4	2hrs. per week	Bureau of Budget Management	February 2026 through October 2026
Grants Management (GM)			
	N/A		
Inter/IntraUnit Transactions (IU)			
11	3hrs. per week	Bureau of Financial Services, Disbursements Unit	February 2026 through October 2026
6	3hrs. per week	Bureau of Financial Services, Policy & Systems Unit	February 2026 through October 2026
2	3hrs. per week	Bureau of Financial Services, Grants Unit	February 2026 through October 2026
Payroll Management (PR)			
2	3hrs. per week	Bureau of Human Resources	February 2026 through October 2026

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)
3	3hrs. per week	Bureau of Financial Services, Policy & Systems Unit	February 2026 through October 2026
Projects Management (PM)			
	N/A		
Revenue Accounting (RA)			
1	3hrs. per week	Bureau of Financial Services, Revenue Unit	February 2026 through October 2026
System Access and Controls (SAC)			
2	2hrs. per week	Bureau of Financial Services	February 2026 through October 2026

UAT Engagement Risks

Issue 1: Resource challenge – End user testing is primarily performed by existing AHCA staff, most of whom are full-time employees of the Bureau of Financial Services with operational responsibilities. Where possible, staff in other areas of the agency, such as the Division of Information Technology (AHCA IT PALM Team), is utilized to support the gap in resources.

Issue 2: Agency Business System support transition – Support for AHCA's business system (SunFocus) has been heavily dependent on a contracted vendor. This contract recently ended, and the agency is in the process of evaluation and planning for replacement. The agency has secured in-house support and is actively working on a new contract.