

Agency for Persons with Disabilities
UAT Engagement Plan
For Florida PALM Financials, Payroll, and
Data Warehouse/Business Intelligence

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Overview

The Agency for Persons with Disabilities (APD) is pleased to provide this UAT Engagement Plan in support of the requirements outlined in **Section 249 of HB 5001**. APD's plan reflects the continued commitment to preparing people, processes, technology, and data for the successful transition to Florida PALM. Staff across agency facilities, regions, and the central office have remained actively engaged in readiness, testing, training, and coordination activities, and that engagement continues to strengthen as UAT continues to progress. APD is participating through a structured PALM Knowledge Center guided approach, to user story testing, agency business system validation, and end user participation. APD is on track to complete testing activities and support a confident transition to Florida PALM.

User Engagement Approach

The APD's user engagement approach is focused on informed participation, practical hands-on testing in a team environment, and sustained communication with end users and supporting teams. The agency is engaging end users through a coordinated strategy that includes leadership oversight, subject matter expert guidance, APD UAT Coordinator-led testing activities, and direct involvement from the teams who will rely on Florida PALM to perform their future job responsibilities. This strategy is designed not only to validate system functionality, but also to build end user familiarity, reinforce training, and increase confidence in the agency's ability to perform critical financial, payroll, reporting, and related business functions in Florida PALM.

Testing Scope

APD is participating in the PALM led UAT testing effort to support the agency's responsibility in validating applicable Florida PALM functionality, agency business processes, impacted agency business systems, and supporting data across agency facilities, regions, and the central office program areas. The scope includes user story testing, end-to-end process validation, role-based access confirmation, agency business system engagement, and review of data and reporting needs. The agency's testing activities are aligned to the broader Florida PALM UAT approach, which emphasizes end-to-end validation across people, processes, technology, and data.

Roles and Responsibilities

APD has a managed UAT support structure. The APD UAT Coordinator aligns leadership, business, technical, project management, change management, training, security, and end user responsibilities. This managed approach allows the agency to maintain clear accountability while supporting the practical needs of testers throughout UAT and with a team approach. The agency's approach reflects a strong level of end user engagement and a focused commitment to completing UAT in a disciplined, collaborative, and timely manner. Each role contributes to the overall success of the effort by helping coordinate issue resolution, validate business processes, remove any barriers, support end users, and maintain visibility into testing progress.

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.	Rose Salinas Deputy Director of Budget, Planning, and Information Technology Budget, Planning and Information Technology

Role	Responsibility	Resources
	Request, provide and assign appropriate resources as needed, and remove obstacles to successfully complete UAT activities.	
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.	Dee Ann Warren Chief Financial Officer Bureau of Financial Services
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.	Charity Cotton Financial Specialist Bureau of Financial Services
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.	Kristopher Baker Technical Liaison PALM-APD Information Technology
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.	Becky Morris PMP Program/Project Manager – PALM Project
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.	Shaquan Jackson Revenue Administrator Division of Budget and Planning
Training Liaison	Identify and track agency UAT participants.	Ramon Evans System Project Analyst Bureau of Financial Services

Role	Responsibility	Resources
	- 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.	
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.	Hayley Bobich Business Analyst – UAT Coordinator - PALM Project Agency for Persons with Disabilities
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	Hayley Bobich Business Analyst – UAT Coordinator - PALM Project Agency for Persons with Disabilities
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.	Asset Accounting and Management Team Melissa Hurst Lylia Flores Cortnie Petry Tamara Harrington Alexis Capps Elijah Phillips Budget Management and Cash Control Team Kelley Fisch Ebony Kiffin Aaron Thomas Alec Eggert Accounts Receivable/Revenue Accounting and Banking Team Shaquan Jackson Violette Labbad Contract Team Kaitlyn Bradwell Gayla Sanders Project Team Derrick Crawford

Role	Responsibility	Resources
		Ryland Musick Disbursements Team Sue Taylor Robert Wilcox Shakenya Clary Account Management and Financial Reporting Team Dee Warren Charity Cotton Ramon Evans Ashlie Hardwick Becki Powell Payroll Team Amanda Dickey Chappella Riggins Latasha Long Angie Sullivan Denessa Hatcher IU/Facilities/Regions Teams Sue Rayford Myrna Moore Adrian Mayes Jimmy Smith Linda Love Lori Pass Roselyn Miller Ted Donaldson April Scrivner Andrea Ross Charles Hardy Kim Meyer David Gillis Elizabeth Watson Michele Patterson
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.	Kevin Dixon Information Security Analyst III Office of Information Technology Erica Bubsey Information Security Analyst III Office of Information Technology
Identity Provider Subject Matter Expert	Add end users to the active directory (or applicable tool) for access to UAT.	Mike Soddors, CISSP Information Security Manager Deputy Chief Information Officer

Role	Responsibility	Resources
	Maintain active directory for access throughout UAT (adding new end users or removing end users as needed).	Benjamin Achong Information Security Analyst III Information Technology
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.	Rohan Mehta Sr. Software Developer Information Technology Lee Durrance Application Development Manager Information Technology
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	Kristopher Baker Technical Liaison PALM-APD Information Technology
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.	Asset Accounting and Management Team Melissa Hurst Lylia Flores Cortnie Petry Tamara Harrington Alexis Capps Elijah Phillips Budget Management and Cash Control Team Kelley Fisch Ebony Kiffin Aaron Thomas Alec Eggert Accounts Receivable/Revenue Accounting and Banking Team Shaquan Jackson Violette Labbad Contract Team Kaitlyn Bradwell Gayla Sanders Project Team Derrick Crawford Ryland Musick Disbursements Team Sue Taylor Robert Wilcox Shakenya Clary

Role	Responsibility	Resources
		Account Management and Financial Reporting Team Dee Warren Charity Cotton Ramon Evans Ashlie Hardwick Becki Powell Payroll Team Amanda Dickey Chappella Riggins Latasha Long Angie Sullivan Denessa Hatcher IU/Facilities/Regions Teams Sue Rayford Myrna Moore Adrian Mayes Jimmy Smith Linda Love Lori Pass Rosalyn Miller Ted Donaldson April Scrivner Andrea Ross Charles Hardy Kim Meyer David Gillis Elizabeth Watson Michele Patterson

User Story Testing Progress

APD is working with the PALM User Story testing through the PALM Topics and Activities Business Process established in the PALM Knowledge Center. The agency's testing effort provides a practical means of confirming that users can complete applicable business activities in Florida PALM, using realistic scenarios and agency-relevant context based on the documented business processes provided by PALM. The agency's user stories are aligned to support the business process groupings while allowing testers to validate work activities in a way that reflects future operations and tasks. APD Teams remain actively engaged in testing, documenting outcomes, identifying needed follow-up, and reinforcing lessons learned through the testing process. This testing effort supports both readiness validation and the development of stronger agency-specific training and support materials. The APD Teams have tested all PALM defined agency specific User Stories with documented statuses.

Table 2: User Story Testing Progress

Number of Activities (Project Recommended)	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)				
6	17	17	14	APD Ideal scenario ("Happy Path") testing completed – 3 tests failed due to process not found in Knowledge Center. APD UAT Plan continues through November.
Accounts Receivable (AR)				
16	20	20	16	APD Ideal scenario testing completed – 4 APD does not have customers. APD UAT Plan continues through November.
Asset Accounting and Management (AAM)				
9	18	15	15	APD Ideal scenario testing completed – 3 tests failed due to process not found in Knowledge Center. APD UAT Plan continues through November.
Banking (BK)				
3	6	6	6	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Budget Management and Cash Control (BM/CC)				
2	7	7	7	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Contracts Management (CT)				
NA	2	2	2	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Disbursements Management (DM)				
9	22	22	22	APD Ideal scenario testing completed – additional testing

Number of Activities (Project Recommended)	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Number of Times the User Stories Have Been Tested	Status Comments
				in progress for alternative story dispositions for non-standard path.
Data Warehouse/Business Intelligence (DW/BI)				
NA				
Grants Management (GM)				
NA				
Inter/IntraUnit Transactions (IU)				
5	11	11	11	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Payroll Management (PR)				
20	25	25	25	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Projects Management (PM)				
7	10	10	10	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.
Revenue Accounting (RA)				
2	2	2	2	APD Ideal scenario testing completed.
System Access and Controls (SAC)				
1	3	3	3	APD Ideal scenario testing completed – additional testing in progress for alternative story dispositions for non-standard path.

Agency Business System Testing Progress

APD continues making steady progress on agency business system testing in support of Florida PALM. Testing remains on track and the agency is validating the business processes and interfaces between Florida PALM and APD applications. While interface testing requires coordination across multiple teams, those efforts are progressing as planned and any issues are being worked through using the project established testing and escalation process.

As part of this effort, APD has also identified legacy business systems and processes that will no longer be needed after Florida PALM goes live. As PALM assumes more of the financial

functionality currently handled by agency applications, those legacy systems will be retired, simplifying APD's technology landscape and reducing long-term maintenance.

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
NEW – Optima (former ABC)	Completed	Y	In Progress	10/31/2026
(CJT) – Collocated Journal Transfer System	Completed	Y	In Progress	10/31/2026
(AJT) – Automated Journal Transfer System	Completed	Y	Not Started	10/31/2026
(SIMS) Supply Inventory Mgmt System	Completed	Y	Not Started	10/31/2026

End User Testing

The end user testing approach for APD, is designed to ensure that teams across agency facilities, regions, and central office areas have meaningful opportunities to practice future job functions/tasks/transactions are supported in the UAT environment. End user participation supports both system validation and organizational change readiness by allowing teams to gain hands-on experience, confirm role assignments, identify questions, and build confidence before go-live. The agency views end user engagement as one of the most important readiness activities because it connects the technical implementation of Florida PALM to the daily work of agency employees.

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)			
6	1-2 hrs. per week	Central Office - GL/Financial Reporting Team	June 2026 through November 2026
Accounts Receivables (AR)			
2	1-2 hrs. per week	Central Office – Revenue Team	June 2026 through November 2026
Asset Accounting and Management (AAM)			
5	1-2 hrs. per week	Central Office – Asset Mgmt Team	June 2026 through November 2026
Banking (BK)			

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	1-2 hrs. per week	Central Office – Revenue Team	June 2026 through November 2026
Budget Management and Cash Control (BM/CC)			
5	1-2 hrs. per week	Central Office – Budget Team	June 2026 through November 2026
Contracts Management (CT)			
2	1-2 hrs. per week	Central Office – Contracts Team	June 2026 through November 2026
Disbursements Management (DM)			
3	1-2 hrs. per week	Central Office – AP/Disbursements Team	June 2026 through November 2026
Data Warehouse/Business Intelligence (DW/BI) - NA			
Grants Management (GM) - NA			
Inter/IntraUnit Transactions (IU)			
11	1-2 hrs. per week	3 Facilities/5 Regions - IU Teams	June 2026 through November 2026
Payroll Management (PR)			
3	1-2 hrs. per week	Central Office – Payroll Team	June 2026 through November 2026
Projects Management (PM)			
2	1-2 hrs. per week	Central Office – Project Team	June 2026 through November 2026
Revenue Accounting (RA)			
2	1-2 hrs. per week	Central Office – Revenue Team	June 2026 through November 2026
System Access and Controls (SAC)			
2	1-2 hrs. per week	Central Office – SAC Team	June 2026 through November 2026

UAT Engagement Risks

APD recognizes that a transformation of this scale will naturally include risks, dependencies, and areas requiring continued management. The agency's approach is to identify these items early, assess their potential impact, and manage them through established governance, reporting, coordination, and mitigation processes. The agency remains confident in its ability to complete UAT successfully and is using the risk management process to maintain transparency, support timely decision-making, and ensure that any challenges are addressed before they affect readiness outcomes.

UAT Engagement Risk Matrix			
Risk	High Risk	Medium Risk	Low Risk
SME Availability	Critical SMEs unavailable for testing.	Occasional SME scheduling conflicts.	SMEs consistently available.
Operational Workload	Daily operations significantly impact testing schedule.	Some competing priorities exist.	Testing time is protected by management.
Knowledge of PALM Processes	Limited understanding of future-state processes.	Moderate understanding with ongoing learning.	Strong understanding of PALM business processes.
Defect Resolution	Numerous critical defects remain unresolved.	Moderate defects with mitigation plans.	Few defects with minimal operational impact.
Agency-Specific Process Coverage	Several agency-specific scenarios remain untested.	Minor agency-specific scenarios remain.	All agency-specific processes have been validated.
Documentation Quality	Significant gaps in testing evidence.	Minor documentation updates needed.	Documentation is complete and audit ready.
Schedule/Timing Risk	High likelihood of missing August 7 milestone.	Some schedule pressure but recoverable.	On track to meet all milestones.