



Department of Citrus Florida PALM Transition User Acceptance Testing (UAT) Engagement Plan

Effective Date: 7/31/2026
Version: 1.0



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

REVISION HISTORY

Author	Date	Ver.	Notes
M. Christovich	7/16/26	0.1	Document created from PALM-provided template.
M. Christovich	7/28/26	0.5	Released for Final Review and Comment.
M. Christovich	7/30/30	0.9	Comments and feedback incorporated.
M. Christovich	7/31/2026	1.0	Submitted to Executive Office of the Governor's Office of Policy and Budget, the chair of the Senate Appropriations Committee, the chair of the House of Representatives Budget Committee, and the Director of the Florida PALM.



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

TABLE OF CONTENTS

Overview	4
User Engagement Approach	5
Testing Scope	6
Roles and Responsibilities	6
PALM User Story Testing Progress	9
Agency Business System Testing Progress	10
End User Testing	11
UAT Engagement Risks	13

TABLE OF TABLES

Table 1: Agency UAT Roles and Responsibilities	6
Table 2: End User Testing to Date by Business Process Grouping	9
Table 3: Agency Business System Testing Progress.....	11
Table 4: End User Testing Planned by Business Process Grouping.....	11
Table 5: UAT Engagement Risks	13



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

OVERVIEW

The Florida Department of Citrus is pleased to provide this UAT Engagement Plan in fulfillment of the requirements outlined in Section 249 of HB5001 for FY2026-27. This plan reflects the Department's continued commitment to preparing its people, processes, technology, and data for the successful transition to Florida PALM.

To date, staff from the Department's accounting office have had limited engagement with Florida PALM UAT testing. As an agency headquartered outside of Tallahassee, the Department has had limited access to the Florida PALM Subject Matter Expert (SME) support provided in person to other state agencies. The Department has an accounting staff of approximately six (6) end users, with a further six (6) end users requiring PALM roles to support Ariba On Demand (AOD). The Department's SME base consists of two (2) key personnel who are required to operate the Department on a day-to-day basis. Given the size of the staff, and their essential operational functions, it was not practicable for them to attend the in-person sessions for six (6) weeks in Tallahassee.

In February 2026, Florida PALM met with Department staff and determined that a remote support model via specialized meetings would be provided subsequent to the completion of the in-person activities that Florida PALM had scheduled for UAT, initially targeted to begin in late May 2026.

In late May 2026, Florida PALM provided the Department with a survey requesting details of our needed engagement in all the Florida PALM key areas. The Department requested that Florida PALM provide approximately a half-day of remote support with a few key SMEs for each of the following key areas:

- Account Management and Financial Reporting (AMFR)
- Asset Accounting and Management (AAM)
- Banking (BK)
- Budget Management and Cash Control (BM/CC)
- Contracts Management (CT)
- Disbursements Management (DM)
- Data Warehouse/Business Intelligence (DW/BI)
- Grants Management (GM)
- Inter/IntraUnit Transactions (IU)
- Payroll Management (PR)
- Projects Management (PM)
- Revenue Accounting (RA)



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

On 7/20/26, senior PALM leadership consisting of the Executive Sponsor, Project Director, and Assistant Project Director met with the Department in Bartow to gather requirements for how Florida PALM can assist the Department with UAT efforts.

Subsequent to the meeting, the Department has begun preliminary testing efforts in the following areas:

- Account Management and Financial Reporting (AMFR)
- Budget Management and Cash Control (BM/CC)

The Department anticipates testing to begin in earnest subsequent to the UAT refresh, current scheduled for August 8 - 24. Four (4) key staff members will attend the UAT Training for End of Year processing to be held in Tallahassee in August 2026.

USER ENGAGEMENT APPROACH

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

As part of RW Task 574, the Department has prepared approximately 200 test cases to validate both Florida PALM functionality and to assist in the development and refinement of future-state Department business processes. Lessons learned in the testing will be used in the finalization of the Department's training requirements and gap analysis between Florida PALM-provided training and the Department's supplements, job aids, and desk references.

Prior to the first execution of each test case, the end user is provided with links to the Florida PALM Knowledge Center for the specific activity and user stories to be tested, as well as the materials required to complete the particular test(s) (e.g. budget information, invoices for testing, documents and process forms related to the user story, etc.) in scope for the particular testing session by the UAT Testing Coordinator and Business Process Consultant.

For the first execution of the test case, the UAT Testing Coordinator schedules a MS Teams meeting lasting approximately 60-90 minutes to review the preliminary materials, confirm end user understanding of the task, and to conduct the first test case execution by the end user. After the first execution of the test case, the end user is free to conduct subsequent tests of the test case outside of the session.



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

If a test case fails to perform as expected, the end user contacts the Department UAT Coordinator who schedules a meeting of the Testing Error Triage Team with the end user to review the results of the case and determine if an error is occurring or if questions need to be asked for clarification from Florida PALM. If either is true, the Testing Error Triage Team designates an individual to create a ticket in the Florida PALM SNow system. This engagement and support model follows the existing PALM Tier 0 support model established during the CMS wave of Florida PALM.

TESTING SCOPE

The Department's testing scope reflects its responsibility to validate applicable Florida PALM functionality, Department business processes, impacted Department business systems (i.e. the Revenue Portal and Data Warehouse), and supporting data across Department program areas. The scope includes user story testing, end-to-end process validation, role-based access confirmation, Department business system engagement, and review of data and reporting needs. The Department'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

Upon the guidance of Florida PALM, the Department has established a coordinated UAT support structure that aligns leadership, business, technical, project management, change management, training, security, and end user responsibilities. This structure allows the Department to maintain clear accountability while supporting the practical needs of testers throughout UAT. Each role contributes to the overall success of the effort by helping remove barriers, support end users, coordinate issue resolution, validate business processes, and maintain visibility into testing progress. The Department's approach reflects a strong level of staff engagement and a shared commitment to completing UAT in a disciplined, collaborative, and timely manner.

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.	Shannon Shepp



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

Role	Responsibility	Resources
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.	Lucy Scrima
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.	Lucy Scrima
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.	Brian Farrelly
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.	Matthew A. Christovich, PMP
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.	Billie Hancock
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.	Lucy Scrima



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

Role	Responsibility	Resources
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.	Matthew A. Christovich
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	Matthew A. Christovich Ryan Marlar Lucy Scrima Kay Anderson
Subject Matter Experts <i>(Assigned per Business Process Grouping)</i>	- 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.	Lucy Scrima Kay Anderson
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.	George Panackal
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).	Brian Farrelly
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.	Brian Farrelly
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	Brian Farrelly



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

Role	Responsibility	Resources
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.

PALM USER STORY TESTING PROGRESS

The Department's user story testing effort provides a practical means of confirming that staff can complete applicable business activities in Florida PALM using realistic scenarios and Department-relevant context. The Department's user stories are intended to support broad coverage of applicable business process groupings while allowing testers to validate work activities in a way that reflects future operations. Department staff have begun actively engaging in testing, documenting outcomes, identifying needed follow-up, and reinforcing lessons learned through the testing process, and will continue after the UAT refresh cycle is complete. This work supports both readiness validation and the development of stronger Department-specific training and support materials.

The following table reflects the Department's activity to date.

Table 2: End User Testing to Date by Business Process Grouping

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)				
6	39	0	0	
Accounts Receivable (AR)				
11	22	0	0	
Asset Accounting and Management (AAM)				
10	28	0	0	
Banking (BK)				
3	6	0	0	
Budget Management and Cash Control (BM/CC)				
2	11	3	15	
Contracts Management (CT)				
0	0	0	0	
Disbursements Management (DM)				
9	20	0	0	



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

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
Data Warehouse/Business Intelligence (DW/BI)				
0	0	0	0	
Grants Management (GM)				
0	0	0	0	Citrus manages Grant activity in FACTS.
Inter/IntraUnit Transactions (IU)				
5	13	0	0	
Payroll Management (PR)				
20	26	0	0	
Projects Management (PM)				
7	25	0	0	Citrus does not currently anticipate using the Projects Management module.
Revenue Accounting (RA)				
2	3	0	0	
System Access and Controls (SAC)				
1	4	4	4	Citrus has successfully added users

AGENCY BUSINESS SYSTEM TESTING PROGRESS

The Department began development on remediations of the Revenue System on June 1st, 2026. The development cycle consists of 16 weeks divided into eight (8) two-week sprints. Sprint 1-4 are complete, with the Department completing Interface Cycle 1 and 2 testing in approximately two (2) weeks, with Cycle 3 testing begun on July 17th, 2026. Cycle 3 testing will be ongoing throughout Florida PALM UAT, but all tests (each interface runs once per day) have been successful to date.

As part of the remediation effort, the Department is continuously engaged in business system testing to support end-to-end validation of business processes that rely on interactions between Florida PALM and Department systems, specifically the following key areas:

- Account Management and Financial Reporting (AMFR)
- Revenue Accounting (RA)

This testing is an important part of confirming that technology, process, and data dependencies are understood and appropriately managed before go-live. The Department is confident in its overall testing trajectory.



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

Table 3: Agency Business System Testing Progress

Business System Name	Cycle 3 Status <i>(Not Started, In Progress, Complete)</i>	End User Testing Needed <i>(Y/N)</i>	Status of End User Testing <i>(Not Started, In Progress, Complete)</i>	Planned or Actual Completion Date of End User Testing
Citrus Data Warehouse	In Progress	N	N/A	N/A
Revenue System	In Progress	Y	In Progress	9/17/2026

END USER TESTING

The Department's end user testing approach is designed to ensure that staff across Department program areas have meaningful opportunities to practice future job functions in the UAT environment. End user participation supports both system validation and organizational change readiness by allowing staff to gain hands-on experience, confirm role assignments, identify questions, and build confidence before go-live. The Department 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 Department employees.

Table 4: End User Testing Planned 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 <i>(Start and End Dates)</i>
Account Management and Financial Reporting (AMFR)			
6	1-3 hours weekly	Accounting	July 2026 through October 2026
Accounts Receivables (AR)			
3	1-3 hours weekly	Accounting	July 2026 through October 2026
Asset Accounting and Management (AAM)			
1	1-3 hours weekly	Accounting	July 2026 through October 2026
Banking (BK)			



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

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)
1	1-3 hours weekly	Accounting	July 2026 through October 2026
Budget Management and Cash Control (BM/CC)			
2	1-3 hours weekly	Accounting	July 2026 through October 2026
Contracts Management (CT)			
3	1-3 hours weekly	Accounting	July 2026 through October 2026
Disbursements Management (DM)			
6	1-3 hours weekly	Accounting	July 2026 through October 2026
6	1-3 hours weekly	Procurement (Via AOD)	July 2026 through October 2026
Data Warehouse/Business Intelligence (DW/BI)			
0	None	None	None
Grants Management (GM)			
2	1-3 hours weekly	Accounting	July 2026 through October 2026
Inter/IntraUnit Transactions (IU)			
6	1-3 hours weekly	Accounting	July 2026 through October 2026
Payroll Management (PR)			
1	1-3 hours monthly	Human Resources	July 2026 through October 2026
Projects Management (PM)			
0	None	None	None
Revenue Accounting (RA)			
2	1-3 hours weekly	Accounting	July 2026 through October 2026
System Access and Controls (SAC)			



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

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	1-3 hours monthly	Security Access Managers	July 2026 through October 2026

UAT ENGAGEMENT RISKS

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

The following risks specifically associated with UAT have been identified and are actively being managed by the Department.

Table 5: UAT Engagement Risks

Title	Description of Risk
Incomplete Test Scenario Coverage	The Department may not develop test scenarios that fully represent its operational and financial processes, resulting in issues that are not discovered during User Acceptance Testing (UAT) of Florida PALM.
Limited Participation by Agency Subject Matter Experts	Department subject matter experts may have limited availability to participate in UAT activities, reducing the effectiveness of testing and increasing the likelihood that operational issues go undetected.
Inadequate Testing of End-to-End Business Processes	Testing may focus on individual system functions rather than complete end-to-end business processes, resulting in integration or workflow issues that are not identified prior to implementation.
Insufficient Time Allocated for Testing	The UAT schedule may not provide adequate time for the Department to fully execute test scenarios, investigate issues, and confirm system functionality prior to go-live.
Testing Conducted with Incomplete or Unrealistic Data	Test environments may not contain representative or complete data sets, limiting the ability of Department staff to validate system behavior under realistic operational conditions.



User Acceptance Testing (UAT) Engagement Plan

Department of Citrus Florida PALM Transition

Unresolved Defects Identified During Testing	Issues discovered during UAT may not be resolved or retested prior to deployment, creating operational risks when the system becomes live.
Inadequate Documentation of Test Results	Test results, defects, and validation outcomes may not be consistently documented, making it difficult to confirm that all critical scenarios have been successfully tested.
Misalignment Between Agency and Statewide Testing Expectations	Differences in expectations between the Department and the statewide implementation program regarding the scope or objectives of UAT may result in gaps in testing coverage.
Limited Testing of System Interfaces	Interfaces between Department systems and Florida PALM may not be fully validated during UAT, increasing the risk of integration failures or data exchange errors after deployment.
Premature Acceptance of System Readiness	The Department may feel pressure to formally accept the system during UAT even if certain concerns remain unresolved, increasing the risk of operational issues after implementation.