



UAT Engagement Plan

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

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Overview

The Florida Department of Commerce's (FloridaCommerce) User Acceptance Testing (UAT) Engagement Plan defines Commerce's strategy for engaging business and technical stakeholders in validating Florida PALM Financials, Payroll, and Data Warehouse/Business Intelligence (DW/BI) functionality prior to implementation. This Plan outlines FloridaCommerce's approach for coordinating end-user participation, executing end-to-end business process testing, validating agency business system integrations, monitoring testing progress, and managing risks throughout the UAT lifecycle.

FloridaCommerce's UAT activities are conducted in alignment with the Florida PALM implementation schedule. Testing encompasses all applicable business process groupings, agency business systems, user stories, and agency-specific configurations required to support a successful transition from FLAIR to Florida PALM. FloridaCommerce utilizes a structured governance model consisting of executive leadership, business and technical liaisons, subject matter experts, managers, and end users to ensure accountability, timely issue resolution, and effective communication throughout testing.

FloridaCommerce's engagement strategy emphasizes broad end-user participation, risk-based prioritization, continuous monitoring of testing progress, and executive oversight to promote readiness for deployment. Progress is measured through user story execution, agency business system testing, defect management, and participation metrics, enabling leadership to evaluate testing readiness, address emerging risks, and support informed decision-making throughout the implementation effort. FloridaCommerce remains committed to executing a comprehensive and disciplined UAT program that supports a successful January 2027 implementation of Florida PALM.

User Engagement Approach

FloridaCommerce employs a structured, risk-based approach to engage business and technical stakeholders throughout User Acceptance Testing (UAT) to validate Florida PALM functionality and agency business system integrations. FloridaCommerce's engagement strategy is designed to ensure that end users are actively involved in testing the business processes and transactions they will perform in production while providing executive leadership with ongoing visibility into testing progress, issues, and organizational readiness.

FloridaCommerce's UAT approach incorporates executive sponsorship, cross-functional collaboration, and phased participation across all applicable Business Process Groupings (BPGs). Subject Matter Experts (SMEs), managers, technical resources, and designated end users participate in a coordinated testing effort to validate end-to-end business processes, agency-specific configurations, reporting capabilities, interfaces, and supporting business systems. Testing activities are executed through agency-hosted testing designed to reinforce user proficiency and validate operational readiness.

End-user engagement is supported through clearly defined governance, established roles and responsibilities, structured testing schedules, user stories, test scripts, agency-developed testing

materials, and ongoing communication throughout the UAT lifecycle. FloridaCommerce leverages both in-person, electronic communication channels, and virtual testing environments to maximize participation while accommodating operational needs. Business unit leadership is responsible for ensuring appropriate resource availability, managing competing priorities, and maintaining participation levels necessary to achieve comprehensive testing coverage.

Testing progress is continuously monitored through user story execution, agency business system testing, defect tracking, issue resolution, and management reporting. Identified risks and issues are evaluated through established governance processes, with escalation and mitigation activities coordinated among executive leadership, the UAT Coordinator, business leads, and the Florida PALM Project as appropriate. This disciplined engagement approach enables FloridaCommerce to maintain accountability, measure organizational readiness, and position the agency for a successful transition to Florida PALM.

Testing Scope

FloridaCommerce's User Acceptance Testing (UAT) scope encompasses the validation of all applicable Florida PALM business processes, agency business systems, interfaces, and supporting configurations necessary to achieve operational readiness for implementation. Testing is designed to confirm that business functions, technical integrations, data, and user access perform as expected within the Florida PALM UAT environment and support FloridaCommerce's business operations.

FloridaCommerce's testing activities include end-to-end validation of all applicable Business Process Groupings (BPGs) identified within the agency's Business Process Inventory, including associated user stories, business scenarios, and agency-specific business procedures. Testing also includes validation of interfaces between Florida PALM and FloridaCommerce business systems, confirmation of reporting functionality, verification of security roles and user access, and assessment of agency-specific configuration values.

Commerce's UAT scope is organized across four primary testing domains:

- **People** – Validation of assigned Subject Matter Experts (SMEs) and designated end users responsible for executing business process testing, confirming role assignments, and validating operational readiness.
- **Process** – End-to-end testing of applicable FloridaCommerce business processes and workflows, including integration with enterprise systems and agency business systems to ensure business requirements are met.
- **Technology** – Validation of Florida PALM integrations with FloridaCommerce business systems, technical interfaces, security access, Identity Provider (IdP) connectivity, reporting capabilities, and supporting technology required for production readiness.
- **Data** – Validation of agency-specific configuration values, test data, Chart of Accounts, SpeedKeys, conversion-related data, and other information necessary to accurately execute business transactions and verify expected processing results.

Activities outside the approved UAT scope are managed through established project governance and change management processes to maintain testing priorities and support successful completion of FloridaCommerce’s UAT objectives.

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.	<i>Tisha Womack, CFO, Primary</i> <i>Ken Heim, Chief of Financial Management, Secondary</i>
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.	<i>Lisa Simpson, Accounting Systems Administrator, Primary</i> <i>Dean Modling, Financial Administrator, Backup</i>
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	<i>Michelle Harvey, Deputy Chief of Financial Management, Primary</i> <i>Chad Myrick, Cash Management Administrator, Backup</i>

Role	Responsibility	Resources
	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.	<i>Matt Pendleton, Applications Systems Programmer, Primary</i> <i>Dennis Sprinkle, Database Administrator, Backup</i>
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.	<i>Tulani Honablew, PALM Project Manager, Primary</i> <i>Lisa Simpson, Accounting Systems Administrator, Backup</i>
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.	<i>Tulani Honablew, PALM Project Manager, Primary</i> <i>Lisa Simpson, Accounting Systems Administrator, Backup</i>
Training Liaison	- Identify and track agency UAT participants. - Support agency hosted UAT sessions with end users.	<i>Jeff Stachnik, HR Training & Research Manager, Primary</i> <i>Christian Anderson, HR Training & Research Consultant, Backup</i>

Role	Responsibility	Resources	
	- 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.	<i>Lisa Simpson, Accounting Systems Administrator</i> <i>Stephen Hobbs, PALM Security Access Manager</i>	
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	<i>Ken Heim, Chief of Financial Management</i> <i>Krystal Hill, Personnel Services Specialist</i> <i>Katina Daniels, Personnel Services Specialist</i> <i>Darrell Morrow, Property Administrator</i> <i>Michelle Harvey, Deputy Chief of Financial Management</i> <i>Lisa Simpson, Accounting Systems Administrator</i> <i>Wade Sansing, Disbursements Administrator</i> <i>Matt Pendleton, Applications Systems Programmer</i>	
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.	Account Management and Financial Reporting (AMFR)	<i>Michelle Harvey, Deputy Chief of Financial Management</i>

Role	Responsibility	Resources	
	• 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.	Accounts Receivable (AR)	<i>Chad Myrick, Cash Management Administrator</i>
		Asset Accounting and Management (AAM)	<i>Darrell Morrow, Property Administrator</i> <i>Rebecca Willis, General Services Property Backup</i>
		Banking (BK)	<i>Chad Myrick, Cash Management Administrator</i>
		Budget Management	<i>Ken Heim, Chief of Financial Management</i> <i>Taylor Branch, Financial Administrator</i>
		Contracts Management (CT)	<i>Michelle Harvey, Deputy Chief of Financial Management</i> <i>Dean Modling, Financial Administrator</i> <i>Roberto Santiago, Financial Administrator</i>
		Disbursements Management (DM)	<i>Taylor Branch, Financial Administrator</i> <i>Wade Sansing, Disbursements Administrator</i>
		Grants Management (GM)	<i>Ken Heim, Chief of Financial Management</i> <i>Dean Modling, Financial Administrator</i>
		Inter/IntraUnit Transactions (IU)	<i>Wade Sansing, Disbursements Administrator</i> <i>Michelle Harvey, Deputy Chief of Financial Management</i>

Role	Responsibility	Resources	
			<i>Ken Heim, Chief of Financial Management</i>
		Payroll Management (PR)	<i>Krystal Hill, Personnel Services Specialist</i> <i>Katina Daniels, Personnel Services Specialist</i> <i>Jon Valdez, Accounting Systems Analyst</i>
		Projects Management (PM)	<i>Michelle Harvey, Deputy Chief of Financial Management</i>
		Revenue Accounting (RA)	<i>Chad Myrick, Cash Management Administrator</i>
		System Access and Controls (SAC)	<i>Stephen Hobbs, PALM Security Access Manager</i> <i>Lisa Simpson, Accounting Systems Administrator</i>
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.	<i>Lisa Simpson, Accounting Systems Administrator</i> <i>Stephen Hobbs, PALM Security Access Manager</i>	
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).	<i>Matt Pendleton, Applications Systems Programmer</i> <i>Tony Wood, Sr. Information Technology Consultant</i> <i>Rollie Solvik, Enterprise Architect</i> <i>Phyllis Gibson, Sr. Information Technology Consultant</i>	

Role	Responsibility	Resources
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.	<i>Matt Pendleton, Applications Systems Programmer</i> <i>Tony Wood, Sr. Information Technology Consultant</i>
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	<i>Matt Pendleton, Applications Systems Programmer</i> <i>Dennis Sprinkle, Database Administrator</i>
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.

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)				
12	12	12	23	Testing is on track
Accounts Receivable (AR)				
17	17	17	21	Testing is on track.
Asset Accounting and Management (AAM)				
14	14	13	35	Testing is on track; however, the remaining user story will be completed by the end of August 2026.
Banking (BK)				
6	6	6	11	Testing is on track.
Budget Management and Cash Control (BM/CC)				
7	7	7	111	Testing is on track.
Contracts Management (CT)				

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
1	1	1	1	Testing is on track.
Disbursements Management (DM)				
21	21	21	228	Testing is on track.
Data Warehouse/Business Intelligence (DW/BI)				
6	6	6	12	Testing is on track.
Grants Management (GM)				
1	1	1	1	Testing is on track.
Inter/IntraUnit Transactions (IU)				
10	10	10	73	Testing is on track.
Payroll Management (PR)				
19	19	19	48	Testing is on track.
Projects Management (PM)				
9	9	9	17	Testing is on track.
Revenue Accounting (RA)				
1	1	1	1	Testing is on track.
System Access and Controls (SAC)				
2	2	2	33	Testing is on track.

Agency Business System Testing 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
SERA Non-Workforce	In Progress	Y	In Progress	10/31/2026
SERA Workforce	In Progress	Y	In Progress	10/31/2026
UC Benefit (Connect)	In Progress	Y	In Progress	10/31/2026
DEO PALM Data Warehouse (New SQL for PALM Interfaces)	In Progress	Y	In Progress	10/31/2026
Cost Pool Allocation System (CPAS)	In Progress	Y	In Progress	10/31/2026
Financial Information System (FIS)	In Progress	Y	In Progress	10/31/2026
TSPPS/CPAS System	In Progress	Y	In Progress	10/31/2026

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)			
7	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Accounts Receivables (AR)			
7	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Asset Accounting and Management (AAM)			
3	2 hours per week	Bureau of General Services	July 2026 – Oct 2026
Banking (BK)			
7	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Budget Management and Cash Control (BM/CC)			
1	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Contracts Management (CT)			
1	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Disbursements Management (DM)			
10	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Data Warehouse/Business Intelligence (DW/BI)			
1	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Grants Management (GM)			
2	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Inter/IntraUnit Transactions (IU)			
11	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Payroll Management (PR)			
2	2 hours per week	Bureau of Financial Management	July 2026 – Oct 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)
Projects Management (PM)			
2	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
Revenue Accounting (RA)			
3	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026
System Access and Controls (SAC)			
2	2 hours per week	Bureau of Financial Management	July 2026 – Oct 2026

UAT Engagement Risks

- Risk:** Dependencies on external systems, scheduled approval windows, and report availability may delay completion of payroll and related testing activities.
 - Mitigation:** Coordinate testing with People First processing schedules, Florida PALM approval windows, and report availability to maximize testing opportunities.
- Risk:** Unresolved Florida PALM UAT defects may prevent completion of certain user stories or require retesting.
 - Mitigation:** Continue defect triage, track open issues to resolution, and schedule retesting as fixes become available.
- Risk:** Untested user stories reduce confidence that all business scenarios have been validated prior to implementation.
 - Mitigation:** Focus testing on the remaining high-risk business scenarios and confirm completion before declaring UAT readiness.
- Risk:** While the FloridaCommerce team is completing testing activities outlined by the project team, there is growing concern that true end-to-end testing cannot be fully executed because system connectivity is not yet sufficiently built out. If all connections are not functional soon, there will be inadequate time for end users to develop proficiency, and for the extensive internal reporting structure to be finalized and thoroughly tested prior to go-live. This presents a significant risk to overall readiness and may impact the quality and reliability of key business processes at launch.
 - Mitigation:** Commerce will continue testing available functionality while ordinating with the Florida PALM Project to monitor system readiness, prioritize end-to-end testing as modules become available, promptly retest resolved defects, and escalate development delays that may impact implementation readiness.