



Department of Revenue
UAT Engagement Plan
For Florida PALM Financials, Payroll, and
Data Warehouse/Business Intelligence

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Overview

The Department of Revenue's (DOR) User Acceptance Testing (UAT) Engagement Plan outlines the agency's strategy for validating Florida PALM functionality and the integration of impacted Agency Business Systems (ABS) prior to go-live. The plan includes agency-led end-to-end testing of Florida PALM business processes, DOR business systems (including SUNTAX, CAMS, CATS, RAMS, RADS, and RSDS), and statewide enterprise systems such as MFMP, People First, STMS, FACTS, and PCard Works.

Agency-led UAT is scheduled from February through November 2026, with formal UAT activities concluding in October 2026. Testing follows a phased approach aligned with fiscal year activities and business priorities, with expanded end-user participation throughout the testing cycle.

Key stakeholders include the Executive Office, General Tax Administration Program, Child Support Program, Property Tax Oversight Program, Information Services Program, the Change Champion Network (CCN), Subject Matter Experts (SMEs), business process owners, technical teams, and end users. The overall objective is to validate business processes, interfaces, data integrity, security roles, reporting, and user readiness while minimizing operational risk prior to implementation.

User Engagement Approach

DOR's user engagement approach emphasizes early and continuous involvement of business users throughout the UAT lifecycle. The Change Champion Network (CCN), SMEs, Training Liaisons, and UAT Coordinators collaborate to prepare end users through prerequisite training, knowledge-sharing sessions, workshops, user guides, and agency-specific testing materials before testing begins.

Testing will be conducted in phases by program area, allowing business units to focus on priority processes while maintaining normal operations. End users will execute scenario-based testing using realistic business transactions, validate system functionality, verify reports and security roles, document defects, participate in retesting, and provide feedback to improve training materials and business processes prior to go-live.

User feedback will be collected through surveys and incorporated into training, job aids, and process improvements to increase user readiness and adoption of Florida PALM.

Testing Scope

The Department's UAT scope includes validation of Florida PALM business processes, agency business systems, statewide enterprise systems, data conversions, security roles, reporting, and end-to-end business scenarios. Testing focuses on ensuring mission-critical operations continue without disruption following implementation of Florida PALM.

Business process testing includes:

- Account Management & Financial Reporting
- Budget Management/Commitment Control
- Asset Accounting & Management
- Banking
- Accounts Receivable

- Payroll Management
- Disbursements Management
- Inter/Intra Unit Transactions
- System Access Controls

Agency Business Systems within scope include SUNTAX, CAMS, CATS, RAMS, RADS, RSDS, and supporting interfaces with Florida PALM. Enterprise system testing includes MFMP, People First, STMS, FACTS, PCard Works, and the Florida PALM Data Warehouse.

Testing will validate:

- End-to-end business processes
- System integrations
- Interface file processing
- Security roles and permissions
- Data conversions and reconciliations
- Reporting accuracy
- Defect resolution
- User readiness for production deployment.

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.	Clark Rogers
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.	Rebecca Evers
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.	Wynette Davis Amy Barrow
Technical Liaison	• Identify and confirm all agency business systems to be tested.	Jeff Miller Deepak Haldiya

Role	Responsibility	Resources
	- 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.	
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.	Deepak Haldiya
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.	Francine Farrington
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.	Nicholas Preston
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.	Samantha Nelson Deepak Haldiya
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	Christopher Kennedy Amy Barrow
Ticket Reporters	- Review status of agency testing error tickets logged in the Testing Customer Portal. - Participate in Testing Error Triage Team	Christopher Kennedy Dethas Ven Tassel

Role	Responsibility	Resources
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.	Wynette Davis, Amy Barrow, Kim Keller (RRP), Kat Horkan (RRP), Betty Palmer (RRP), Tasha Thomas (RRP), Andrea Hunter (RA&R), Marsha Revell (RR), Gustavo Rojas (RA&R), Shontessia Thurman (RA&R), Catherine Barber, Tannye Rogers (Resource Mgmt), Michael Hysinger (Resource Mgmt), Tiffany Helton (Resource Mgmt), Wendy Wu (Resource Mgmt), Niya Henderson, Ashley Williams, Teresa Abernathy-Ballard, Ron VunKannon, Kimmy Rigdon, Leilani Simmons, Tina Wright, David Henderson, Shawn Stewart, Siva Alluri, Ashley Heuring, Allison Matthews, Christopher Kennedy, Dethas Van Tassel, Aquila Franklin, Donna Bowers, Tammy Fleetwood, Lisa Punausuia, Samantha Nelson, Grace Sumpter
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.	Ivan Brawer Galen Olds Joseph Savage

Role	Responsibility	Resources
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).	Cliff Singletary Brian Crum
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.	Richard Robertson Mohammad Hamden
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	Sachin Patil Santosh Dixit Balaji Santhanam Christopher Kennedy Dethas Van Tassel Sanjay Srinivasan Jeff Miller
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

The Department of Revenue (DOR) continues to make significant progress executing User Acceptance Testing (UAT) using scenario-based user stories that validate Florida PALM business processes, agency business systems, and statewide enterprise system integrations. User stories were developed from applicable Florida PALM Activities and DOR business processes and are executed by Subject Matter Experts (SMEs) and business users across all impacted program areas.

As of the June 2026 reporting period, DOR has identified **125 applicable project-defined activities**, with **123 activities (98.4%) supported by user stories**, demonstrating near-complete business process coverage. User stories of a couple of project recommended activities are currently being evaluated to determine whether it applies to the agency's business processes.

Testing execution has increased steadily throughout the UAT cycle. Between February and June 2026, planned testing expanded from **103 planned tests with 99 completed executions** in February to a cumulative total of **1068 planned tests with 2070 completed executions** until June 2026, indicating that testing has kept pace with or exceeded the planned schedule while maintaining an overall **Satisfactory** performance rating.

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)				
11	13	13	61	All stories for this module have been tested.
Accounts Receivable (AR)				
16	23	21	212	Two activities have not been tested. Currently evaluating whether one testing activity applies to our agency's business processes and the other activity will be tested after the UAT refresh.
Asset Accounting and Management (AAM)				
18	27	22	58	UAT Tickets have been submitted, and we are working with Florida PALM to test remaining stories
Banking (BK)				
4	15	2	37	Two activities have not been tested. Currently evaluating whether one testing activity applies to our agency's business process, and the second activity is an email process outside of Florida PALM.
Budget Management and Cash Control (BM/CC)				
7	16	15	164	DOR cannot generate a test scenario for one of the activities – "Resolving Invested Balance Exceptions". We will reach out to Florida PALM and complete it after UAT Refresh.
Contracts Management (CT)				
N/A				DOR will not be using CT Module
Disbursements Management (DM)				
22	71	67	258	All stories have been tested except the carry forward user stories. Waiting on Florida PALM for project-hosted sessions and process steps. In-person sessions are scheduled for August 2026.
Data Warehouse/Business Intelligence (DW/BI)				
6	6	6	24	All user stories for this module have been tested.

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
Grants Management (GM)				
N/A				DOR will not be using GM Module.
Inter/IntraUnit Transactions (IU)				
13	32	31	1171	Testing for Carry Forward is waiting on Florida PALM. In-person sessions are scheduled for August and September 2026.
Payroll Management (PR)				
25	27	21	82	We have not been able to fully test all User Stories due to limited payroll runs in UAT environment and staffing constraints. We plan to complete the User Stories testing after the UAT Refresh.
Projects Management (PM)				
N/A				DOR will not be using PM module.
Revenue Accounting (RA)				
N/A				DOR will not be using RA module.
System Access and Controls (SAC)				
3	3	3	3	All user stories for this module have been tested.

Agency Business System Testing Progress

The Department of Revenue (DOR) is conducting end-to-end testing of multiple Agency Business Systems (ABS) that interface with Florida PALM. Systems included in Cycle 3 Full Integration Testing include **SUNTAX, CAMS, CATS, RAMS, RADS, and RSDS**, along with interfaces to statewide enterprise systems such as MFMP, People First, STMS, FACTS, PCard Works, and the Florida PALM Data Warehouse. The objective of testing is to validate end-to-end business processes, interface functionality, data integrity, security, reporting, and downstream business impacts prior to production implementation.

DOR has continued to expand Cycle 3 Full Integration Testing throughout the reporting period.

By June 2026:

- **Inbound interfaces:** 31 interface connections with **133 tests planned** and **115 completed during the reporting period**, achieving a **Satisfactory** performance rating.
- **Outbound interfaces:** 15 out of 17 interface connections were tested with **75 tests planned** and **106 completed during the reporting period**, also achieving a **Satisfactory** performance rating. For the remaining two connections, the Department will have both fully tested by September 2026.

Technical interface testing is also nearing completion:

- **Inbound Cycle 2 Technical Testing: 96.88% complete** (31 of 32 interfaces complete).

- **Outbound Cycle 2 Technical Testing: 100% complete** (17 of 17 interfaces complete).

These results demonstrate continued progress toward validating integrated business processes across Florida PALM and DOR's Agency Business Systems.

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
SUNTAX (System for Unified Taxation)	In Progress	Y	In Progress	10/31/2026
CAMS (Child Support Automated Management System)	In Progress	Y	In Progress	10/31/2026
CATS (Contract Administration Tracking System)	In Progress	Y	In Progress	10/31/2026
RAMS (Revenue Asset Management System)	In Progress	Y	In Progress	10/31/2026
RADS (Revenue Accounting Distribution System)	In Progress	Y	In Progress	10/31/2026
RSDS (Revenue Sharing Distribution System)	In Progress	Y	In Progress	10/31/2026

End User Testing

End users from Finance, Budget, Payroll, Asset Management, General Tax Administration, Child Support, Information Services, and other impacted business areas have actively participated in user story testing. Testing participation has increased steadily throughout the UAT period, with user story execution expanding significantly from February through June 2026 while maintaining an overall satisfactory testing performance. Based on current progress, DOR is well positioned to complete planned user story testing prior to the conclusion of UAT, provided current participation levels continue.

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	3 hrs. per week	EXE/OFM	February 2026 through October 2026
6	1-2 hrs. every other week	Operational Management Staff	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)
44	1-2 hrs. every other week	Field Office/Operational Staff (to view reports)	September 2026 through October 2026
Accounts Receivables (AR)			
13	2-4 hr. every two weeks	Revenue Accounting/Account Services, EXE/OFM Users	February 2026 through October 2026
58	1-2 hr every two weeks	All end users across DOR	September 2026 through October 2026
Asset Accounting and Management (AAM)			
7	2-4 hours every week	EXE/OFM	February 2026 through October 2026
78	1-2 hours every two week	DOR Inventory Processors and Operational Management Staff	September 2026 through October 2026
Banking (BK)			
8	1-2 hours every two weeks	EXE/OFM, GTA/Deposits Team	February 2026 through October 2026
9	1-2 hours every other weeks	CSP, GTA End Users	September 2026 through October 2026
Budget Management and Cash Control (BM/CC)			
11	1-2 hrs per week	EXE/Budget, EXE/OFM	February 2026 through October 2026
42	1 hr every other week	Operational Management Staff across DOR to pull reports	July 2026 through October 2026
Contracts Management (CT)			
N/A			
Disbursements Management (DM)			
49	1-2 hours every week	GTA/Revenue Accounting, EXE/OFM	February 2026 through October 2026
121	1 hour every 2 weeks	GTA/Refunds, DOR Reporting End Users	September 2026 – October 2026
Data Warehouse/Business Intelligence (DW/BI)			
8	2-4 hours every week	DOR DW/BI Authors, EXE/OFM, CSP and GTA Consumers	May 2026 – October 2026
27	1-2 hours every other week	DOR DW/BI Consumers	September 2026 – October 2026
Grants Management (GM)			
N/A			

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)
Inter/IntraUnit Transactions (IU)			
25	1-2 hours every week	EXE/OFM, GTA/Revenue Accounting, CSP/Financial Planning	February 2026 through October 2026
58	1-2 hours every other week	DOR Reporting End Users	September 2026 through October 2026
Payroll Management (PR)			
6	1-2 hours every week	EXE/OFM/Payroll Staff	April 2026 through October 2026
22	1 hours every other week	DOR/PALM Reporting End users	September 2026 through October 2026
Projects Management (PM)			
N/A			
Revenue Accounting (RA)			
N/A			
System Access and Controls (SAC)			
3	1-2 hrs every two weeks	DOR/Security Access Managers	February 2026 through October 2026

UAT Engagement Risks

The Department of Revenue (DOR) continues to make steady progress toward completing User Acceptance Testing (UAT) for Florida PALM and Agency Business Systems. While overall testing activities remain on schedule and performance has been satisfactory, the agency continues to monitor several risks and dependencies that could affect the timely completion of end-user testing.

The primary risk involves remaining technical dependencies associated with Florida PALM interface testing. Specifically, completion of the **PRI063 Outbound Voucher and Payment Extract** interface is dependent on Florida PALM processing and delivery of the required outbound file. The dependency may affect the timing of final end-to-end validation for certain Agency Business System interfaces.

As end-user testing expands, DOR continues to monitor the availability of Subject Matter Experts (SMEs) and business users to ensure sufficient participation while balancing operational responsibilities. The agency has identified and enabled more than 260 end users within the UAT environment and continues to coordinate testing activities across multiple business areas to maintain testing momentum.

User readiness also remains an area of continued focus. Although prerequisite training and agency-specific training activities are ongoing, approximately half of the required Florida PALM

learning paths had been completed as of the June reporting period. DOR will continue to promote completion of prerequisite training to ensure end users are adequately prepared to execute testing and support production readiness.

Additional areas being monitored include timely resolution of testing defects, completion of security role validation, and continued coordination of testing across multiple Agency Business Systems and statewide enterprise systems. DOR will continue to evaluate testing results, resolve identified issues, and perform retesting as necessary to ensure business processes, interfaces, reporting, and security function as expected before implementation. This approach is consistent with the agency's UAT strategy of validating end-to-end business processes and minimizing operational risk prior to Florida PALM deployment.

Understanding of Data Warehouse (DW/BI) data views to build and deliver custom reports for DOR End users is one of the risks being monitored. DOR has eliminated a few of its agency business systems for reporting and will be relying heavily on the Florida PALM data warehouse for its reporting needs.

DOR will be performing end-to-end testing across all Enterprise Systems and their information exchange with Florida PALM after the UAT Refresh. This poses a low-to-medium risk which needs to be monitored.

Overall, DOR does not currently identify any high-priority risks that are expected to prevent completion of UAT but will continue to monitor technical dependencies, end-user participation, training completion, and defect resolution through monthly UAT reporting to support successful implementation.