Department of Financial Services

Florida PALM
Planning, Accounting, and Ledger Management

DFS CHANGE CHAMPION NETWORK

Date: July 31, 2026

To: Senator Ed Hooper, Chair of the Senate Appropriations Committee
Representative Lawrence McClure, Chair of the House of Representatives Budget Committee
Leda Kelly, Office of Policy and Budget
Jimmy Cox, Florida PALM Director

From: Scott Fennell, Agency Sponsor and Chief Deputy Financial Officer

Subject: Florida PALM DFS UAT Engagement Plan – July 2026

Attached is the required Florida PALM UAT Engagement Plan per FY 2026/27 HB 5001E General Appropriations Act Section 249. The proviso stated in Section 249 *"each entity receiving funds pursuant to this section shall submit a report the 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 Project detailing the entity's Florida PALM user acceptance testing engagement plan, including the number and roles of resources assigned, the number of test cases, and the planned dates for executing those test cases by July 31, 2026."*

The report format utilizes the provided template from Florida PALM.

If additional information needs to be included, please let us know and it will be added.

Thank you,

Scott Fennell
Deputy Chief Financial Officer
Florida Department of Financial Services

Department of Financial Services

UAT Engagement Plan

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

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Overview

The Department of Financial Services (DFS) is using User Acceptance Testing (UAT) as both a formal business process validation activity and a structured end-user readiness experience for the January 2027 implementation of Florida PALM Financials, Payroll, and Data Warehouse/Business Intelligence. The Department's approach recognizes that successful UAT is not limited to determining whether system functionality operates as designed. It also prepares the people who will use, support, govern, and sustain the new solution after Go-Live. Accordingly, DFS has integrated business process validation, Agency Business System testing, end-user engagement, organizational change management, communications, training development, and operational transition planning into a single coordinated effort.

DFS's engagement model builds on the Department's comprehensive UAT planning framework and the experience gained through early SME testing. The Change Champion Network (CCN), UAT Coordinators, business and technical liaisons, Subject Matter Experts (SMEs), security and identity resources, Agency Business System owners, training resources, and organizational change management resources work together to identify applicable Florida PALM activities, develop and execute agency-specific Test Scripts, validate end-to-end business processes, document testing errors, and prepare increasingly broader groups of end users for the transition. This layered approach allows experienced SMEs to test first, refine materials and expectations, and then facilitate role-based end-user participation with practical guidance grounded in actual DFS business processes.

The engagement period extends beyond test execution. Information gathered during UAT is used to improve agency-specific training, job aids, communications, process documentation, security role mapping, reporting readiness, and post-Go-Live support planning. UAT findings will also inform cutover planning, agency hypercare, escalation paths, knowledge transfer, and the transition of unresolved or deferred items into controlled operational support. This approach aligns UAT results with Florida PALM Training Plan and reinforces evidence-based Agency Readiness Certifications.

The Department's desired outcome is a workforce that understands not only how to complete transactions in Florida PALM, but also how their work fits into updated end-to-end processes, internal controls, enterprise responsibilities, Agency Business Systems, reporting requirements, and downstream impacts. By treating UAT as preparation for Go-Live, DFS is using hands-on practice to build knowledge, confidence, ability, and adoption while reducing operational risk.

User Engagement Approach

DFS-Proper uses a progressive engagement model that expands participation as testing materials, business process documentation, and support mechanisms are refined and available. SMEs and business process owners serve as the first end users because they possess the detailed knowledge needed to validate normal, exception, periodic, and agency-specific scenarios. Their participation creates a practical feedback loop: test results improve the Test Scripts, business process documentation, training content, communications, and tools that will be used with the broader end-user population.

This phased knowledge-sharing approach also helps minimize employees being overwhelmed and reduces change fatigue by introducing new concepts in manageable, bite-sized increments. As a result, end users have more time to absorb and apply new information while continuing to meet their day-to-day operational responsibilities, resulting in greater confidence, readiness, and sustained engagement throughout the transition to Florida PALM.

End users are engaged according to business role, security assignment, degree of process impact, and interaction with Florida PALM or an impacted Agency Business System. Engagement includes prerequisite training materials specific to UAT, Knowledge Center navigation, demonstrations, hands-on testing, agency-hosted sessions, guided practice, surveys, and targeted communications. This role-based model avoids a one-size-fits-all approach and ensures that employees receive the level of information and practice appropriate to the work they will perform.

Communications and training are intentionally coordinated with test execution. Communications establish awareness, clarify expectations, explain why participation matters, and reinforce that UAT is a safe environment for learning and identifying gaps. Training and educational materials then provide the knowledge and tools needed to participate effectively. Testing gives end users an opportunity to apply that learning, ask questions, and build confidence through hands-on practice. Feedback from those activities is incorporated into revised materials and future engagement. This approach has enhanced both tester confidence and organizational readiness by building the knowledge and experience necessary to validate increasingly complex business processes, including nuanced scenarios that require a comprehensive understanding of Florida PALM functionality and agency operations.

Additionally, leadership and supervisors are expected to protect time for participation, reinforce the importance of UAT, monitor completion, and minimize resource constraints. The CCN and UAT team provide leaders with status information, and targeted support so that barriers can be addressed before they affect testing or readiness. This shared-accountability model supports sustained participation while normal DFS operations continue.

Testing Scope

DFS testing scope includes Florida PALM functionality, agency-specific configurations, enterprise responsibilities, security, data, reporting, interfaces, and end-to-end business processes needed to sustain DFS operations.

Testing covers daily, weekly, monthly, quarterly, annual, and as-needed activities, as well as high-risk and non-routine scenarios such as month-end and year-end close, carry forward and certified forward, emergency and disaster operations, exception handling, high-volume processing, and cross-organizational workflows. DFS also validates agency-specific elements such as Chart of Account values, SpeedKeys, Combination Edits, internal controls, security roles, reports, queries, interfaces, and impacted Agency Business Systems.

The testing scope addresses the four readiness dimensions of people, process, technology, and data. This provides a complete view of readiness by confirming that the process can be performed, the technology and integrations function as expected, the required data and reports are reliable, and users understand how to complete and support the work.

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, • Remove obstacles to successfully complete UAT activities.	Scott Fennell
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. • Perform and confirm agency business processes.	Alexandra Weimorts Sheila Cole
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.	Sheila Cole Latora Brockman Mikaela Boatright

Role	Responsibility	Resources
	• Perform and confirm agency business processes. • Conduct knowledge transfer needed by end users to facilitate building daily processes.	
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.	Stacey Pollock
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.	Functional: Asif Sahaf Technical: Michael Avello
Change Management Liaison	• Develop and maintain a UAT communications 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. • Conduct knowledge transfer needed by end users to facilitate building daily processes.	Amy Topol
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.	Latasha Tuck
Accounting & Auditing Liaison	• Serve as the primary point of contact between the Project and the Division of Accounting & Auditing.	Renée Hermeling Julia Collins-Okane

Role	Responsibility	Resources
	• Track the division's completion of division and enterprise activities and tasks.	
Treasury Liaison	• Serve as the primary point of contact between the Project and the Division of Treasury. • Track the division's completion of division and enterprise activities and tasks.	Sarah Pons Jennifer Pelham Emily Bell
Tier 1 Division UAT Coordinators	• Develop User Stories and update test scrips based on results. • Ensure that end-to-end testing of agency business processes is conducted. • 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 submitting SNow tickets, reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline. • Work through the PMP-OCM Agency Workgroup for sister agency collaboration.	Varsha Premkumar Pavani Eupuri
Tier 2 Division UAT Coordinators	• Track and confirm testing progress. • Serve as the primary point-of-contact for the Tier 2 divisions for documenting and reporting testing progress, discussing testing issues, and ensuring coordination of agency efforts with the overall UAT timeline.	Treasury: Blake Goodwin, Mireia Vidal Unclaimed Property: Liz Tatum Workers' Compensation: Sarah Busey, Ryan Gagne
Testing Error Triage Team	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation.	Primary: Module SME, UAT Participants, ABS Developers, UAT Coordinators, Project Manager, SAMs Secondary: Training and OCM Liaison
A&A Florida PALM Transition Team	• 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 submitting SNow tickets, reporting progress, discussing testing issues, and ensuring coordination of agency efforts with the overall UAT timeline. • Work through the PMP-OCM Agency. Workgroup for sister agency collaboration.	Renee Hermeling Julia Collins-O'Kane Laura Norred Sam Halbert Samhitha Gaddam Lakshmi Gollapudi Nate Wright

Role	Responsibility	Resources
	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation. • 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. • Help develop enterprise and agency training materials. • Report testing errors and testing progress . • 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. • Conduct knowledge transfer needed by end users to facilitate building daily processes.	
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. • Help develop agency training material. • 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.	Agency Subject Matter Experts Identified
Security Access Manager	• Enter/track role assignment changes for SMEs and end users during UAT.	Heather Dunbar Cindy Holloman

Role	Responsibility	Resources
	• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator, and support mitigation strategies or resolutions. • Generate utilization reports for CCN.	RickiLee Mainer
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). • Ensure proper integration and functionality of identity management systems.	OIT Infrastructure
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. • Manage and ensure the integrity of file transfers and storage.	OIT
Batch Error Contact	• Serve as the primary point of contact for batch errors or change in batch process timing.	OIT/ABS Functional System Owner
End Users	• Practice related job processes. • Confirm end-user role assignment(s). • Execute test cases to validate system functionality and usability. • Report testing errors and testing progress to SME or UAT Coordinator, as appropriate.	Included in Table 2 below.

DFS applies a coordinated governance structure in which each role contributes to both testing completion and organizational readiness. The Agency Sponsor and senior leadership provide visible sponsorship, remove barriers, allocate resources, and monitor risks. The Agency Liaison and Project Management Liaisons maintain alignment with Florida PALM milestones and Readiness Workplan requirements. Business and Technical Liaisons coordinate functional scope, Agency Business System readiness, interface dependencies, and remediation activities.

The UAT Coordinators manage day-to-day test development, execution, progress reporting, materials, issue escalation, and coordination with the Florida PALM Project. The Testing Error Triage Team provides a disciplined forum for reviewing errors, distinguishing defects from data, access, documentation, or training issues, assigning ownership, and confirming retesting and closure. This prevents individual testers from carrying unresolved issues alone and facilitates consistent resolution across business areas.

Subject Matter Experts (SMEs) are central to the DFS engagement model. They validate agency-specific processes, execute and refine User Stories, identify gaps, support end users, and translate test experience into training and operational guidance. To prepare them for this role, SMEs received instruction on adult learning principles and effective knowledge transfer techniques, equipping them with above-average capability to deliver role-based knowledge, facilitate peer learning, and reinforce understanding throughout the UAT and training lifecycle.

The Change Management and Training Liaisons connect UAT activity to communications, readiness assessments, learning materials, role-based training, and reinforcement. Security Access Managers, File Managers, Batch Error Contacts, Agency Business System owners, and IT support ensure that end users can access the right environments, roles, files, and technical assistance at the right time.

End users are active participants rather than passive recipients of change. They are expected to complete prerequisites, practice job-related processes, validate role assignments, report errors or unclear instructions, provide feedback, and identify where additional training or support is needed. Supervisors support this participation by protecting time, balancing workloads, and reinforcing the expectation that questions and testing errors are valuable readiness information.

User Story Testing Progress

Table 2: User Story Testing Progress by DFS-Proper and Division of Treasury end users.

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	154	66	103	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those general activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.

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
Accounts Receivable (AR)				
9	85	37	50	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Asset Accounting and Management (AAM)				
19	103	71	76	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Banking (BK)				
6	27	16	183	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Budget Management and Cash Control (BM/CC)				
7	122	79	141	All Project Recommended Standard Activities have

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
				been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Contracts Management (CT)				
N/A	N/A	N/A	N/A	DFS will utilize FACTS for this functionality.
Disbursements Management (DM)				
22	201	204	206	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Data Warehouse/Business Intelligence (DW/BI)				
6	8	6	20	All Project Recommended Standard activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Grants Management (GM)				
1	1	1	9	All testing is complete.

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
Inter/IntraUnit Transactions (IU)				
11	270	263	265	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Payroll Management (PR)				
25	147	132	154	All Project Recommended Standard Activities have been tested. The remaining user stories involve either variations of those activities or year-end or payroll processes that could not be tested before the UAT environment refresh. Testing of the remaining user stories will resume once the UAT environment becomes available.
Projects Management (PM)				
10	21	14	18	All tests have been completed but additional variations of these tests will be executed after the UAT refresh.
Revenue Accounting (RA)				
N/A	N/A	N/A	N/A	DFS will utilize an Agency Business System for this functionality.
System Access and Controls (SAC)				
3	4	4	8	All tests have been completed but additional variations of these tests will

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
				be executed after the UAT refresh.

Table 3: Enterprise User Story Testing Progress by the Division of Accounting & Auditing.

Florida PALM Module	Tested	Not Started	Deferred	Grand Total
AM		2		2
AP	81	35	1	117
AR		4		4
GL	19	61		80
IU	13	15		28
KK	7	83		90
PCard Works		7		7
SAC		4		4
Grand Total	**120**	**211**	**1**	**332**

DFS monitors UAT progress by Business Process Grouping, applicable Activity, Unique Test Script, execution count, outcome, testing error, and retest status. The Department uses this information to distinguish coverage from repetition: a Test Script may be executed multiple times by different end users to validate process variations, security roles, organizational perspectives, or data conditions.

Progress is reviewed through recurring coordination meetings, dashboards, inventories, testing trackers, Monthly Progress Reports, and leadership updates. Testing gaps are evaluated based on business criticality, frequency, enterprise impact, dependency, and review of Project Recommended Standard Activities. High-impact processes such as payroll, disbursements, cash and budget management, financial reporting, enterprise integrations, month-end and year-end activities, and critical reports receive heightened attention.

Where testing cannot be completed as planned, DFS documents the reason, impact, owner, mitigation, and next action. Constraints may include environment availability, data limitations, security access, unresolved defects, external dependencies, incomplete interfaces, or competing operational priorities. This transparency allows leadership and the Florida PALM Project to distinguish a scheduling variance from a material readiness concern and to direct resources accordingly.

UAT results also serve as an input to training and communications. Repeated questions, navigation difficulties, misunderstood terminology, data interpretation issues, and process deviations are converted into targeted job aids, FAQs, demonstrations, and agency-specific learning. In this way, testing progress is not treated only as a numeric completion measure. It is used to strengthen DFS's readiness for adoption.

Agency Business System Testing Progress

Interface Cycle 3 Testing includes Agency Business Systems and reports as follows:

- **Tier 1 systems**, which integrate directly with Florida PALM,
- **Tier 2 systems**, which integrate with Tier 1 systems, and
- **Reports,** which include data from Florida PALM interfaces.

During this phase, functional owners will test their Agency Business Systems to confirm that:

- Required remediation changes function as expected, and
- Data exchanges between Agency Business Systems and Florida PALM are accurate, secure, and reliable.

Key objectives for Agency Business System Interface Cycle 3 Testing include:

- **Validate ABS Design Changes:** Confirm that all documented ABS changes required for integration with Florida PALM are functioning as intended. This includes the execution of negative testing scenarios to ensure systems handle invalid or unexpected data appropriately.
- **Verify Data Integration:** Ensure accurate and secure transmission, processing, and storage of data exchanged between Agency Business Systems and Florida PALM. This includes:
    - Validation of file transmissions using approved interface layouts,
    - Confirmation that Florida PALM can process incoming files and generate accurate error logs, and
    - Verification that Agency Business Systems can load return files and appropriately handle errors.
- **Execute and Complete Test Scenarios:** Ensure all test steps defined in approved test scenarios are executed successfully, with expected results confirmed.
- **Test Tier 2 Systems and Reports:** Ensure all Tier 2 systems and impacted reports have been tested successfully.
- **Identify and Resolve Defects:** Detect, document, and track any defects that arise during testing, including those not identified in prior phases, to ensure system stability and readiness.

The table below includes a list of Tier 1 Agency Business Systems and their testing status. Status of "Complete" refers to the successful completion of Interface Cycle 3 test scenarios.

Regression testing and final sign-off from functional system owners is planned during the month of September following the Florida PALM data refresh (scheduled August 2026). The table also identifies Tier 1 Agency Business Systems for which certain test scenarios cannot be completed until appropriate test data is produced and made available for testing after the Florida PALM data refresh. The team will perform testing for all other test scenarios, and then, following the data refresh, the team will complete any outstanding test scenarios in parallel with regression testing.

Table 4: 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
Certificates of Deposit System (CD) (Regression Testing Only)	Complete	Y	Complete	4/22/2026
Consolidated Miscellaneous Deduction Vendor Website (CMDV)	Complete	Y	Complete	7/9/2026
Lease Tracking System	Complete	Y	Complete	6/30/2026
Printing Inventory Request System (PIRQ)	Complete	Y	Complete	3/18/2026
Tuition Waiver Website (Tuition Waiver)	Complete	Y	Complete	6/30/2026
Cashiers Office Deposit Automation System (CODA)	In Progress	Y	In Progress	9/30/2026
Florida Accountability Tracking System (FACTS)	In Progress	Y	In Progress	7/31/2026
Florida Integrated Payee System (FLIPS)	In Progress	Y	In Progress	9/30/2026
Special Disability Trust Fund Claims System (SDTF)	In Progress	Y	In Progress	9/30/2026
Permanent Total Disability Payment System (PT)	In Progress	Y	In Progress	9/30/2026
Special Purpose Investment Account System (SPIA)	In Progress	Y	In Progress	7/31/2026
Transparency Site - Vendor/Payee Payments Website (Transparency Site)	In Progress	Y	In Progress	7/31/2026
Unclaimed Property Management Information System (UPMIS)	In Progress	Y	In Progress	9/30/2026
Barcode Inventory System – Property (Barcode)	In Progress	Y	In Progress	7/31/2026
MySafeFloridaHome System (MSFH)	In Progress	Y	In Progress	9/30/2026

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
Claim Administration System for Risk Management (ORIGAMI)	In Progress	Y	In Progress	9/30/2026

Interface Cycle 3 Testing will be coordinated and tracked by Florida PALM and the functional system owners for the four Agency Business Systems listed below.

- Clearwater System
- Deferred Compensation System (OMNI/FIS)
- P-Card Works System (PC Works)
- Workiva W-Desk System
- Collateral Administration Program (CAP)

Interface Cycle 3 Testing is progressing as planned. Key challenges include the timely delivery of unique outbound test files from Florida PALM, the processing of transaction data from partner agencies required to support interface testing, and the resolution of outstanding Florida PALM issues that are currently preventing the completion of certain test scenarios. The project team continues to collaborate with Florida PALM and participating agencies to address these challenges, mitigate risks, and maintain testing progress according to the planned schedule.

Findings from Cycle 3 and related integration testing are being incorporated into cutover checklists, operating procedures, communications, and training materials. This approach supports a controlled cutover transition by aligning technical and business readiness activities and providing a comprehensive view of agency preparedness for implementation.

End User Testing

UAT Time Participation Summary

To ensure a successful UAT, the CCN developed and distributed Division and Office UAT Participation Planning Forms and Tester Strategy Supplements to assist supervisors and testers in proactive planning for participation in Florida PALM testing. The planning process encouraged teams to identify operational impacts, staffing considerations, workload conflicts, testing resource needs, and mitigation strategies well in advance of testing activities. Collecting this information provided intentional planning and set expectations and commitment, rather than verbally stating the written analysis provided thoughtful and thorough planning.

The completed plans demonstrate a high level of organizational engagement across participating business areas. Collectively, the responses provide valuable insight into organizational readiness and enable the CCN to proactively identify areas where additional support, communication, or coordination may be beneficial.

The planning effort identified several common themes across divisions and offices. Many business areas reported significant operational demands associated with fiscal year-end activities, month-end processing, annual reporting requirements, and hurricane season responsibilities that may affect testing capacity during portions of the UAT schedule. Several division and offices also identified concurrent agency initiatives, implementation of legislative changes, internal system modernization efforts, staffing vacancies, planned leave, and other testing activities that could influence resource availability throughout the testing period.

Despite these competing priorities, divisions and offices consistently demonstrated thoughtful mitigation planning. Common approaches include cross-training staff, temporarily redistributing workloads, prioritizing critical business functions, leveraging backup personnel, adjusting work schedules, and providing flexible testing windows. Many divisions also indicated that supervisors will actively monitor tester workloads throughout UAT and adjust as needed to ensure both operational responsibilities and testing objectives are successfully achieved. Most participants anticipate dedicating between one and five hours per week to testing activities while balancing ongoing operational responsibilities.

The planning process also highlighted the complexity of the Florida PALM implementation beyond the core financial system. Testers identified dependencies across numerous Enterprise Business Systems including MFMP, STMS, PCard Works, People First, and multiple Agency Business Systems that will require coordinated testing activities and continued collaboration between business and technical teams.

Overall, the UAT Participation Planning process significantly strengthened organizational readiness by encouraging early discussions between supervisors and testers regarding expectations, workload management, resource availability, and risk mitigation. The information gathered enables the CCN to make informed decisions regarding communications, scheduling, support resources, and readiness activities while providing leadership with increased confidence that potential testing constraints have been identified and addressed before large-scale UAT began.

Chart 1: Strategies that divisions and offices will use to ensure completion of end-user testing while continuing operational duties.

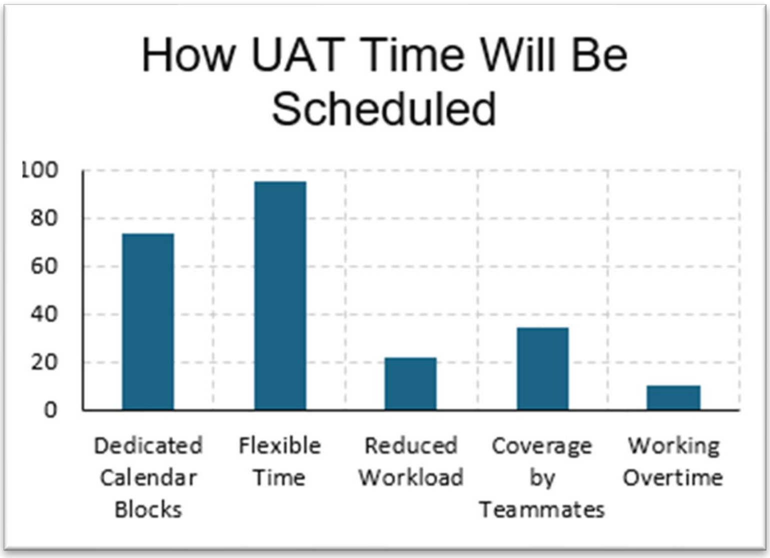

Table 5: End-User Testing by Business Process Grouping for DFS-Proper

Note: Anticipated time commitment for each division/office reflects aggregate testing hours across all Business Process Groupings.

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)			
5	8 hrs./week	Division of Administration	Jun – Nov 2026
2	2 hrs./week	Division of Consumer Services	Aug – Nov 2026
3	2 hrs./week	Division of Insurance Agent & Agency Services	Aug – Nov 2026
8	2 hrs./week	Division of Risk Management	Feb – Nov 2026
29	4 hrs./week	Division of Treasury	Feb – Nov 2026
2	4 hrs./week	Division of Unclaimed Property	Feb – Nov 2026
25	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
1	2 hrs./week	Office of Financial Regulation	Aug – Nov 2026
Accounts Receivables (AR)			
22	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Asset Accounting and Management (AAM)			
5	8 hrs./week	Division of Administration	Jun – Nov 2026
11	4 hrs./week	Office of Finance and Budget	Feb – Nov 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)*
6	2 hrs./week	Division of Risk Management	Feb – Nov 2026
18	5 hrs./week	Division of Treasury	Feb – Nov 2026
18	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Budget Management and Cash Control (BM/CC)			
2	2 hrs./week	Division of Consumer Services	Aug – Nov 2026
2	4 hrs./week	Division of Funeral, Cemetery, & Consumer Services	Aug – Nov 2026
3	2 hrs./week	Division of Insurance Agent & Agency Services	Aug – Nov 2026
2	2 hrs./week	Division of Rehabilitation and Liquidation	Aug – Nov 2026
2	2 hrs./week	Division of Risk Management	Feb – Nov 2026
1	2 hrs./week	Division of State Fire Marshal	Aug – Nov 2026
14	4 hrs./week	Division of Treasury	Feb – Nov 2026
2	4 hrs./week	Division of Unclaimed Property	Feb – Nov 2026
1	2 hrs./week	Division of Workers' Compensation	Feb – Nov 2026
20	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
13	2 hrs./week	Office of Financial Regulation	Aug – Nov 2026
5	2 hrs./week	Office of Information Technology	Aug – Nov 2026
2	2 hrs./week	Office of Insurance Regulation	Aug – Nov 2026
2	2 hrs./week	Office of the General Counsel	Aug – Nov 2026
1	4 hrs./week	Office of the Insurance Consumer Advocate	Aug – Nov 2026
Contracts Management (CT)			
27	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Disbursements Management (DM)			
5	4 hrs./week	Criminal Investigations Division	Aug – Nov 2026
9	8 hrs./week	Division of Administration	Feb – Nov 2026
3	2 hrs./week	Division of Consumer Services	Aug – Nov 2026
2	2 hrs./week	Division of Funeral, Cemetery, & Consumer Services	Aug – Nov 2026
3	2 hrs./week	Division of Insurance Agent & Agency Services	Aug – Nov 2026
4	2 hrs./week	Division of Rehabilitation and Liquidation	Aug – Nov 2026
14	2 hrs./week	Division of Risk Management	Feb – Nov 2026
6	2 hrs./week	Division of State Fire Marshal	Aug – Nov 2026
29	4 hrs./week	Division of Treasury	Feb – Nov 2026
5	3 hrs./week	Division of Unclaimed Property	Feb – Nov 2026
13	5 hrs./week	Division of Workers' Compensation	Feb – Nov 2026
36	4 hrs./week	Office of Finance and Budget	Feb – Nov 2026
13	2 hrs./week	Office of Financial Regulation	Aug – Nov 2026
5	2 hrs./week	Office of Information Technology	Aug – Nov 2026
7	4 hrs./week	Office of Insurance Regulation	Aug – Nov 2026
6	2 hrs./week	Office of the General Counsel	Aug – Nov 2026
1	4 hrs./week	Office of the Insurance Consumer Advocate	Aug – Nov 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)*
Data Warehouse/Business Intelligence (DW/BI)			
5	4 hrs./week	Criminal Investigations Division	Aug – Nov 2026
18	8 hrs./week	Division of Administration	Jun – Nov 2026
3	2 hrs./week	Division of Consumer Services	Aug – Nov 2026
7	4 hrs./week	Division of Funeral, Cemetery, & Consumer Services	Aug – Nov 2026
3	2 hrs./week	Division of Insurance Agent & Agency Services	Aug – Nov 2026
4	2 hrs./week	Division of Rehabilitation and Liquidation	Aug – Nov 2026
3	2 hrs./week	Division of Risk Management	Feb – Nov 2026
6	2 hrs./week	Division of State Fire Marshal	Aug – Nov 2026
38	4 hrs./week	Division of Treasury	Feb – Nov 2026
1	4 hrs./week	Division of Unclaimed Property	Feb – Nov 2026
13	5 hrs./week	Division of Workers' Compensation	Feb – Nov 2026
31	4 hrs./week	Office of Finance and Budget	Feb – Nov 2026
14	2 hrs./week	Office of Financial Regulation	Aug – Nov 2026
6	2 hrs./week	Office of Information Technology	Aug – Nov 2026
7	4 hrs./week	Office of Insurance Regulation	Aug – Nov 2026
6	2 hrs./week	Office of the General Counsel	Aug – Nov 2026
1	4 hrs./week	Office of the Insurance Consumer Advocate	Aug – Nov 2026
Grants Management (GM)			
4	4 hrs./week	Division of Treasury	Feb – Nov 2026
27	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Inter/IntraUnit Transactions (IU)			
13	2 hrs./week	Division of Risk Management	Feb – Nov 2026
3	4 hrs./week	Division of Treasury	Feb – Nov 2026
3	4 hrs./week	Division of Unclaimed Property	Feb – Nov 2026
33	5 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Payroll Management (PR)			
11	8 hrs./week	Division of Administration	Feb – Nov 2026
5	2 hrs./week	Division of Risk Management	Feb – Nov 2026
21	4 hrs./week	Division of Treasury	Feb – Nov 2026
15	3 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Projects Management (PM)			
6	2 hrs./week	Division of State Fire Marshal	Aug – Nov 2026
22	4 hrs./week	Office of Finance and Budget	Feb – Nov 2026
Revenue Accounting (RA)			
N/A			
System Access and Controls (SAC)			
2	5 hrs./week	Division of Risk Management	Feb – Jul 2026
2	5 hrs./week	Division of Unclaimed Property	Feb – Nov 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)*
13	5 hrs./week	Division of Workers' Compensation	Feb - Nov 2026
3	10 hrs./week	Office of Finance and Budget	Feb – Nov 2026
3	3 hrs./week	Division of Accounting & Auditing	Feb - Nov 2026

DFS identifies end-user participants through role mapping, division and office outreach, and Enterprise/Agency Business System impacts. Participants are grouped according to whether they enter transactions directly into Florida PALM, access reports and data, perform payroll or employee self-service activities, support agency business systems, Tier 1, support enterprise functions, or experience indirect impacts through changes to Agency Business Systems and business procedures.

Before participating, end users receive the prerequisites and contextual information needed to test productively. Preparation includes a UAT kickoff that includes testing expectations, error-reporting guidance, and an overview of testing resources. Regular sessions are held with testers that include a review of the relevant Test Scripts and instructions on reporting testing results.

The Florida PALM Knowledge Center is a foundational readiness resource. DFS prepares end users to locate business process flows, process step narratives, terminology, reports information, training materials, and other Project resources. Knowledge Center readiness reduces dependence on informal knowledge and promotes a sustainable post-Go-Live model in which employees can find authoritative guidance.

Participation is intentionally expanded over time. Early UAT findings are used to improve scripts and materials before larger groups are engaged. End users who complete testing may become peer resources, trainers, office-hour support, or hypercare contacts. This creates a multiplier effect in which hands-on experience is retained within the business areas that will need it most after Go-Live.

Feedback is collected through direct observation, testing notes, error trends, surveys, readiness assessments, and discussions with SMEs and supervisors. DFS evaluates not only whether end users completed a test, but also whether they understood the process, could find needed information, recognized the expected outcome, and felt increasingly confident performing their role.

Division of Accounting & Auditing End User Participation Summary

The chart below outlines the planned testing hours for all teams within the Division of Accounting & Auditing (A&A). Because A&A provides enterprise-wide support to agencies and external stakeholders, the Division's capacity to conduct testing and assist agencies with their activities depends on each agency's level of engagement and timely completion of their testing tasks. Additionally, given A&A's enterprise responsibilities, the Division supports a wide range of business processes so testing focus may shift daily based on the activities agencies are performing. The hours listed below represent the total effort dedicated to all testing activities across the business processes supported by each team.

Table 6: End-User Testing by Business Process Grouping for the Division of Accounting & Auditing

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)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
10	5 hrs./week	Statewide Financial Reporting Team	Feb - Nov 2026
8	10 hrs./week	Enterprise Accounting & Reporting Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Accounts Receivables (AR)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
8	10 hrs./week	Enterprise Accounting & Reporting Team	Feb - Nov 2026
9	5 hrs./week	Process Team A	Feb - Nov 2026
9	5 hrs./week	Process Team B	Feb - Nov 2026
10	5 hrs./week	Process Team C	Feb - Nov 2026
9	5 hrs./week	Process Team D	Feb - Nov 2026
10	5 hrs./week	Process Team E	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Asset Accounting and Management (AAM)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
8	10 hrs./week	Enterprise Accounting & Reporting Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Banking (BK)			
8	25 hrs./week 5	Transition Team	Feb - Nov 2026
11	5 hrs./week	Vendor Management	Feb - Nov 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)*
12	5 hrs./week	EFT Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Budget Management and Cash Control (BM/CC)			
4	2 hrs./week	Administrative Team	Feb - Nov 2026
8	25 hrs./week	Transition Team	Feb - Nov 2026
11	5 hrs./week	Vendor Management Team	Feb - Nov 2026
12	5 hrs./week	EFT Team	Feb - Nov 2026
9	5 hrs./week	Taxation/Reconciliation Team	Feb - Nov 2026
12	5 hrs./week	Payroll Processing Team	Feb - Nov 2026
8	5 hrs./week	Employee Records Team	Feb - Nov 2026
10	5 hrs./week	Statewide Financial Reporting Team	Feb - Nov 2026
8	10 hrs./week	Enterprise Accounting & Reporting Team	Feb - Nov 2026
9	5 hrs./week	Process Team A	Feb - Nov 2026
9	5 hrs./week	Process Team B	Feb - Nov 2026
10	5 hrs./week	Process Team C	Feb - Nov 2026
9	5 hrs./week	Process Team D	Feb - Nov 2026
10	5 hrs./week	Process Team E	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Contracts Management (CT)			
8	25	Transition Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Disbursements Management (DM)			
4	2 hrs./week	Administrative Team	Feb - Nov 2026
8	25 hrs./week	Transition Team	Feb - Nov 2026
11	5 hrs./week	Vendor Management Team	Feb - Nov 2026
12	5 hrs./week	EFT Team	Feb - Nov 2026
9	5 hrs./week	Taxation/Reconciliation Team	Feb - Nov 2026
12	5 hrs./week	Payroll Processing Team	Feb - Nov 2026
8	5 hrs./week	Employee Records Team	Feb - Nov 2026
9	5 hrs./week	Process Team A	Feb - Nov 2026
9	5 hrs./week	Process Team B	Feb - Nov 2026
10	5 hrs./week	Process Team C	Feb - Nov 2026
9	5 hrs./week	Process Team D	Feb - Nov 2026
10	5 hrs./week	Process Team E	Feb - Nov 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)*
6	5 hrs./week	Enterprise Purchasing and Card Admin Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Data Warehouse/Business Intelligence (DW/BI)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
5	2 hrs./week	Reporting Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Grants Management (GM)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Inter/IntraUnit Transactions (IU)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
9	5 hrs./week	Taxation/Reconciliation Team	Feb - Nov 2026
12	5 hrs./week	Payroll Processing Team	Feb - Nov 2026
8	5 hrs./week	Employee Records Team	Feb - Nov 2026
10	5 hrs./week	Statewide Financial Reporting Team	Feb - Nov 2026
8	10 hrs./week	Enterprise Accounting & Reporting Team	Feb - Nov 2026
9	5 hrs./week	Process Team A	Feb - Nov 2026
9	5 hrs./week	Process Team B	Feb - Nov 2026
10	5 hrs./week	Process Team C	Feb - Nov 2026
9	5 hrs./week	Process Team D	Feb - Nov 2026
10	5 hrs./week	Process Team E	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Payroll Management (PR)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
9	5 hrs./week	Taxation/Reconciliation Team	Feb - Nov 2026
12	5 hrs./week	Payroll Processing Team	Feb - Nov 2026
8	5 hrs./week	Employee Records Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Projects Management (PM)			
8	25 hrs./week	Transition Team	Feb - Nov 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)*
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
Revenue Accounting (RA)			
8	25 hrs./week	Transition Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026
System Access and Controls (SAC)			
3	2 hrs./week	Project, Training, & Change Management	Feb - Nov 2026
4	2 hrs./week	Administrative Team	Feb - Nov 2026
8	25 hrs./week	Transition Team	Feb - Nov 2026
6	10 hrs./week	Enterprise Trends & Analysis (Reporting only)	Feb - Nov 2026
6	5 hrs./week	Compliance Audit Team (Reporting only)	Feb - Nov 2026
3	5 hrs./week	Article V Process Team (Reporting only)	Feb - Nov 2026

UAT Engagement Risks

DFS manages UAT engagement risks through early identification, assigned ownership, documented mitigation, recurring review, leadership visibility, and escalation to the Florida PALM Project when resolution is outside the Department's control. Risks are evaluated for their potential effect on testing coverage, end-user participation, operational readiness, training quality, Agency Business System readiness, and the ability to support Go-Live.
Key engagement risks and mitigations include:

- **Competing priorities and limited staff capacity.** Operational demands may reduce the time available for SMEs and end users to test. DFS mitigates this risk through advance scheduling, leadership reinforcement, workload planning, prioritized testing, group sessions, make-up opportunities, and escalation when critical processes lack sufficient coverage.
- **Access, role, or environment constraints.** Delayed access, incorrect role assignments, environment outages, or unavailable test data can interrupt participation. DFS coordinates with Security Access Managers, UAT Coordinators, Testing Triage Teams, and Project contacts to validate access early, maintain issue logs, reschedule affected work, and distinguish technical barriers from user-performance concerns.
- **Incomplete process, data, report, or interface readiness.** Some end-to-end scenarios depend on converted data, reports, batch processing, interfaces,

enterprise partners, or Agency Business System remediation. DFS tracks dependencies, uses production-like data where available, documents limitations, performs retesting, and establishes mitigation or follow-up plans for items that cannot be completed in the initial window.

- **Inconsistent documentation or insufficient end user preparation.** End users may be unable to execute a test reliably when instructions, terminology, expected outcomes, or business context are unclear. DFS uses SME review, prerequisite learning, Knowledge Center navigation, testing handbooks, guided sessions, job aids, and rapid updates to materials to reduce this risk.
- **Change fatigue, anxiety, or low confidence.** The scale of the transition and the learning curve may discourage participation or lead end users to interpret expected learning challenges as failure. DFS communications reinforce that UAT is a low-risk practice environment, that identifying issues is a successful outcome, and that confidence develops through repetition, support, and access to reliable resources.
- **Overreliance on a small number of SMEs.** Concentrated knowledge can create bottlenecks during UAT and hypercare. DFS broadens participation, documents decisions and workarounds, develops role-based resources, pairs SMEs with additional end users, and establishes peer-support resources to improve resilience and succession of knowledge.
- **Unresolved errors or late changes.** Defects, design changes, or updated requirements may require retesting and revision of materials close to Go-Live. DFS uses error triage, impact-based prioritization, regression testing, version control, targeted communications, and a formal handoff of remaining items to cutover and hypercare governance.
- **Readiness evidence that is incomplete or overly focused on completion counts.** Numeric completion alone may not demonstrate that end users or operations are ready. DFS supplements progress metrics with testing outcomes, issue trends, survey feedback, training needs, confidence indicators, business owner validation, and documented mitigation plans.

Success Conclusion

Successful execution of this UAT Engagement Plan demonstrates that DFS can perform its business functions in Florida PALM, has aligned end-user testing with Project expectations, and is prepared for Agency Readiness Certification. By validating all required test cases, resolving or mitigating critical issues, confirming that the system operates as intended, and ensuring end users understand the necessary business processes and data, DFS can move forward to Go-Live with confidence.

Project Approvals

The Agency Sponsor and Agency Liaison acknowledge they have reviewed the Florida PALM UAT Engagement Plan and agree with the information contained herein. The Agency Sponsor and Agency Liaison hereby give the project manager the authority to apply the approved level of organizational resources to project activities. Changes to this Florida PALM UAT Engagement Plan will be coordinated with and approved by the Agency Sponsor and Agency Liaison or their designated representatives.

Printed Name:	Scott Fennell
Signature:	*/s/ Scott Fennell*
Title:	Deputy Chief Financial Officer of Operations
Agency:	Florida Department of Financial Services
Role:	Agency Sponsor

Printed Name:	Alexandra Weimorts
Signature:	*/s/ Alexandra Weimorts*
Title:	Chief of Financial Services
Agency:	Florida Department of Financial Services
Role:	Agency Liaison

cc:
Executive Office of the Governor's Office of Policy and Budget
Chair of the Senate Appropriations Committee
Chair of the House of Representatives Budget Committee
Florida PALM Director via Florida PALM Inbox