



User Acceptance Testing Engagement Plan

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

Table of Contents

Overview	3
User Engagement Approach	3
Testing Scope	3
Roles and Responsibilities	4
User Story Testing Progress	7
Agency Business System Testing Progress	8
End User Testing.....	9
UAT Engagement Risks	10
Appendix.....	12

Overview

The Florida Department of Health (DOH) is working with all divisions and bureaus within the agency to design and implement Florida PALM. User Acceptance Testing (UAT), a critical part of this process, began in February 2026 and will continue through November 2026. The previously created and revised UAT Training Plan outlines the details regarding UAT, including test execution, testing scope, and success criteria. The ongoing process of UAT has provided valuable insight regarding PALM's future impact on business processes and day-to-day operations within DOH.

User Engagement Approach

Testing Scope

DOH is using UAT to test and validate all updated agency business processes, agency business system remediation, end user role assignments, agency-specific configurations, and reporting needs and solutions. Agency-specific end user training and education materials are in the process of being developed and are almost complete. UAT has also been used by DOH to provide end users with exposure to and practice in Florida PALM in preparation for go-live in January of 2027.

Test Cases / Standard Operating Procedures (SOPs)

End users report their testing results to the DOH PALM Team on a weekly basis. These results are then calculated and displayed on the UAT Testing Metric Dashboard on DOH's SharePoint site. Test Case Completion, Rate/Progress, and Hours Spent Testing are documented within the dashboard.

DOH began UAT testing on February 2, 2026, and currently has tested 1049 business process test cases across 14 modules. The predominant testing has occurred in Budget Management, Cash Control, Disbursements Management, and Payroll Management; however, all modules, with the exception of four, have been tested by DOH subject matter experts (SMEs). The four modules which have not been tested (Banking, Grants Management, Contracts Management, and System Access and Controls) are smaller modules with limited functionality (e.g., the Banking module is primarily request forms, and Systems Access and Controls primarily reports functionality regarding users). The Contract and Grants Management modules are limited to FACTS exempt agencies and DOH is not one of those agencies; therefore, Contract and Grants Management must be established and maintained in FACTS and not in PALM.

- Total of 1,049 test cases that have been tested:
 1. Account Management and Financial Reporting – 50
 2. Budget Management and Cash Control – 322
 3. Disbursements Management – 289
 4. Asset Accounting and Management – 71
 5. Revenue Accounting – 51
 6. Accounts Receivables – 43
 7. Banking – 0
 8. Project Management – 29
 9. Grants Management – 0

- 10. Contracts Management – 0
- 11. Payroll Management – 139
- 12. Inter / Intraunit transactions – 39
- 13. System Access and Controls – 0
- 14. Data Warehouse / Business Intelligence – 16

DOH expects to test approximately 1200 business process test cases in total. Based on the expected test cases, DOH has tested approximately 87.4% (1049 / 1200).

In the remaining UAT end-to-end testing, the DOH intends to complete the remaining 12.6%, or 151, test cases and also retest all of the business process modules focusing specifically on areas that could present potential issues. In addition, testing will be conducted after UAT refresh on Financial Reporting, Carry Forward, Certified Forward, and other related year end processes.

Interface Files

The DOH PALM Team created an application, AFAM PALM Broker (APB), to help DOH business systems successfully upload inbound interface files into Florida PALM. Within the State Health Office there are nine DOH business systems that will interface with PALM and have successfully uploaded test files into APB.

Since the beginning of Cycle 3 Testing (aligning with the beginning of UAT in February):

- 154 inbound files have been uploaded to Florida PALM
- 83 of the inbound files contained no errors on the first upload

These results are demonstrated in the Cycle 3 Interface Testing Spreadsheet (see attached).

Roles and Responsibilities

The roles and responsibilities for the UAT planning, processes, and engagement are defined in the table below.

Name	Role	Responsibility
Robert Herron	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.
Terri Mulkey	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.
Terri Mulkey	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.
Pura Ahler	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.
Sheetal Shidhaye	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.
Patrick VanLandingham	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.
Catina Giles	Training Liaison	• Identify and track agency UAT participants. • Support agency hosted UAT sessions with end users. • Coordinate or lead agency training material development. • Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions
Jennifer Lindsey Patrick VanLandingham	UAT Coordinators	• 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.
Terri Mulkey Jennifer Lindsey Mindy Crisp Sheetal Shidhaye Patrick VanLandingham	Testing Error Triage Team	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation.

Janeann Brown Michael Graddy Todd Grussing Veronica Bishop Val Jefferson Cassandra Barton BaTina Slater Katabia Henry Tamara McElroy Amy Hart Debbie Connell Mary Scott Terri Mulkey Curtis Barker	Subject Matter Experts	• Support UAT planning. • 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 processes, 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.
Reshma Kancharla	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.
Reshma Kancharla	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).
Sudheer Kumar Goriparthi	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.
DOH PALM Integration Technical Team and Sudheer Kumar Goriparthi	Batch Error Contact	• Serve as the primary point of contact for batch errors or change in batch process timing.
CHD Subject Matter Expert Participants	End Users	• Practice related job processes. • Confirm end user role assignments. • Report testing errors and testing progress to SME or UAT Coordinator

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)				
4	6	50	8	All user stories successfully tested
Accounts Receivable (AR)				
9	17	43	2.5	All user stories successfully tested
Asset Accounting and Management (AAM)				
12	15	71	4.5	All user stories successfully tested
Banking (BK)				
1	1	0	0	All user stories successfully tested
Budget Management and Cash Control (BM/CC)				
3	12	322	26	All user stories successfully tested
Contracts Management (CT)				
2	2	0	0	One user story to be tested
Disbursements Management (DM)				
12	44	289	6.5	All user stories successfully tested
Data Warehouse/Business Intelligence (DW/BI)				
N/A	N/A	16	N/A	Testing covered by ADHOC Test Cases
Grants Management (GM)				
1	3	0	0	Three user stories to be tested
Inter/IntraUnit Transactions (IU)				
6	9	39	4	All user stories successfully tested
Payroll Management (PR)				
N/A	N/A	139	N/A	Testing covered by ADHOC Test Cases
Projects Management (PM)				
1	1	29	29	All user stories successfully tested
Revenue Accounting (RA)				
N/A	N/A	51	N/A	Testing covered by ADHOC Test Cases
System Access and Controls (SAC)				
N/A	N/A	0	N/A	Testing covered by ADHOC Test Cases

Agency Business System Testing Progress

Business System Grouping	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	Comments
CORTNE	Complete	Y	In Progress	10/31/2026	
Division of Disability Determinations (DDD)	In Progress	Y	In Progress	10/31/2026	Testing on hold due to POI006*
Enterprise Applications and Support (EAS)	Complete	Y	In Progress	10/31/2026	
Environmental Health	Complete	Y	In Progress	10/31/2026	
Financial Information Reporting System (FIRS)	Complete	Y	In Progress	10/31/2026	
Management Information and Payment System (MIPS)	Complete	Y	In Progress	10/31/2026	
Medical Quality Assurance (MQA)	Complete	Y	In Progress	10/31/2026	
Rehabilitation Information and Management System (RIMS)	In Progress	Y	In Progress	10/31/2026	Testing on hold due to POI006*
Payroll	Complete	Y	In Progress	10/31/2026	
Asset Management System (AMS)	In Progress	Y	In Progress	10/31/2026	Testing on hold due to AMI008**
Contract Management System (CONMAN)	Complete	Y	In Progress	10/31/2026	
Cherwell – People DB	Complete	Y	In Progress	10/31/2026	
Vendor Payment System (VPS)	Complete	Y	In Progress	10/31/2026	

**Interface file POI006 cannot be tested until after the PALM UAT Refresh (August 5th-24th) at which time, the agency will attend Financial Reporting and Carry/Certify Forward In-Person Workshops conducted by the Florida PALM Project and perform interface testing as scheduled by the project.*

*** Interface file AMI008 – Testing began August 2025 and the first file sent was sent in November 2025. As of today we have not had a successful file. The latest SNow ticket*

(UAT0014866) was submitted on 06/26/26 and we had a meeting with the PALM Team on 07/17/26. Issue is still open with PALM Project team.

End User testing will continue for Agency Business Systems through end-to-end testing with PALM.

End User Testing

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	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Accounts Receivables (AR)			
5	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Asset Accounting and Management (AAM)			
4	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Banking (BK)			
5	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Budget Management and Cash Control (BM/CC)			
10	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Contracts Management (CT)			
1	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Disbursements Management (DM)			
16	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Data Warehouse/Business Intelligence (DW/BI)			
5	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Grants Management (GM)			
2	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Inter/IntraUnit Transactions (IU)			
5	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Payroll Management (PR)			
4	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Projects Management (PM)			

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Organization(s) or Agency Business System	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
1	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
Revenue Accounting (RA)			
5	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026
System Access and Controls (SAC)			
2	1-2 hrs. every other week	State Health Office Budget Staff	February 2026 through November 2026

CHD personnel are also testing but DOH is not monitoring and tracking hours tested by CHDs. DOH has rolled out a waved approach of CHD testing so they can be supported as needed by State Health Office, please see the attached wave release testing schedule for CHDs.

The number of CHD personnel in the UAT environment was approximately 217.

UAT Engagement Risks

- 1) Subject Matter Experts (SMEs) are currently unable to test the full range of system functionality. Several required controls are either missing or not accessible to SMEs, which restricts their ability to conduct comprehensive testing. Consequently, SMEs are gaining knowledge only within a limited scope and are not able to develop a complete understanding of the end-to-end PALM process.
- 2) ServiceNow (Snow) Tickets and issues/clarifications take a long time to be addressed by the PALM Team. Initially tickets were closed automatically within three days if not addressed, and now they are closed within five days.

Example:

- a) DOH submitted three separate SNow tickets for data missing in ARI024 before receiving the necessary clarification.
 - 1) UAT0013523 – 05/27/26
 - 2) UAT0014685 – 06/10/26
 - 3) UAT0014096 – 06/22/26
- b) Interface file AMI008 – Testing began August 2025 and the first file sent was sent in November 2025. As of today we have not had a successful file. The latest SNow ticket (UAT0014866) was submitted on 06/26/26 and we had a meeting with the PALM Team on 07/17/26. Issue is still open with PALM Project team.
- 3) Enterprise Applications (EA) continues to experience significant challenges related to testing and data integration with PALM. Our team has encountered ongoing difficulties in

communicating these issues to EA and has observed limited follow-through and corrective action. At this time, there is no effective coordination or “handshake” between EA, the agency, and PALM, which inhibits issue resolution and limits our ability to achieve the intended integration outcomes.

Appendix

File	Description	Attachment
APB Inbound Interface Directory	Spreadsheets showing inbound interface testing progress and results.	 APB_Inbound_Interface_Directory_Cycle_3
CHD UAT Schedule	Documentation demonstrating waves of CHD testing during UAT.	 CHD UAT Schedule.xlsx
CHD SME Participants	List of CHD SMEs Participants	 CHD UAT SME Participants.xlsx