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TO: Executive Office of the Governor, The Honorable Ron Desantis ATTN: Mrs. Leda Kelly, Director, Office of Policy and Budget

Florida Senate ATTN: Senator Ed Hooper, Chairman, Senate Appropriations Committee

Florida House of Representatives ATTN: Representative Lawrence McClure, Chairman, House Budget Committee

Mr. Jimmy Cox, Director, Florida PALM Project

SUBJECT: Florida PALM User Acceptance Engagement Testing Plan

Pursuant to Chapter 2025-198, Laws of Florida *GAA-2025-26, the Florida Department of Veterans' Affairs respectfully submits its Florida PALM User Acceptance Engagement Testing Plan for your review.

If you have any questions regarding any matter covered by the document, please contact Chief of Staff, Al Carter at (727) 518-3202 or Cabinet and Legislative Affairs Director, Roy Clark at (850) 728-2349.

James S. Hartsell
Major General, United States Marine Corps (Ret.)
Executive Director

Encls:
Florida PALM User Acceptance Engagement Testing Plan

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

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Overview

The Florida Department of Veterans' Affairs (FDVA) User Acceptance Testing (UAT) Engagement Plan outlines the Agency's strategy for expanding end user participation in Florida PALM UAT following completion of the initial Subject Matter Expert (SME) testing effort.

Since February 2026., FDVA SMEs have successfully completed the initial phase of UAT by developing agency-specific User Stories, and validating the majority of applicable Florida PALM Activities. Nearly all applicable Activities have been successfully executed at least once. Remaining testing is limited primarily limited to fiscal year-end processes that depend upon refreshed conversion data or additional Project guidance.

Following the August 7, 2026 UAT Refresh, existing UAT participants will complete testing of all remaining fiscal year-end and outstanding Activities by September 7, 2026. FDVA will then expand testing to all sixty-four (64) end users. All end users will be provided with the necessary access and materials, trained, and actively testing by November 1, 2026. Each end user will successfully execute assigned Activities by December 1, 2026, and the Agency will complete at least two (2) successful executions of every applicable Florida PALM Activity by December 11, 2026.

Although these milestones establish the agency's planned testing objectives, FDVA will continue UAT activities through Florida PALM go-live as new functionality, updated business processes, or revised Project guidance becomes available.

User Engagement Approach

FDVA will utilize a phased, competency-based approach to end user engagement that builds upon the testing completed by agency Subject Matter Experts.

After completion of the remaining SME testing effort, FDVA will progressively onboard additional end users into the UAT environment. Prior to testing, participants will complete agency-led training covering Florida PALM navigation, testing expectations, error reporting procedures, agency business processes, and use of agency-developed training materials and process documentation.

Business area supervisors will coordinate with Agency Project staff to assign Activities based on each employee's typical responsibilities. Every assigned Activity must be successfully completed at least once by the assigned end user. Testing will begin with common and mission-critical Activities before expanding to less frequently performed Activities.

Initial testing assignments will focus on high-volume, mission-critical business process and Activities to establish user proficiency before progressing to less frequently performed Activities. Testing results will be continuously evaluated throughout execution to identify knowledge gaps, reinforce competency through repeated execution, and improve overall operational readiness.

FDVA will consider the UAT engagement effort successful when:

- Every applicable Florida PALM Activity has been successfully executed at least once by an experienced UAT participant.
- All 64 planned end users have been provisioned, trained, and actively participating in UAT by November 1, 2026.
- Every participating end user has successfully executed each assigned Florida PALM Activity at least once by December 1, 2026.
- Every applicable Florida PALM Activity has been successfully executed a minimum of two times by December 11, 2026.

Testing Scope

Following the August 7, 2026 UAT environment refresh, FDVA will:

- Complete remaining testing of outstanding Activities by September 7, 2026.
- Train and onboard all participating end users no later than November 1, 2026.
- Require each participating end user to successfully execute every assigned Florida PALM Activity at least once by December 1, 2026.
- Achieve a minimum of two (2) successful executions of every applicable Florida PALM Activity by December 11, 2026.
- Continue monitoring testing progress using the agency's User Story Inventory, User Story Activity Coverage documentation, Monthly Progress Reports, and agency testing trackers to ensure complete coverage of applicable Florida PALM Activities.

Roles and Responsibilities

Table 1.1: 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.	• Primary: Al Carter, Chief of Staff • Backup: Linda Rizzo, Director of Administration
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.	• Primary: Linda Rizzo, Director of Administration • Backup: Shannan Lakis, Fiscal Officer
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.	• Primary: Nhora Chann, Sr. Management Analyst II • Backup: Shannan Lakis, Fiscal Officer
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.	• Primary: Dr. Teresa Stillwell, Director of IT • Backup: Romelle Dials, Data Center Director

Role	Responsibility	Resources
	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.	- Primary: Nhora Chann, Sr. Management Analyst II - Backup: Shannan Lakis, Fiscal Officer
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.	- Primary: Al Carter, Chief of Staff - Backup: Linda Rizzo, Director of Administration - Backup: Katie DiDio, Lead Business Analyst (C) - Backup: Elizabeth Houghtaling, Management Analyst II
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.	- Primary: Nhora Chann, Sr. Management Analyst II - Backup: Linda Rizzo, Director of Administration - Shannan Lakis, Fiscal Officer - Erin Pierce, Professional Account Specialist - Annemarie Whalen, Budget Analyst C - Billie Jo Grassinger, Accounting Services Administrator - Jerry LaCroix, Budget Analyst - Yaimaris Cuenca, Budget Management & Cash Control

Role	Responsibility	Resources
UAT Coordinator	- Track and confirm testing progress. - Lead the Testing Error Triage Team. - Serve as the primary point of contact with the Florida PALM Project team for reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline.	- Primary: Katie DiDio, Lead Business Analyst (C) - Backup: Elizabeth Houghtaling, Management Analyst II
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities. - Review testing errors to determine resolution or need for escalation.	- Primary: Nhora Chann, Sr. Management Analyst II - Backup: Romelle Dials, Data Center Director
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.	See Table 1.2 in appendix
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.	- Primary: Eriola Musollari, Professional Accountant - Primary: Cerise Adams, Professional Accountant
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).	- Primary : Romelle Dials, Data Center Director - Backup: Neeta Patel, Programmer III
File Manager	Serve as the primary point of contact for interface testing.	Primary: Nhora Chann, Sr.

Role	Responsibility	Resources
	Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM.	Management Analyst II Backup: Romelle Dials, Data Center Director
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing.	- Primary: Nhora Chann, Sr. Management Analyst II - Backup: Romelle Dials, Data Center Director
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.	See Table 1.2 in Appendix.

User Story Testing Progress

Remaining untested User Stories are attributable to UAT environment limitations, fiscal year-end processing dependencies, or pending Project guidance.

Overall, FDVA has successfully tested the majority of applicable User Stories across all Business Process Grouping, with the remaining work concentrated in fiscal year-end and carry forward processes requiring the August 7, 2026 UAT Refresh, as well as Project-dependent functionality. FDVA will complete testing as the required information becomes available.

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)				
17	17	12	102	
Accounts Receivable (AR)				
24	16	12	61	
Asset Accounting and Management (AAM)				
19	19	14	80	
Banking (BK)				
6	3	2	9	
Budget Management and Cash Control (BM/CC)				
7	7	6	99	
Contracts Management (CT)				
0	0	0	0	FDVA monitors and manages contracts in FACTS
Disbursements Management (DM)				
22	22	17	150	

Number of Activities	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Number of Times the User Stories Have Been Tested	Status Comments
Data Warehouse/Business Intelligence (DW/BI)				
6	6	5	15	
Grants Management (GM)				
0	0	0	0	FDVA monitors and manages grants in FACTS
Inter/IntraUnit Transactions (IU)				
13	13	10	87	
Payroll Management (PR)				
26	24	22	171	
Projects Management (PM)				
10	10	10	228	
Revenue Accounting (RA)				
0	0	0	0	All project recommended RA Activities relate to invoice production for “customers”; FDVA does not produce invoices/does not have “customers”.
System Access and Controls (SAC)				
3	3	3	9	

Agency Business System Testing Progress

FDVA currently maintains two (2) agency business systems requiring validation during UAT. End-to-end testing will ensure successful integration with Florida PALM interfaces and supporting Agency processes.

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
Strategic Asset Management System (AMI004)	Complete	Y	Complete	06/30/2026
Strategic Asset Management System (AMI008)	In Progress	Y	In Progress	10/01/2026

End User Testing

End-user participation represents the final phase of FDVA’s UAT strategy. Participants will validate business processes within their normal functional responsibilities while gaining practical experience using Florida PALM prior to production implementation.

Table 4.1: Agency UAT/Testing Participants

Business Unit	Approver	Processor
Disbursement Management	BillieJo Grassinger, Accounting Services Administrator	Zailet Martinez, Professional Accountant Supervisor
Vendor/Supplier	BillieJo Grassinger, Accounting Services Administrator	Jerry LaCroix, Budget Analyst B
Budget Management & Cash Control	Annemarie Whalen, Budget Analyst C	Jerry LaCroix, Budget Analyst B
	BillieJo Grassinger, Accounting Services Administrator	Zailet Martinez, Professional Accountant Supervisor
	Yaimaris Cuenca, Financial Specialist Supervisor	Jose Sosa, Professional Accountant Specialist
Accounts Receivable	BillieJo Grassinger, Accounting Services Administrator	Zailet Martinez, Professional Accountant Supervisor
Inter/IntraUnit Transactions	Yaimaris Cuenca, Financial Specialist Supervisor	Jose Sosa, Professional Accountant Specialist
	BillieJo Grassinger, Accounting Services Administrator	Zailet Martinez, Professional Accountant Supervisor
Asset Accounting & Management	Yaimaris Cuenca, Financial Specialist Supervisor	Sean Frazier, Professional Accountant Specialist
Projects Management	Jerry LaCroix, Budget Analyst B	Yaimaris Cuenca, Financial Specialist Supervisor
Payroll Management	James Uliasz, HR Officer	Austin Waugh, HR Manager
	Nhora Chann, Sr. Management Analyst II	Erin Pierce, Professional Account Specialist
System Access & Controls	Eriola Musollari, Professional Accountant	Cerise Adams, Professional Accountant
Account Management & Financial Reporting	Annemarie Whalen, Budget Analyst C	Jerry LaCroix, Budget Analyst B
	Yaimaris Cuenca, Financial Specialist Supervisor	Jose Sosa, Professional Accountant Specialist

Table 4.2: End User Testing by Business Process Grouping

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment Per Week	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)			
10	1-3 hrs.	Fiscal Services	August 2026 – Go-live
Accounts Receivables (AR)			
33	30-60 mins.	Fiscal Services	August 2026 – Go-live
Asset Accounting and Management (AAM)			
7	1-2 hrs.	Fiscal Services	August 2026 – Go-live
Banking (BK)			
N/A	N/A	N/A	N/A
Budget Management and Cash Control (BM/CC)			
6	2-4 hrs.	Fiscal Services	August 2026 – Go-live
Contracts Management (CT)			
N/A	N/A	N/A	N/A
Disbursements Management (DM)			
13	2-4 hrs.	Fiscal Services	August 2026 – Go-live
Data Warehouse/Business Intelligence (DW/BI)			
3	As needed to validate reporting supporting assigned Activities	Fiscal Services	August 2026 – Go-live
Grants Management (GM)			
N/A	N/A	N/A	N/A
Inter/IntraUnit Transactions (IU)			
23	1-2 hrs.	Fiscal Services	August 2026 – Go-live
Payroll Management (PR)			
12	1-2 hrs.	Fiscal Services	August 2026 – Go-live
Projects Management (PM)			
7	1-2 hrs.	Fiscal Services	August 2026 – Go-live
Revenue Accounting (RA)			
N/A	N/A	N/A	N/A
System Access and Controls (SAC)			
2	As needed	Fiscal Services	August 2026 – Go-live

UAT Engagement Risks

Project Risks:

Project Changes to Florida PALM Topics/Activities

The Florida PALM Project may introduce new Activities, consolidate existing Activities, retire Activities, or publish updated process documentation after Agency testing has begun. These changes may require updates to agency User Stories, process documentation, testing assignments, and testing schedules.

- Mitigation Strategy: FDVA will continuously monitor Florida PALM Project communications, update Agency testing documentation as necessary, reprioritize testing assignments, and execute additional testing as required to ensure continued alignment with Project expectations.

Outstanding Fiscal Year-End Activities

Completion of remaining fiscal year-end Activities depends upon successful completion of the August 7, 2026 UAT environment refresh and availability of updated conversion data and Project process documentation.

- Mitigation Strategy: Existing UAT participants will prioritize execution of all remaining fiscal-year end Activities immediately following the UAT environment refresh with a target completion date of September 7, 2026.

Agency Risks:

End User Availability

Operational responsibilities may affect the amount of time available for end users to participate in UAT activities.

- Mitigation Strategy: Business area supervisors will coordinate testing schedules with operational workloads, monitor participation, and adjust testing assignments as necessary to ensure agency milestones are achieved.

End User Readiness

Many participants entering UAT after the August refresh will have limited experience using Florida PALM and may require multiple testing attempts before successfully completing assigned Activities.

- Mitigation Strategy: FDVA will provide instructor-led training, agency-developed process documents, Florida PALM Knowledge Center resources, and SME support throughout the testing effort. End users will continue testing assigned Activities until at least one (1) successful execution has been achieved.

Asset Inventory (AMI008) Validation

Validation of the Asset Management physical inventory process depends upon successful retrieval and validation of the AMI008 interface file. FDVA's decentralized asset inventory and annual inventory schedule increase the complexity of completing this testing.

- Mitigation Strategy: FDVA will continue to work with the Florida PALM Project and vendors to resolve AMI008 issues and perform testing using available resources.

Remote FDVA Facility End User Support and Training

FDVA will have one Florida PALM end user located at each of its nine (9) veteran nursing homes/facilities. Because these end users are geographically dispersed and are the only Florida PALM users at their respective facilities, the Agency's ability to provide in-person training, support, and oversight during UAT is limited.

- Mitigation Strategy: FDVA will provide virtual support through Microsoft Teams meetings, agency-developed training materials, and process documents. Training completion and engagement will be monitored using available tracking tools to identify end users who may require additional support. Risk is further reduced because each remote end user is responsible for performing only one (1) assigned Florida PALM Activity during UAT.

Production Readiness

End users may successfully complete required testing while still requiring additional practice with infrequently performed business processes.

- Mitigation Strategy: FDVA will continue voluntary practice sessions, refresher training, and targeted coaching throughout production employment.

Note: Testing priorities may be adjusted throughout the engagement period based on Project-directed changes, identified risks, defect resolution, or updates to Florida PALM business processes, Topics, and/or Activities.

Appendix

Table 1.5: Subject Matter Experts (SMEs) and End Users

Position	Name	Location	Subject Matter Expert
Professional Accountant	VACANT	Headquarters (Largo)	No
Accountant IV - Health Insurance Billing	Debra Bolden	Headquarters (Largo)	No
Business Manager II	Kelli Champagne	Remote Facility (Bennett)	No
Sr. Management Analyst II - FL Palm Supervisor	Nhora Chann	Headquarters (Largo)	Yes
Budget Analyst	Danna Claypool	Headquarters (Largo)	No
Accountant II	Jawanna Coker	Remote Facility (Jenkins)	No
Business Manager II	Omayra Colon	Remote Facility (Lake Baldwin)	No
Accountant II	William Creekbaum	Remote Facility (Ardie Copas)	No
Financial Specialist / Supervisor	Yaimaris Cuenca	Headquarters (Largo)	Yes
Accountant III	Karen Daniele	Headquarters (Largo)	No
Business Manager II	Vicki Dickerson	Remote Facility (Ardie Copas)	No
Business Analyst (Contractor)	Katie Didio	Headquarters (Largo)	Yes

Accountant II	Cori Downs	Remote Facility (Lassen)	No
Accountant IV - Health Insurance Billing	Tyree Drayton	Headquarters (Largo)	No
Grants Specialist V	Sandra Engeloff	Headquarters (Largo)	No
Business Manager II	Joshua Firebaugh	Remote Facility (Baldomero)	No
Professional Accountant Specialist	Sean Frazier	Headquarters (Largo)	No
Professional Accountant	Lisa Glenn	Headquarters (Largo)	No
Accountant II	Fay Gonzales	Remote Facility (Bennett)	No
Accounting Services Administrator	Bille Jo Grassinger	Headquarters (Largo)	Yes
Management Analyst II	Elizabeth Houghtaling	Headquarters (Largo)	Yes
Personnel Services Specialist	Ashley Ingle	Headquarters (Largo)	No
Accountant III	Natalia Ivantsova	Headquarters (Largo)	No
Health Data Analyst	Adean King	Headquarters (Largo)	No
Professional Accountant	Xhoni Kodheli	Headquarters (Largo)	No
Human Resource Consultant	Kenneth Kovacs	Headquarters (Largo)	Yes
Budget Analyst B	Jerry Lacroix	Headquarters (Largo)	Yes
Fiscal Officer	Shannan Lakis	Headquarters (Largo)	No

Health Operations Manager - SES	Melissa Mahoney	Headquarters (Largo)	No
Human Resource Analyst	Kainoa Maka	Headquarters (Largo)	No
Management Review Specialist	Lindsay Mallard	Headquarters (Largo)	No
Accountant IV Health Insurance Billing	Ivanska Manzano	Headquarters (Largo)	No
Professional Accountant Supervisor	Zailet Martinez	Headquarters (Largo)	Yes
Business Manager II	Jamie McDaniel	Remote Facility (Jacobson)	No
Accountant IV	Olga Medovnikova	Headquarters (Largo)	No
Personnel Services Supervisor/HR	Neha Mehta	Headquarters (Largo)	No
Accountant IV	Joan Mireles	Headquarters (Largo)	No
Accountant II	Nilza Montanini	Remote Facility (Lake Baldwin)	No
Human Resource Analyst	Brenda Ojeda	Headquarters (Largo)	No
Professional Accountant	Michelle Passenger	Headquarters (Largo)	No
Accountant IV-Health Insurance Billing	VACANT	Headquarters (Largo)	No
Accountant IV	Rinkesh Patel	Headquarters (Largo)	No

Professional Accountant Specialist	Erin Pierce	Headquarters (Largo)	Yes
Accountant IV	Zachery Pleasant	Headquarters (Largo)	No
Accountant IV	Karen Purslow	Headquarters (Largo)	No
Accountant II	Judithe Richards	Remote Facility (Baldomero)	No
Director Of Administration	Linda Rizzo	Headquarters (Largo)	No
Senior Management Analyst I	Darlene Robinson	Headquarters (Largo)	No
Business Manager II	Cattibell Rodriguez	Remote Facility (Lassen)	No
Human Resource Consultant	Tammy Rubino	Headquarters (Largo)	No
Accountant II	Deborah Santoro	Remote Facility (Nininger)	No
Purchasing Supervisor	Nicholas Scire	Headquarters (Largo)	No
Business Manager II	Donna Scrima	Remote Facility (Nininger)	No
Business Manager II	Paula Smith	Remote Facility (Sims)	No
Professional Accountant Specialist	Jose Sosa	Headquarters (Largo)	No
Budget Analyst	Ronda Stansbury	Headquarters (Largo)	No
Business Manager II	Patricia Stephenson	Remote Facility (Jenkins)	No

Business Manager III	Georgina Thompson	Headquarters (Largo)	No
Accountant II	Madison Vanslambrouck	Remote Facility (Jacobson)	No
Accountant III	Thais Veghte	Headquarters (Largo)	No
Accountant II	Satin Washington	Remote Facility (Sims)	No
Human Resource Manager	Austin Waugh	Headquarters (Largo)	No
Budget Analyst C / Supervisor	Annemarie Whalen	Headquarters (Largo)	Yes