



Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Prepared for: **Floria PALM Project Team**

Prepared by:
FLORIDA FISH AND WILDLIFE
CONSERVATION COMMISSION

Table of Contents

1. Overview	3
2. User Engagement Approach	3
2.1 Testing Scope	3
2.1.1 Roles and Responsibilities	4
2.1.2 User Story Testing Progress	7
2.1.3 Agency Business System Testing Progress	8
2.2 End User Testing	8
3. UAT Engagement Risks	11
4. Appendix – End Users	12

1. Overview

This document explains key elements, timelines, scope, and stakeholders related to the Florida PALM User Acceptance Testing (UAT) activities. This Plan is meant to cover end user engagement with Florida PALM functionality.

2. User Engagement Approach

In this section we will describe FWC's approach to engaging end users in the user acceptance testing efforts. In the sections below, we will describe the testing scope and end user testing, including progress to-date.

2.1 Testing Scope

The scope of this UAT is limited to testing applications and processes directly related to Florida PALM enhancements. Modifications to applications or processes that are not directly related to Florida PALM will be considered out of scope.

FWC's objectives during User Acceptance Testing are as follows:

1. Ensure the impacted FWC business processes are sufficiently tested and all critical defects within the Florida PALM application are resolved before going live.
2. Ensure the interface functionality between FWC and Florida PALM meets FWC's business needs.
3. Ensure the FWC business systems are sufficiently tested and all critical defects are resolved before the Florida PALM go-live date.
4. Ensure FWC end-user role assignments allow the appropriate business user to perform their job functions
5. Ensure FWC reporting needs are met by sufficiently testing the reports and all critical defects within the Florida PALM application are resolved before going live.
6. Ensure the appropriate business users participate in UAT.
7. Develop a measurable, improvable, repeatable, and manageable test process.
8. Confirm consistency and quality in design, coding, and implementation within the FWC applications.
9. Confirm FWC change impacts on people, processes, technology, and data
10. Implement a defect resolution process to identify, prioritize, resolve, and report defects in a consolidated and accurate format.
11. Develop FWC-specific end-user training and education materials

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

2.1.1 Roles and Responsibilities

Each team member's role and responsibility is discussed in the following section.

Role Name	Responsibilities	Person(s) Assigned
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 PALM project. • Request, provide, and assign appropriate resources as needed and remove obstacles to complete UAT activities successfully.	Jessica Crawford
Agency Liaison	• Collaborate closely with the UAT Coordinator and provide updates to the Agency Sponsor. • Report agency-specific Florida PALM risks and issues to the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Laurie Kershaw
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 the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Charlotte Jerrett
Technical Liaison	• Identify and confirm all agency business systems to be tested. • Confirm agency business systems are ready for complete integration testing. • Coordinate agency business system remediation as needed based on testing results. • Report agency-specific Florida PALM risks and issues to the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Mike Turner

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Role Name	Responsibilities	Person(s) Assigned
Project Management Liaison	• Capture and track Project- and internal agency-driven UAT activities and maintain awareness of progress and due dates. • Report agency-specific Florida PALM risks and issues to the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Laurie Kershaw
Change Management Liaison	• Develop and maintain a UAT communication plan. • Support the identification and tracking of agency UAT participants. • Report agency-specific Florida PALM risks and issues to the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Tanya Maphis
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 the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions	Shannon Knowles
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, and ensuring coordination of agency efforts with the overall UAT timeline.	Laurie Kershaw
Testing Error Triage Team	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation.	Charlotte Jerrett Tanya Maphis Holly Hill Clay White Anna Yawn Chris Bowling Rachel Korade
Subject Matter Experts	• Support UAT planning (e.g., user stories/script development, agency-specific materials development). • Participate as first end users in UAT.	AAM-Chris Bowling AMFR- Holly Hill AR-Holly Hill

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Role Name	Responsibilities	Person(s) Assigned
(Assigned per Business Process Grouping)	- Conduct agency-hosted UAT sessions with end users. - Serve as the 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 the UAT Coordinator. - Support end-user understanding during UAT and after go-live. - Report agency-specific Florida PALM risks and issues to the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions	BK-Holly Hill BM/CC-Clay White CT-Rachel Korade DM-Tanya Maphis DW/BI-Holly Hill GM-Holly Hill IU-Tanya Maphis PM-Clay White PR-Anna Yawn RA-Holly Hill SAC-Tanya Maphis
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 the Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.	Crystal Wood Taylah Tolliver
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).	Westley Farmer Mike Turner
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	Sherry Lake
Batch Error Contact	Serve as the primary point of contact for batch errors or changes in batch process timing.	Sherry Lake
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.	This list is available in the Appendix

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

2.1.2 User Story Testing Progress

Business Process Grouping	Number of Activities	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Status Comments
Account Management and Financial Reporting (AMFR)	17	51	34	Testing is in progress
Accounts Receivable (AR)	24	72	48	Testing is in progress
Asset Accounting and Management (AAM)	19	57	38	Testing is in progress
Banking (BK)	6	18	12	Testing is in progress
Budget Management and Cash Control (BM/CC)	7	21	14	Testing is in progress
Contracts Management (CT)	1	3	2	Testing is in progress
Disbursements Management (DM)	22	66	44	Testing is in progress
Data Warehouse/Business Intelligence (DW/BI)	6	18	12	Testing is in progress
Grants Management (GM)	1	3	2	Testing is in progress
Inter/IntraUnit Transactions (IU)	11	33	22	Testing is in progress
Payroll Management (PR)	25	75	50	Testing is in progress

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Business Process Grouping	Number of Activities	Unique Number of User Stories	Number of Successfully Tested Unique User Stories	Status Comments
Projects Management (PM)	10	30	20	Testing is in progress
Revenue Accounting (RA)	2	6	4	Testing is in progress
System Access and Controls (SAC)	3	9	6	Testing is in progress

2.1.3 Agency Business System Testing Progress

Business System Name	Cycle 3 Status (Not Started, In Progress, Completed)	End User Testing Needed (Yes, No)	Status of End User Testing (Not Started, In Progress, Completed)	Planned or Actual Completion Date of End User Testing
Invoice Tracking System	In Progress	Yes	In Progress	10/30/2026
Property System	In Progress	Yes	In Progress	10/30/2026

2.2 End User Testing

Business Process Grouping	Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Division/Office	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Account Management and Financial Reporting (AMFR)	9	5 hours per week per person	OED	February 2026 through November 2026
Accounts Receivable (AR)	10	5 hours per week per person	OED	February 2026 through November 2026

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Business Process Grouping	Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Division/Office	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Asset Accounting and Management (AAM)	19	5 hours per week per person	OED	February 2026 through November 2026
Banking (BK)	9	5 hours per week per person	OED	February 2026 through November 2026
Budget Management and Cash Control (BM/CC)	34	5 hours per week per person	DLE FFM FWRI HGM HSC MFM OED	February 2026 through November 2026
Contracts Management (CT)	25	5 hours per week per person	OED	February 2026 through November 2026
Disbursements Management (DM)	77	5 hours per week per person	DLE FFM FWRI HGM HSC MFM OED	February 2026 through November 2026
Data Warehouse/Business Intelligence (DW/BI)	97	5 hours per week per person	DLE FFM FWRI HGM HSC MFM OED	February 2026 through November 2026

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

Business Process Grouping	Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Division/Office	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Grants Management (GM)	6	5 hours per week per person	OED	February 2026 through November 2026
Inter/IntraUnit Transactions (IU)	51	5 hours per week per person	DLE FFM FWRI HGM HSC MFM OED	February 2026 through November 2026
Payroll Management (PR)	8	5 hours per week per person	OED	February 2026 through November 2026
Projects Management (PM)	26	5 hours per week per person	DLE FFM FWRI HGM HSC MFM OED	February 2026 through November 2026
Revenue Accounting (RA)	2	5 hours per week per person	OED	February 2026 through November 2026
System Access and Controls (SAC)	2	5 hours per week per person	OED	February 2026 through November 2026

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

3. UAT Engagement Risks

Status	Primary Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue
Open and Monitoring	Training	Resistance to change	Stable	4 (Medium/Medium)	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact	If folks don't get on board with the changes, we will have issues once we go live
Open and Monitoring	Staffing/Resource Availability	Limited subject matter expert (SME) availability	Stable	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	If SMEs aren't available to learn and test the system, we will have issues once we go live.
Open and Monitoring	Staffing/Resource Availability	Team Attrition	Stable	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	If team members leave, they take all their knowledge with them, making it that much harder for whoever is left once we go live.
Open and Monitoring	User Acceptance Testing	There is no communication plan between PALM, Enterprise systems and the agencies. FWC is unable to accurately define impacts to processes and potentially agency business systems.	Stable	4 (Medium/Medium)	1. FWC Analysis, design, and system remediation is being based on calculated assumptions	If we learn of enterprise changes too late in the process, we will be at risk for not being able to perform the needed activities within those applications at go live.

Florida PALM UAT Engagement Plan for Financials, Payroll, Data Warehouse/Business Intelligence

4. Appendix – End Users

First Name	Last Name	First Name	Last Name	First Name	Last Name
Jessica	Bass	Holly	Hill	Jessica	Rivera Gutierrez
Peter	Begin	Kerrigan	Hollis	Joseph	Scholtz
Chinquetta	Benton	Barbara	Howell	PAUL	SCHULZ
Rachel	Best	Candace	James	Ashley	Scruggs
Holli	Blakley	Kimneshia	James	Maria	Segura-Carnes
Christopher	Bowling	Charlotte	Jerrett	Anthony	Sigmundik
Josephine	Bratcher	Faith	Johnson	Christine	Simmons
Keywana	Brooks	Tracie	Kelly	Sean	Singletary
Annette	Brown	Melissa	Lynch	Cory	Smith
Ryan	Cooper	Taylor	Mann	Umeda	Spencer
Timothy	Coughlin	Tanya	Maphis	Angelina	Stoliker
Chama	Cronin	Rachel	Massey	Philip	Stone
Alexandria	Davis	Neander	McBride	Morgan	Strickland
KRISTINA	DAVIS	Shelby	McCarty	Ashlye	Taylor
LAUREN	DAVIS	Daniel	McCormick	Emily	Teegen
Meltonia	Dickey	Stephanie	McDonald	Taylah	Tolliver
Ingrid	Easom	Jinisha	Mehta	Richard	Ulrich
Dale	Eastmond	Loren	Minutoli	Rhonda	Ward
Valerie	Edenfield	Candace	Moody	Gloria	Watford
Gina	Embrey	Donald	Moore	Christopher	White
David	Emery	Jessica	Morales	Hope	White
Crystal	Enfinger	Joseph	Morcate	Brooke	Wilke
Evelyn	Ethridge	Keith	Nelson	Julius	Willis
James	Feiertag	Adam	Neuse	Stacy	Wilson
Whitney	Finaldi	Barlowe	Nix	Crystal	Wood
Debra	Finch	Melisa	Nobles	Melinda	Workman
Kendall	Frack	Emily	Oconnor	Kisha	Wright
Shannel	Franklin	Gianelys	Pereira	Sarah	Wright
Deborah	Furrow	Johanna	Poston	Anna	Yawn
John	Godwin	Aubrey	Putnam		
Audra	Griffin	Shakera	Rahming		
Rosa	Guthrie	Diamond	Redden		
Justin	Haire	Kristin	Reshard		
Kennaey	Hester	Brenda	Rivera		