

State of Florida
Department of Environmental
Protection



UAT Engagement Plan

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

Table of Contents

Overview	3
User Engagement Approach.....	4
Testing Scope	4
People.....	4
Processes.....	4
Technology	5
Data	5
Roles and Responsibilities	6
User Story Testing Progress	9
Agency Business System Testing Progress.....	10
End User Testing.....	11
UAT Engagement Risks	12

Overview

The Department of Environmental Protection (DEP) is participating in agency User Acceptance Testing (UAT) beginning in February 2026 to prepare for the next major implementation of Florida PALM in January 2027. UAT includes testing the financial accounting, payroll, and Data Warehouse/ Business Intelligence (DW/BI) processes, enterprise system processes, and Agency Business Systems (ABS). Testing will include all processes comprehensively from end-to-end, including the integration of necessary agency business systems and enterprise systems. The full end-to-end testing with enterprise partners may be time-limited depending on the enterprise system.

The UAT effort includes independent and coordinated testing activities between the Project, enterprise partners (entities and systems) and DEP.

UAT will be used to:

- Test and validate:
 - Updated agency business processes from end to end, including processes that integrate with enterprise systems,
 - Business system remediation (where applicable),
 - End user role assignments,
 - Agency-specific configurations, and
 - Reporting needs and solutions
- Develop agency-specific end user training and education materials
- Provide all end users exposure to, and practice in, Florida PALM (i.e., host agency-led UAT sessions)
- Confirm agency change impacts on people, processes, technology and data
- Include system-testing and validation of all remediated ABS (Tier 1, 2, and 3)

UAT has been conducted to date to ensure DEP Subject Matter Experts (SME) become familiar with new processes, data, as well as updated functions of PALM, enterprise systems, and agency business systems. Continued UAT efforts will build thorough understanding and confidence to allow SMEs to train agency end users prior to go-live.

DEP will continue UAT through the PALM UAT refresh in August 2026 and will include ABS testing and other non-PALM testing scenarios, in addition to planning and developing user resources for testing and training. DEP will use the full scope of PALM and enterprise system UAT timeframes through October 2026 to ensure SMEs and end user testers have confidently tested and understand the systems. This confidence will prepare SMEs to finalize reference and training documentation in addition to performing the end user training to staff not conducting testing.

Independent of the Project Readiness Workplan (RW)-tasks, DEP will conduct ABS UAT testing for all agency business systems (Tier 1,2, and 3) with business SMEs, and OTIS supporting the effort. Completion of UAT activities are tied to [Agency Readiness Certifications](#) and will support information provided to the Executive Steering Committee (ESC) to inform the Stage Gate 4 – Agency Readiness decision. The four Agency Readiness Certifications will include Agency Sponsor assertion of the progressive completion of readiness activities, culminating with the final certification, aligning with the conclusion of agency UAT participation.

Deployment and Cutover are planned for November- December 2026, followed by go-live in January 2027.

User Engagement Approach

User engagement began in conjunction with UAT in February 2026. DEP's approach to user-based testing is to educate and build confidence in agency SMEs to allow them to effectively conduct group and individual testing with their employees and end users.

DEP PALM webpages and internal SharePoint pages provide up to date PALM configuration and conversion data to aid testers with the data values to successfully test in PALM. The DEP PALM core team conducted process reviews by module with applicable SMEs to prepare them for the initial UAT testing sessions in addition to the completion of the PALM prerequisite training courses established in People First LMS. Group testing sessions were conducted from February through June with agency SMEs by PALM module to create confidence in testing. As SME testing continues to the UAT refresh, additional end users have been incorporated into testing efforts.

Agency end users participated in an agency PALM "Passport" event where they completed various training activities to prepare them for PALM testing. These activities included the PALM prerequisite training courses, review of the PALM knowledge center, review of DEP's PALM training and resource information, and other knowledge building exercises. Agency SMEs, in coordination with the PALM core team, will conduct additional testing sessions with all end users via team testing, one-on-one testing, and other means to complete agency testing prior to the PALM testing completion data scheduled for October 30, 2026.

DEP is coordinating and tracking testing progress through both the PALM user story inventory and a DEP testing tool which allows staff to be assigned tests and allows managers to monitor and report on testing metrics.

Testing Scope

Testing scope is identified below and broken down by people, processes, technology and data.

People

Testing scope includes the identification of all required testing participants. The primary testing participants will be the future Florida PALM end users. Role Mapping worksheets will be used to continually maintain end user listing as staffing changes occur, or as role changes occur during testing. All testers were role mapped prior to the start of UAT. Changes during the UAT period will be managed by the agency's Security Access Managers (SAMs) and Independent Provider (IdP) SMEs. Additional testing participants will be needed beyond the Florida PALM end users, such as users of related agency business systems or related enterprise systems (e.g., People First, MFMP, Works, FACTS). DEP will coordinate with all testers needed to complete an agency business process from end to end.

Processes

All the existing agency processes and subprocesses, or activities, were documented for potential impacts by PALM. To confirm all the activities that must be tested, DEP

- Analyzed current business practices, documented in the Agency Current State Analysis.
 - RW Task 324 – Complete FLAIR Data Elements Inventory
 - RW Task 325 – Complete Data Security and Access Survey
 - RW Task 326 – Update Current State Agency Business System Inventory and Documentation
 - RW Task 327 – Complete Reports Inventory
 - RW Task 328 – Document Current Agency Business Processes

- Analyzed Florida PALM Design, presented through a series of design workshops, and documented in the [Knowledge Center](#).
 - Business Processes, subprocesses and activities
 - Chart of Account Design
 - Configurations
 - Conversions
 - End user roles, access, and security
 - Interfaces
 - Reports
 - Workflow
- Analyzed the changes to the agency's current state based on Florida PALM design, including changes to people, processes, technology, data.

An inventory of all activities that should be tested in Florida PALM and document changes to people, processes, technology, and data using the Change Analysis Tool (RW Task 560) were created. The Change Analysis Tool was used to support the agency's creation of user stories used for testing.

Technology

Activities outside of the Florida PALM solution are also needed in the scope of UAT, such as activities related agency business systems. A series of RW tasks were completed to update Agency Business System Documentation (RW Tasks 504, 516, 528, 544, and 558). Agency business systems will be tested during full integration testing beginning February 2026 based on documented changes required for PALM.

Data

Critical data changes must be tested and validated. Data considerations include the validation of:

- Agency conversion files and balances
- Agency-specific configuration values
- Reporting needs
- Data access (e.g., applicable end users have access to necessary data)

Converted data (e.g., balances, files) will be reconciled to FLAIR at multiple stages of testing to ensure the data is accurate. A process is also being implemented to maintain clean data, so the cut-over conversion and configuration values accurately reflect the agency's data for testing. The fulfillment of the following set of assumptions will ensure the highest level of process and system testing success.

- PALM Project processes and sub-processes, that will be conducted by the department, are in scope for testing.
- The testing scope for PALM functionality will be included in the processes on the PALM [Knowledge Center website](#) maintained by PALM
- PALM [Interfaces](#), [Conversions](#), [Reports](#), and [System Access and Controls](#) are in scope
- Month-End and Year-End activities are included in testing scope
- All DEP processes and procedures defined in the [Business Process Inventory Smartsheet](#), and impacted by PALM, are tested
- Processes that integrate with other agency business systems (ABS) and enterprise systems (e.g. STMS, MFMP, FACTS, PCard Works, People First, LAS/PBS) will be tested
- The DEP business systems (ABS) documented in the [Business System Inventory](#) in Smartsheet, that will be used with PALM, will be tested

- All forms, spreadsheets, databases, codes and internal/external reports not being retired will be tested
- PALM [Configuration](#) values and combinations will be tested
- PALM [Conversion](#) data will be validated
- PALM Data Warehouse and Business Intelligence (DW/BI) functionality is tested and data validated
- ABS and PALM user access and workflow based on SME and end user access roles will be tested

Roles and Responsibilities

The table below outlines the UAT roles and staff responsible for each task.

Table 1: Agency UAT Roles and Responsibilities

Role	Responsibility	Resources
Agency Sponsor	• Certify readiness to participate in UAT. • Regularly monitor agency UAT progress • Monitor agency risks, issues, and mitigation plans and communicate them to the Project • Request, provide and assign appropriate resources as needed, and remove obstacles to successfully complete UAT activities	Director of Administrative Services
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	Chief of Finance and Accounting
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: Assistance Chief of Finance and Accounting Backup: All managers in the Division of Administrative Services
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	Application Systems Program Manager

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	PALM Project Manager
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	Organizational Development and Engagement Manager
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	Accounting Services Supervisor
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	Assistant Chief of Finance and Accounting and Accounting Services Supervisor
Testing Error Triage Team	- Meet regularly to review progress and discuss upcoming activities - Review testing errors to determine resolution or need for escalation	Assistant Chief of Finance and Accounting, Accounting Services Supervisor, Project Manager
Subject Matter Experts (SME) (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	Division of Administrative Services Managers and Specialized Process Leads

Role	Responsibility	Resources
	- 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	
Security Access Manager (SAM)	- 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	Application Systems Program Manager
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)	Data Processing Manager
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	Data Processing Manager
Batch Error Contact	Serve as the primary point of contact for batch errors or change in batch process timing	Application Systems Program Manager
End Users	- Practice related job processes - Confirm end user role assignment(s). - Report testing errors and testing progress to SME or UAT Coordinator, as appropriate	Included in Table 2 below
Agency Change Champion Network	- Attend DEP PALM meetings to communicate information to managers and peers for impacts to people and processes - Communicate needs and concerns to DEP PALM team	A business and technical liaison from each Division/District/Office

User Story Testing Progress

The table below includes agency information on the number of activities and test scenarios needed to test to ensure coverage of applicable Activities and business processes, and the number of user stories that have been successfully tested so far.

Some PALM activities are based on Year-End Processes. PALM is scheduled to conduct Year-End testing sessions in early September which will allow agencies to confidently test related activities.

Table 2: User Story Testing Progress

Number of Agency Applicable PALM Activities	Unique Number of Agency User Stories	Number of Successfully Tested Agency Unique User Stories	Number of Times the Agency User Stories Have Been Tested
Account Management and Financial Reporting (AMFR)			
17	35	19	64
Accounts Receivable (AR)			
24	36	28	72
Asset Accounting and Management (AAM)			
18	48	36	100
Banking (BK)			
6	6	4	4
Budget Management and Cash Control (BM/CC)			
7	19	14	89
Contracts Management (CT)			
2	4	2	3
Disbursements Management (DM)			
22	78	49	243
Data Warehouse/Business Intelligence (DW/BI)			
5	9	5	27
Grants Management (GM)			
2	2	1	5
Inter/IntraUnit Transactions (IU)			
11	51	34	155
Payroll Management (PR)			
25	42	25	54
Projects Management (PM)			
9	15	9	45
Revenue Accounting (RA)			
2	3	2	7
System Access and Controls (SAC)			
2	16	9	14
Agency Defined User Stories			
N/A	38	23	93

Agency Business System Testing Progress

Agency business system testing has begun for all remediating systems, and multiple tests have been completed. Identified testing issues have been resolved, though continued testing is needed with additional end users and until all testing scenarios have been confirmed.

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
FIN Convert	In Progress	Y	In Progress	9/30/2026
FIN Reports	In Progress	Y	In Progress	10/31/2026
FIN Grants Management System	In Progress	Y	In Progress	10/31/2026
FIN Maintenance	In Progress	Y	In Progress	10/31/2026
FIN Parks Revenue Application	In Progress	Y	In Progress	10/31/2026
FIN Rate Report	Complete	Y	Complete	6/30/2026
FIN Tax	In Progress	Y	In Progress	10/31/2026
FIN AR Collections	In Progress	Y	In Progress	9/30/2026
Cash Receiving Application	In Progress	Y	In Progress	10/31/2026
Environmental Restoration Integrated Cleanup	In Progress	Y	In Progress	10/31/2026
Strategic Asset Tracking System	Complete	Y	In Progress	9/30/2026
Storage Tank Contamination and Monitoring System	In Progress	Y	In Progress	10/31/2026
Land Management System	In Progress	Y	In Progress	10/31/2026
Potable Water System	In Progress	Y	In Progress	9/30/2026
Asbestos	In Progress	Y	In Progress	9/30/2026
Permitting Application	In Progress	Y	In Progress	10/31/2026
Electronic Forms and Flows	In Progress	Y	In Progress	10/31/2026
Wastewater Facilities and Related Sites	In Progress	Y	In Progress	9/30/2026
Air Resource Management System	In Progress	Y	In Progress	10/31/2026
Oculus/Laserfische	In Progress	Y	In Progress	10/31/2026
Oculus Validations	In Progress	Y	In Progress	9/30/2026
Administer Loans/State Revolving Fund	In Progress	Y	In Progress	9/30/2026
Salesforce Grant System	In Progress	Y	In Progress	9/30/2026
Legal Case Tracking	In Progress	Y	In Progress	9/30/2026
PPMTS	In Progress	Y	In Progress	9/30/2026

End User Testing

Agency end users included in UAT testing efforts are listed in the table below by PALM business process grouping.

Table 4: End User Testing by Business Process Grouping

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Organization(s) or Agency Business System	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Account Management and Financial Reporting (AMFR)			
16	Varies based on end user responsibilities. (1-2 hours per week to 3-6 hours per week)	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Accounts Receivables (AR)			
14	3-6 hours per week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Asset Accounting and Management (AAM)			
13	4-8 hours per week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Banking (BK)			
5	1-2 hours every other week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Budget Management and Cash Control (BM/CC)			
18	1-2 hours every other week	Office of Budget and Planning, Bureau of Finance and Accounting	February 2026 through October 2026
Contracts Management (CT)			
17	1-2 hours every other week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Disbursements Management (DM)			
30	4-8 hours a week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Data Warehouse/Business Intelligence (DW/BI)			
10	1 hour a week	Bureau of Finance and Accounting Staff, Office of Budget and Planning, Bureau of Human Resources, Office of Technology and Information Systems	February 2026 through October 2026
Grants Management (GM)			
4	1-2 hours every other week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
Inter/IntraUnit Transactions (IU)			
23	2-4 hours a week	Bureau of Finance and Accounting Staff	February 2026 through October 2026

Planned or Actual Number of End Users Performing Testing	Anticipated Time Commitment	End User Organization(s) or Agency Business System	Planned or Actual Dates for End Users to Perform Testing (Start and End Dates)
Payroll Management (PR)			
10	3-6 hours a week	Division of Administrative Services	February 2026 through October 2026
Projects Management (PM)			
11	1-2 hours a week	Division of Administrative Services and Budget Liaisons	February 2026 through October 2026
Revenue Accounting (RA)			
2	1-2 hours a week	Bureau of Finance and Accounting Staff	February 2026 through October 2026
System Access and Controls (SAC)			
10	1 hour a week	Bureau of Finance and Accounting Staff, Office of Budget and Planning, Bureau of Human Resources, Office of Technology and Information Systems	February 2026 through October 2026

UAT Engagement Risks

The following risks have been documented with the PALM Project team to address impacts to testing by end users of both business processes and agency business systems.

- Training and Testing Resource Conflicts
 - Internal training efforts for agency users is dependent on agency SME's completing PALM system training and testing during UAT efforts, test ABS, develop agency training material, and being able to train agency end users while also being expected to conduct all agency UAT.
- Changing Requirements and Impacts on Resources and Delivery
 - High volume and impact changes to PALM processes and interfaces could negatively impact the agency's ability to remediate and test agency business systems with interface testing and UAT.
 - Changes are anticipated to continue, though large volume or late developing updates in these areas have to be analyzed for impact and work redirected to change remediation and process knowledge efforts.
 - Changes in requirements and replanning of activities due to unforeseen changes can lead to rescheduling of project activities. This can disrupt project flow, affect dependencies, and require changes to resource allocations in a short time leading to unforced errors, overloaded resources and delayed delivery schedules.
- Test Case Identification
 - Due to the variety and volume of processes changing due to PALM, the agency may not identify all needed scenarios that need to be tested. This includes verifying remediated reports and agency business systems reflect correct balances.

- Conversion and Configuration Data Testing
 - Agency conversion and configuration data available for testing will conclude with data as of June and July 2026 (DR2). Additional updates to data identified after this time frame (6 months) will not be available in the UAT environment to test based on the current testing information. Significant variances in testing data identified after DR2 could result in unverified information that would impact the success of PALM implementation for the agency.