



UAT Engagement Plan

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

JUSTICE ADMINISTRATIVE COMMISSION

July 31, 2026

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Overview

The Justice Administrative Commission (JAC) submits this UAT Engagement Plan to document end user engagement with Florida PALM functionality and impacted agency business system functionality. JAC provides administrative services—including accounting, budget, financial services, and human resources on behalf of the Judicial Related Offices (JROs) it supports. JAC's UAT efforts focus on three user populations: JAC business units; five JROs that will directly enter financial transactions in Florida PALM; and the 44 remaining JROs, most of which will enter information into an Agency Business System and have limited direct interaction with Florida PALM.

JAC executes UAT through its transition team (PMO) and functional business units. Technical writers develop test scenarios based on business process steps published by Florida PALM in the PALM Knowledge Center, validate those scenarios with functional subject matter experts, and route them to business lead Directors for review, prioritization, and tester assignment. Scenarios are issued to testers using a consistent format with defined execution and return expectations. Following the August UAT environment refresh, JAC intends to re-execute critical end-to-end scenarios in the refreshed environment, conduct JAC-led training and testing for direct-entry JROs, and complete testing in alignment with the Project timeline.

At a high level, JAC's UAT objectives are to:

- Validate that end-users (JAC and JROs) can perform business processes without system or workflow errors;
- Confirm that Florida PALM integrates correctly with existing Agency Business Systems (ABS);
- Confirm that JAC end users understand Florida PALM roles and are assigned the appropriate roles; and
- Obtain formal Agency Sponsor sign-off that JAC is prepared for go-live.

User Engagement Approach

JAC's approach engages end users progressively to test, train, and prepare the JAC workforce on core Florida PALM functionality and process changes prior to go-live. JAC SMEs, serving as Knowledge Champions, tested financial processes first, including participation in Pre-UAT Preview Sessions held from October through December 2025.

Scenarios validated by the JAC transition team—developed from Florida PALM process steps published in the Knowledge Center—are executed by business end user testers under functional Director oversight. Knowledge Champions serve as members of the triage team to support training, provide guidance or instruction, and address initial questions or escalations from testers. This approach allows end users to complete testing in a consistent format while executing transactions within their functional units to reflect real-world use of core Florida PALM capabilities.

Testing Scope

JAC's testing scope, as established in the UAT Plan Update Task 688 and updated for the revised PALM timeline, covers the people, processes, technology, and data dimensions of PALM. The following areas are considered in scope by JAC for the purposes of UAT preparation and execution:

- Disbursement Management
- Inter/IntraUnit Transactions
- Asset Accounting and Management

- Payroll Management
- Account Management and Financial Reporting
- Banking, Accounts Receivable, and Revenue Accounting
- Budget Management and Cash Control
- Contracts and Grant Management
- Project Management
- DWBI

Roles and Responsibilities

The following table identifies current assignments for Project-provided UAT roles, as well as internal JAC project team roles established to support test scenario development and execution.

Table 1: Agency UAT Roles and Responsibilities

Role	Responsibility	Resources
Agency Sponsor	• Certify readiness to participate in UAT • Regularly monitor agency UAT progress • Be advised on agency risks, issues, and mitigation plans • Approve appropriate resources and remove obstacles to successfully complete UAT activities.	Information provided by the Project Management Lead and others
Agency Liaison	• Compile data • Act under the direction of the Agency Sponsor • Consult with the Project Management team when issues arise	Information provided by the JAC Directors and other Change Champion Network members
Business Liaison	• Consult with the Transition Team on issues that occur during UAT	All UAT participants
Technical Liaison	• Consult with the Transition Team on issues that occur during UAT • Test and validate interface interoperability	All UAT participants and BOMS Liaison
Project Management Liaison	• Monitor 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 support mitigation strategies or resolutions • 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 • Consult with and lead all Liaisons, Teams, Coordinators and Managers during the testing period	Project Sponsor, CCN members, the Florida PALM Project team members, Florida PALM Task instructions all UAT participants
Change Management Liaison	• Develop and maintain UAT communication plan • Just in Time communications	• Florida PALM Task instructions

Role	Responsibility	Resources
	- Consult with the Project Management Lead when issues arise - Monitor activities for any necessary changes and updates to the Agency's Change Management Approach	- Other Florida PALM communiques - Feedback from JRO team members - Project and Agency created reports - Guidance from PML
Training Liaison	- Support agency hosted UAT sessions with end users - Coordinate or lead the agency training material development - Consult with the Project Management Lead when issues arise - Assure all end-users have completed training	- Feedback from JRO team members - Project and Agency created reports - LMS Reports
BOMS Liaison	- Supports BOMS project management - Facilitates BOMS testing processes - Develops & leads BOMS training - Coordinates with JAC PML, UAT Coordinator, and SMEs in management and testing processes	- Florida PALM Tasks - Other Florida PALM communiques - Feedback from JRO team members - Information from JAC CCM
UAT Coordinator	- Lead the Testing Error Triage Team - Planning all aspects of the Agency's UAT functions - Track and confirm testing progress - Consult with the Project Management Lead when issues arise	- Florida PALM Tasks - Other Florida PALM communiques - Feedback from JRO team members - Project and Agency created reports - Guidance from PML
UAT Operations & Triage Team	- Meet regularly to review progress and discuss upcoming activities - Review testing errors to determine resolution or need for escalation - Compile results and report to the Project Management Lead and Agency Sponsor - Conduct agency-hosted UAT sessions with end users - Assure end users are aware of weekly assignments and registered for in-person sessions	- Florida PALM Tasks - Other Florida PALM communiques - Feedback from JRO team members - Project and Agency created reports - Guidance from PML
Subject Matter Experts (Assigned per Business)	- Support UAT execution (e.g., user stories/script validation, agency-specific materials development) - Participate as first end users in UAT	All UAT participants

Role	Responsibility	Resources
<i>Process Grouping)</i>	• Conduct agency hosted UAT session with end users • Serve as primary point of contact for end user business process, data, and technical questions • 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 PML and UAT Coordinator and support mitigation strategies or resolutions	
Transition Team	• Identify and track agency UAT participants • Create User Stories • Create/Improve Test Scenarios • Compile UAT data • Survey end users weekly	• Florida PALM Tasks • Feedback from JRO team members • Guidance from PML
Security Access Manager(s)	• Perform and track role assignment changes for SMEs and end users during UAT • Consult with PML when issues arise	• Guidance from the Florida PALM project • Guidance from DFS Accounting and Auditing (A&A)
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)	• End Users • PMO • Florida PALM Project Team
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	• Guidance from the Florida PALM Project team • Data from BOMS/JROs and JAC sources
Batch Error Contact	• Serve as the primary point of contact for batch errors or change in batch process timing	• Batch error information from Florida PALM
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	• Guidance and direction provided by UAT Operations and Triage Team • Resources created by the Training Liaison and the Transition Team

Role	Responsibility	Resources
		Resources created by the Florida PALM project

User Story Testing Progress

Testing counts below indicate testing completed by JAC team members as of 07/27/2026.

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)				
14	55	0	0	The four AMFR testers also support testing in other BPGs. JAC generally tests one or two BPGs simultaneously, and these testers are also heavily involved in year-end financial reporting activities.
Accounts Receivable (AR)				
28	54	17	19	The four testers also support testing in other BPGs.
Asset Accounting and Management (AAM)				
19	40	20	41	Testing is progressing; however, because JAC does not currently use FLAIR for asset management, testers are proceeding deliberately as they learn AAM functionality within a larger enterprise system.
Banking (BK)				
8	8	2	2	Because this BPG includes only eight activities, JAC has not prioritized this testing area.
Budget Management and Cash Control (BM/CC)				
8	26	23	72	BM/CC testing is substantially complete. Repeat testing will begin after the refresh.
Contracts Management (CT)				
1	1	0	0	JAC will have view-only access for CT; therefore, this testing is not currently prioritized.
Disbursements Management (DM)				
24	67	31	141	Testing is progressing well. Untested user stories include those involving CF activities and those

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
				for which process steps were not published by the Florida PALM Project until later in the spring or summer.
Data Warehouse/Business Intelligence (DW/BI)				
20	20	0	0	JAC is continuing to review DW/BI functionality. Multiple ServiceNow tickets have been submitted to clarify and resolve issues. Testing will begin once these issues are resolved. JAC anticipates extensive use of DW/BI and expects the number of user stories to increase.
Grants Management (GM)				
1	1	0	0	JAC will have view-only access for GM; therefore, this testing is not currently prioritized.
Inter/IntraUnit Transactions (IU)				
14	103	8	7	JAC intends to accelerate testing for this BPG after gaining a stronger understanding of system functionality. This effort will require broad collaboration among JAC users and other agencies.
Payroll Management (PR)**				
44	60	0	0	JAC focused initial Payroll testing efforts on Florida People First testing. After the refresh, JAC plans to conduct end-to-end testing for Payroll Management (PR).
Projects Management (PM)				
9	60	22	32	This multi-unit testing effort is progressing more slowly because many testers are also supporting year-end activities.
Revenue Accounting (RA)				
2	2	2	2	Although all activities have been tested, JAC will continue testing within this BPG.
System Access and Controls (SAC)				
3	14	0	0	Due to challenges encountered with Spreadsheet Upload (SU), JAC has not yet tested SU unhappy paths. System Access

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
				and Controls testing will include review of failed batches, which JAC intends to create and test after the Florida PALM data refresh.

Agency Business System Testing Progress

JAC is monitoring testing progress across three main Agency Business Systems.

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
BOMS	In Progress	Y	In Progress	10/02/2026
CAATS	In Progress	Y	In Progress	10/02/2026
DOGS	In Progress	Y	In Progress	10/02/2026

End User Testing

The table below identifies end users who are planned for, or currently engaged in, agency-led testing. Direct-entry Florida PALM JRO participants and remaining JRO participants who use BOMS will begin testing after the August Florida PALM refresh.

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)			
3	2 hours biweekly	JAC Budget Unit	05/26 – 10/26
7	2 hours per week	JAC Financial Services	08/26 – 11/26
Accounts Receivables (AR)			
1	5 hours per week	JAC Revenue Unit	10/25 – 11/26
2	2 hours per week	JAC Revenue Unit	03/26 – 11/26
2	1 hour per week	JAC Financial Services	08/26 – 11/26
Asset Accounting and Management (AAM)			
4	4 hours per week	JAC Operations	04/26 – 11/26
5	.5 hours per week	JROs (GaL and SA 11)	08/26 – 11/26

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)
2	1 hour per week	JAC Financial Services	08/26 – 11/26
Banking (BK)			
3	5 days a week	JAC Revenue Unit	Implemented CMS Wave
1	.5 hours per week	JAC Financial Services	08/26 – 11/26
Budget Management and Cash Control (BM/CC)			
3	2 hours per week	JAC Budget Unit	03/26 – 10/26
7	1 hour per week	JAC Financial Services	08/26 – 11/26
Contracts Management (CT)			
3	1 hour biweekly	JAC Budget Unit	07/26 – 10/26
Disbursements Management (DM)			
3	5 hours per week	JAC Disbursement Accounting	10/25 – 11/26
6	3 hours per week	JAC Disbursement Accounting	10/25 – 11/26
3	1 hour biweekly	JAC Budget Unit	07/26 – 10/26
4	1 hour per week	JAC Financial Services	08/26 – 11/26
180	1 hour per week	JRO users (49 JROs)	08/26 – 11/26
Data Warehouse/Business Intelligence (DW/BI)			
3	1 hour per week	JAC Financial Services	04/25 – 11/26
3	2 hours per week	JAC Financial Services	
Grants Management (GM)			
3	1 hour biweekly	JAC Budget Unit	07/26 – 10/26
Inter/IntraUnit Transactions (IU)			
2	2 hours total	JAC Revenue Staff	06/26 – 06/26
3	3 hours per week	JAC Disbursement Accounting	10/25 – 11/26
6	1-2 hours per week	JAC Disbursement Accounting	03/26 – 11/26
4	1 hour per week	JAC Financial Services	08/26 – 11/26
Payroll Management (PR)			
4	1 hour per week	JAC Financial Services	08/26 – 10/26
Projects Management (PM)			
3	5 hours	JAC Disbursement Accounting	10/25 – 11/26
3	2 hours biweekly	JAC Budget Staff	06/26 – 11/26
3	2 hours per week	JAC Financial Services	08/26 – 11/26
8	1 hour weekly	JRO Users	08/26 – 11/26
Revenue Accounting (RA)			
3	.5 hours per week	JAC Financial Services	08/26 – 11/26

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)
System Access and Controls (SAC)			
8	1 hour per week	JAC SAMs	08/26 – 11/26
6	1 hour per week	JAC various	08/26 – 11/26
10	1 hour per week	JROs	09/14 – 11/06

UAT Engagement Risks

JAC has previously provided bimonthly risk and issue updates for each reporting period and will continue providing updates monthly beginning in July 2026. Current risks and concerns related to end user testing of business processes and agency business systems include:

- Deployment/cutover downtime: The 3.5-week gap between FLAIR sunset and Florida PALM go-live creates risk related to prompt payment compliance and may result in a significant post-go-live transaction backlog. JAC is aware of the proviso language contained in the FY 2026-27 GAA; however, given the volume of invoices JAC processes each month, this remains an identified risk.
- Spreadsheet upload failures: Testing has identified upload failures and inconsistencies across multiple business process groupings.
- Data Warehouse/reporting gaps: Standard reports do not provide all reporting required by JAC and the JROs it serves. DW/BI outputs have been inconsistent and unreliable during testing.
- System and documentation instability: Ongoing changes to the system and Project documentation require scenario and learning material rework, limit end users' ability to learn the system before go-live, and delay JAC readiness activities. After the refresh, JAC will re-baseline scenarios and determine whether retesting is required based on Florida PALM changes.
- BOMS remediation timeline: BOMS remediation must be completed in time to support August testing. Slippage in BOMS remediation, or Florida PALM changes requiring additional rework, may impact JRO readiness capacity. BOMS developers are awaiting key information from JAC in areas such as year-end closing and carry forward processes.

The list of previously submitted risks is listed below:

Risk Title	Trend	Impact Rating	Probability Rating	Risk Rating	Background
Transfer of FLAIR IW data to PALM DW fails.	Stable	High (3) - Extensive impact	Low (1) - Unlikely but possible to occur	3 (High/Low)	The Florida PALM plan indicates that FLAIR IW data will be extracted and stored in the Florida PALM Data Warehouse. If this process fails, the agency may not have access to historical data required for reporting.
Business Management Operations System (BOMS)	Decreasing	High (3) - Extensive impact	Low (1) - Unlikely but possible to occur	3 (High/Low)	JAC and the JROs it serves use an external business system, BOMS, for core business functionality. BOMS requires substantial remediation to meet Florida PALM requirements, including system and process changes.
Spreadsheet Upload Failures	Stable	High (3) - Extensive impact	Low (1) - Unlikely but possible to occur	3 (High/Low)	JAC has observed spreadsheet upload failures during testing across multiple BPGs.
System Reliability	Increasing	Medium (2) - Moderate impact	Medium (2) - Likely to occur at some time	4 (Medium/Medium)	Ongoing system and documentation changes make it difficult for agencies to fully learn the system and its functionality.

Data Warehouse Reporting	Increasing	High (3) - Extensive impact	Medium (2) - Likely to occur at some time	6 (High/Medium)	Standard Florida PALM reports do not provide all reporting required by JAC and the JROs. As a result, JAC planned to use DW/BI for standardized reporting across JAC and the JROs. To date, DW/BI reporting has been inconsistent, inaccurate, and unreliable during testing.
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