Florida PALM Major Implementation

Division of Administrative Hearings (DOAH)
User Acceptance Testing Plan

Table of Contents

Overview

DOAH will be participating in User Acceptance Testing (UAT) beginning in April 2025 through November 2025 to prepare our team and end users for the implementation of Florida PALM in January 2026. Participation will include PALM project-hosted sessions for Subject Matter Experts (SMEs) based on business process groupings and end user role; DOAH's SMEs will conduct UAT onsite; and end users will conduct individual at their desk sessions. The data for the UAT onsite and individual desk sessions will be based on transactions already executed by DOAH. Upon completion of DOAH's participation in UAT, our sponsor will certify our readiness.

Objectives and Scope

The objective of UAT is to validate system operation and usability for our end users. Upon conclusion of UAT, DOAH's end users of Florida PALM will have a high level of confidence that the system will meet their needs in functionality and assist in the transition from FLAIR to Florida PALM.

DOAH's acceptance test of Florida PALM system will include our budget, payroll, and accounting business processes related to FLAIR and enterprise systems (MFMP, People First, STMS, Works). These business processes will be tested to:
- verify end user role assignments;
- confirm DOAH's specific data configurations;
- verify reporting and needs and solutions;
- ensure functionality of system; and
- accuracy of financial data resulting from tested entries.

DOAH will utilize this acceptance testing to assist in developing DOAH-specific end user training and education materials; provide all end users with exposure to and practice in Florida PALM; and confirm our change impacts to people, processes, technology and data.

DOAH will work with Image API, to test and validate the voucher files being uploaded to the Axiom Pro application to create our financial record for the transaction.

Key Activities

Listed below are the activities and tasks required to prepare for UAT.

People
- All end users will be assigned designated roles based on their functions.
- Access will be provided to the PALM testing application to end users.
- Confirm Subject Matter Experts (SMEs), End Users, and Information Technology Staff acknowledgement and understanding of their role for UAT.
- Identify schedule for testing participation for all end users. Mandatory testing will be required from all end users.
- Request end users to provide planned leave during the UAT period for scheduling purposes.
- Inform Management team of testing schedule and any updates to the schedule to ensure understanding if day-to-day operational duties are delayed in being processed during testing.

Process

- All identified business processes have been documented for change impacts and updated.
- Testing materials will be developed including user stories/scripts to describe the why and what behind the need for the activity.
- Confirmation all modules will be accessible at all times during the testing period or have knowledge of when they are accessible in order to schedule testing based on functions.

Technology

- Confirmation received Image API will be able to participate in testing.
- Testing environment has been established and confirmed.
- Documentation has been fully documented and updated.

Data

- Identify test data by business processes and role.
- Ensure data is cleansed prior to testing.
- Confirmation received data configurations.

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.	Megan Silver Darren Schwartz
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.	Patricia Kenyon Cindy Ardoin
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.	Brandy Kirkland
Technical Liaison	Identify and confirm all agency business systems to be tested.	Jeff Russell Scott Rioux

Role	Responsibility	Resources
	• 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.	
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.	Patricia Kenyon Cindy Ardoin
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.	Patricia Kenyon Cindy Ardoin
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.	Brandy Kirkland
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.	Patricia Kenyon
Testing Error Triage Team	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation.	DOAH CCN Team
Subject Matter Experts *(Assigned per Business*	• Support UAT planning (e.g., user stories/script development, agency-specific materials development). • Participate as first end users in UAT.	Accounting & Purchasing Staff, HR Staff, and Budget Director

Role	Responsibility	Resources
Process Grouping)	• 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	• 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.	Cindy Ardoin Patricia Kenyon
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).	Jeff Russell Scott Rioux
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.	Jeff Russell Scott Rioux
Batch Error Contact	• Serve as the primary point of contact for batch errors or change in batch process timing.	Patricia Kenyon
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.	Accounting and Purchasing Staff, HR Staff and Budget Director

Test Execution

DOAH's UAT timeline will span from April 2025 through November 2025. DOAH's SME's will participate in project-led UAT sessions conducted in person from April 2025 through June 2025. This testing will focus on manual entries in FL PALM and based on business functions.

From July 2025 through September 2025, DOAH will provide agency-led testing sessions for all end users. Testing will include all business processes from start to finish including Axiom Pro and the Enterprise Systems (e.g. People First, MFMP, STMS, and Works).

During the month of October 2025, DOAH will participate in project-led testing sessions for year-end processes and activities. DOAH will also be resolving any outstanding testing issues and prepare to submit our Agency Readiness Certification.

Testing Resources

- Testing Participants

SME	Role by Business Process Grouping
Cindy Ardoin	Account Management and Financial Reporting Budget Management and Cash Control Banking System Access and Controls
Janece Roberson	Accounts Receivable Revenue Accounting Banking Asset Accounting and Management
Patricia Kenyon	Account Management and Financial Reporting Disbursements Management Accounts Receivable Revenue Accounting Inter/IntraUnit Transactions Asset Accounting and Management Contracts Management System Access and Controls
Sharolyn Galloway	Payroll Management
Brandy Kirkland	Account Management and Financial Reporting Inter/IntraUnit Transactions Banking Payroll Management
ShaKenya Clary	Disbursements Management Inter/IntraUnit Transactions
Odis Henry, Jr.	Contracts Management

End User	Role by Business Process Grouping
Cindy Ardoin	Account Management and Financial Reporting Budget Management and Cash Control Banking System Access and Controls
Janece Roberson	Accounts Receivable Revenue Accounting Banking Asset Accounting and Management
Patricia Kenyon	Account Management and Financial Reporting Disbursements Management Accounts Receivable Revenue Accounting Inter/IntraUnit Transactions Asset Accounting and Management Contracts Management

	System Access and Controls
Sharolyn Galloway	Payroll Management
Brandy Kirkland	Account Management and Financial Reporting Inter/IntraUnit Transactions Banking Payroll Management
ShaKenya Clary	Disbursements Management Inter/IntraUnit Transactions
Joyce Plummer	Contracts Management
Odis Henry, Jr.	Contracts Management
FaNasha Black	Disbursements Management

Logistics of Agency-Led UAT Sessions

- DOAH's SMEs and end users are located at DOAH's headquarter location in Tallahassee, Florida. The SMEs will facilitate agency-led testing sessions from their own individual workstations (virtually) and end users will participate from their workstations. The SMEs and end users will meet weekly in a conference room to review and provide update status regarding testing activities and results.

  Due to the limited number of staff that currently function in FLAIR and will be transitioning to FL PALM (eleven staff members), all end users will participate in UAT from July through September. The testing schedule for all end users will consist of a minimum of three (3) hours per week including participation in the weekly recap meeting. During this testing period, the majority (nine staff members) of staff will be affected by carry forward activities and current year responsibilities as well. This will mean the end users will need to prioritize their tasks daily to ensure the minimum of three hours of testing is completed and documented each week. The Training Liaison and UAT Coordinator will monitor testing activities in order to implement any necessary mitigation strategies to ensure testing stays on schedule.

  DOAH Management has been informed of the critical need to have end users participate in UAT and understand their tasks may take a longer time for processing during this period. The Agency Liaison will provide updates, risks, and any issues to the sponsor and other management staff on a bi-weekly basis during the management team meetings.

Testing Materials

- The Training and Business Liaisons will collaborate with the SMEs to develop user stories and ensure all end user activities are identified and aligned under the business process groupings required for testing. End users will be required to review the documented business processes completed from PALM tasks. Materials developed and provided by the project team will be utilized and the Training and Business Liaisons will develop crosswalks for the COAs and SpeedKeys for reference materials to be used by end users.

  The Training and Business Liaisons will work with SMEs to save transactions (e.g. deposits, transfers, invoices, surplused property, salary refund, etc.) from January to March 2025 in order to process relatable transactions in UAT. They will also work with

the Change Management Liaison to ensure all identified participants have the materials prior to beginning agency-led testing.

Data Testing Management
- The CCN Team will ensure the data selected for testing is complete with the required fields; has been reconciled; and is relevant to the business process grouping. The Training and Business Liaisons will upload the data files to a shared folder so all end users will have access. The Change Management Liaison will be responsible for communicating the availability and location of the data files to the end users.

  All end users will have access to a spreadsheet to identify any issues related to data while participating in testing sessions. The UAT Coordinator will maintain the data issues spreadsheet and will meet with the Testing Triage Team and the CCN Team to review the listed issues and collaborate to resolve the issues. The UAT Coordinator will document these activities and resolutions.

Tracking and Reporting Testing Progress
- The following four (4) factors will be tracked and reported:
  - overall testing progress to determine if we are on track to complete testing activities on time;
  - end user participation;
  - progress and validation of agency business processes; and
  - testing errors and statuses for FL PALM and business systems.

  The UAT Coordinator will utilize the weekly recap meetings, data issues spreadsheet, and meetings with the Testing Triage Team and CCN Team to prepare the documentation required to report the testing progress. The Testing Tracking Report will consist of the following four (4) components to align with the Project's identified critical readiness points:
  - people;
  - processes;
  - technology; and
  - data.

  The Agency Liaison/UAT Coordinator will provide the Testing Tracking Report information to the project team via the Monthly Touchpoint Meetings with the PALM Readiness Team; through the bi-monthly status reports; and by the readiness certification process.

Testing Error Management

The Testing Triage Team will review all testing errors captured on the data issues spreadsheet during their daily meeting to determine the issue and a course of action for resolution. The team will determine if the error can be resolved internally or if it requires submission of a ticket in Service Now (SNow). If DOAH has the ability to provide the resolution for an error such as an end user not able to complete a user story because they do not have the correct role assignment, it will be resolved internally. If DOAH does not have the ability to resolve an error such as an Approver is unable to approve a transaction despite having the assigned role, it will be submitted as a ticket through SNow. The Project will review logged tickets daily for resolution.

- Testing Coordination

Role	Responsibility	Resources
UAT Coordinator	- Track and confirm testing progress. - Lead the Testing Error Triage Team.	Patricia Kenyon

Role	Responsibility	Resources
	• 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.	
Testing Error Triage Team	• Meet regularly to review progress and discuss upcoming activities. • Review testing errors to determine resolution or need for escalation.	DOAH CCN Team
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.	Accounting & Purchasing Staff, HR Staff, and Budget Director
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.	Cindy Ardoin Patricia Kenyon
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).	Jeff Russell Scott Rioux
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.	Jeff Russell Scott Rioux
Batch Error Contact	• Serve as the primary point of contact for batch errors or change in batch process timing.	Patricia Kenyon

Role	Responsibility	Resources
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.	Accounting and Purchasing Staff, HR Staff and Budget Director

Success Criteria

For each business process to be tested, the acceptance tester (end user) will execute pre-defined activities associated with business process for their role with the activities. Each activity has a series of actions and expected results based on activities previously performed in FLAIR. The results will be verified and if they meet the expected outcome, the "pass" marking will be documented and logged. If the expected outcome is not met, the "fail" marking will be documented and logged.

People

- Identified SMEs have been assigned end user roles based on job functions.
- UAT roles and responsibilities have been identified within the UAT plan.
- SMEs have been identified and prepared to participate in UAT.
- Training Plan is completed.
- End users have been assigned end user roles based on job functions.
- SMEs have participated in Project-led UAT sessions, or agency has a plan to engage remaining SMEs in Agency-specific testing activities.
- End users have begun to register for Florida PALM training.
- Changes to end user role assignments are being documented, as needed.
- Specific training materials have been created.
- End users have started Florida PALM provided training.
- End users have started practicing job functions in UAT.
- All end users have completed training before January 2026.
- End users have practiced or will practice completing job functions in UAT before go-live.
- End users have tested and validated end user roles.

Process

- Change impacts have been identified for business processes.
- Testing materials including user stories end-to-end processing have been developed.
- Some processes have been tested in UAT.
- Process documentation updates have started based on testing results and access to UAT environment.
- Processes are being tested from start to finish, including workflows, enterprise systems and Axiom Pro application.
- Spreadsheet uploads have been tested.
- Process documentation has been updated based on testing results.
- All business processes from end-to-end have been tested and validated.
- Business process documentation has been updated and prepared for distribution, or agency has a fully documented plan to complete the updates and distribute prior to January 2026.
- All UAT scenarios have been identified.

- All business processes from end to end have been tested and validated.

Technology

- Interface needs have been confirmed.
- IDP has been confirmed, and configuration with the Florida PALM UAT environment is on track to be complete before the start of UAT.
- SME end users have been added to DOAH's IDP for the Florida PALM UAT environment.
- Technical interface testing successfully completed.
- Axiom Pro application documentation is fully updated, or the agency has a plan to complete prior to conducting end-to-end integration testing in July 2025.
- All critical interfaces have been tested and validated.
- Axiom Pro application remediation has been tested and validated.
- The deployment plan has been updated based on end-to-end testing.

Data

- Documented reporting needs.
- DOAH specific configurations have been confirmed.
- DOAH data is cleansed based on Mock Conversions 2 results.
- Test data has been identified.
- Data is cleansed based on Mock Conversion 3 and Mock Conversion 4 results.
- Florida PALM provided reports have been tested and validated.
- Changes to DOAH specific configurations have been documented and provided to the Project, if applicable.
- Critical DOAH-specific queries have been created, tested and validated.
- All configurations have been tested, validated and confirmed (including any final updates provided to the Project).
- All reporting needs and solutions have been tested and validated.

Mitigating Gaps in UAT Success Criteria

To mitigate gaps during UAT, DOAH has and will do the following:

- Involved end-users since Segment III Workshops to familiarize them with the project and to understand their needs and expectations.
- Develop detailed acceptance criteria that outlines the expected outcomes and performance of each activity.
- Establish weekly meetings to collect end user input throughout the UAT process and address concerns promptly.
- Encourage collaboration among the end users and SMEs to ensure everyone is on the same page.
- Ensure multiple end users test and validate the same activity for accuracy of expected outcomes.
- Allow for sufficient time for UAT to ensure thorough testing and feedback