Task Instructions

Task ID: 536-C
Task Name: *Create Agency Specific User Acceptance Testing Plan*
Task Start Date: *December 9, 2024*
Task Due Date: *May 2, 2025*
Project Impact: *Indirect*

Task Description

Prepare a plan for agency participants to engage in User Acceptance Testing, develop agency testing scripts and materials and test all business processes.

536-C: Confirm business processes to be tested and identify UAT success criteria.

Task Overview

User Acceptance Testing (UAT) will provide the opportunity to complete end-to-end testing of your agency business processes within the Florida PALM testing environment. UAT ensures that agency change impacts to people, processes, technology, and data have been addressed and verified to allow for a successful transition to Florida PALM at go-live in January 2026.

As described in the UAT Approach, all agencies are expected to participate in UAT beginning in April 2025 to prepare for the next major implementation of Florida PALM, which includes implementation of Financials and Payroll Wave and Data Warehouse/Business Intelligence. Given the magnitude of change to be tested and validated and the expectation that all end users are to practice in UAT prior to go-live, agencies will need to develop and execute an agency-specific UAT plan. The objective of a UAT Plan is to document your agency's approach, key activities, essential resources needed to prepare for and complete UAT.

This task (Task 536) has been separated into three manageable subtasks to allow your agency to gather, add, or update information within your UAT plan as it becomes available through the completion of other readiness tasks or receipt of Project information.

Table 1: RW Subtasks

Subtask	Subtask Planning Objectives	Planned Dates
536-A	536-A will require agencies to establish their testing objectives, scope, key activities and their agency roles and responsibilities.	Jun. 17, 2024 – Aug. 16, 2024
536-B	536-B will require agencies to identify key components of test execution including test management.	Aug. 19, 2024 – Oct. 11, 2024
536-C	536-C will require agencies to confirm their business processes to be tested and identify UAT success criteria.	Dec. 9, 2024 – May 2, 2025

Subtask C Task Elements

This subtask contains three parts:

1. Review the updated UAT Approach
2. Continue developing your UAT Plan, with the addition of the following:
    a. Confirmation of Testing Scope
    b. Identification of Success Criteria
    c. Mitigation
3. Submit your unanswered UAT questions

Review the UAT Approach

The UAT Approach has been updated to include guidance for agency identification and documentation of:
- testing scope, and
- success criteria.

Upon your review of the updated approach, you should review your questions previously logged in the UAT Planning question log. Update the related questions in the question log if the additional information included in the updated UAT Approach provides the answers.

Continue Developing your UAT Plan

The UAT Plan template has been updated to support the development of your plan. The following are the components of your UAT Plan that should be documented with this subtask.

Testing Scope

UAT is intended to allow agencies to confirm agency impacts to people, processes, technology and data. Agencies should plan to test and validate:
- all updated agency business processes from end-to-end, including processes that integrate with their agency business systems and other enterprise systems (e.g., People First, MFMP);
- business system remediation (where applicable);
- end user role assignments;
- agency specific configurations; and
- reporting needs and solutions.

You will be documenting your agency's change impacts using the Change Analysis Tool (RW Task 560), which will support your documentation of testing scope. Use the Change Analysis tool to identify the scope of what needs to be tested for your agency, specifically:
- **People** – Who should participate in testing?
- **Processes** – What agency functions or activities need to be tested and validated?
- **Technology** – What agency business systems should be included in testing?
- **Data** – What data values (inputs) or reports (outputs) need to be validated?

Success Criteria

Now that you have identified what needs to be tested, you must determine and document what success looks like for your agency. You should define success based on your documented testing scope and the most critical needs for your agency. You should also align your success criteria to that of the Agency Readiness Certification, which Agency Sponsors must submit in November 2025 to support the Executive Steering Committee's vote on Stage Gate 4: Agency Readiness.

As you consider and define your agency's success criteria for each critical operational element, consider the following questions:

People:
- Which testing participants are required to support our test scenarios / user stories during UAT?

- Who are the critical individuals or organizational units we need to ensure get exposed to Florida PALM during UAT (e.g., which end users will be accessing Florida PALM day one to support their functions)?
- Can we prioritize the users based on the significance of their estimated Florida PALM interaction after go-live?
- Which users may need more time or exposure to Florida PALM based on their current knowledge or learning needs?
- What do we want the UAT participants to be able to do when they complete their UAT efforts?

Processes:
- Which agency business processes are most critical for day one after go-live? Do we have those documented?
- What changes are we anticipating for our processes? How can we test those? What sort of documentation changes do we need?
- What do we (or the user) need to confirm success of a business process?
- Which stakeholders rely on our processes? What is the timing of that involvement?
- Who are the owners of the processes and what do they need from testing?

Technology:
- Which agency business systems are going to be sending or receiving information from Florida PALM or that will include financial information from Florida PALM?
- What vendor support do we rely on? How will we measure their participation or success?

Data:
- Have the agency-specific configuration values been tested and validated?
- What reports are critical for our business processes?
- Which stakeholders do we provide information to which will come from Florida PALM?

Submit Unanswered UAT Questions

You have been maintaining your UAT question using the UAT Question Log throughout the duration of the UAT Planning subtasks. If you have remaining UAT questions that have not been answered through the progressive updates to the UAT Approach and information shared by the Project, you should submit those questions to your Readiness Coordinator to be managed through the standard agency question management process.

How will agencies use this information?

Your specific UAT plan is critical to ensure agencies are ready to successfully participate in UAT. This is the third and final step of a multi-step task to develop a thorough agency specific UAT plan.

Your UAT Plan will be used to inform the following future tasks:

- 579 – Identify, Prepare, and Confirm Understanding of User Acceptance Testing Participants
- 574 – Prepare Documentation for User Acceptance Testing

Additionally, the completion of your agency specific UAT plan is directly correlated to agency UAT readiness criteria. RW Task 539 – Update Agency Readiness Certification Criteria in March 2025 will require agencies to certify readiness to participate in UAT.

Tips:

- *Activities from your Agency Specific UAT Plan should be included in your Agency Specific Implementation Schedule.*
- *Agency-specific UAT preparation activities or identified risks and issues related to the planning and execution of UAT should be reported in your Bimonthly Agency Readiness Status Reports.*

What will the Florida PALM Team do with this information?

The Project team will review your UAT Plan to facilitate conversations about your agency's UAT approach with your CCN. The Project team will also review your task submission based on the following criteria to confirm completion:

Table 2: Task Completion Rubric

Task Completion Rubric
Agency's updated UAT Plan is attached to task 536-C within your Readiness Workplan Task Tracker.
Drafts within the following sections of your updated Agency UAT Plan have been completed: • Testing Scope • Success Criteria
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Complete your Agency's UAT Plan through collaboration with key stakeholders and your agency's CCN by adding your agency's testing scope and success criteria. Review and update your UAT Question Log. Close any questions which are no longer applicable and submit any remaining open questions that have not been answered with the updated UAT Approach to your Readiness Coordinator. Attach your Agency's UAT Plan in your Readiness Workplan Task tracker.

Smartsheet Navigation:
- *Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) UAT Planning Questions*
- *Florida PALM Workbook for (Agency) > Agency Readiness > (Agency) Readiness Workplan Task Tracker*

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 2 above.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Review the updated UAT Approach.*
2) *Collaborate with your Change Champion Network and key stakeholders to continue drafting your Agency UAT Plan.*

Summary of Task Completion Steps

3)	Update your UAT Question Log in Smartsheet and submit any remaining questions to your Readiness Coordinator.
4)	Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.
5)	Complete task by **May 2, 2025.**
6)	When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
7)	If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- UAT Approach
- UAT Plan Template
- Agency Readiness Certification Criteria