

Task Instructions

Task ID: 678

Task Name: *Submit Monthly Progress Report – Testing, Training*

Task Start Date: *May 1, 2026*

Task Due Date: *May 29, 2026*

Project Impact: Indirect

Task Description

Provide progress update for agency interface testing, user acceptance testing and end user training.

Task Instructions

As described in the [Understanding Your Monthly Progress Report Dashboard](#) document, your <Agency> Monthly Progress Report has been populated using agency reported data from the following resources, as applicable, located in your Florida PALM Workbook in Smartsheet.

Table 1: Smartsheet Resources for Monthly Status Report and Agency Applicability

| Smartsheet Resource | Agency Applicability |
|---|--|
| <Agency> Incomplete Cycle 2 Testing Check In worksheet | Required only for agencies that have not completed Cycle 2 testing |
| <Agency> Cycle 2 Technical Interface Testing worksheet | Required only for agencies that have not completed Cycle 2 testing |
| <Agency> Interface Cycle 3 – Full Integration Testing worksheet | Required for all interfacing agencies |
| <Agency> User Story Inventory worksheet | Required only for agencies that have chosen to document user stories outside of the Change Analysis tool |
| <Agency> Change Analysis worksheets | Required only for agencies that have chosen to document user stories within the Change Analysis tool |
| <Agency> Prerequisite Tracking worksheet | Required for all agencies |
| <Agency> Role Mapping worksheet | Required for all agencies |
| <Agency> UAT Participation Identification Report | Maintained by the Project for all agencies |
| <Agency> Mock Conversion worksheet | Required for all agencies |
| <Agency> User Story Activity Coverage | Required for all agencies |
| <Agency> Configuration and Conversion Worksheets | Required for all agencies |
| NEW <Agency> Training Plan Questionnaire | Required for all agencies |

This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration. **Five (5) business days before the task is due, the**

confirmation form will be enabled to allow submission and will close promptly the business day after the task is due.

After reviewing your <Agency> Monthly Progress Report dashboard to ensure the data is representative of your current status, your Primary or Backup Agency Sponsor must confirm and submit the report using the Agency Sponsor Confirmation form at the bottom of the dashboard. The confirmation requires the Agency Sponsor to provide their name, add a check in the checkbox to “Confirm” the Dashboard, and click the Submit button for submission.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Monthly Progress Reporting

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 below.

What will the Florida PALM Team do with this information?

Your Monthly Progress Report will be shared with Project stakeholders, including the ESC. 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 Sponsor has confirmed and submitted the Monthly Progress Report. |
| All required fields have been completed in the <Agency> Incomplete Cycle 2 Testing Check In worksheet (if applicable). <i>This is only required for agencies that have not completed Cycle 2 testing.</i> |
| All required fields have been completed in the <Agency> Interface Cycle 3 - Full Integration Testing worksheet (if applicable). <i>This is only required for interfacing agencies.</i> |
| All required fields have been completed in the <Agency> User Story Activity Coverage worksheet. |
| All required UAT progress reporting fields have been completed in the <Agency> User Story Inventory worksheet OR the <Agency> Change Analysis worksheets, based on agency user story inventory option selection. |
| All required fields have been completed in the <Agency> Training Plan Questionnaire worksheet. |
| The RW Task Tracker, Agency Reported Task Progress column, has been updated to 100% - Submitted. |

Supporting Materials & Resources:

- [Understanding Your Monthly Progress Report Dashboard](#)
- [Cycle 3 Interface Full Integration Testing Supplemental](#)
- [Incomplete Cycle 2 Testing Supplemental](#)
- [Interface Testing Worksheet Supplemental](#)
- [Change Analysis Tool for Progress Reporting Supplemental](#)
- [User Story Inventory for Progress Reporting Supplemental](#)
- [UAT Online Prerequisite Training Tracker Supplemental](#)

- [User Story Activity Coverage Supplemental](#)
- [Training Plan Questionnaire Supplemental](#)