Task Instructions
Task ID: 688
Task Name: *Update UAT Plan*
Task Start Date: December 8, 2025
Task Due Date: January 9, 2026
Project Impact: Indirect

Task Instruction Updated: 12/18/2025

Summary of Change: Added task requirement to confirm UAT Key Resources in the *<Agency> Testing Support* worksheet.

Task Description
Review and update UAT Plan to align to revised UAT Approach.

Task Overview
All Agency 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 2027.

As described in the UAT Approach, all agencies are expected to participate in UAT beginning in February 2026 to prepare for the next major implementation of Florida PALM, which includes implementation of Financials and Payroll Waves 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, and success criteria.

Your agency previously completed a UAT Plan through a series of Readiness Workplan (RW) subtasks (Table 1). Since those RW tasks, the Project timeline and UAT approach has changed through the approval of Amendment 13. During this task (Task 688), you will review the revised UAT Approach and your update your agency UAT Plan for alignment.

Table 1: RW Tasks

Task	Task Planning Objectives	Planned Dates
536-A	536-A required 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 required agencies to identify key components of test execution, including test management.	Aug. 19, 2024 – Oct. 11, 2024
536-C	536-C required agencies to confirm their business processes to be tested and identify UAT success criteria.	Dec. 9, 2024 – May 2, 2025
688	688 will require agencies to review and update their UAT Plan to align to a revised UAT Approach.	Dec. 8, 2025 – Jan. 9, 2026

Task Elements
This task contains two parts:

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1. Update your UAT Plan
2. Confirm Key UAT Resources

Update your UAT Plan

Review the revised UAT Approach. Some of the significant changes in the UAT Approach include the following.

- All Agency UAT
  - There will no longer be two segments of UAT (Online UAT for SMEs and UAT Full) as originally planned.
  - Agencies that have completed Cycle 2 interface testing will have access to fully integrated UAT at the start of UAT.
- Testing Timeline
  - All Agency UAT start date of February 2026.
  - UAT end date of November 6 2026.
  - The UAT environment will continue to be available to agencies until go-live.
- UAT Environment Refresh
  - The UAT environment will be refreshed with updated configuration and conversion data during the month of August, using Dry Run 2 data.
  - The UAT environment refresh will include a secondary load of agency end users.
- End User Access
  - Agencies will submit the initial load of end user roles mapping by December 19th as part of RW Task 573-B, and again for the UAT environment refresh.
  - SOD conflicts are allowed during the first portion of UAT, but SOD conflict management will be strictly enforced by DFS A&A following the UAT environment refresh.

Upon your review of the Project's updated UAT Approach, you should review your questions previously logged in in your *<Agency> UAT Planning Questions* log in Smartsheet. Update the related questions in the question log if the additional information included in the updated UAT Approach provides the answers.

Row ID	Requestor	Question Topic	Question	Status	Comments
001	Jane Doe	Timeline	When will all end users be able to access UAT?	Open	

Figure 1: UAT Planning Questions Log

You should review the updated UAT Approach and consider other related UAT preparations that may impact your UAT Plan.

- Agency Role Mapping for the initial end user load
- Development of User Stories and supporting materials
- Configuration values used for Mock Conversion 4
- Mock Conversion 4 results (to be shared in January 2026)
- Project provided UAT materials in the Knowledge Center including process steps and demo videos

Now you must update your UAT Plan. A fully formed plan is critical for your agency to successfully participate and complete UAT activities. The following are the components of your UAT Plan that should be reviewed and updated, as necessary.
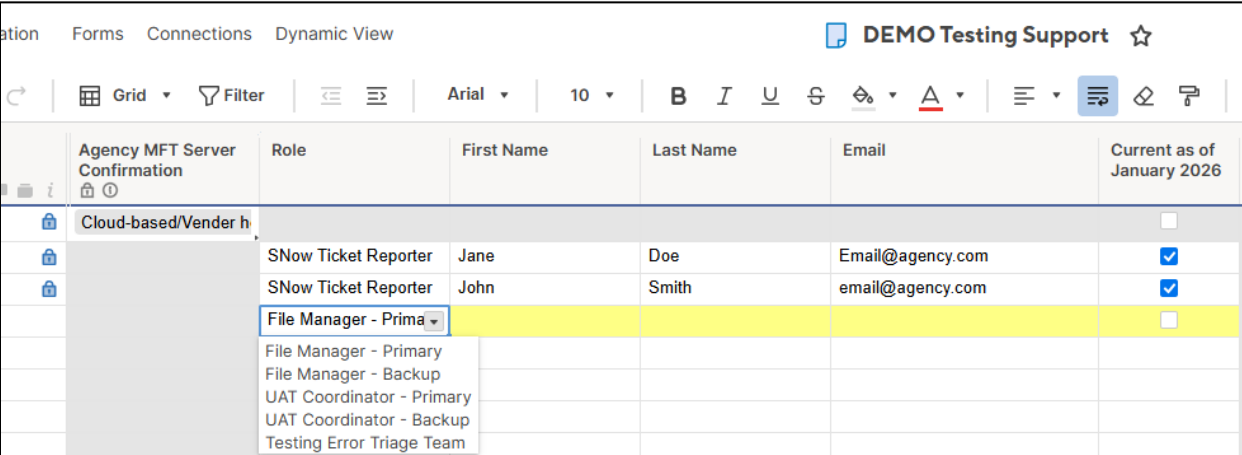
a. Objectives and Scope
b. Key Activities
c. Roles and Responsibilities
d. Testing Participants
e. Testing Logistics
f. Testing Materials
g. Testing Data
h. Tracking and Reporting Testing Progress
i. Testing Error Management
j. Testing Coordination
k. Testing Scope
l. Success Criteria

A description of what should be included in each section of your plan are available in the previous related task instructions linked in the Supporting Materials & Resources section, below.

If you have remaining UAT questions that have not been answered through the updated 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.

Confirm Key UAT Resources

As you have updated your UAT Plan with your key resources, you must confirm those resources in your *<Agency> Testing Support* worksheet (Figure 2) located in the *Agency Readiness > Agency Contacts* folder in Smartsheet.

Figure 2: Demo Testing Support worksheet

Review and update your sheet to include at least one person and their email address for each of the following critical roles.

- File Manager - Primary

- UAT Coordinator – Primary
- Testing Error Triage Team

You must also confirm that the information is correct by adding a check mark in the "Current as of January 2026" column for all resources listed in the worksheet.

NOTE: The following agencies do not have any interfaces and are not required to provide a File Manager: DOEA, DOS, EOG, FSDB, and PSC.

Your sheet has been pre-populated with your agency's SNow Ticket Reporters, as approved by the Florida PALM Solution Center. These rows are locked from editing. If you require a change to these role assignments, you must contact the Florida PALM Solution Center.

How will agencies use this information?

Your specific UAT plan is critical to ensure agencies are ready to successfully participate in UAT. You will use the information in your plan to execute UAT within your agency.

Additionally, the completion of your agency specific UAT plan is directly correlated to agency UAT readiness criteria. This task is directly associated with the following Agency Readiness Certification #2 (RW Task 606) Criteria:

- Agency UAT Plan has been updated to align the Project's revised UAT Approach.

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. Your confirmed key UAT resources will be used by the Project for targeted UAT communications.

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 the row for Task 688 within your Readiness Workplan Task Tracker.

Agency's updated UAT Plan includes information for all required sections:
    a. Objectives and Scope
    b. Key Activities
    c. Roles and Responsibilities
    d. Testing Participants
    e. Testing Logistics
    f. Testing Materials

Task Completion Rubric

g.   Testing Data
    h.   Tracking and Reporting Testing Progress
    i.   Testing Error Management
    j.   Testing Coordination
    k.   Testing Scope
    l.   Success Criteria

Agency's Testing Support worksheet has at least one person identified and confirmed for the following roles: • File Manager – Primary (*Not required for DOEA, DOS, EOG, FSDB, and PSC*) • UAT Coordinator – Primary • Testing Error Triage Team
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Update your Agency's UAT Plan through collaboration with key stakeholders and your agency's CCN. 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 update your Agency UAT Plan.*
3) *Confirm your agency's key UAT resources in your **<Agency> Testing Support worksheet**.*
4) *Update your UAT Question Log in Smartsheet and submit any remaining questions to your Readiness Coordinator.*
5) *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.*
6) *Complete task by **January 9, 2026**.*
7) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
8) *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
- 536 A - Create Agency Specific User Acceptance Testing Plan
- 536-B - Create Agency Specific User Acceptance Testing Plan
- 536-C - Create Agency Specific User Acceptance Testing Plan