

Task Instructions

Task ID: 681

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

Task Start Date: July 1, 2026

Task Due Date: July 31, 2026

Project Impact: Indirect

Task Description

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

Task Instructions

In accordance with the 2026-2027 Implementing Bill, Agency Project Sponsors must provide a monthly report to the Florida PALM Executive Steering Committee (ESC) with information “on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of the Florida PALM System.”

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, Agency Applicability and Related Guidance

Smartsheet Resource	Agency Applicability	Related Task Instruction or Supplemental Documentation
<Agency> <i>Incomplete Cycle 2 Testing Check In</i> worksheet	Required only for agencies that have not completed Cycle 2 testing	Incomplete Cycle 2 Testing Supplemental
<Agency> <i>Cycle 2 Technical Interface Testing</i> worksheet	Required only for agencies that have not completed Cycle 2 testing	Interface Testing Worksheet Supplemental
<Agency> <i>Interface Cycle 3 – Full Integration Testing</i> worksheet	Required for all interfacing agencies	Cycle 3 Interface Full Integration Testing Supplemental
<Agency> <i>User Story Activity Coverage</i> worksheet	Required for all agencies	User Story Activity Coverage Supplemental
<Agency> <i>User Story Inventory</i> worksheet	Required only for agencies that have chosen to document user stories outside of the Change Analysis tool	User Story Inventory for Progress Reporting Supplemental
<Agency> <i>Change Analysis</i> worksheet	Required only for agencies that have chosen to document user stories outside of the User Story Inventory worksheet	Change Analysis Tool for Progress Reporting Supplemental

Smartsheet Resource	Agency Applicability	Related Task Instruction or Supplemental Documentation
<Agency> Agency Business Process Documentation Inventory worksheet	Required for all agencies	RW Task 602 – Update Agency Business Process Documentation
<Agency> Role Mapping worksheet	Required for all agencies	Role Mapping Supplemental
<Agency> Prerequisite Tracking worksheet	Required for all agencies	UAT Online Prerequisite Training Tracker Supplemental
<Agency> Agency-Specific Training Inventory worksheet	Required for all agencies	RW Task 604 – Create Agency-Specific Learning Materials to Support End Users
<Agency> Mock Conversion worksheet	Required for all agencies	N/A – RW Task 698 - Complete Data Cleansing in Preparation for Dry Run 2 is closed.
<Agency> Configuration and Conversion worksheets	Required for all agencies	Configuration and Conversion Supplementals located on the Agency Readiness webpage
*NEW <Agency> Agency Supplier Testing	Required for all agencies	APC001 Agency Supplier Testing Supplemental
*NEW <Agency> Risks	Required for all agencies	Risks and Issues Supplemental
*NEW <Agency> Issues	Required for all agencies	Risks and Issues Supplemental
*NEW <Agency> Deployment Plan Questionnaire worksheet	Required for all agencies	Deployment Plan Questionnaire Supplemental

New and Updated Items for July Progress Reporting

Agency Supplier Testing

All agencies must complete test scenarios in UAT to validate the set up of their Agency Supplier Record. It is highly encouraged to test early in the month of July, so that issues or concerns related to the Agency Supplier Record can be reported timely to the Project.

Confirmation of Risks and Issues

Starting for the July reporting period, agency risks and issues must be updated and confirmed monthly. Agencies will continue using their Risk and Issue worksheets in Smartsheet.

Deployment Plan Questionnaire

July is the first month agencies are required to provide a progress reporting update for cutover. This month, agencies will provide an update on their Deployment Planning and Cutover Checklist development progress.

Prerequisite Training Statistics

Your role mapping for the UAT Refresh was submitted on June 26 (RW Task 702). Now that you understand your full scope of end users and role assignment, you should ensure that all end users are prepared to participate in UAT by completing UAT Prerequisite Training. The Prerequisite Training widget on the Monthly Progress Report Dashboard has been updated to reflect statistics for all end users in your role mapping worksheet.

Business Process Documentation and Agency-Specific Training Material Development Status

The widgets displaying a summary of your activity related to updating your agency business process documentation and creating agency-specific training materials have been updated to include progress status.

Submitting Your Progress Report

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.

Task Completion Requirements

Your testing and training progress data reported should be complete and accurate, as you will use the data provided in your Monthly Progress Report and previous reports to complete upcoming RW Task 619 – *Update Agency Readiness Certification #3*.

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> <i>Incomplete Cycle 2 Testing Check In</i> 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> <i>Cycle 2 Technical Interface Testing</i> 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> <i>Interface Cycle 3 - Full Integration Testing</i> worksheet (if applicable). <i>This is only required for interfacing agencies.</i>
All required fields have been completed in the <Agency> <i>User Story Activity Coverage</i> worksheet.
All required UAT progress reporting fields have been completed in the <Agency> <i>User Story Inventory</i> worksheet OR the <Agency> <i>Change Analysis</i> worksheets, based on agency user story inventory option selection.
All required fields have been completed in the <Agency> <i>Agency Supplier Testing</i> worksheet.
All required fields have been completed in the <Agency> <i>Deployment Plan Questionnaire</i> worksheet.
Complete the Confirmation and Reporting Period Comments columns in the Agency Risks and Agency Issues worksheets in Smartsheet for all risks and issues created, remaining open, or closed for the current reporting period.
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](#)
- [Role Mapping Supplemental](#)
- [RW Task 602 – Update Agency Business Process Documentation](#)
- [RW Task 604 – Create Agency-Specific Learning Materials to Support End Users](#)
- [AP001 Agency Supplier Record Supplemental](#)
- [APC001 Agency Supplier Testing Supplemental](#)
- [Risks and Issues Supplemental](#)
- [Deployment Plan Questionnaire Supplemental](#)