

Task Instructions

Task ID: 691

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

Task Start Date: September 1, 2026

Task Due Date: September 30, 2026

Project Impact: Indirect

Task Description

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

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>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
<Agency> <i>Agency Business Process Documentation Inventory</i> worksheet	Required for all agencies	RW Task 602 – Update Agency Business Process Documentation
<Agency> <i>Role Mapping</i> worksheet	Required for all agencies	Role Mapping Supplemental
<Agency> <i>Prerequisite Tracking</i> worksheet	Required for all agencies	UAT Online Prerequisite Training Tracker Supplemental

Smartsheet Resource	Agency Applicability	Related Task Instruction or Supplemental Documentation
<Agency> <i>Agency-Specific Training Inventory</i> worksheet	Required for all agencies	RW Task 604 – Create Agency-Specific Learning Materials to Support End Users
<Agency> <i>Mock Conversion</i> worksheet	Required for all agencies	N/A - RW Task 705 – Complete Data Cleansing in Preparation for Dry Run 3
<Agency> <i>Configuration and Conversion</i> worksheets	Required for all agencies	Configuration and Conversion Supplementals located on the Agency Readiness webpage
<Agency> <i>Risks</i> worksheet	Required for all agencies	Risks and Issues Supplemental
<Agency> <i>Issues</i> worksheet	Required for all agencies	Risks and Issues Supplemental
<Agency> <i>Readiness Mitigation #3</i> worksheet	Required only for agencies with outstanding Readiness Certification #3 criteria	Readiness Certification #3 Mitigation Supplemental
<Agency> <i>UAT Proviso Requirements Questionnaire</i> worksheet	Required for all agencies	UAT Proviso Requirements Questionnaire Supplemental
<Agency> <i>Cutover Checklist</i>	Required for all agencies	Cutover Checklist Supplemental

New and Updated Items for September Progress Reporting

Deployment Plan Questionnaire

The Deployment Plan Questionnaire has been removed.

Cutover Checklist

A new widget has been added to display data on the total number of tasks and their progress listed on your <Agency> *Cutover Checklist*.

UAT Proviso Requirements Questionnaire

The 2026 General Appropriations Act (GAA) includes several items that agencies must complete during UAT. The questionnaire for the UAT Proviso requirements has been updated to allow agencies to provide an update on the progress toward completing each of the requirements. Questionnaire responses will be displayed on the Dashboard.

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, training, and cutover planning progress data reported should be complete and accurate, as you will use the data provided in your Monthly Progress Reports to complete future RW Task 628 – Submit Agency Readiness Certification #4.

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>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.
Tasks have been added and all required fields have been completed in the <Agency> <i>Cutover Checklist</i> worksheet.
All required fields have been completed in the <Agency> <i>Readiness Mitigation #3</i> worksheet. <i>This is only required for agencies with outstanding Readiness Certification #3 criteria.</i>
The Confirmation and Reporting Period Comments columns in the <Agency> <i>Risks</i> and <Agency> <i>Issues</i> worksheets are complete for all risks and issues created, remaining open, or closed for the current reporting period.
All required fields have been completed in the <Agency> <i>UAT Proviso Requirements Questionnaire</i> .
The RW Task Tracker, Agency Reported Task Progress column, has been updated to 100% - Submitted.

Supporting Materials & Resources:

- [Readiness Certification #3 Mitigation Supplemental](#)

- [Understanding Your Monthly Progress Report Dashboard](#)
- [Cycle 3 Interface Full Integration Testing 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](#)
- [Risks and Issues Supplemental](#)
- [UAT Proviso Requirements Questionnaire Supplemental](#)
- [Cutover Checklist Supplemental](#)