EXECUTIVE STEERING COMMITTEE

DEPARTMENT OF FINANCIAL SERVICES

APRIL 23, 2025

ADMINISTRATIVE

TOMMY WERNER

Administrative
Budget

FY 2024-2025 Spend Plan Summary as of March 31, 2025				
Category	**Projected FYTD**	**Incurred FYTD**	**Released FYTD**	**Release Remaining**
FLAIR System Replacement	**$21,144,096**	**$22,811,441**	**$30,916,123**	**$8,104,682**
SSI Implementation Services	$10,439,953	$12,313,511		
Facilities and Maintenance	$311,769	$311,769		
Production Support	$7,094,578	$7,094,578		
Additional Facilities	$114,784	$110,289		
Production Support Administration	$42,408	$42,408		
Oracle Software and Maintenance	$816,642	$780,686		
Project Administration	$192,238	$63,721		
ERP and OC Support Services	$1,347,191	$1,335,109		
QA Support Services	$784,533	$759,370		
IT Service Management	$887,263	$889,672	$1,304,572	$414,900
Contingency	$0	$0	$0	$0
Salaries & Benefits	$7,002,678	$6,933,752	$10,220,897	$3,287,146
HR Transfer and Risk Management Insurance	$31,957	$25,957	$37,957	$12,000
Total:	**$29,065,994**	**$30,660,822**	**$42,479,549**	**$11,818,728**

Administrative
Risks and Issues

▸ Open Issue – Inability to Achieve Stage Gate 3 on the Current Timeline

- Action Plan Steps:
  - Negotiate and execute Amendment – **Complete**
  - Update the Project Schedule – **In progress**
  - Communicate RW changes to Stakeholders – **In progress**

Administrative
Risks and Issues

▸ Six open risks: No risks were opened or closed

▸ One risk with a score of 6

  ◦ Risk 2 – External stakeholders and agencies expectations

▸ Three risks with a score of 9

  ◦ Risk 4 – Agency engagement

  ◦ Risk 5 – Timing and efficiency of information sharing

  ◦ Risk 6 – Execution of contracts and procurement activity outside of the Project

▸ One risk's Trend was changed to Increasing from Stable

  ◦ Risk 1 – Insufficient staffing or delays in onboarding

▸ One risk's Status was changed to Monitoring from Mitigating

  ◦ Risk 6 – Execution of contracts and procurement activity outside of the Project

Open Risk Log

INDEPENDENT VERIFICATION AND VALIDATION (IV&V)

CONTENT PROVIDED BY PUBLIC CONSULTING GROUP

IV&V Update
Development

- Finding 14 – Risk that Delays to Build Could Impact the Completion of System Testing and the Start of UAT.
  - The Finding has been closed based on the updated timeline for Development and System Testing as part of Amendment 12 and progress against the new targeted dates for AD document approvals.

- As of 4/16/25, all Segment IV AD documents have been drafted (112) and approval is ahead of current targets (76 approved vs. 73 targeted).

- All AD documents for DW/BI Build Segment III have been drafted (18) and 7 approvals in progress as of 4/25/25.

IV&V Update
Development

- Remaining Development for 5 extensions associated with Employee Self-Service and 13 RICEFW Items associated with Amendment 12 or recently approved PCRs.
  - Approval of AD documents for these remaining items spans from May to October.
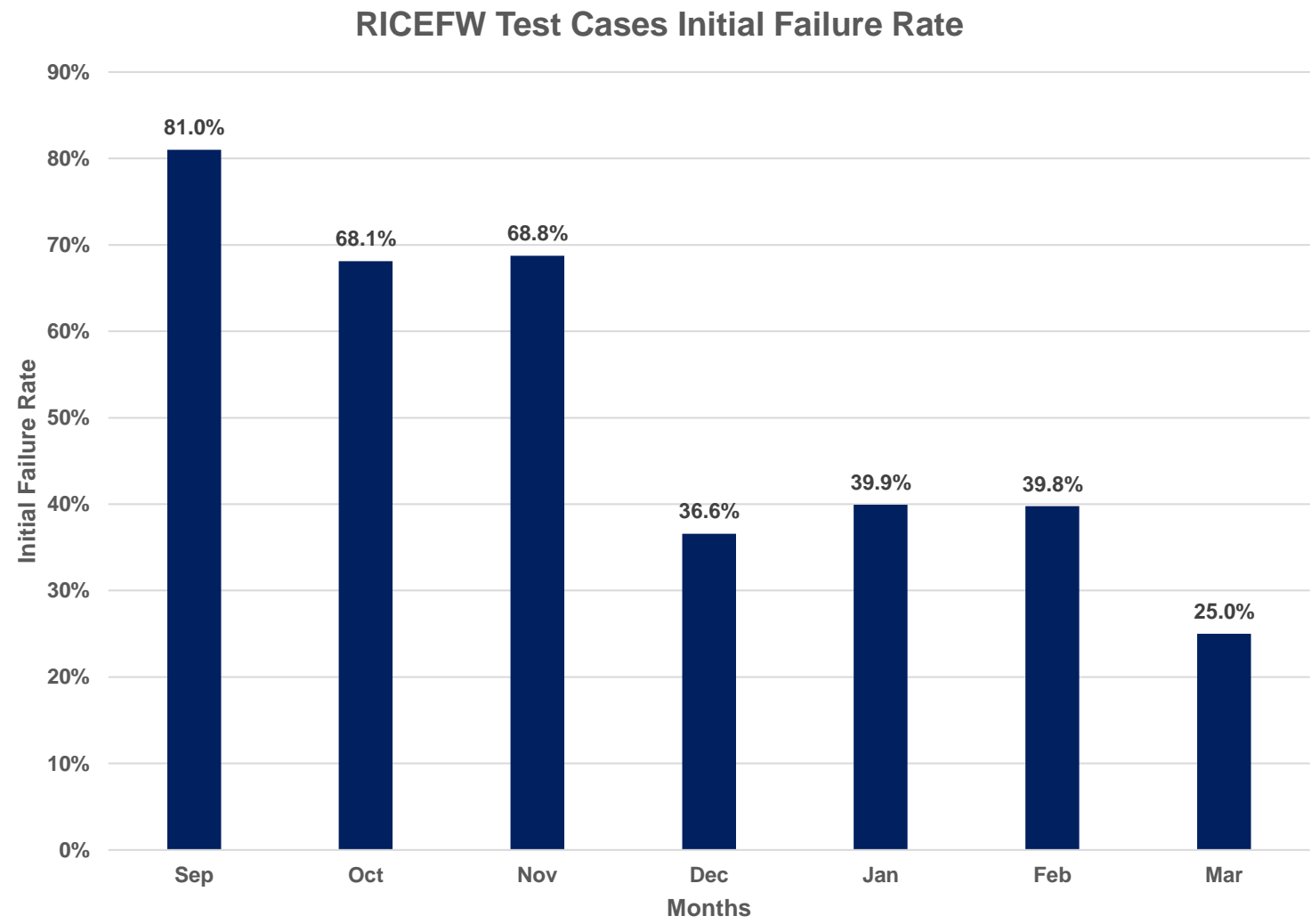
IV&V Update
Data, Conversion, and Interfaces

▸ Finding 16 – Compounding delays in Mock Conversion 0 and 1 have led to a compressed timeline for Mock Conversion 2 and potentially impacted multiple downstream activities, such as Interface Testing, future Mock Conversions, and UAT.

  ◦ As of 4/15/25, 7 unresolved SIRs remain for Mock Conversion 1B (5 Medium-priority and 2 Low-priority).

  ◦ Florida PALM IV&V recommends that the Florida PALM Project Team collaborate with the SSI Vendor to establish clear deadlines for resolving these SIRs, execute remaining scripts, and finalize State Validation for prior Mock Conversions.

▸ Mock 2A began on 3/19/25 and Mock 2B began on 4/8/25.

  ◦ All Mock Conversion 2 activities targeted for completion by 5/2/25.

IV&V Update
System Testing

▶ Finding 15 – Risk that High Failure Rate For RICEFW-related Test Scripts May Impact Stage Gate 3 – Ready to Begin UAT.

◦ Sustained improvement in initial failure rate for RICEFW-related Test Scripts.

◦ Risk level reduced; monitoring as 34% of RICEFW Tests remaining to execute.

RICEFW Test Cases Initial Failure Rate

Month	Initial Failure Rate
Sep	81.0%
Oct	68.1%
Nov	68.8%
Dec	36.6%
Jan	39.9%
Feb	39.8%
Mar	25.0%

IV&V Update
System Testing

- Finding 18 – The current pace of System Test execution by the SSI Vendor and the addition of Test Scripts as Build Segments are completed could delay the completion of System Testing and increase the overlap with UAT.
  - The Finding has been closed based on the extended System Testing timeline in Amendment 12 and the removal of overlap between System Testing and UAT.

- System Testing for Segment III began on 3/17/25.
  - Number of unresolved SIRs decreased from 331 at the end of February to 99 at the end of March.
  - 115 unresolved SIRs as of 4/18/25 as Segment III progresses.

- Regression Testing for Event 1 – Full Regression Test began in March (after completing System Testing for Segments I & II).

IV&V Update
System Testing

- ▸ System Testing for DW/BI:
  - ◦ Planned start date for System Testing DW/BI is 3/18/25 in Amendment 12.
  - ◦ The Florida PALM Project Team indicated that planning activities are occurring, and that execution will be 5/13/25 – 7/18/25.
    - • Initial list of Test Scripts has been submitted with DED for D661 – Completion of System Test DW/BI.
  - ◦ Florida PALM IV&V has not observed Test Scripts for DW/BI added to the TSWUT/TEXT or a System Testing kickoff meeting scheduled yet.
  - ◦ Florida PALM IV&V will monitor the progress of preparation activities and any potential impacts on the completion of System Testing DW/BI within the targeted timeline.

IV&V Update
Project Management

- Finding 19 – The Florida PALM Project could benefit from increased adherence and updates to the Risk and Issue Management process.
  - No changes to Finding related to updated Risk and Issue Management Process due to prioritizing Schedule updates.

- As the Project Schedule is being revised and finalized, Florida PALM IV&V recommends implementing the following schedule control measures:
  - Using estimated Start/Finish dates to establish schedule control thresholds and define acceptable variance limits.
  - Establish action triggers or alerts for tasks that may impact the Critical Path, enabling the Florida PALM PMO Team to proactively identify potential timeline risks and take appropriate mitigation steps.
  - Florida PALM PMO Team to conduct weekly meetings with task coordinators to verify teams are aligned, review progress, adjust workstreams as needed, and offer guidance so tasks stay on schedule.

IV&V Update
Organizational Change Management

▸ Finding 17 – Risk that the overlapping timing of UAT, Training activities, and YEC tasks may create resource constraints, increase SME and end-user change fatigue and burnout, and reduce the effectiveness of Training delivery.

  ◦ No changes to the Finding related to the updated timeline in Amendment 12 and RW updates/adjustments.

▸ Florida PALM IV&V Team recommends RCs continue to incorporate the following in Readiness Touchpoints:

  ◦ Encourage CCN members to join and ask about areas where they need support.

  ◦ Ask if Agency end-users know about changes associated with the Florida PALM Project.

  ◦ Ask how internal Agency OCM efforts are going.

IV&V Update
Organizational Change Management

▸ Florida PALM IV&V discussed Agency Dashboards with the Florida PALM Readiness Team on 3/28/25.

  ◦ RCs have provided varying guidance on how Agencies should report Tasks they are unable to start or complete for valid reasons.

    • Some Agencies were instructed to mark the Task as complete. Others were advised to assign partial completion percentages and include comments.

  ◦ Florida PALM IV&V recommends that consistent guidance be provided across all Agencies regarding updating Task progress.

▸ Florida PALM IV&V Team acknowledges the benefits of Agency-led sub/workgroups and encourages Agency participation and cross-collaboration with the Florida PALM Project Team as needed.

IV&V Update
Agency Readiness

▸ Florida PALM IV&V Team observed increased activity within multi-Agency sub-groups:

  ◦ Multi-Agency PML-CML Meeting

  ◦ Florida PALM Agency Liaisons Forum

  ◦ UAT Training Sub-Group

▸ Agencies commented that shared information and support have had a positive impact and improved their understanding of key areas like RW Tasks and Data Conversion efforts.

  ◦ Florida PALM IV&V recommends that Agencies continue to engage with sub-groups to provide and receive support for Florida PALM.
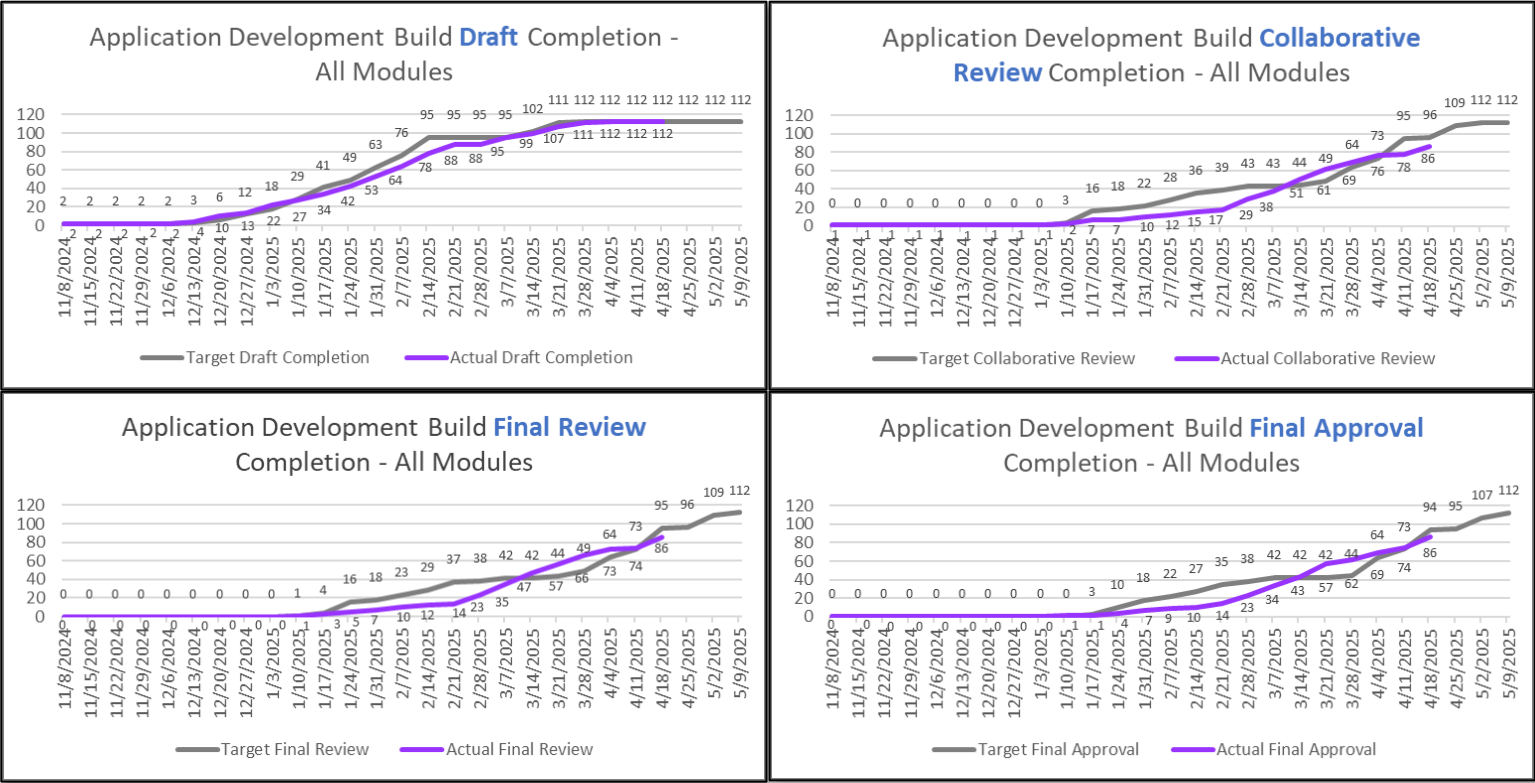
IMPLEMENTATION ACTIVITIES

STACEY TERRY

Legend: ● Complete ● On Track ● Monitoring ● Not on Track   Scope Schedule

Readiness and Implementation
Implementation Activities – App Dev Build

Application Development Build **Draft** Completion - All Modules

Application Development Build **Collaborative Review** Completion - All Modules

Application Development Build **Final Review** Completion - All Modules

Application Development Build **Final Approval** Completion - All Modules

Segment IV App Dev Build

Overall Status (Draft deliverable due 5/27)

- 112 of 112 (100%) draft ADs have been submitted for review / approval
- 86 of 112 (76.8%) have been fully approved
  - Target remaining 26 work units to be fully approved on schedule by 5/27
- 26 of 112 (23.2%) work units remain outstanding; all are in Collaborative Review
  - 4 (15.4%) pending initial state review
  - 9 (34.6%) pending feedback resolution by Accenture team
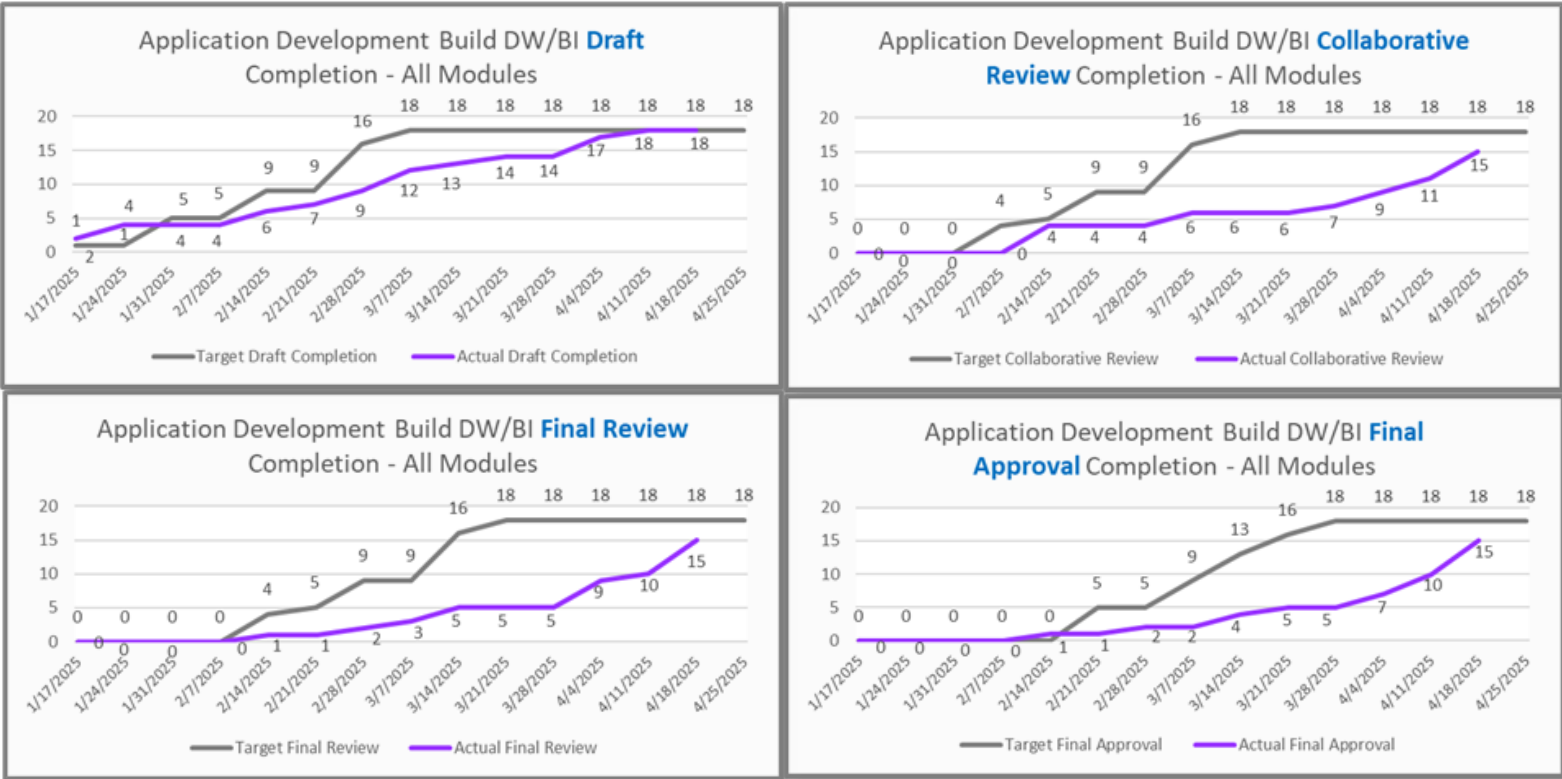 - 13 (50%) pending state resolution confirmation

Segment IV App Dev Build Status
(as of 4/18/2025)

FloridaPALM
Planning, Accounting, and Ledger Management

Readiness and Implementation
Implementation Activities – DW/BI – Build

DW/BI Build Segment III

Overall Status (Draft deliverable due 5/21)

- 18 of 18 (83.3%) draft ADs have been submitted for review / approval
- 15 of 18 (83.3%) have been fully approved
    - Target remaining 3 work units to be fully approved by 5/2
- 3 of 18 (16.7%) work units remain outstanding; all are in Collaborative Review
- 123 ETL jobs have been customized for modules where reports have been built
    - Complete – AM (17), AP (22), GL (21), GM (4), IU (8), KK (2), PC (11), PR (38)
    - Evaluation of Attachment 5.2 customizations is in progress to retrofit for self-service reporting

DW/BI Build Segment III Status
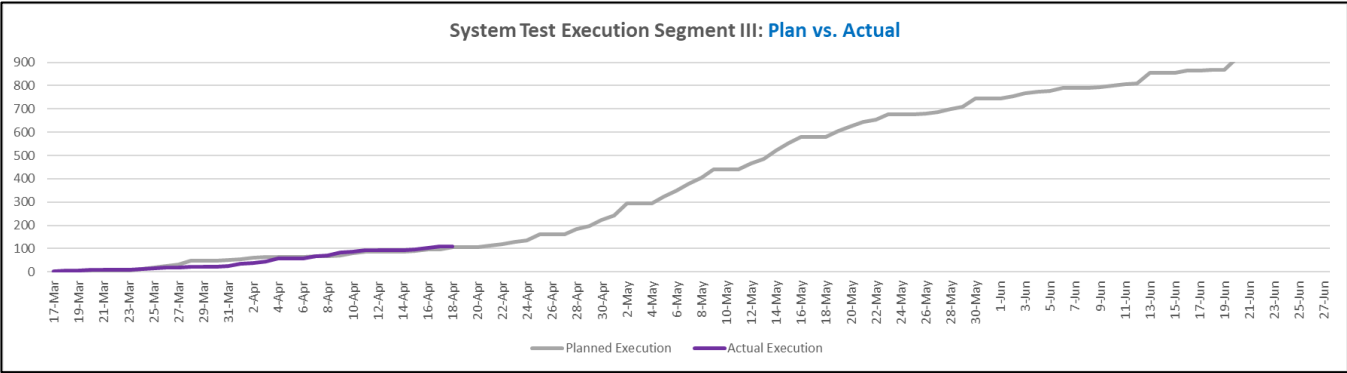### (as of 4/18/2025)

Readiness and Implementation
Implementation Activities – System Testing

System Test Execution Segment III	Count	% Against Total	% Against Executed to Date
Original Total Number of Scripts	706	-	-
New Total Number of Scripts	921	-	-
Planned to Date	105	11.4%	-
Executed to Date	110	11.9%	-
1st Run Pass Rate	66	7.2%	60%
1st Run Fail Rate	44	4.8%	40%
Pass Rate	88	9.6%	80%
Fail Rate	22	2.4%	20%

System Test Segment III – Execution

Overall Execution Status
- Overall test execution is tracking per schedule (Draft deliverable due 7/2)
- 76 SIRs logged to date (refer to image below)
- Run 1 Execution Status
  - 76 of 110 (69%) executed to-date are RICEFW related
    - Initial Pass – 51.3%
    - Initial Fail – 48.7% (Interface logs, process and validation issues)
  - 34 of 110 (31%) executed to-date are Security, Configuration, BPM, or Cross Module related
    - Initial Pass – 70.6%
    - Initial Fail – 29.4% (Security and transaction processing issues)

System Test Execution Segment III: Plan vs. Actual

— Planned Execution — Actual Execution

System Test Segment III – SIRs

Priority	CLOSED	NEW	RESOLVE	RETEST	ON HOLD	REJECTED	CANCELLED	T:
^ High	14	1	9	3	2	0	0	29
= Medium	27	1	8	2	0	0	2	40
⌄ Low	5	0	0	0	0	2	0	7
Total Unique Issues:	**46**	**2**	**17**	**5**	**2**	**2**	**2**	**76**

System Testing Segment III Status
(as of 4/18/2025)

Florida PALM
Planning, Accounting, and Ledger Management

Readiness and Implementation
Implementation Activities – Mock Conversion

Mock Conversion II Execution Status	2A Financials	2B Payroll
Conversion Complete • **Load to Target, DVR and Functional Validation Complete**	0	0
Load to Target – Complete • Pending DVR and/or Functional Validation Completion	6	3
Load to Target – In Progress	1	1
Load to Target – Not Started	4	10
Total	**11**	**14**

Mock Conversion II

- Mock II scheduled to complete by 5/2
  - Mock 2A load percentage to-date averaging 89.6%
  - Mock 2B load percentage to-date averaging 99%
- Resolving SIRs; key issues related to conversion data discrepancies, log file errors and staging agency configuration values

Mock Conversion SIRs

Custom List 2	⌃ High	═ Medium	⌄ Low	T:
Mock 1B	0	5	2	7
Mock 2A	6	5	5	16
Mock 2B	1	3	0	4
Total Unique Issues:	**7**	**13**	**7**	**27**

Mock Conversion Status
(as of 4/18/2025)

Florida PALM
Planning, Accounting, and Ledger Management

Readiness and Implementation
Implementation Activities – Interface Testing

Enterprise Partners	Agencies and Special Handling	Third Parties
• DOR • FACTS • MFMP • LAS/PBS • People First • STMS • Works (BOA)	• Agencies (31) • AG • DFS Enterprise • DMS • EDR • FRS • HSMV • LEG • Risk Management • UCP	• Fidelity Information Services (FIS) • JP Morgan Chase (JPMC) • Wells Fargo (WF)

Interface Testing Segment I

- Interface Test Segment I includes the following cycles:
  - ○ Cycle 1 – Connectivity Testing (Began October 2024)
    - ▪ Connectivity testing is complete for the integrating systems with the exception of STMS web service; testing in progress
  - ○ Cycle 2 – Technical Testing (June – October 2025)
    - ▪ 495 connections received
      - ❖ 22 connections have since been removed leaving 473 confirmed connections
      - ❖ Additional connections pending receipt
    - ▪ Environment preparation activities are underway which includes configuration of MFT folders, run controls and custom configuration values
    - ▪ Preparing execution schedule, metrics tracking tools and status reporting structure
    - ▪ Smoke testing will be completed after Mock II data is migrated to the environment
    - ▪ Kick-off meeting planned for week of May 20

Interface Testing Status
(as of 4/18/2025)

Florida **PALM**
Planning, Accounting, and Ledger Management

READINESS ACTIVITIES

NIKKI KLEIN
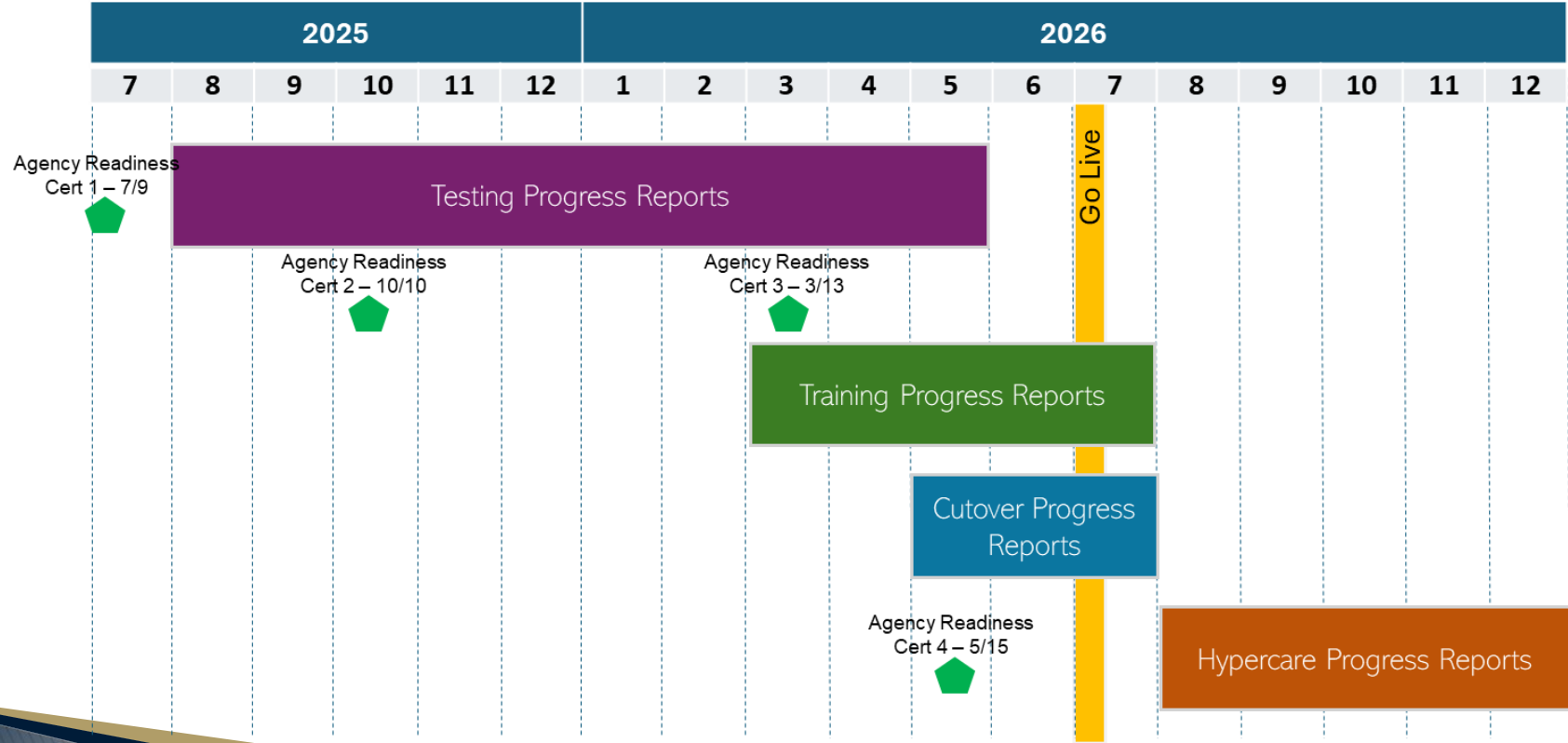
Readiness Activities
Readiness Workplan Updates

▸ Removed recurring tasks to manage risks and issues

◦ Activity and confirmation to be included in Bimonthly Status Report submission

◦ Risk, Issue, and Assumption logs updates have been shared with agencies

▸ Agency Business System-related tasks by Segment

◦ All segment related tasks have closed

◦ 59 occurrences of outstanding tasks, across 17 agencies

◦ Outstanding remediation or documentation updates can be completed in current Task 576 - Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing

Readiness Activities
Readiness Workplan Updates

▸ Removing generalized tasks and adding new monthly Progress Report Tasks as agencies execute Testing, Training, Cutover, and Hypercare

Readiness Activities
Readiness Workplan Updates

▸ RW tasks in May will focus on Testing Preparations

People
- Identify and Role Map SMEs for UAT

Processes
- Finalizing Change Analysis Tool
- Preparing Documentation for UAT

Technology
- Ongoing ABS Remediation and Unit Testing
- IdP Confirmation for UAT

Data
- Update Configuration Workbooks
- Review Mock 2 Results and Perform Data Cleansing
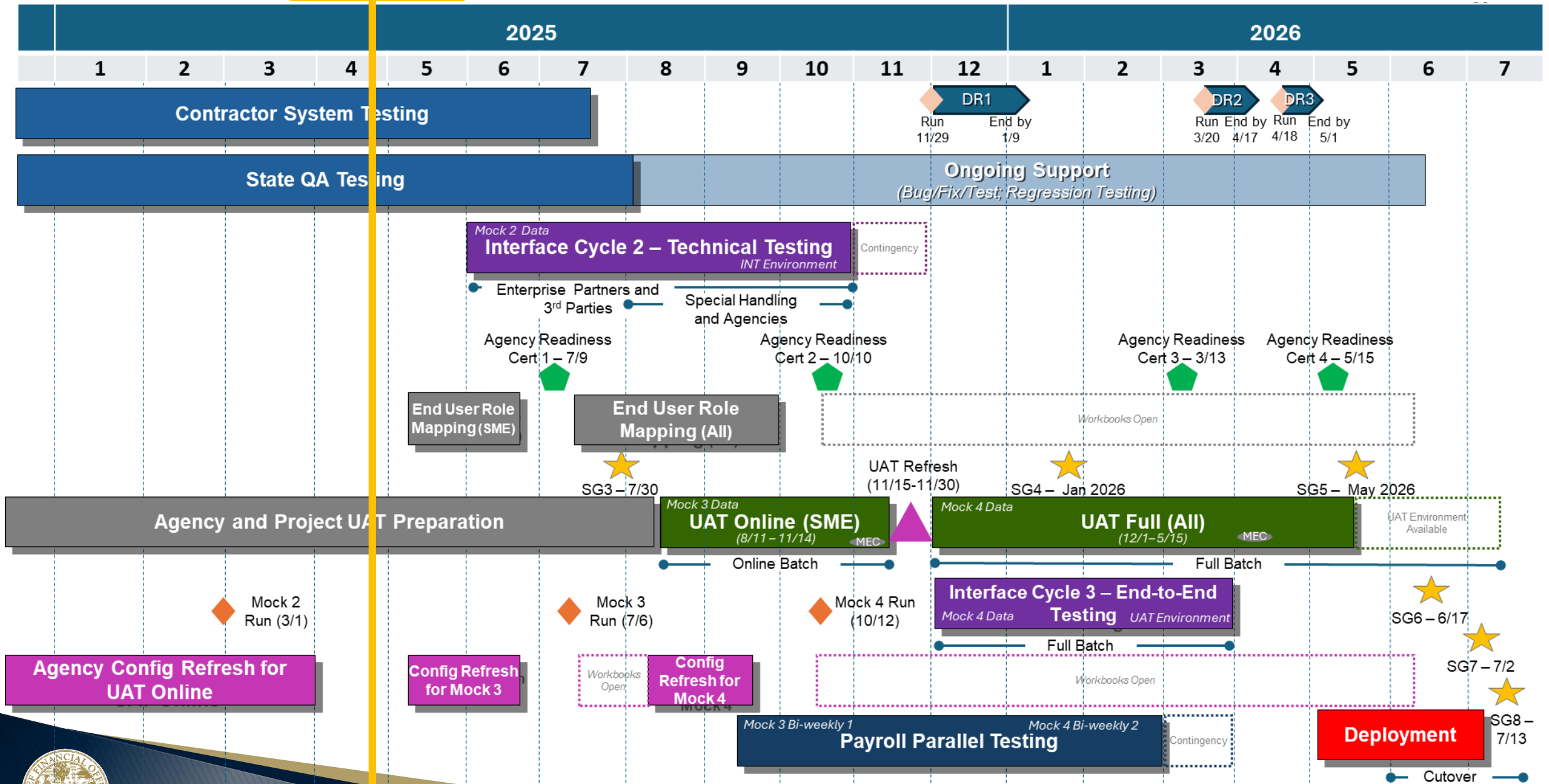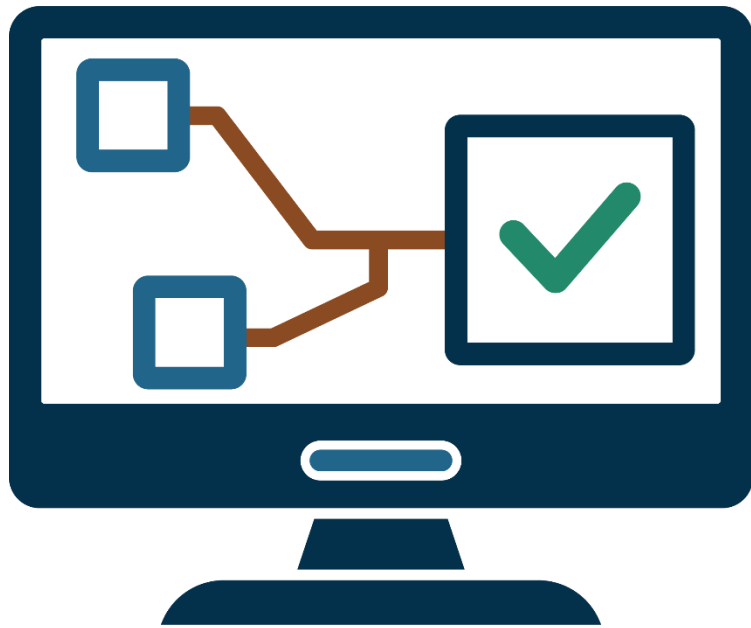- Update Mappings for Conversions

Florida **PALM**
Planning, Accounting, and Ledger Management

TESTING ACTIVITIES

JIMMY COX, ANGIE ROBERTSON

We are here

2025

2026

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Contractor System Testing

DR1
Run 11/29 — End by 1/9

DR2 Run 3/20 — End by 4/17
DR3 Run 4/18 — End by 5/1

State QA Testing

Ongoing Support
(Bug/Fix/Test; Regression Testing)

Mock 2 Data
Interface Cycle 2 – Technical Testing
INT Environment
Contingency

Enterprise Partners and 3rd Parties — Special Handling and Agencies

Agency Readiness Cert 1 – 7/9
Agency Readiness Cert 2 – 10/10
Agency Readiness Cert 3 – 3/13
Agency Readiness Cert 4 – 5/15

End User Role Mapping (SME)
End User Role Mapping (All)

Workbooks Open

SG3 – 7/30

UAT Refresh (11/15-11/30)

SG4 – Jan 2026
SG5 – May 2026

Agency and Project UAT Preparation

Mock 3 Data
UAT Online (SME)
(8/11 – 11/14) MEC

Mock 4 Data
UAT Full (All)
(12/1–5/15) MEC

UAT Environment Available

Online Batch
Full Batch

Mock 2 Run (3/1)
Mock 3 Run (7/6)
Mock 4 Run (10/12)

Interface Cycle 3 – End-to-End Testing
Mock 4 Data *UAT Environment*

Full Batch

SG6 – 6/17

Agency Config Refresh for UAT Online

Config Refresh for Mock 3

Workbooks Open
Config Refresh for Mock 4

Workbooks Open

SG7 – 7/2

Mock 3 Bi-weekly 1 *Mock 4 Bi-weekly 2*
Payroll Parallel Testing
Contingency

Deployment
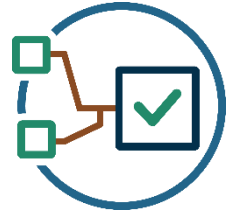
SG8 – 7/13

Cutover

TESTING ACTIVITIES

TECHNICAL INTERFACE TESTING

JIMMY COX, ANGIE ROBERTSON

Testing Activities
Technical Interface Testing

What is the purpose of Technical Interface Testing?

▸ Agency Business Systems (ABS) and Enterprise Systems - Validate system remediation has been performed on the ABS or enterprise system to generate/process the selected interface files in the Florida PALM interface file format

▸ Inbound to Florida PALM –
  ◦ Ensure each ABS and enterprise system can properly generate files from their system(s) (i.e., validate the system was remediated correctly) in the Florida PALM interface file layouts
  ◦ Identify any issues with the file creation that need to be remediated prior to starting end-to-end interface testing

▸ Outbound from Florida PALM –
  ◦ Ensure each ABS and enterprise system can consume the selected outbound files from Florida PALM into their system(s)
  ◦ Identify any issues with processing the files that need to be remediated prior to starting end-to-end interface testing

▸ Third-Party Systems (e.g., banks) – Validate Florida PALM is correctly generating outbound and processing inbound files using the correct file layouts
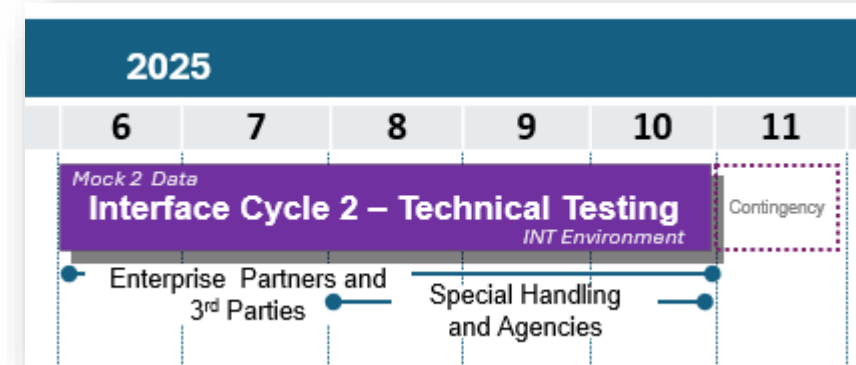
Testing Activities
Technical Interface Testing

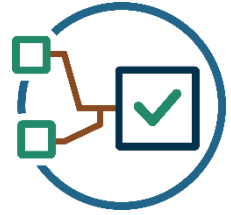### When is Technical Interface Testing?

▶ Technical Interface Testing will occur between June and November of 2025

- June – August: Testing with Enterprise Partners and Third Parties

- August – November: Testing with Agency Business Systems

- As part of RW Task 576, agencies indicated when they would be ready to test

- Florida PALM is currently developing a testing schedule based on agencies responses to RW Task 576

Testing Activities
Technical Interface Testing

What data will be used?

▸ Technical Interface Testing will use Mock 2 data
- Financials – as of March 1, 2025
- Payroll – as of March 30, 2025

▸ Data sent back will be based on the ABS and Enterprise system interface selections
- If both inbound and outbound files were selected, then inbound file will be processed, and used to generate the applicable outbound file
- If only an outbound file was selected, then Florida PALM will stage transactions to generate the outbound file

Testing Activities
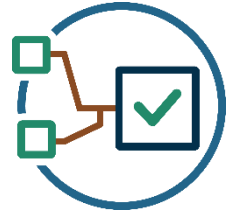## Technical Interface Testing

What is NOT included?

- ‣ Online entry
- ‣ Spreadsheet uploads
- ‣ Full integration testing
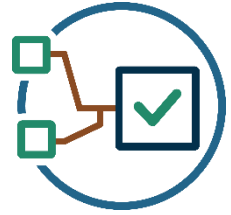
Testing Activities
Technical Interface Testing

What else should you know about Technical Interface Testing?

▸ It is heavily curated, unlike end-to-end interface testing

▸ All files will be exchanged using the MFT setup for the interfacing partner

▸ It is not connectivity test; connectivity testing has already occurred

▸ It is not a test of the agencies' ability to manually create an interface file

▸ The intent is to test the systems, not people

Testing Activities
Technical Interface Testing
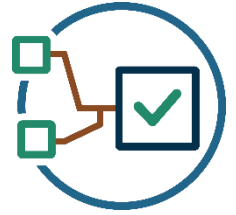
What are expected outcomes?

▸ Confirmation that ABS and enterprise systems can accurately generate and load interface files

▸ Allow agencies and enterprise systems to confirm their understanding of the inbound/outbound file formats

▸ Identify remediation needs <u>prior</u> to starting end-to-end (Cycle 3) interface testing

▸ Ready the state for end-to-end interface testing

▸ Confirm third-party integrations are working correctly

Testing Activities
Technical Interface Testing
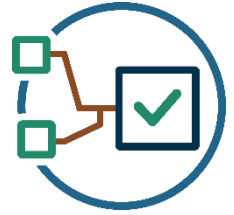
What is the exit criteria?

▸ Inbound to Florida PALM
  ◦ File is received in correct file format and can be processed by Florida PALM
  ◦ Must be able to process the transaction to completion
  ◦ Verification that the file is generated by the business system, not manually

▸ Outbound from Florida PALM
  ◦ File is processed/loaded into the business system
  ◦ Verification that the data is present in the business system

▸ Testing can and will be repeated until successful

▸ Must complete Technical Interface Testing <u>prior</u> to starting end-to-end testing (Cycle 3)

Testing Activities
User Acceptance Testing

Jimmy Cox, Angie Robertson

Testing Activities
User Acceptance Testing

When is User Acceptance Testing?

‣ **UAT Online (SMEs only) August – November 2025**
  ◦ Project-hosted sessions (in-person & virtual) with SMEs
  ◦ RW Task includes criteria on how to select a SME for UAT Online sessions
  ◦ SMEs will have Mock 3 data (as of 7/6) available in UAT environment

‣ **UAT environment will be offline for a data refresh November 15 - 30**

‣ **UAT Full (all end users) December – May 2026**
  ◦ SMEs will facilitate agency-led UAT sessions; Project will provide support from the Project site where needed, but agencies will lead
  ◦ End users will have Mock 4 data (as of 10/12) available in UAT environment
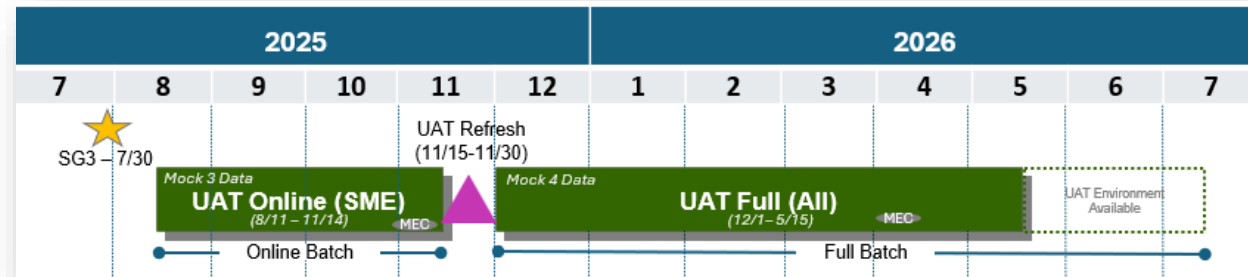
Testing Activities
User Acceptance Testing

Why are we conducting User Acceptance Testing?

▸ Allow agencies to familiarize themselves with how transactions, data, reporting, etc., work within Florida PALM

▸ Allow for continued remediation of agency business processes, desk procedures, etc.

▸ Identify other gaps in business processes that require additional remediation

▸ Hands-on access supports working through the stages of change management / emotions, leading end users to acceptance

▸ Key step in end user readiness

Testing Activities
User Acceptance Testing

What is/is not included in UAT Online?

▸ Included
  ◦ Processing transactions online
  ◦ Online batch processing and Data Warehouse batch processing
  ◦ Processing spreadsheet uploads
  ◦ Processing reports in Florida PALM and the Florida PALM Data Warehouse
  ◦ Creating new Queries in the Florida PALM Data Warehouse
  ◦ Off-cycle payroll processes (e.g., cancellations, adjustments)

▸ Not Included
  ◦ Interface testing – this will occur in a separate interface testing environment
  ◦ Interface batch processing
  ◦ Payroll Processing (i.e., biweekly, monthly, supplemental) – this will occur in the interface testing environment and in the parallel testing environments

Testing Activities
User Acceptance Testing

What is/is not included in UAT Full?

▸ Included

- ◦ Processing transactions online
- ◦ Processing spreadsheet uploads
- ◦ Interface processing
- ◦ Full batch schedule
- ◦ Processing reports in Florida PALM and the Florida PALM Data Warehouse
- ◦ Creating new Queries in the Data Warehouse
- ◦ Interface batch processing
- ◦ Full Payroll Processing

▸ Not Included – N/A

Testing Activities
User Acceptance Testing

What are Project vs. Agency responsibilities?

Project Responsibilities	Agency Responsibilities
▸ Creation of core materials to support end user learning	▸ Creation of agency-specific materials (e.g., applicable COA values, source documents to support work simulation)
▸ Guided sessions to support SMEs (UAT Online)	▸ Creation of User Stories to support user testing
▸ Creation and maintenance of a UAT environment with agency configurations and data loaded	▸ Testing of agency processes and business systems
▸ Support for agency processes and business system testing	▸ Coordination / assignment of agency participants
▸ Resolution of Florida PALM system-related issues (e.g., tickets)	▸ Tracking of agency-specific testing issues
	▸ Resolution of agency system-related issues

Testing Activities
User Acceptance Testing

▸ The Project will prepare and publish 'core functions' materials

- UAT Materials – *includes general navigation and other pre-requisites for UAT as well as step-by-step instructions for completing transactions in Florida PALM*

- Training Materials – *will be a mix of web-based training, Knowledge Checks, and select instructor led / facilitated coursework available through self-study or guided learning*

- End User Manual – *a resource, located on the Knowledge Center, that will house 'all things' Florida PALM from a functionality and end user learning perspective*

▸ Agencies will need to provide materials for agency-specific functions

▸ The Project will support end user learning and maintenance of materials starting in UAT and continuing through Post Implementation Support
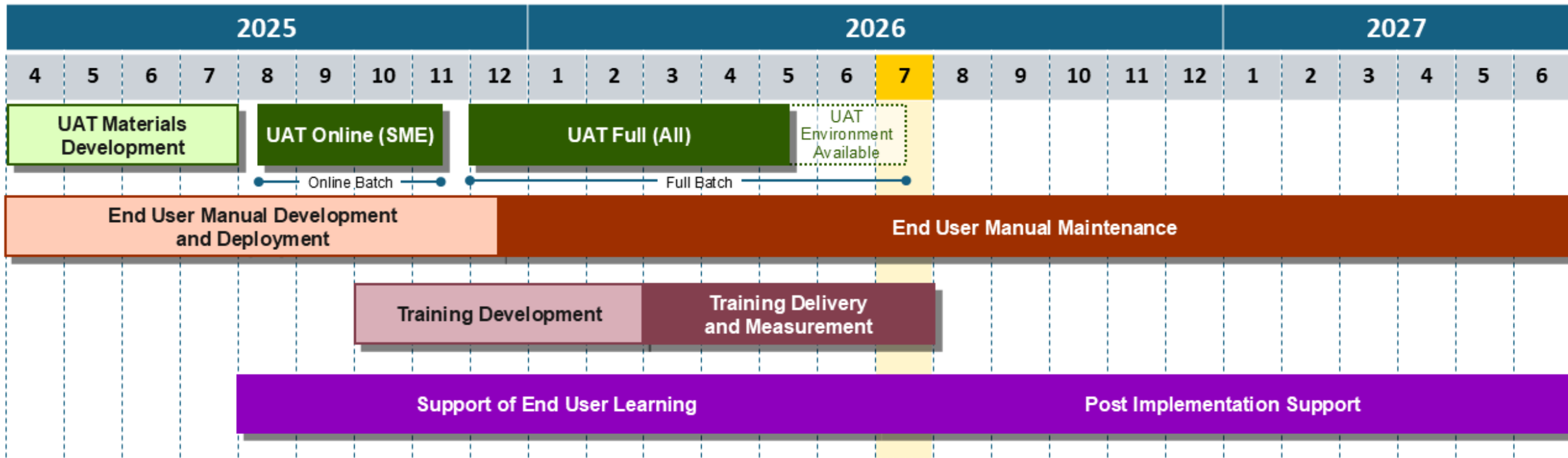
Testing Activities
User Acceptance Testing

What is the timeline for creating the materials?

2025									2026													2027					
4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6

- UAT Materials Development
- UAT Online (SME)
- UAT Full (All)
- UAT Environment Available
- Online Batch
- Full Batch
- End User Manual Development and Deployment
- End User Manual Maintenance
- Training Development
- Training Delivery and Measurement
- Support of End User Learning
- Post Implementation Support

Testing Activities
User Acceptance Testing

What should agencies do to prepare for UAT?

▸ Complete change analysis to identify changes in agency business processes

▸ Identify SMEs that can support agency processes and end users within each applicable business process grouping

▸ Maintain list of end users (in Smartsheet)

▸ Role map SMEs

▸ Create data value 'cheat sheets' for agency COA values

▸ Ensure SMEs take pre-requisite UAT training

▸ Create agency-specific pre-requisite UAT training

▸ Create user stories

▸ Create and maintain a UAT plan and approach for tracking testing activities and for engaging end users in UAT Full

Testing Activities
User Acceptance Testing

What should agencies do during UAT Online?

▸ Confirm SMEs are participating in UAT and are growing their learning

▸ Confirm User Stories based on SME testing activities (i.e., create new ones, make changes / refine)

▸ Prepare for UAT Full sessions (logistics, materials, etc.)

▸ Ensure end users complete pre-requisites (project and agency-specific)

▸ Role map end users

▸ Refine configuration values (in Smartsheet) based on SME testing

▸ Track testing activities and resolution of agency-specific issues

▸ Refine agency business processes and agency business systems, as needed, based on testing activities

Testing Activities
User Acceptance Testing

What should agencies do during UAT Full?

▸ Confirm end users are participating in UAT and are growing their learning

▸ Refine end user role mapping based on testing efforts

▸ Refine configuration values (in Smartsheet) based on testing

▸ Track testing activities and resolution of agency-specific issues

▸ Finalize agency business processes and agency business systems based on testing activities

▸ Prepare for final Agency Readiness Certification – May 15, 2026

STAGE GATE 3 – READY TO BEGIN UAT

JIMMY COX, ANGIE ROBERTSON

Stage Gate 3 – Ready to begin UAT

▶ Stage Gate 3 – Ready to Begin UAT
  ◦ Executive Steering Committee Stage Gate Decision
  ◦ Planned Decision Date – July 30, 2025

▶ Contract Requirement
  ◦ Design and Build are complete; Contractor System Test is at least 90% complete; or as mutually agreed to based on ESC direction; and the UAT environment is ready for testing
  ◦ Excludes PCRs and other work that are mutually agreed to have a different timeline

Stage Gate 3 – Ready to begin UAT

▸ Other considerations before starting UAT (Not tied to Stage Gate 3)

- Agency Subject Matter Experts identified and registered for UAT
- UAT training materials are ready
- Security role mapping has occurred
- Agency Identity Provider (IdP) connections have been pointed to UAT
- Agency and Enterprise Security Access Managers are ready to assist end-users
- Agencies have developed their UAT Plan, user stories, and where possible test scripts

Stage Gate 3 – Ready to begin UAT

▸ What does the ESC want to review in order to support the Stage Gate 3 Decision?

▸ What happens if the Stage Gate 3 Decision is delayed?

▸ Are there other considerations?

NEXT MEETING

MAY 28, 2025

DEPARTMENT OF REVENUE

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