

Florida Department of Financial Services Planning, Accounting, and Ledger Management Project

Independent Verification and Validation Monthly Assessment Report June 2025

July 11, 2025

Contract: 80101507-21-STC

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Executive Summary

The following list summarizes the key items of the Florida PALM IV&V Team details in the Monthly Assessment Report for June 2025:

- The overall Florida PALM Project Risk Rating worsened from a Medium Risk to a High Risk due to the opening of new Findings that may impact the Florida PALM Project's ability to proceed into User Acceptance Testing (UAT), as well as elevated Risk Ratings from Medium Risks to High Risks for several Focus Areas.
- Four new Findings were opened:
 - Finding 22 highlights the Risk that not all System Testing Exit Criteria will be met in time for the 7/30/25 Executive Steering Committee (ESC) vote to confirm Stage Gate 3 – Ready to Begin UAT. As of 6/30/25, 4 of the 6 Exit Criteria remain "Not Met."
 - Finding 23 documents a Preliminary Concern regarding the pace of Data Warehouse (DW)/Business Intelligence (BI) test execution and retesting, which may delay System Testing DW/BI completion and impact the UAT start date.
 - Finding 24 raises the Risk that the high failure rate (approximately 50%) of DW/BI Test Scripts may indicate quality issues related to data, configuration, or the DW/BI environment.
 - Finding 25 raises a Preliminary Concern that the SSI Vendor is not accurately reflecting Florida PALM Project status in ESC presentations, creating gaps in stakeholder visibility.
- Finding 15 was closed after all Reports, Interfaces, Conversions, Extensions, Forms, and Workflows (RICEFW)-related Test Scripts were executed, and the number of unresolved failures dropped to manageable levels with improved retest success rates
- Finding 19 was closed due to the approved Florida PALM Project Management Plan (PMP) updates that incorporated three of the five recommendations included in the Finding.
- The Risk Ratings for the Florida PALM Project Testing and Data, Conversion, and Interfaces Focus Areas worsened from Medium Risks to High Risks due to concerns about the SSI Vendor's ability to meet the documented Exit Criteria by the targeted completion dates for System Testing and System Testing DW/BI.
- The Risk Rating for the Agency Project Management Focus Area worsened from a Medium Risk to a High Risk due to limited progress reported by some Agencies toward Readiness Certification Criteria #1 and the lack of traceability regarding the status of their business system remediation efforts.
- The Risk Rating for the Florida PALM Organizational Change Management (OCM) Focus Area improved from a Medium Risk to a Low Risk due to the continued efforts of the Florida PALM Agency Readiness Team to support Agencies in preparation for UAT.

Focus Area Updates

The Table below summarizes the Florida PALM IV&V Team's updates for the various Focus Areas since the last Monthly Assessment Report. Detailed updates regarding these Focus Areas are provided in this document's Focus Area Updates section. Some Focus Areas may be marked as Not Applicable (NA) as they have not started or if there is no activity during this reporting

period. Descriptions for each Focus Area will be incorporated into each Monthly Assessment Report.

Florida PALM Project Focus Areas:

Table 1: Florida PALM Project Focus Areas

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Overall Project Indicator	Medium	High	Worsening	<p>The overall Florida PALM Project Risk Rating has worsened from a Medium to a High Risk.</p> <p>Four new Findings were opened – one related to System Testing (Finding 22), two focused on System Testing DW/BI (Findings 23 and 24), and one regarding the SSI Vendor's ESC presentation on the status of System Testing and System Testing DW/BI (Finding 25). Findings 22–24 may impact the ESC's decision to vote on Stage Gate 3 – Ready to Begin UAT, scheduled for 7/30/25, as well as the overall UAT timeline.</p> <p>Finding 15 related to initial failure rates for RICEFEW-related Test Script failures and Finding 19 related to adherence and updates to Florida PALM Project Changes, Risks, Action Items, Issues, Decisions, and Lessons Learned (CRAIDL) management were closed.</p> <p>The Risk Ratings for the Florida PALM Project Testing and Data, Conversion, and Interfaces Focus Areas increased from Medium Risks to High Risks due to concerns about the SSI Vendor's ability to meet the documented Exit Criteria by the targeted completion dates for System Testing and System Testing DW/BI. Conversely, the Florida PALM OCM Focus Area improved from a Medium to a Low Risk, reflecting the continued efforts of the Florida PALM Agency Readiness Team to support Agencies in preparation for UAT.</p> <p>The Risk Rating for the Agency Project Management Focus Area increased from a Medium Risk to a High Risk due to limited progress reported by some Agencies toward Readiness Certification Criteria #1 and the lack of traceability</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				regarding the status of their business system remediation efforts.
Florida PALM Project Management	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>As of 6/30/25, the Florida PALM Project Schedule Performance Indicator (SPI) declined from .94 in May to .92 in June, indicating that the Florida PALM Project is progressing behind schedule at 92%. Delayed Tasks increased from 207 in May to 212 in June.</p> <p>The Florida PALM Project Management Office (PMO) Team implemented process improvements, including moving the Florida PALM PMO Weekly Touchpoint to Fridays and transitioning RADAR to a collaboration folder. Additionally, Project Change Request (PCR) 124 was approved, reallocating unused Reports, Interfaces, and Florida PALM Project Training to support additional Connections.</p>
Florida PALM Organizational Change Management	Medium	Low	Improving	<p>The Risk Rating for this Focus Area has improved from a Medium Risk to a Low Risk.</p> <p>The Florida PALM Agency Readiness Team prioritized sharing information on configuration, conversion, UAT, Training, and other Testing efforts. Readiness Coordinators (RCs) are encouraged to continue promoting collaboration between smaller, resource-constrained Agencies and larger Agencies, and to emphasize participation in Agency-led workgroups to reduce overreliance on RC support.</p>
Florida PALM Requirements and Design	Low	Low	No Change	<p>The Risk Rating for this Focus Area remains a Low Risk.</p> <p>The Florida PALM Project Team is progressing through pre-Build and Build reviews for several miscellaneous RICEFW Items. All five Employee Self-Service (ESS) Functional Design (FD) specifications were approved as of 6/30/25, approximately four weeks behind schedule due to prioritization of</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				Build Segment IV. The Florida PALM IV&V Team does not expect this delay to impact Stage Gate 3 – Ready to Begin UAT.
Florida PALM Development	Medium	Medium	Worsening	<p>The Risk Rating for this Focus Area remains a Medium Risk but is worsening from Low Yellow to Medium Yellow.</p> <p>Five ESS Extensions and 13 additional RICEFW Items still require development. Most of the miscellaneous RICEFW Application Development (AD) documents are on track, with one delayed by approximately one month. Development for the ESS Extensions also started about one month late, but they are still expected to be available before Full UAT begins.</p> <p>System Investigation Request (SIR) activity increased, with a 68% rise in open SIRs compared to May, driven by an 85% increase in newly identified SIRs. While the number of SIRs resolved also increased by 51%, it has not kept pace with the number of new SIRs logged. If this trend continues, additional Development staff may be necessary to support timely SIR resolution.</p>
Florida PALM Testing	Medium	High	Worsening	<p>The Risk Rating for this Focus Area has worsened from a Medium Risk to a High Risk.</p> <p>The SSI Vendor completed all planned System Testing Segment III Test Scripts by the targeted finish date of 6/27/25, but Finding 22 was opened to track the risk that not all Exit Criteria will be met ahead of the ESC Stage Gate vote on 7/30/25, which could delay the start of UAT.</p> <p>An analysis of unresolved SIRs shows the highest concentrations of issues are in critical business modules, particularly HCM-Payroll, with 61 unresolved SIRs, along with several key Financial modules.</p> <p>Florida PALM IV&V Independent Testing began on 6/10/25, with initial efforts focused on individual components (e.g.,</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				BPMs, RICEFW objects) in preparation for Stage Gate 3. Approximately 30% of planned Test Scripts have been executed, with an average of 6 scripts per day and a First run Pass rate of 64%.
Florida PALM Data, Conversion, and Interfaces	Medium	High	Worsening	<p>The Risk Rating for this Focus Area has worsened from a Medium Risk to a High Risk.</p> <p>System Testing DW/BI, which began on 6/2/25, was paused on 6/10/25 due to a high volume of SIRs logged within the first week of execution. Testing resumed on 6/23/25, and as of 6/30/25, 49% of Test Scripts have been executed. The pass rate remains low at 51%, indicating potential concerns about the quality of the environment and configuration (Finding 24), and that execution may not be complete by the targeted finish date of 7/25/25 (Finding 23). Continued prioritization of critical SIRs, strong cross-team coordination, and sustained weekend work efforts will be essential to stabilize the environment and meet the System Testing DW/BI timeline.</p> <p>The SSI Vendor has begun preparations for Mock Conversion 3. Based on the durations, volume of SIRs identified, and resolution rates observed during previous Mock Conversions, the current Mock Conversion 3 timeline may not be feasible.</p>
Florida PALM Implementation Readiness	NA	NA	NA	The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

Florida PALM Agency Focus Areas

Table 2: Florida PALM Agency Focus Areas

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Agency Project Management	Medium	High	Worsening	<p>The Risk Rating for this Focus Area is worsening to a High Risk.</p> <p>While Agencies continue to meet with third-party vendors to coordinate remediation, most do not maintain</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<p>supplemental documentation beyond what is submitted through Readiness Workplan (RW) Tasks. This limits the ability of the Florida PALM Project and IV&V Teams to verify the status of business system remediation and assess readiness for Interface Testing Cycle 2.</p> <p>Additionally, some Agencies have yet to develop detailed user stories. Although these Agencies cite confidence based on internal planning and strategy discussions, the absence of documented user stories presents a risk to their UAT readiness and tester effectiveness.</p> <p>Ten Agencies also had no reported progress on RW Task 593 – Update Readiness Certification #1. The Florida PALM IV&V Team recommends that all Agencies complete Certification #1 Tasks by the 7/18/25 due date to avoid impacting their ability to begin UAT on 8/11/25.</p>
Florida PALM Agency Readiness	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Uncertainty around the outcomes of Legislative Budget Requests (LBRs) for staff augmentation in the upcoming fiscal year challenges the Agencies' ability to plan resources effectively to support Florida PALM activities.</p> <p>Role mapping also remains a concern to the Agencies due to system-enforced separation of duties and limited staffing. While some Agencies are internally reallocating tasks to address conflicts, others acknowledge that certain issues may require Florida PALM Project-level exceptions.</p> <p>Additionally, during the Multi-Agency Project Management Liaison (PML)-Change Management Liaison (CML) meetings, the Florida PALM IV&V Team observed key discussions, including the planned launch of a Trainer 101 program to help Agency staff adopt a trainer mindset. There</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				was also a proposal to develop a cross-Agency risk log and establish a working group to create shared risk management processes and a collaborative risk tracker.
Agency Requirements and Design	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>The Florida PALM IV&V Team observed 122 updates in the Florida PALM Knowledge Center Change Catalog across Interfaces, Business Processes, Reports, Conversions, and Configurations. Agencies reported minimal impacts of the business process changes to their Business System Remediation efforts.</p>
Agency Testing	Medium	Medium	Worsening	<p>The Risk Rating for this Focus Area remains a Medium Risk but has worsened from Medium Yellow to High Yellow.</p> <p>The Florida PALM IV&V Team assessed 31 Agency UAT Plans. Some were not available at the time of review, either because they hadn't been submitted or Verified as Complete. Based on the task instructions and industry best practices, 38% were comprehensive, 41% were moderate, and 12% were limited.</p> <p>Remediation efforts for 11% of selected Interfaces have not started, and five percent of Interfaces have unknown readiness dates.</p>
Agency Data, Conversion, and Interfaces	Medium	Medium	Worsening	<p>The Risk Rating for this Focus Area remains a Medium Risk but has worsened from Medium Yellow to High Yellow.</p> <p>While all Agencies have marked key RW Tasks related to Mock Conversion 2 Data Cleansing, Conversion Field Mapping, and Configuration Workbooks as 100% Submitted, many were returned by the Florida PALM Agency Readiness Team for</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<p>corrections due to errors or incomplete content.</p> <p>Five percent of business systems associated with selected Interfaces have unknown readiness dates. These Interfaces may be critical to Agency business operations, and without confirmation that they will be tested within the designated Interface Testing timeline, there is an increased risk of integration issues that could affect both Agency operations and the Florida PALM implementation schedule.</p> <p>Additionally, 12% of the total Agency business systems have not yet started remediation or preparation efforts, though more than half of those have also reported in Smartsheet that they will be ready to test during the Interface Testing Cycle 2 timeline.</p>
Agency Implementation Readiness	NA	NA	NA	The Florida PALM IV&V Team will begin reporting progress once Agency Implementation efforts begin.

New Findings

Finding Type: Risk

Impact: Significant

Probability: Likely

Priority: High

Finding Number and Title: **Finding 22** – Risk that not all System Testing Segment III Exit Criteria will be met by the SSI Vendor before the 7/30/25 ESC vote to confirm Stage Gate 3 – Ready to Begin UAT, which could result in a delay to the start of UAT.

Finding Description: As of the targeted System Testing completion date of 6/30/25, the SSI Vendor had not yet demonstrated that four of the six System Testing Segment Exit Criteria documented in D696 – Completion of System Test Segment III had been met. While the deadline for the Exit Criteria review has been extended to 7/11/25, these four outstanding criteria must be satisfied in order to successfully complete System Testing.

Criteria Per D696 – Completion of System Test Segment III, the completion of System Testing Segment III is defined as the successful fulfillment of six Exit Criteria, all of which must be met to complete System Testing. The specific Exit Criteria are outlined in the Table below:

Table 3: System Testing Exit Criteria

#	Exit Criteria	Status as of 6/30/25
1	All planned test scripts (for all cycles) have been executed with evidence supplied.	Met
2	At least 90 percent of test scripts have passed. If less than 90 percent of test scripts meet this criterion, the Project Director may deem system testing completed. This management discretion will be based on understanding the nature of the outstanding items and an approved action plan to address the outstanding SIRs.	Not Met
3	For System Testing Segment I and II, outstanding SIRs (i.e., Known Issues List) have been documented in Jira with their planned resolution dates. For System Testing Segment III, agreed upon SIRs have been migrated to ServiceNow (SNow).	Not Met
4	Critical or high business criticality SIRs are resolved or have an agreed upon disposition.	Not Met
5	There is agreement on the assigned priority for the outstanding medium and low priority SIRs.	Not Met
6	Appropriate metrics are captured, reported, and analysed.	Met

Cause: As of 6/30/25, four Exit Criteria remain unmet.

- **Criteria #2:** The State Quality Assurance (QA) Team has yet to complete approximately 235 (22%) of their review of successfully passed SSI Vendor Test Scripts, and 28 (3%) are currently in Returned for Action (RFA) status. At the current pace of review (approximately 51 Test Scripts per week), it could take an estimated 4.5 weeks to

complete the remaining reviews. While the Exit Criteria review deadline has been extended to 7/11/25, there may not be sufficient time to complete all reviews. Since the outcome of the remaining State QA Team review and RFA resolutions may result in some Test Scripts changing from Passed to Failed, there is a risk that the SSI Vendor may not be able to meet the 90% pass rate by the new deadline.

- **Criteria #3:** Outstanding issues are documented in Jira and have not yet been migrated to SNow. SIR migration is planned to be completed prior to the start of UAT.
- **Criteria #4:** Per metrics reported by the SSI Vendor, six High-priority System Testing SIRs remain unresolved. These must be addressed before System Testing can be considered complete. Based on the current pace of defect resolution, this criterion is likely to be met by the revised System Testing Exit Date of 7/11/25, provided no additional Critical or High-priority SIRs are identified by the State QA Team and no outstanding Medium-priority SIRs are escalated by the Florida PALM Project Team.
- **Criteria #5:** The Florida PALM Project Team has not yet completed its review of all outstanding Medium- and Low-priority and Business Criticality SIRs to confirm the appropriateness of their assigned priority levels. Any SIRs that are elevated to Critical or High as a result of this review would then need to be evaluated against Exit Criteria #4.

Effect: If the Exit Criteria are not met, the Florida PALM Project will be unable to proceed with the vote for Stage Gate 3 – Ready to Begin UAT at the ESC meeting on 7/30/25, which would impact the planned UAT start date of 8/11/25.

Recommendations: To increase the likelihood of satisfying all Exit Criteria, the Florida PALM IV&V Team recommends the following:

1. The SSI Vendor should provide the Florida PALM Project Team with a clear and easy-to-use extract of all outstanding Medium and Low-priority and Business Criticality SIRs, including a field for suggested Priority or Business Criticality changes and justification.
2. The Florida PALM Project Team should identify a subgroup of key decision makers to work with the SSI Vendor to review and confirm or update Priority or Business Criticality ratings of unresolved SIRs. Targeted SIR resolution dates based on the overall UAT timeframe (e.g., SIRs to be resolved prior to UAT Online or prior to UAT Full) could then be assigned to the unresolved SIRs.
3. Prioritize the allocation of Development and Testing staff to resolve and retest remaining Critical and High-priority and Business Criticality SIRs and to support progress toward meeting all remaining Exit Criteria.

Finding Type: Preliminary Concern

Impact: High

Probability: Possible

Priority: Medium

Finding Number and Title: **Finding 23** – Preliminary concern that the current pace of System Testing DW/BI execution and defect retesting by the SSI Vendor may delay the completion of System Testing DW/BI and potentially impact the start of UAT.

Finding Description: As of 6/30/25, the SSI Vendor had executed 70 of the 144 total Test Scripts planned for System Testing DW/BI, representing approximately 49% of the total Testing scope. Of the Test Scripts executed, 34 resulted in failures. Based on the current execution pace of approximately three Test Scripts per day, the Florida PALM IV&V Team projects that initial execution of all remaining Test Scripts may extend approximately three days beyond the planned completion date of 7/25/25. In addition, given the initial failure rate of approximately 50%, the SSI Vendor may require additional time to resolve and retest failed Test Scripts.

Criteria: According to Work Product (WP) 429 – Updated System Test Plan (DW/BI), the System Testing exit criteria for DW/BI include the execution of all planned Test Scripts with documented evidence, achieving a 90% pass rate, and ensuring that all Critical or High Business Criticality SIRs are either resolved or have an agreed-upon disposition.

Cause: System Testing DW/BI began on 6/2/25, but Testing activities were temporarily suspended from 6/16/25 to 6/23/25, due to the growing number of SIRs identified regarding the DW/BI environment and configuration.

Effect: If the System Testing DW/BI Exit Criteria are not met, the Florida PALM Project will be unable to proceed with the vote for Stage Gate 3 – Ready to Begin UAT. This would delay the ESC's decision and could impact the planned UAT start date of 8/11/25. Delays may create pressure to accelerate test execution, which could result in rushed testing, reduced coverage, and increased risk post-implementation. In addition, Parallel Testing could also be delayed, as both Testing efforts depend on the same defect resolution cycle and resources.

Recommendations: To support meeting the scheduled completion date of 7/25/25 for System Testing DW/BI, the Florida PALM IV&V Team recommends the following actions:

1. Define and prioritize the execution of higher-risk Test Scripts early in the test cycle to help identify and address potential SIRs as soon as possible.
2. Establish daily stand-up meetings between the SSI Vendor and State DW/BI teams to facilitate ongoing communication and support the timely resolution of any issues that arise during Testing.
3. The SSI Vendor should develop a comprehensive SIR and retest burn down plan to evaluate actuals against projections.

Finding Type: Risk

Impact: High

Probability: Possible

Priority: Medium

Finding Number and Title: **Finding 24** – Risk that the high failure rate of DW/BI Test Scripts may indicate potential quality issues related to the DW/BI environment, data, or configuration.

Finding Description: System Testing for DW/BI began on 6/2/25 but was temporarily suspended by the SSI Vendor on 6/16/25 due to an increasing number of SIRs being identified. Testing resumed on 6/23/25, but the initial failure rate of executed Test Scripts remains approximately 50%.

Criteria: According to WP429 – Updated System Test Plan (DW/BI), the Exit Criteria for System Testing DW/BI indicates that all Critical or High Business Criticality SIRs are either resolved or have an agreed-upon disposition.

Cause: As of 6/30/25, there were 41 High-priority SIRs open. Eleven are indicated as Code defects, 21 are Data-related issues, and nine are due to Functional or Technical Design.

Effect: The high volume of SIRs, particularly those related to the DW/BI environment and configuration, may indicate issues with the initial environment setup or configuration data loading. With an initial failure rate of approximately 50%, the need to resolve and retest nearly half of the planned Test Scripts could impact the SSI Vendor's ability to complete System Testing DW/BI by the targeted date of 7/25/25. Additionally, any further suspensions in test execution would pose additional risks to the System Testing DW/BI timeline and potentially impact UAT.

Recommendations: To support the resolution of Critical and High-priority System Testing DW/BI SIRs by the scheduled completion date of 7/25/25, the Florida PALM IV&V Team recommends the following actions:

1. The SSI Vendor should prioritize DW/BI data-related issues as these impact both the SSI Vendor's execution of Report-related Test Scripts and the State DW/BI Team's creation of the Self-Service Reports.
2. The SSI Vendor should consider using small group of dedicated resources to perform an extensive analysis of the root cause for missing or incorrect data and develop a more holistic approach to addressing the underlying data issues.
3. The Florida PALM Project Team should work with the SSI Vendor to define targeted timeframes for resolving Medium-priority SIRs based on when they are needed for UAT.

Finding Type: Preliminary Concern

Impact: Medium

Probability: Possible

Priority: Medium

Finding Number and Title: **Finding 25** – Preliminary concern that the SSI Vendor is not accurately reflecting Florida PALM Project status in ESC presentations.

Finding Description: The Florida PALM IV&V Team observed during the 6/25/25 ESC meeting that the Florida PALM Project status presentation provided by the SSI Vendor did not fully or accurately reflect the challenges the Florida PALM Project was facing. Specifically, it did not address the high number of unresolved Critical and High SIRs that needed to be resolved before the planned System Testing completion date of 6/30/25, nor did it acknowledge the issues with the DW/BI environment that had impacted the SSI Vendor's ability to continue executing DW/BI Test Scripts.

Criteria: Per the ESC Charter, presenters are expected to report on key aspects of the Florida PALM Project, including scope, schedule, budget, risks and issues, decisions and change requests, and other relevant implementation updates. This expectation aligns with PMBOK guidance related to the Manage Communications process, which emphasizes the importance of keeping stakeholders informed about completed and ongoing work, schedule performance (e.g., milestones), cost performance, identified risks and issues, and forecasting. Additionally, the Monitor Communications process highlights the need to ensure stakeholder information needs are met by confirming that communications are timely, clear, relevant, and understood. The Manage Stakeholder Engagement process further reinforces the importance of consistent and transparent communication through reporting mechanisms that promote awareness of project progress and challenges.

Cause: In the ESC, the SSI Vendor reported that they remained on track to complete System Testing by 6/27/25, including the resolution of all remaining Critical and High-priority SIRs. The schedule was reported as yellow, indicating it was being monitored. In contrast, the Florida PALM IV&V Team noted that, as of 6/20/25, six Critical and 72 High-priority SIRs remained unresolved. Based on the average pace of resolution, the Florida PALM IV&V Team projected that the SSI Vendor may not meet the targeted System Testing completion date of 6/30/25.

The SSI Vendor also reported that System Testing DW/BI was behind schedule, with the schedule similarly marked yellow, but the presentation materials did not reference the temporary suspension of System Testing DW/BI. The Florida PALM IV&V Team's slides included this information, along with the number of open SIRs, which was also not reflected in the SSI Vendor's update.

Effect: Failing to reflect or report project status to stakeholders accurately can lead to misinformed decision-making, delayed issue resolution, and unrealistic expectations that jeopardize key milestones. Most significantly, it can erode stakeholder trust. When reporting is not forthright or omits critical risks or delays, it can raise concerns about credibility and

accountability. Ensuring that reporting is complete, timely, and candid is essential to maintaining trust, promoting accountability, and enabling early intervention when challenges arise.

Recommendations: To support adequate and accurate reporting of the Florida PALM Project to the ESC and stakeholders, the Florida PALM IV&V Team recommends the following actions:

1. The SSI Vendor should include the required Entry or Exit Criteria for each Florida PALM Project phase or work stream that the SSI Vendor is responsible for meeting, along with the status of each Criteria and projected dates for when the Criteria will be met.
2. While the SSI Vendor does include burn up charts to demonstrate the overall progress of the different work streams, they should also include metrics that highlight key challenges impacting Florida PALM Project milestones. This could include the number and status of unresolved SIRs and their projected resolution dates, average time to resolve SIRs by Priority and Business Criticality, pass rate for First, Second, and Third test runs, etc. to improve transparency regarding Florida PALM Project health and identify actions they are taking to address and mitigate these challenges.

Open Findings

There were no open Findings in this reporting period.

Closed Findings

Finding Number and Title: **Finding 15** – Risk that high failure rate for RICEFW-related Test Scripts may impact Stage Gate 3.

Date Opened: 10/31/24

Date Closed: 6/30/25

Rationale for Closing: All RICEFW-related Test Scripts have been executed. As of 6/30/25, 50 Test Scripts remain in a failed status. Of these, four have been executed three times, 16 have been executed twice, and 30 have been executed once. Based on historic failure rates for second and third executions, it is likely that future test runs of the failed RICEFW Test Scripts will result in approximately eight new failures. Over the past six weeks, the SSI Vendor has averaged 108 Test Script executions per week, with 102 passing weekly. Given that all RICEFW-related Test Scripts have been executed, the number of remaining failures (50), and the expected number of repeat failures (8), this Finding has been closed.

Finding Number and Title: **Finding 19** – The Florida PALM Project could benefit from increased adherence and updates to the Risk and Issue Management process, promoting additional clarity and transparency regarding open Risks and Issues.

Date Opened: 1/31/25

Date Closed: 6/30/25

Rationale for Closing: The Florida PALM IV&V Team observed that the Florida PALM Project Team presented Version 8.0 of the Florida PALM PMP to the ESC on 6/25/25. This revised version includes updates across key project management areas:

- Schedule Management
- Change Management
- Risk Management
- Issue Management
- Decision Management
- Deliverable Management
- Action Item Management
- Lesson Learned Management

Following a thorough review of the updated PMP, the Florida PALM IV&V Team noted that three of the five prior recommendations were adopted. Although recommendations #3 (refining the process for reviewing and tracking Risk status updates) and #5 (standardizing reporting to improve clarity on Florida PALM Project Risks and Issues in the Monthly Status Report and ESC Meetings) were not addressed in Version 8.0, this Finding has been closed.

Metrics Related to Findings

The Figure below shows the open, closed, and new Findings identified by the Florida PALM IV&V Team. Four new Findings were opened this month. There are no open Findings and 10 closed Findings.

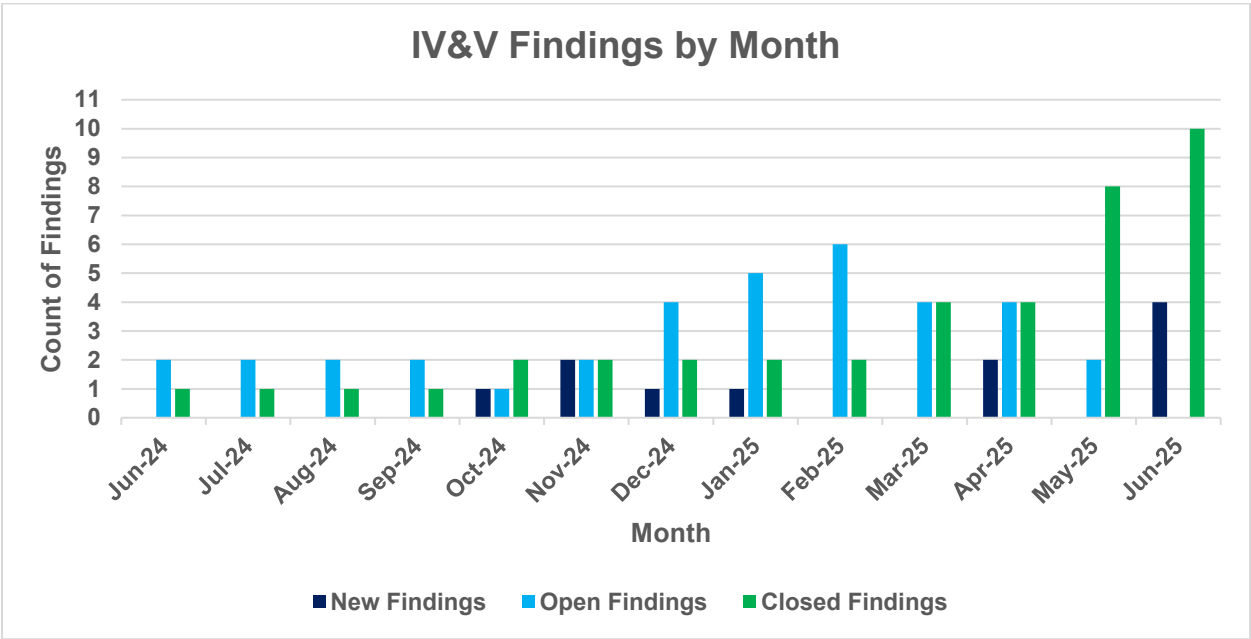
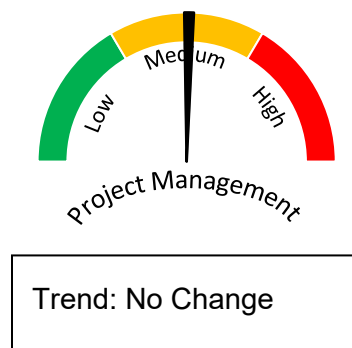


Figure 1: Florida PALM IV&V Findings by Month

Florida PALM Project Focus Area Updates

Florida PALM Project Management

Focus Area Indicator¹



Florida PALM Project Management Updates

The Florida PALM PMO Team has held several meetings to inform and educate Florida PALM Project team members on the importance of maintaining accuracy in the Florida PALM Project Schedule, emphasizing correct start and finish dates, dependencies, and clarity in supporting notes. These efforts help reinforce expectations that support early risk identification, effective mitigation strategies, and stronger schedule management practices. Setting these expectations will help identify risks and mitigation strategies and promote stronger schedule management procedures.

The Florida PALM PMO Team implemented positive changes, such as moving the Florida PALM PMO Weekly Touchpoint to Fridays and using a collaboration folder for RADAR. Since Task Coordinators are required to update RADAR by the end of each week, holding the Florida PALM PMO Touchpoint on Fridays allows the Florida PALM PMO Team to review a finalized RADAR report, discuss potential impacts to the Florida PALM Project Schedule, and follow up on any outstanding items or needed clarifications with Task Coordinators. Additionally, using a collaboration folder for RADAR helps reduce delays, as Task Coordinators no longer need to wait for the file to be checked in before making updates.

One challenge the Florida PALM IV&V Team observed is getting complete and accurate updates in RADAR from Task Coordinators, such as actual Start and Finish dates, correct Percent Complete, and comments explaining any deviation. To mitigate this, the Florida PALM PMO Team is spending additional time with the Task Coordinators to obtain and verify the necessary updates. These updates are intended to provide Florida PALM Project team members and stakeholders with a clear and accurate view of completed work, upcoming tasks, and key dates to support effective coordination and project management.

¹ Indicator includes this month's indicator as well as a shadow that shows what the previous indicator rating was similar to what is provided in the current Monthly Assessment Report template.

Start and Finish dates in the Florida PALM Project Schedule will shift for current and future tasks as the Florida PALM PMO Team updates the Florida PALM Project Schedule to reflect anticipated dates provided by the Task Coordinators in RADAR. These updates may result in variances between actual and baseline Start/Finish dates. Where significant variances are observed, the Florida PALM PMO Team should collaborate with Florida PALM Project Team Leads and/or Task Coordinators to identify root causes and explore strategies to realign dates, particularly for major milestones and critical path activities. If mitigation is not feasible, the Florida PALM PMO Team should consider logging a Risk to monitor the variance and assess its potential impact on future milestones. Maintaining accurate Start/Finish dates, percent complete, and Task Coordinator comments will support proactive risk management and help minimize schedule delays.

Florida PALM Project SPI

Utilizing the Florida_PALM_Project_ScheduleEOM.mpp file with a status date of 6/30/25, the Florida PALM Project SPI is .92 at the end of June. This is a decrease of .02 from the May Report. An SPI of .92 indicates that the Florida PALM Project is progressing at 92% of the planned pace, which is behind schedule. Given that the Florida PALM Project is nearing completion of several concurrent testing streams in preparation for UAT, and considering the recent adjustments made to the Florida PALM Project timeline, a declining SPI may indicate potential impacts to the UAT timeline or other downstream milestones.

Florida PALM Project Delayed Tasks

The Florida PALM IV&V Team uses Steelray to analyze the Florida PALM Project Schedule and identify which specific tasks are delayed. As of 6/30/25, there were 212 Delayed Tasks in the Florida PALM Project Schedule, a slight increase from 207 in May. Steelray defines Delayed Tasks as any task that should have started or finished but has yet to be completed. The Figure below highlights several major categories of Delayed Tasks.

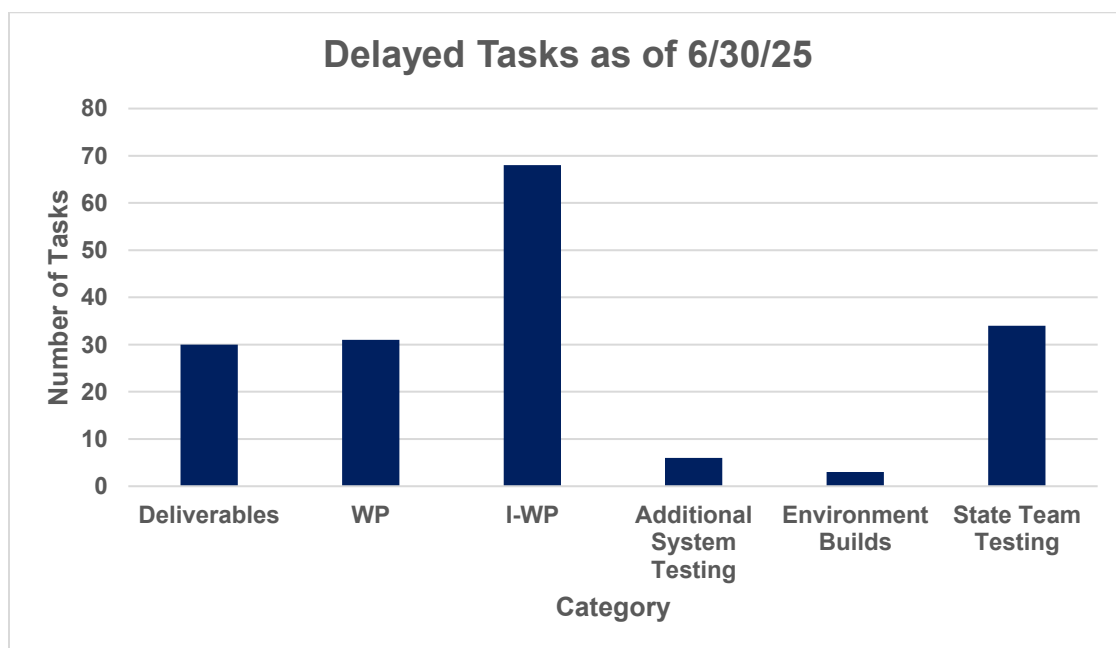


Figure 2: Delayed Tasks by Category

While Delayed Tasks within the WP category decreased, Internal Work Products (I-WPs) and State Team Testing increased. Specifically, I-WP111 – UAT Training Materials and I-WP112 – End User Manual accounted for the highest number of Delayed Tasks and are critical to ensuring Agencies are adequately prepared for UAT and end-user Training. Within the State Team Testing category, delays were primarily observed in QA Testing for System Testing Segment III, as the State QA Team cannot review or execute Test Scripts until they are released by the SSI Vendor. Delays were also noted in the execution of State Functional System Testing.

Florida PALM Project Decisions and Change Requests

There was one new Decision submitted, one new Decision approved, and one PCR approved.

- Decision 362 – Removal of Test Scripts from D696 – Completion of System Testing Segment III was approved in June. The removed Test Scripts were identified as duplicates or determined to be no longer valid.
- Decision 363 – Removal of Identity Provider (IdP) User Access Report was submitted. This Decision includes the removal of Florida PALM Project Schedule tasks associated with the Design, Build, Testing, and Approval of the IdP User Access Report as it was determined no updates were needed to the report.
- PCR 124 – Exchange for Interface Connections, submitted in May, was approved. This PCR proposed reallocating unutilized Reports, Interfaces, and Florida PALM Project Team Training items to support additional Connections.

The Figure below illustrates the Decision and PCR trend over the past six months.

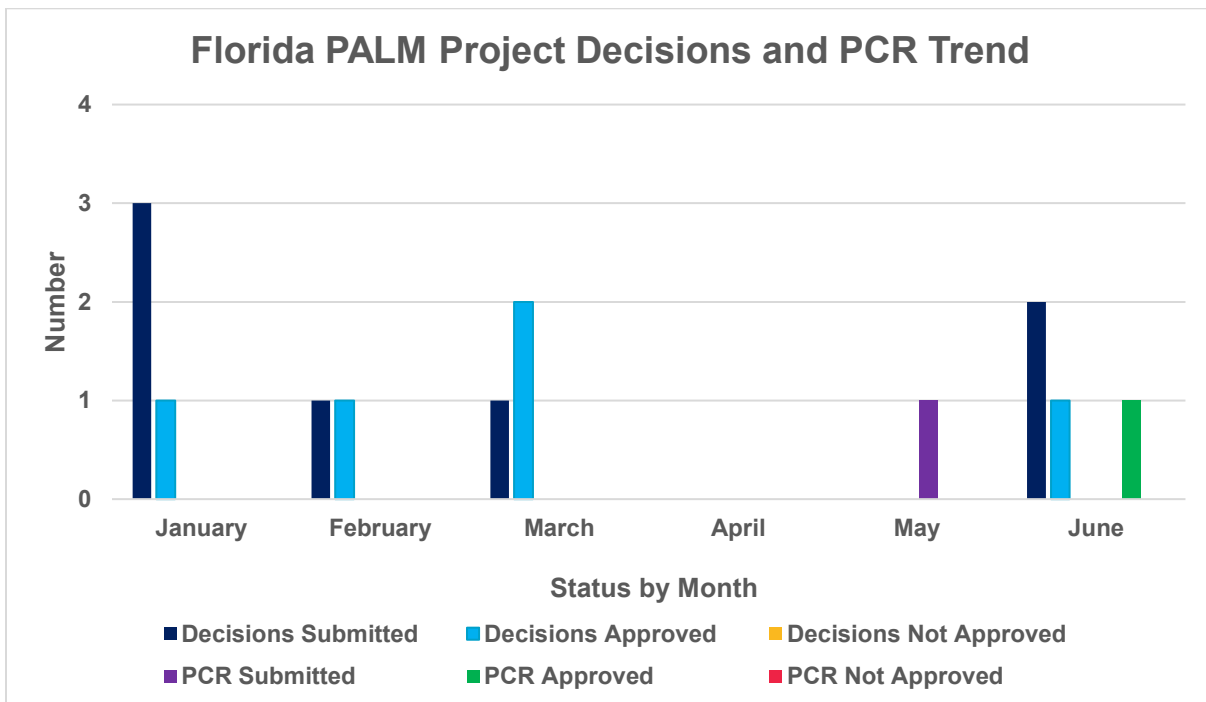


Figure 3: Florida PALM Project Decisions and PCR Trend

Overall Task Completion

The June EOM Florida PALM Project Schedule contains 12,860 tasks (excluding Summary tasks). The Table below provides a snapshot of work completed versus remaining, helping Florida PALM Project team members and stakeholders better understand the status of the Florida PALM Project.

Table 4: Florida PALM Work Completed and Remaining

Status	Number of Tasks	Percent
Complete	8,914	69%
Future	3,586	28%
Late ¹	267	2%
On Schedule	93	1%
Total	12,860	100%

¹Microsoft Project considers a task late if the % complete value is less than the expected % complete as of the Status date, which is different than how Steelray calculates Delayed Tasks. The current date will be used if a status date is not set. For example, if a task should be 50% complete by the status date but is 25% complete, it will be marked as late.

The Florida PALM IV&V utilized Steelray to conduct a schedule comparison of the May EOM Florida PALM Project Schedule against the June EOM Florida PALM Project Schedule. The variance in the number of total tasks from May (12,909) to June (12,860) was primarily related to the removal of RW-related Tasks that appeared to be acting as placeholders in the Schedule. There was roughly a three percent increase in the number of tasks completed in June and a three percent decrease in the number of future tasks.

Risk and Issues Trend

The Figure below shows the number of Florida PALM Project Risks and Issues that have been opened and closed over the last six months.

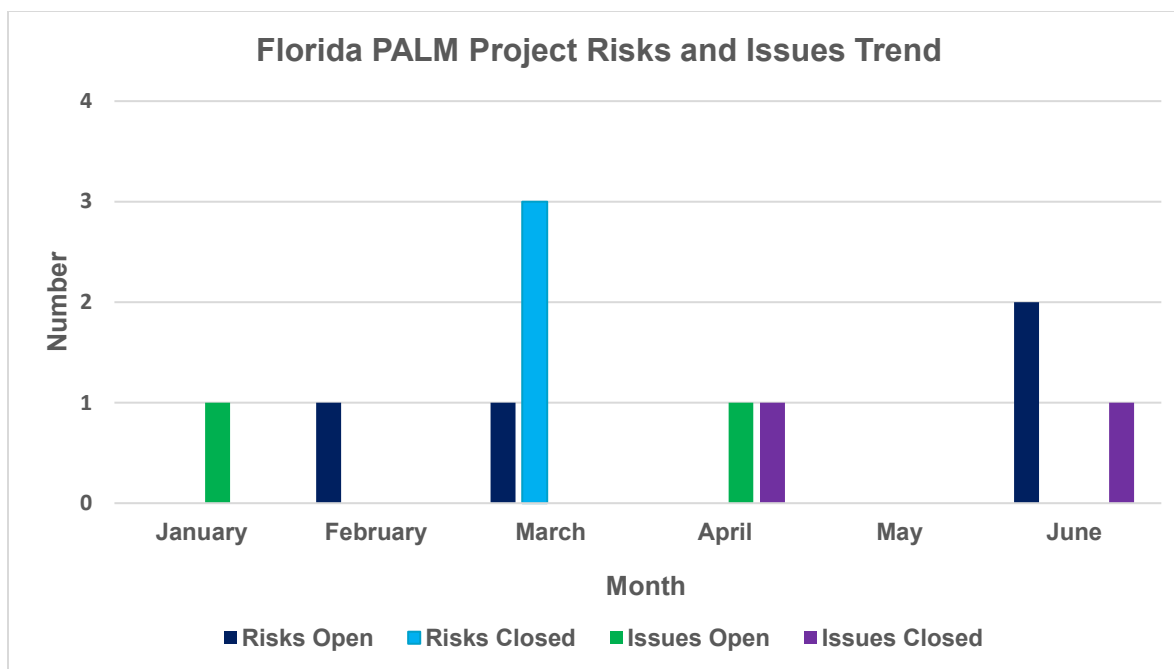


Figure 4: Project Risks and Issues Trend

The Florida PALM IV&V Team also reviewed the open Florida PALM Project Risks to assess the frequency and relevance of updates to their associated Mitigation Strategies. For Risk #4 and Risk #5, the Florida PALM IV&V Team observed that the Status is listed as "Mitigating" and the Trend is "Increasing," despite no documented updates in over a year for Risk #4 or since Risk #5 was created, as shown in the Table below.

Table 55: Last Updates to Mitigation Strategy for Risks

Risk #	Status	Current Risk Score	Current Trend	Mitigation Strategy Updates
Risk #4 Agencies' ability to adequately engage and participate may impact agency readiness	Mitigating	9	Increasing	Mitigation Plan updated March 2024
Risk #5 The timing and efficiency of information sharing between enterprise partners and agencies, and the Project could impact the success of the Project	Mitigating	9	Increasing	Risk created on 4/26/2023 and has been increased over time, marked as mitigating, no mitigation strategy update noted.

Since these mitigation plans are outdated, the potential impacts to the Florida PALM Project include:

- Increased vulnerability if mitigation strategies do not address new or evolving risks.
- Reduced effectiveness in responding to issues during critical phases of the Florida PALM Project.

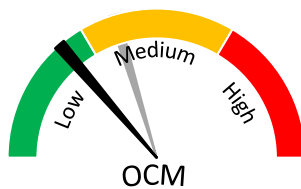
- Heightened potential for increased costs due to unanticipated challenges, delays, or the need for reactive solutions.

The Florida PALM IV&V Team recommends reviewing these risks to ensure that the mitigation strategies are documented and up-to-date. Additionally, it is important to reinforce with the Florida PALM Project team members the value of identifying and monitoring risk triggers to support proactive responses and help keep the Florida PALM Project timeline and budget on track.

The Risk Rating for this Focus Area remains a Medium Risk.

Florida PALM Organizational Change Management

Focus Area Indicator



Trend: Improving

Florida PALM Organizational Change Management Updates

The Florida PALM IV&V Team assessed OCM efforts through review of the RW, participation in meetings, and evaluation of Florida PALM Project Deliverables WPs, particularly as the Florida PALM Project approaches critical milestones such as UAT Online for Subject Matter Experts (SMEs), scheduled to begin in August 2025.

Stakeholder Engagement and Information Sharing

During Agency Readiness Touchpoints, RCs share information related to critical Florida PALM Project milestones such as UAT and Training, and track progress on corresponding RW Tasks. Although RCs deliver clear guidance during Agency Readiness Touchpoints, some Agencies are more experienced working on large-scale Information Technology (IT) projects and better equipped to leverage the information proactively to manage Florida PALM Project work. This is evident in that the more experienced Agencies have robust internal OCM activities, expressing that they've had routine internal engagements with their staff and leading Agency sub-group meetings. Meanwhile, the Florida PALM IV&V Team observed that smaller, more resource-constrained Agencies are showing slower progress on RW Tasks, lower engagement during Agency Readiness touchpoints, and a greater reliance on RCs for support.

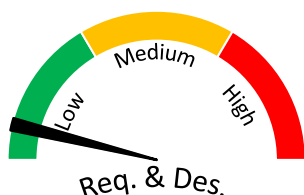
To help mitigate this, the Florida PALM IV&V Team recommends that the RCs encourage smaller, resource-constrained Agencies to collaborate with more experienced Agencies on specific areas where they may be facing challenges. This peer-to-peer collaboration could offer practical examples and proven approaches, helping these Agencies make more effective and efficient

progress on key activities and tasks. The Florida PALM IV&V Team has observed that RCs continue to promote upcoming trainings, workshops, and Agency subgroup meetings during Agency Readiness Touchpoints.

The Risk Rating for this Focus Area is improving from a Medium to a Low Risk.

Florida PALM Requirements and Design

Focus Area Indicator



Trend: No Change

Florida PALM Requirements and Design Updates

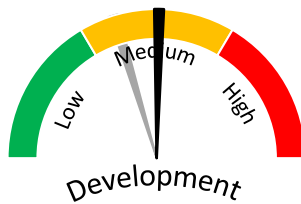
The Florida PALM IV&V Team attended several Design meetings, including sessions focused on Supplier Design with the applicable Enterprise Partner, Inbound Project Costing Budget Load, Florida PALM Suppliers for a specific Agency, and the Outbound Voucher and Payment Extract Error Detail. Additionally, the Florida PALM IV&V Team participated in the Interface and Conversion Workshop, which provided a detailed walkthrough of the related processes and logic. ESS pre-Build meetings, which had been paused in May to prioritize Build Segment IV, also resumed in June.

As documented in the Design Work Unit Tracker (DWUT), all five FDs for the ESS Extensions included in PCR 121, targeted for completion in May 2025, were approved as of 6/30/25. This approximately four-week delay postponed the start of Development and may impact the timing of subsequent ESS System Testing activities, but it is not anticipated to impact UAT.

The Risk Rating for this Focus Area remains Low Risk.

Florida PALM Development

Focus Area Indicator



Trend: Worsening

Florida PALM Development Updates

Miscellaneous RICEFW Build

Thirteen RICEFW items are excluded from the contractual Development completion date outlined in Amendment 12. These items are associated with PCRs approved after the completion of all Design Segments or are required due to the revised timeline established in Amendment 12. As a result, they require separate Design and Development activities outside of Build Segment IV.

As shown in the Figure below, five of these RICEFW Items are scheduled for development prior to the end of System Testing, three are planned for development between the end of System Testing and the start of UAT, and five will not be developed until after UAT begins. This staggered Development approach will require additional coordination and communication with UAT testers to ensure they are aware of when functionality will be available and to identify any test scenarios that may need to be deferred accordingly.

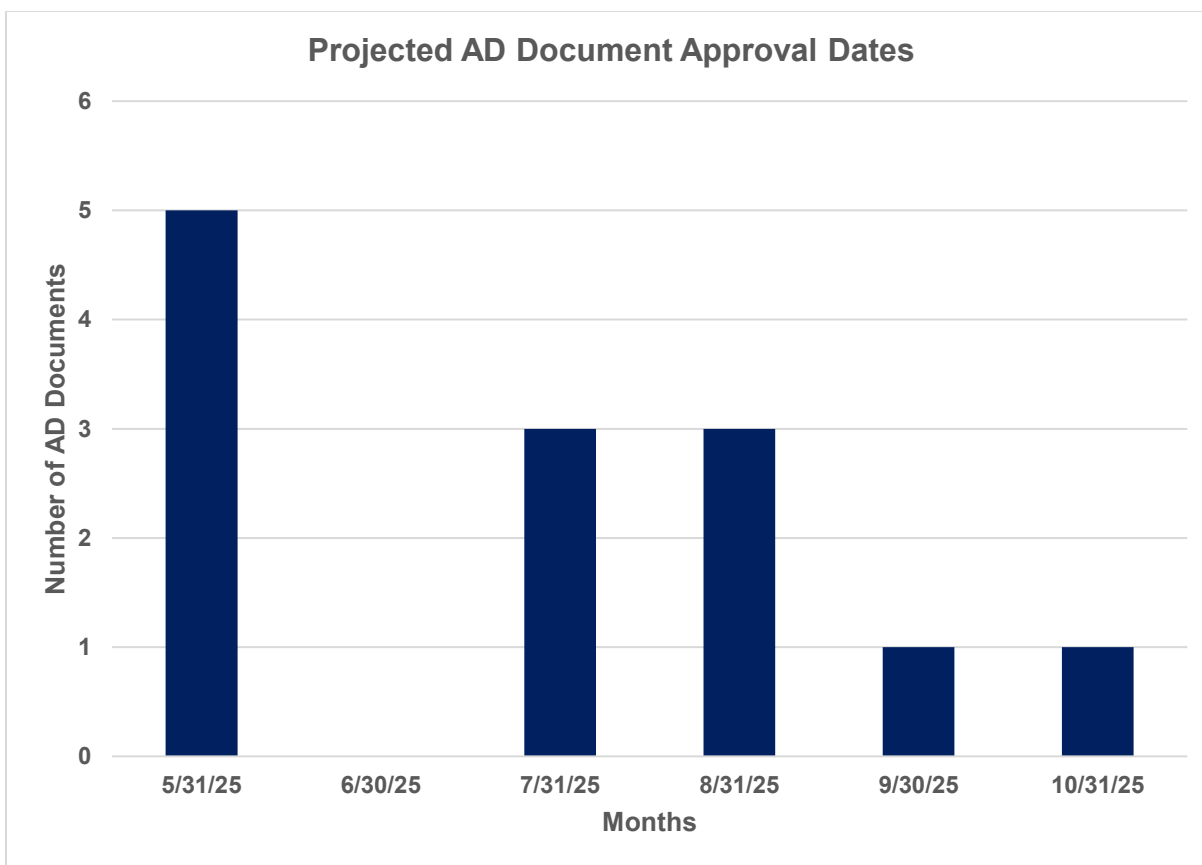


Figure 5: Projected AD Document Approvals per Month

As of 6/30/25, both the drafting and approval of the miscellaneous 13 RICEFW Items are under the targeted count by one AD document, as can be seen in the Figures below.

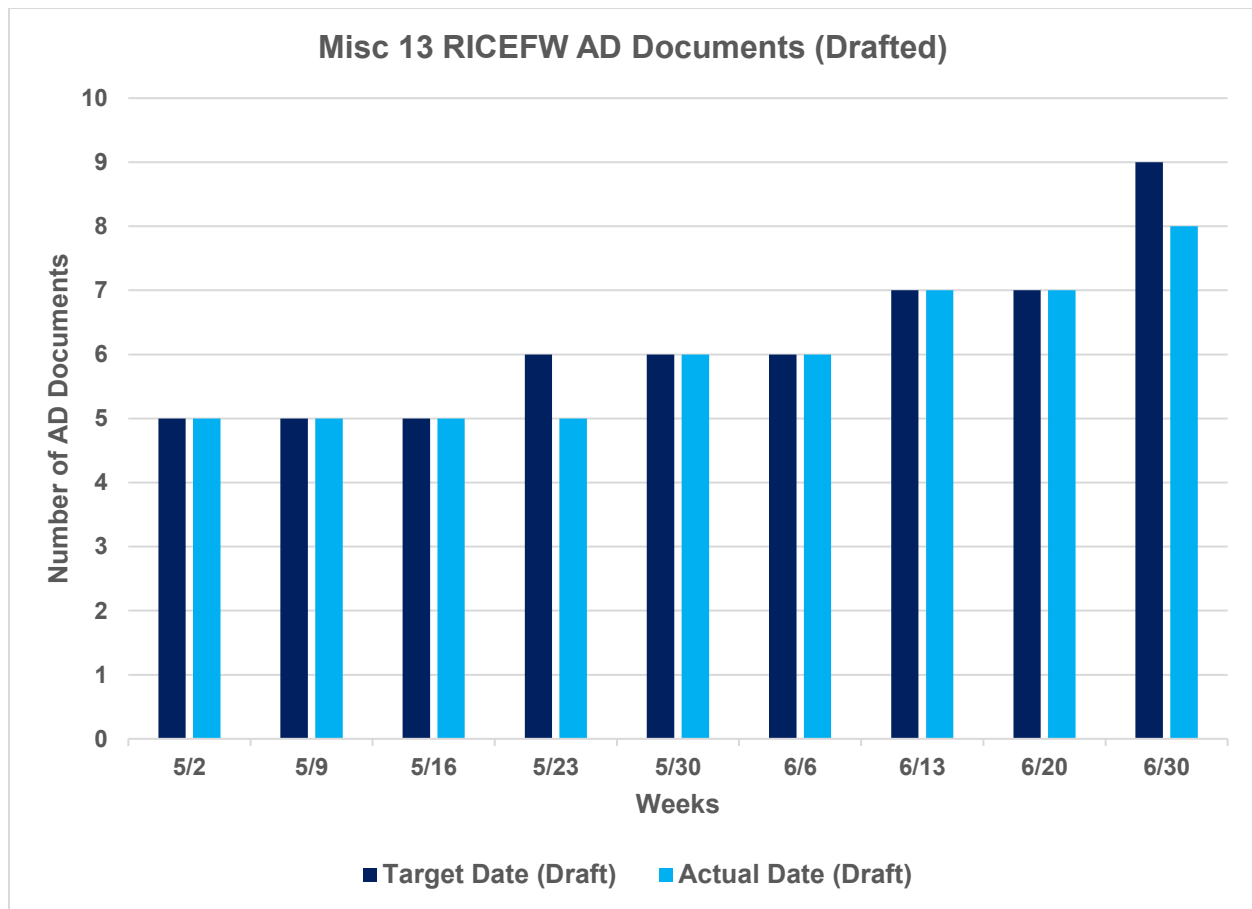


Figure 6: Misc RICEFW AD Documents Drafted per Week

Eight of the nine AD documents that were expected to be drafted by 6/30/25 have been drafted. GLE011 – Zero Dollar Investment Budget Journal is the AD document that is behind schedule. The pre-Build meeting for this AD document was targeted for 6/2/25, but it has not yet occurred. This AD document is targeted for final approval on 7/30/25 but due to the approximately one-month delay to the pre-Build meeting, it is anticipated that the AD document will not be approved until after the start of UAT. As with the other miscellaneous AD documents in a similar status, coordination between the Florida PALM Project Team, SSI Vendor, and the Agencies will be necessary to manage any potential impact on UAT activities.

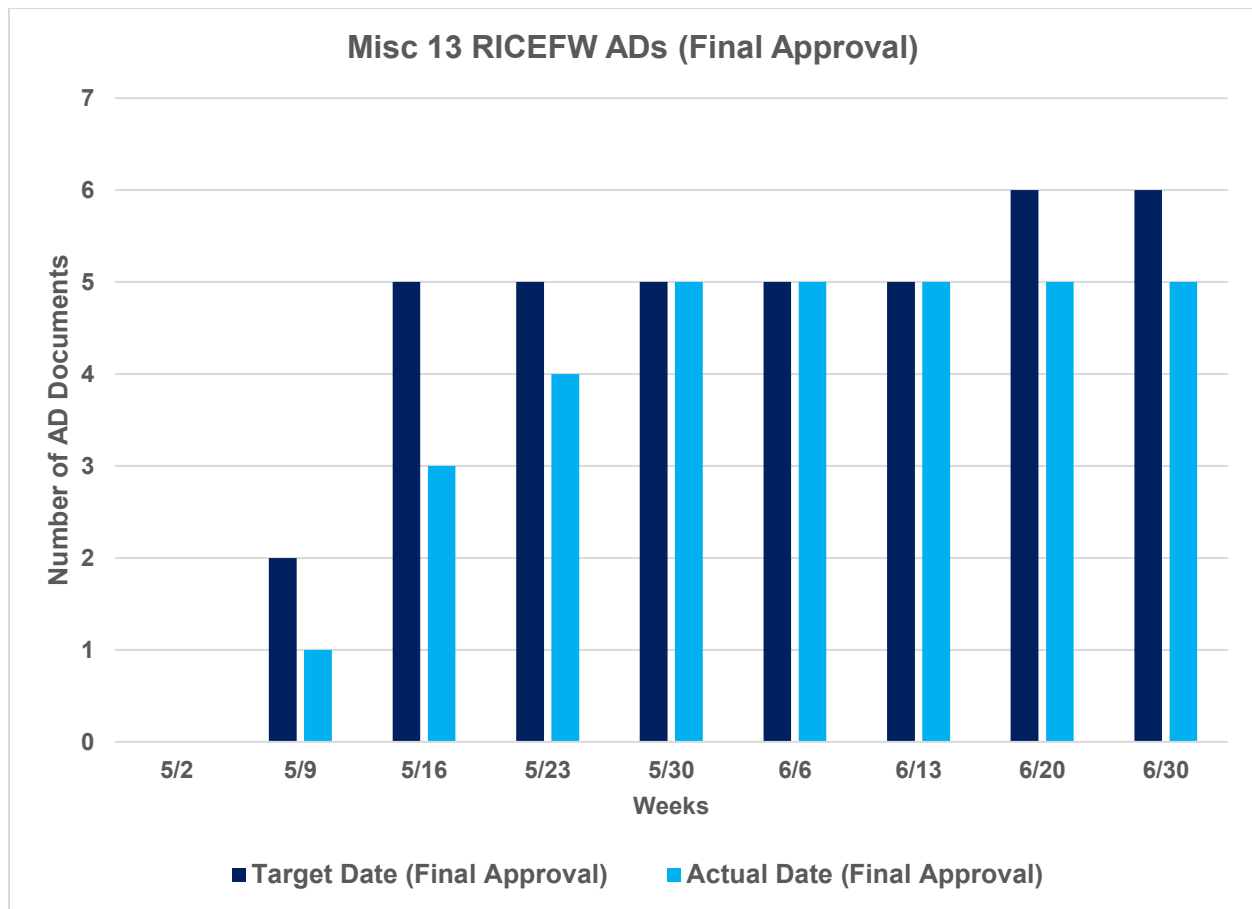


Figure 7: Misc RICEFW AD Documents Final Approval per Week

Five of the six AD documents targeted for approval by 6/30/25 have been approved. PCI009 – Inbound Project Costing Budget Load is the AD document that is behind schedule but is in final approval status as of 6/30/25. This delay is anticipated to be minimal and does not impact future Testing activities.

Subsequent System Testing will result in five of these items not being available until after the start of UAT. Ongoing coordination between the Florida PALM Project Team, SSI Vendor, and the Agencies will be necessary to communicate the timing of their migration to the UAT environment and to assess any potential impacts on UAT activities.

ESS Build

Five large ESS-related Extensions approved under PCR 121 are being developed outside of the Build Segments. Approval of the FDs for these Extensions was delayed by approximately four weeks, impacting the planned start of pre-Build activities, which were originally scheduled to start in early May 2025 but did not start until 6/13/25.

All five of the ESS AD documents were planned to be drafted by 6/30/25, but none of the drafts have been completed, as can be seen in the Figure below.

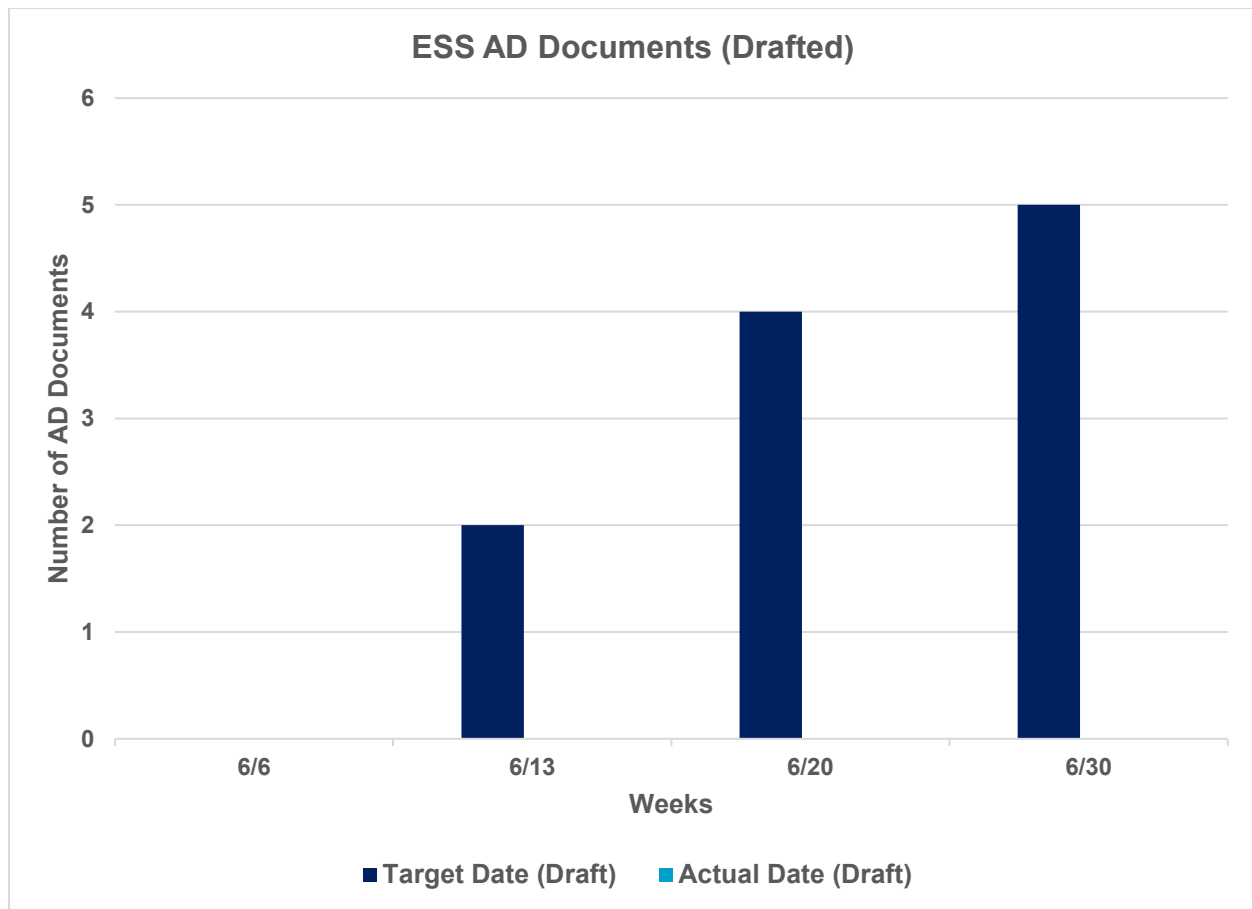


Figure 8: ESS AD Documents Drafted per Week

The AD documents were targeted for approval by 7/21/25, but given the delayed start, it is anticipated that the final approval will be delayed by at least a month. Additionally, the window between pre-Build meetings and completion of the AD document drafts is approximately four and a half weeks. Due to the size of these Extensions, approximately 19 equivalent Developers will be needed to complete Development within this timeframe. While Development staffing has begun to taper with the completion of Build Segment IV, current levels still appear sufficient to support this effort. The Figure below displays actual and projected Development staffing levels from February through July 2025.

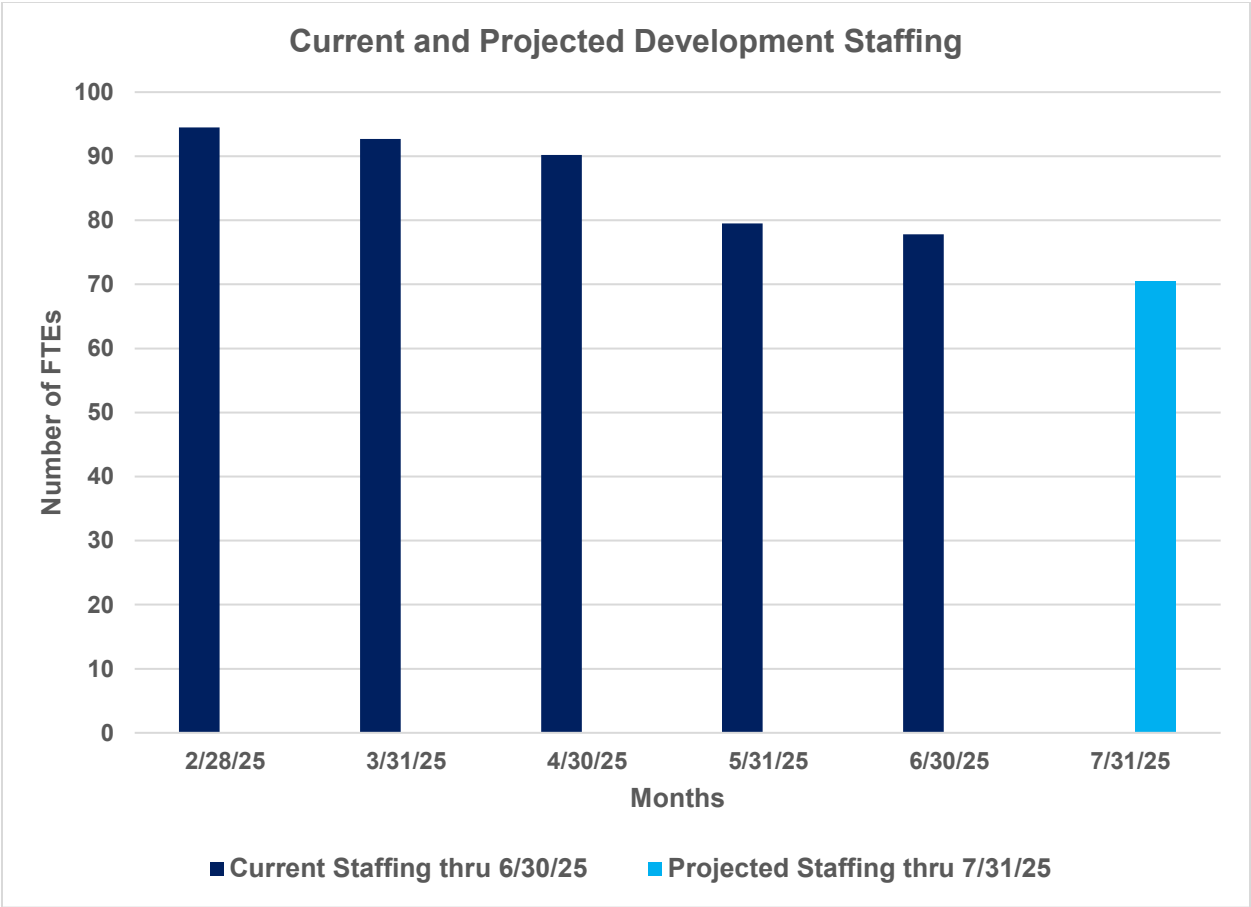


Figure 9: Current and Projected Development Staffing

The delay in completing the ESS FDs is expected to affect the Development and System Testing timelines for the ESS functionality. System Testing for these Extensions is now projected to finish by mid-November 2025 (as opposed to the target of October 2025), which is still ahead of the planned start of UAT for end users in December 2025.

SIR Resolution

The SSI Vendor’s Development staff is involved in resolving SIRs that are generated by any of the testing activities. The Figure below shows the count of open SIRs over time across all testing activities, categorized by their assigned Priority in Jira (ranging from “None” to “Highest”). As can be seen in the Figure, the overall number of open SIRs increased significantly in June 2025.

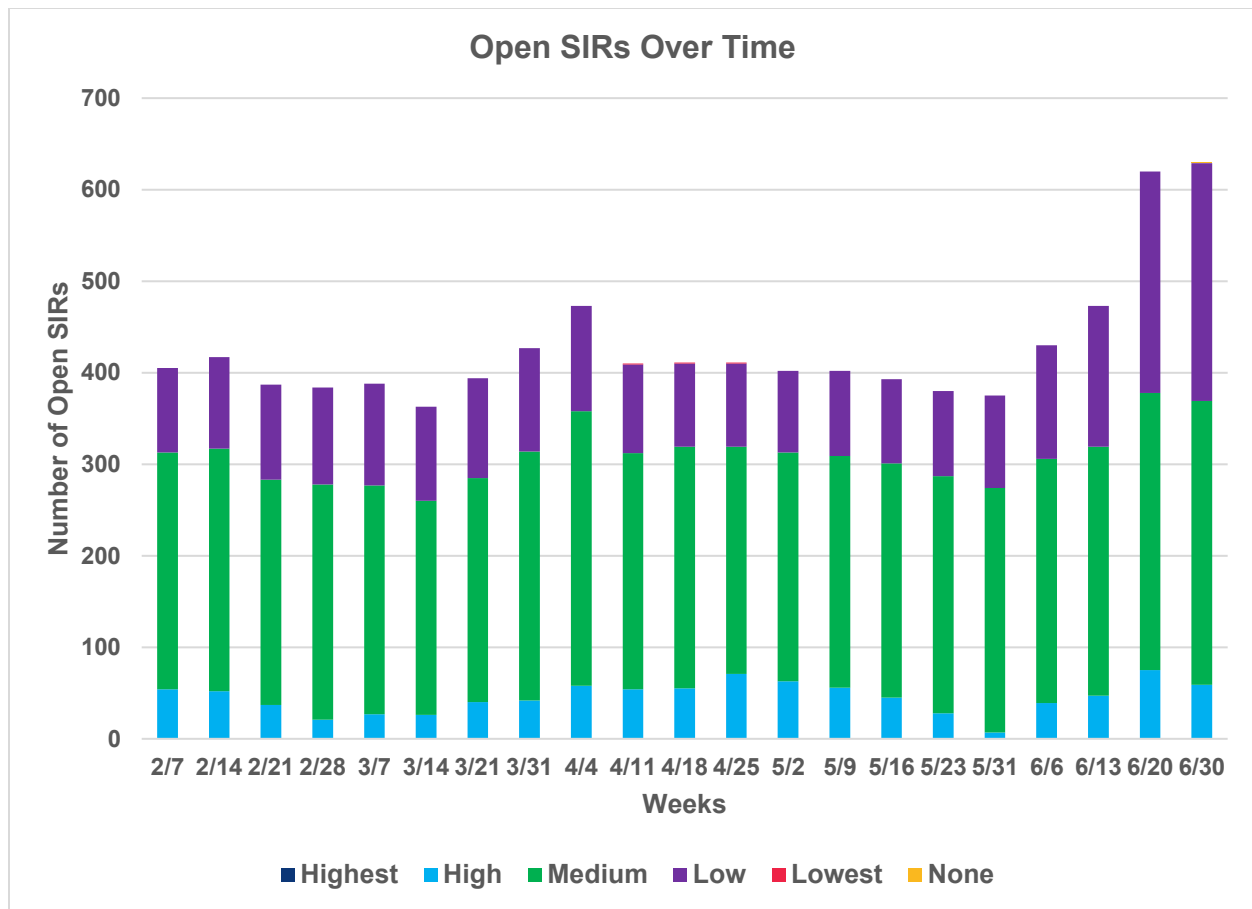


Figure 10: Open SIRs over Time

Both the number of new SIRs being identified and the number that are closed per week have increased, but the number of new SIRs being opened is outpacing the number closed. This can be seen in the Figure below.

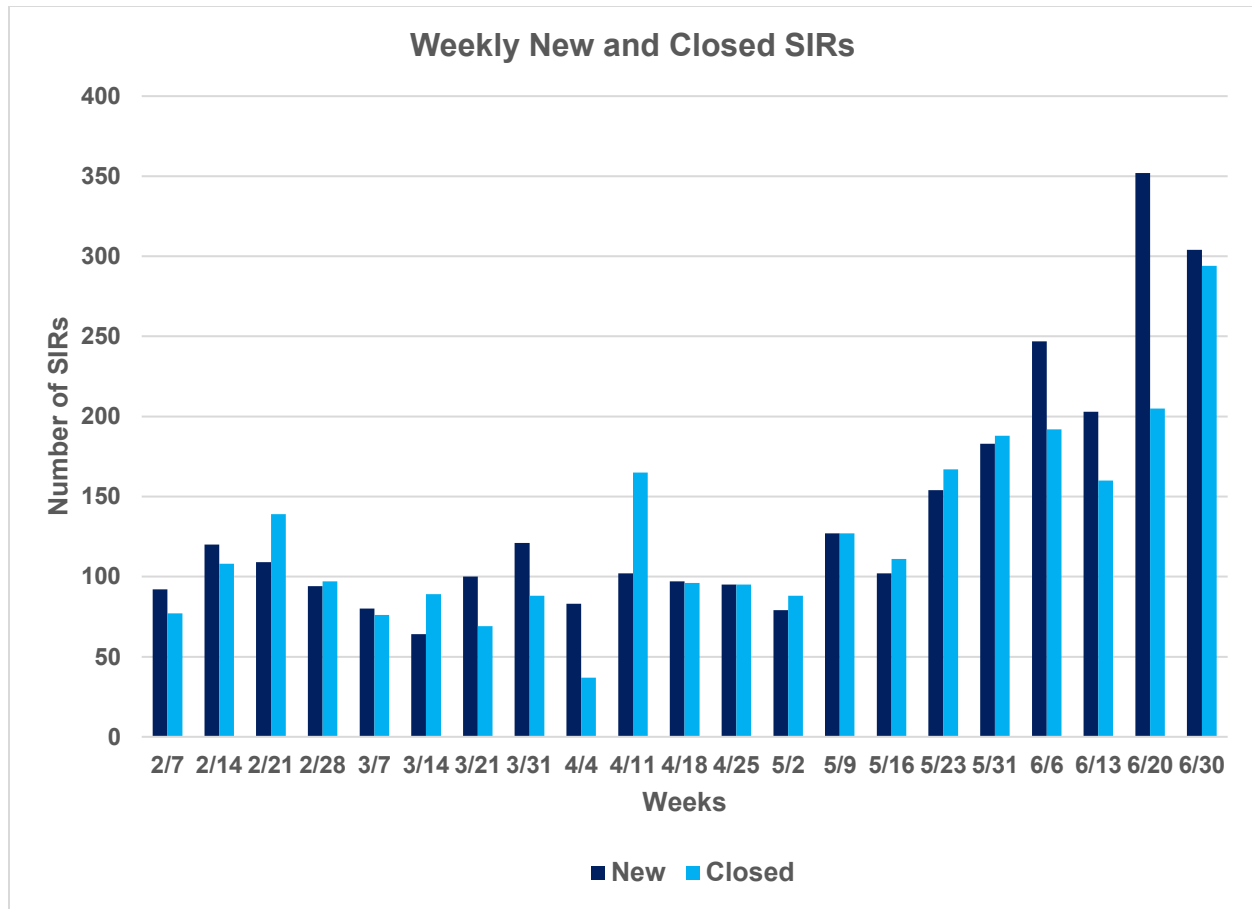


Figure 11: New and Closed SIRs over Time

Overall, there was a 68% increase in the number of open SIRs between May and June 2025. The rapid growth in newly identified SIRs is due to the push in June to complete SSI Vendor System Testing as well as ongoing State QA Team Testing and State DW/BI Testing. The count of newly identified SIRs per month can be seen in the Table below.

Table 6: New SIRs Created Per Month by Originating Team

Originating Team	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Total
Functional - Cross Application	0	0	0	1	0	0	1
Functional - DW / BI	1	0	0	0	0	2	3
Functional - Financials	181	199	118	177	363	367	1405
Functional - Payroll	48	57	42	45	75	147	414
Technical - Application Development	7	2	8	16	8	7	48
Technical - Application Security	4	0	0	4	5	3	16
Technical - Conversion	28	10	14	38	14	6	110
Technical - Infrastructure	0	0	0	1	0	0	1
Technical - Interface	0	1	0	3	8	72	84

Originating Team	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Total
Technical - PeopleSoft Administration	1	1	1	14	0	2	19
Technical / Batch	0	0	0	2	6	13	21
Technical - DW / BI	0	0	0	0	3	72	75
State QA Team	127	145	182	124	115	215	908
State Interface Team	0	0	0	0	0	14	14
State DW/BI Team	0	0	0	0	0	169	169
IVV Test Team	0	0	0	0	0	17	17
Total	397	415	365	425	597	1106	3305

The number of new SIRs being created by month increased by 85% between May and June 2025. Although the number of new SIRs identified by the SSI Vendor Functional – Financials and Payroll Teams will likely drop since all SSI Vendor System Test Scripts have been executed, there may still be an influx of new SIRs from the State QA Team, State DW/BI Team, and the SSI Vendor Functional and Technical DW/BI Teams.

The pace of closing SIRs has also increased, although not at the same pace as new SIRs are being identified. This can be seen in the Table below that shows closed SIRs by month.

Table 7: Closed SIRs Per Month by Originating Team

Originating Team	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Total
Functional - Cross Application	0	0	0	0	0	1	1
Functional - DW / BI	0	0	0	0	0	2	2
Functional - Financials	114	236	119	155	341	383	1348
Functional - Payroll	37	57	41	39	62	132	368
Technical - Application Development	6	3	4	14	13	5	45
Technical - Application Security	2	0	3	3	5	3	16
Technical - Conversion	33	22	16	31	20	10	132
Technical - Infrastructure	0	0	0	1	0	0	1
Technical - Interface	0	0	0	0	12	59	71
Technical - PeopleSoft Administration	0	1	0	14	0	1	16
Technical / Batch	0	0	0	0	2	14	16
Technical - DW / BI	0	0	0	0	0	34	34
State QA Team	60	104	127	203	126	181	801
State Interface Team	0	0	0	0	1	8	9
State DW/BI Team	0	0	0	0	0	42	42
IVV Test Team	0	0	0	0	0	3	3
Total	252	423	310	460	582	878	2905

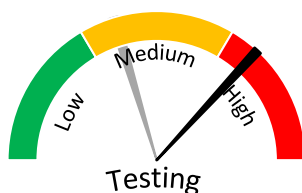
The pace of closing SIRs has increased by 51% in June. This is to be expected as Development staff completed AD documents and transitioned to support SIR resolution. As noted in Finding 22, the time required to resolve these SIRs to meet the System Testing Exit Criteria presents a potential risk to achieving Stage Gate 3, especially if the backlog of open SIRs continues to grow.

If the current trend of identifying new SIRs continues, additional Development support may be needed to mitigate delays.

The Risk Rating for this Focus Area remains a Medium Risk but is worsening from Low Yellow to Medium Yellow.

Florida PALM Testing

Focus Area Indicator



Trend: Worsening

Florida PALM Testing Updates

System Testing Segment III

The SSI Vendor completed execution of all planned System Testing Segment III Test Scripts on 6/27/25 as scheduled. Despite this, Finding 22 has been opened to document that ESC approval of Stage Gate 3 – Ready for UAT may be at risk, primarily due to System Testing Exit Criteria for all Segments not yet being fully satisfied. The Table included in Finding 22 presents the status of each Exit Criteria as of 6/30/25.

The Table below represents the System Testing Segment III Test Execution results. As noted in Finding 22, the final status of some Test Scripts may change from passed to failed based on the State QA Team's review and execution, so the 90% Exit Criteria cannot yet be confirmed.

Table 86: Segment III Test Execution Results

Cycle	Total No of Test Cases	No. of Test Cases Cancelled	No. of Test Cases Deferred	Actual No of Test Cases Executed	Pass	Fail	Pass % (based on executed)	Fail % (based on executed)
Cycle 1	2	0	0	2	2	0	100%	0%
Cycle 2	1212	193	0	1021	967	54	95%	5%
Cycle 3	2	0	0	2	2	0	100%	0%
Cycle 8	31	0	0	31	31	0	100%	0%
Total	1247	193	0	1056	1002	54	95%	5%

Regression Testing

While the combined results for System Testing Segments I, II, and III indicate a 98% pass rate as of 6/30/25, it is important to note that Regression Testing Event 1, which included Segments I and II, revealed additional issues in Test Scripts that had previously passed. This Regression cycle had an 11% First run failure rate, and 35 additional Test Scripts were deferred due to newly introduced defects from Segment III, reflecting increased complexity. Since these Regression failures were not reflected in the original System Testing metrics, the reported pass rate may overstate Florida PALM's actual stability and highlight a potential gap between a point-in-time snapshot of System Testing metrics and issues uncovered later during Regression Testing.

State Quality Assurance Testing

During the State QA Team's review of the SSI Vendor's Test Scripts, 52 new Segment III Test Scenario gaps were identified. These gaps have not yet been prioritized or had Test Scripts developed, as the State QA Team is currently focused on completing its review of the SSI Vendor's test results to validate reported metrics against the System Testing Exit Criteria. While this approach is reasonable given UAT's dependency on the completion of System Testing, the longer the scenario gaps remain untriaged, the less time will be available to address any that may be critical to Florida PALM readiness for UAT.

The Florida PALM IV&V Team recommends that once the review of the remaining SSI Vendor Test Scripts is complete, the State QA Team should consider prioritizing the identified scenario gaps, assess their potential impact on system readiness, and develop a plan of action as needed.

SIR Business Criticality and Priority

Since System Testing Segment III started in March 2025, the Florida PALM IV&V Team has been reporting SIR Business Criticality metrics in the Monthly Assessment Report to track progress against System Testing Segment III Exit Criteria #4, which requires resolution of all Critical and High Business Criticality SIRs. Contributing factors include an upgrade to Enterprise-level Jira services, which modified the Business Criticality value definitions, as well as inadvertent selection of incorrect values by new testers when logging SIRs. As a result, the Florida PALM Project Team plans to review and update SIR Business Criticalities as necessary, and the Florida PALM IV&V Team will not provide Business Criticality metrics this month.

The Florida PALM IV&V Team also observed in multiple meetings that discussions of SIR resolution have primarily focused on Priority levels (Critical, High, Medium, and Low) for resolution tracking and when addressing System Testing Exit Criteria #4, despite the text specifically referencing Business Criticality. The Florida PALM IV&V Team recommends that the Florida PALM Project Team assess unresolved Critical and High SIRs by both Priority and Business Criticality to ensure comprehensive coverage. Additionally, the Florida PALM Project Team should consider elevating the Business Criticality of any SIRs deemed necessary to resolve prior to the start of UAT.

Unresolved System Test SIRs

The SSI Vendor and State QA Team logged SIRs during System Testing execution. As shown in the Figure below, 283 SIRs from System Testing Segment III remain in an unresolved status (excluding those with a status of Canceled, Closed, Marked as Duplicate, Works as Designed, or Rejected).

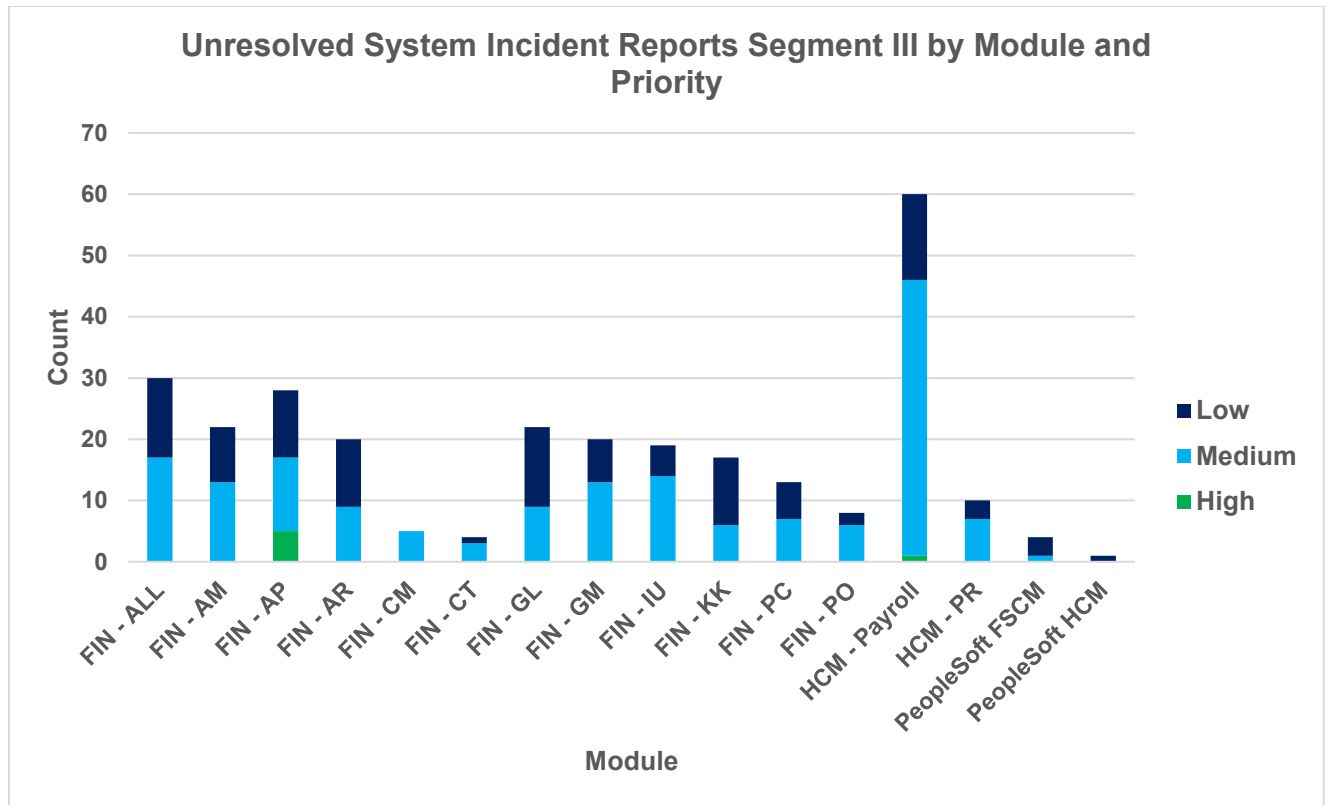


Figure 12: Unresolved SIRs System Test Segment III by Module and Priority

Across all three Segments, a total of 359 SIRs remain in an unresolved Status (excluding those with a status of Canceled, Closed, Marked as Duplicate, Works as Designed, or Rejected) as seen in the Figure below.

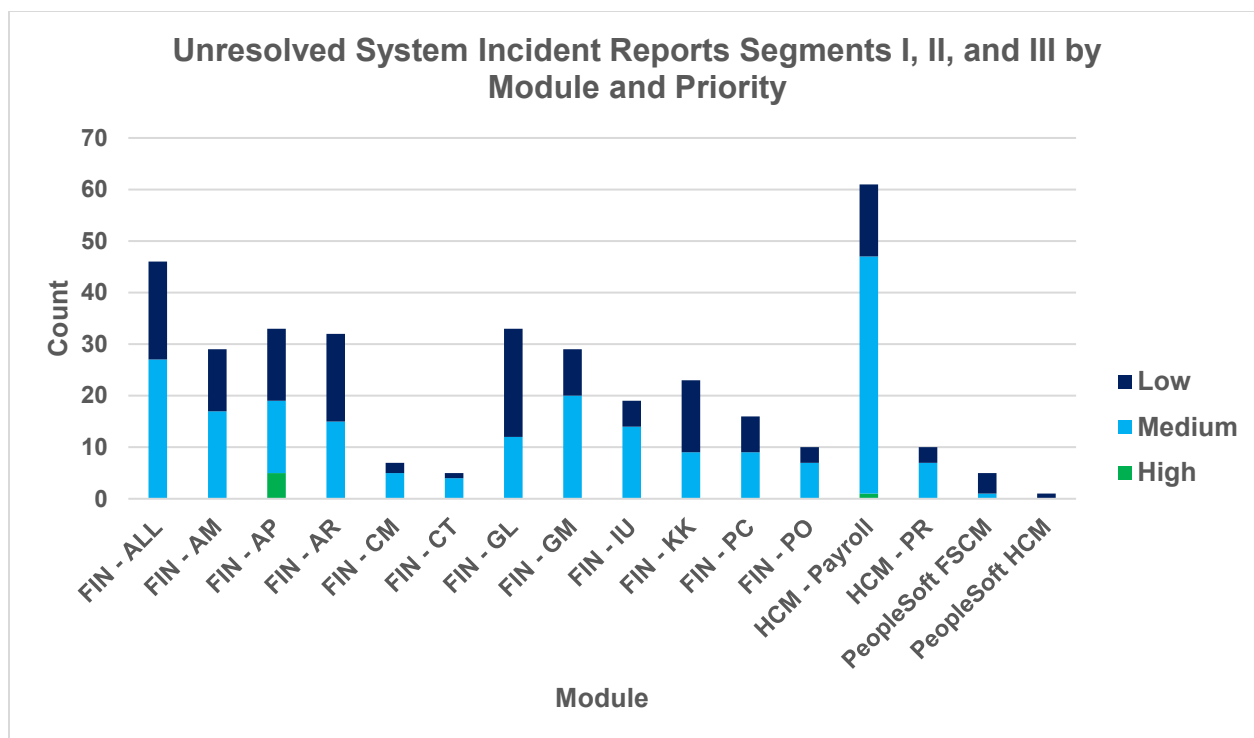


Figure 13: Unresolved SIRs System Test Segments I, II, III by Module and Priority

An analysis of unresolved SIRs across all System Testing Segments indicates that the highest concentration of open SIRs is within critical business modules, most notably HCM-Payroll, which has 61 unresolved SIRs, along with several Financial modules. This suggests a backlog in key functional areas that are critical to Florida PALM readiness for UAT.

Table 97: Unresolved System Test SIRs by Priority

Priority	June Unresolved Count (Segment III only)	June Unresolved Count (All Segments I, II, and III)	Highest Number of Impacted Modules
Highest	0	0	None Reported
High	6	6	Payroll Accounts Payable
Medium	167	207	Payroll Grants Management
Low	110	146	General Ledger Accounts Receivable
Total	283	359	Payroll, General Ledger, Accounts Payable, Accounts Receivable, and Grants Management

Several Financial modules reflect a high volume of unresolved SIRs. While High-priority SIRs are fewer, their presence remains a concern due to the critical nature of these modules in supporting core business operations. The majority of issues are classified as Medium-priority, which could collectively pose risks to overall Florida PALM stability and performance. Given the volume of unresolved Medium and Low-priority SIRs, particularly within key Financial modules, the Florida PALM IV&V Team recommends:

- Adding and establishing dedicated resources to begin working through the backlog of Medium-priority SIRs to reduce risk prior to UAT.
- Tracking and reporting progress during SIR Triage meetings, with focused attention on high-impact areas such as Payroll and General Ledger. This will help to ensure mitigation strategies are in place for unresolved issues that could jeopardize the 90% pass rate System Testing Exit Criteria.
- Identifying realistic resolution timelines for outstanding SIRs, flagging any issues that may affect UAT readiness or necessitate interim workarounds.

Florida PALM IV&V Independent Testing

Florida PALM IV&V Independent Testing began on 6/10/25. Current testing efforts are focused on individual components, such as BPMs and RICEFW objects, to support the Florida PALM IV&V Team's Stage Gate 3 assessment and evaluate Florida PALM's readiness for UAT. Testing will progress to end-to-end scenarios once the Florida PALM Project enters UAT. Florida PALM IV&V Independent Testing will only test functionality that the SSI Vendor has fully tested and will not test any functionality that has unresolved SIRs. Florida PALM IV&V Independent Testing is being conducted using BUs separate from those assigned to the SSI Vendor and State Testing teams.

The Florida PALM IV&V Independent Testing Team has executed approximately 30% of the planned component Test Scripts, averaging about 6 Test Scripts per day, with a first-run Pass rate of approximately 64%. To meet the planned completion date of 7/25/25, the pace needs to increase to approximately 11 Test Scripts executed per day. The Florida PALM IV&V Independent Testing Team continues to make steady progress, following initial access and role challenges encountered at the start of test execution. These early challenges were not unexpected, as other Testing teams have faced similar initial challenges. The Figure below illustrates the cumulative progress of the Florida PALM IV&V Independent Testing Team's execution compared to the planned trajectory through the targeted completion date of 7/25/25.

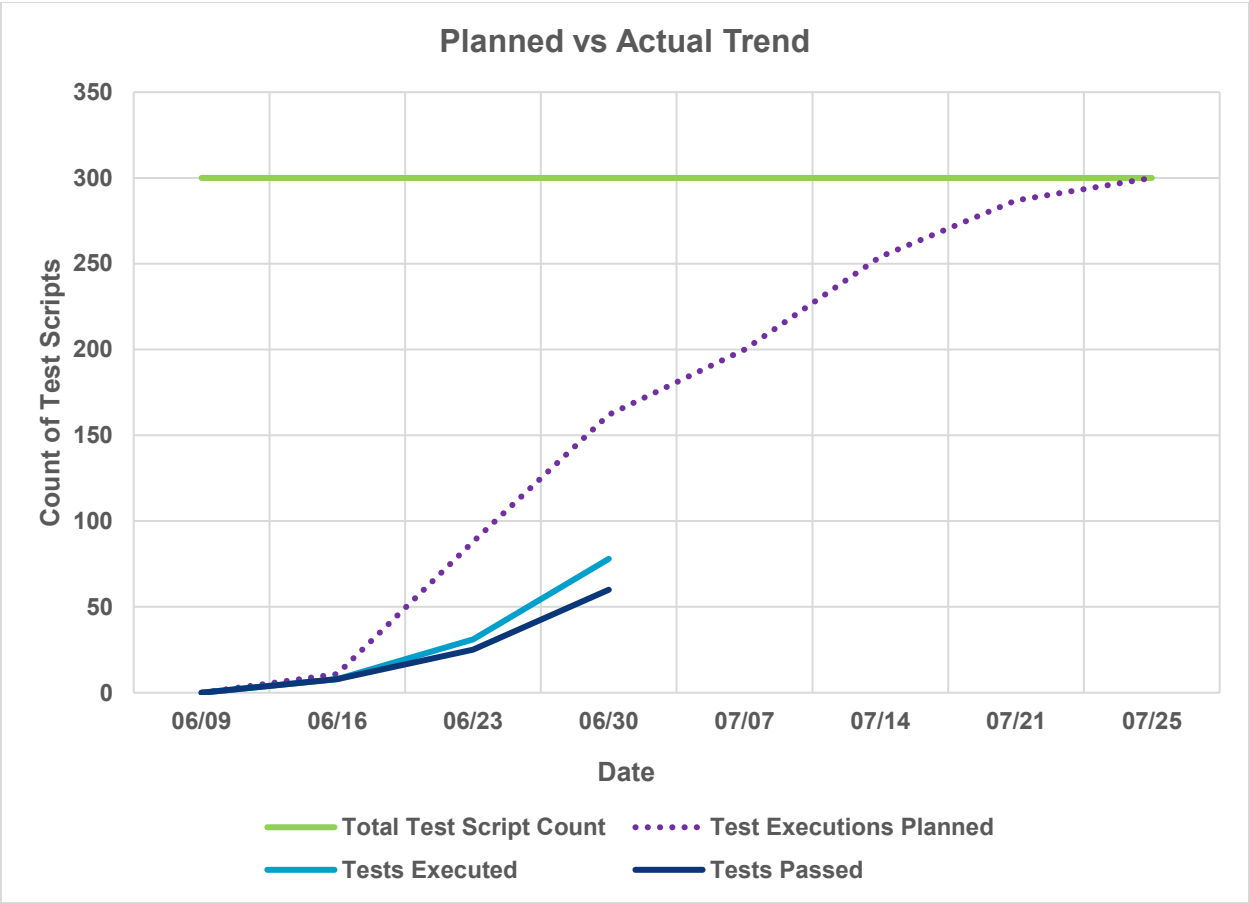
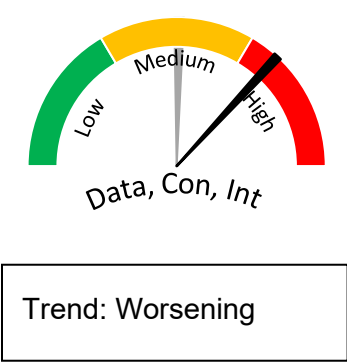


Figure 14: Florida PALM IV&V Independent Testing Execution

The Risk Rating for this Focus Area is worsening from a Medium Risk to a High Risk.

Florida PALM Data, Conversion, and Interfaces

Focus Area Indicator



Florida PALM Data, Conversion, and Interface Updates

Conversions

The SSI Vendor has continued to work through the outstanding SIRs from Mock Conversion 2, which concluded on 6/12/25, in preparation for the upcoming Mock Conversion 3, which is scheduled to begin in early July. The Table below outlines the actual start and finish dates for each Mock Conversion, along with the duration in days:

Table 108: Mock Conversion Start and Finish Dates

Mock Conversion	Start Date	Finish Date	Duration in Days
0	6/24/24	1/31/25	149
1	7/19/24	5/9/25	199
2	3/4/25	6/12/25	71
3 (Anticipated)	7/2/25	08/29/25	42

The Table below summarizes the number of SIRs generated during each Mock Conversion.

Table 119: SIRs Generated per Mock Conversion

Mock Conversion	Number of SIRs
0	106
1	105
2	104
3 (Anticipated)	100+

Given the historical duration of previous Mock Conversions, the volume of SIRs opened for each Mock Conversion, and the average resolution time of 14 days per SIR, the Florida PALM IV&V Team is projecting that Mock Conversion 3 may not be completed by the target date of 7/25/25, potentially impacting the planned start of UAT. To stay on track, it is essential to maintain a strong focus on resolving the remaining SIRs promptly. Continued collaboration between the Florida PALM Project Team and the SSI Vendor, and timely issue resolution, will be key to avoiding delays and ensuring the Mock Conversion 3, as well as the UAT timeline, remains intact.

Mock Conversion 2A SIRs

Five new SIRs for Mock Conversion 2A were opened, and eight unresolved SIRs remain from May. The SSI Vendor closed ten SIRs, leaving five Medium-priority SIRs unresolved.

Table 1210: Status of SIRs for Mock Conversion 2A

Priority	Jira Status		
	Resolve	Re-test	Closed
High	0	0	0
Medium	4	1	7
Low	1	3	3
Total	5	4	10

Note: A Jira status of Resolve indicates the SIR has been assigned to the appropriate Development staff and a fix is being worked on. A Jira status of Re-test indicates a resolution for the SIR that has been loaded into the Testing environments and is ready for re-test. A Jira status of Closed indicates that the SIR resolution has passed a re-test and has been closed.

Mock Conversion 2B SIRs

Six new SIRs for Mock Conversion 2B were opened, and eight unresolved SIRs remained from May. The SSI Vendor closed twelve SIRs, with ten Medium-priority SIRs remaining unresolved.

Table 1311: Status of SIRs for Mock Conversion 2B

Priority	SIR Status		
	Resolve	Retest	Closed
High	0	0	0
Medium	5	5	10
Low	0	1	2
Total	5	6	12

Interfaces

Interface Testing Cycle 2 began on 6/2/25. As testing efforts ramped up, the SIR backlog increased. High-priority SIRs rose to six, Medium-priority SIRs peaked at 14, with one resolved by 6/30/25, and Low-priority SIRs remained stable, with three still open as of 6/30/25.

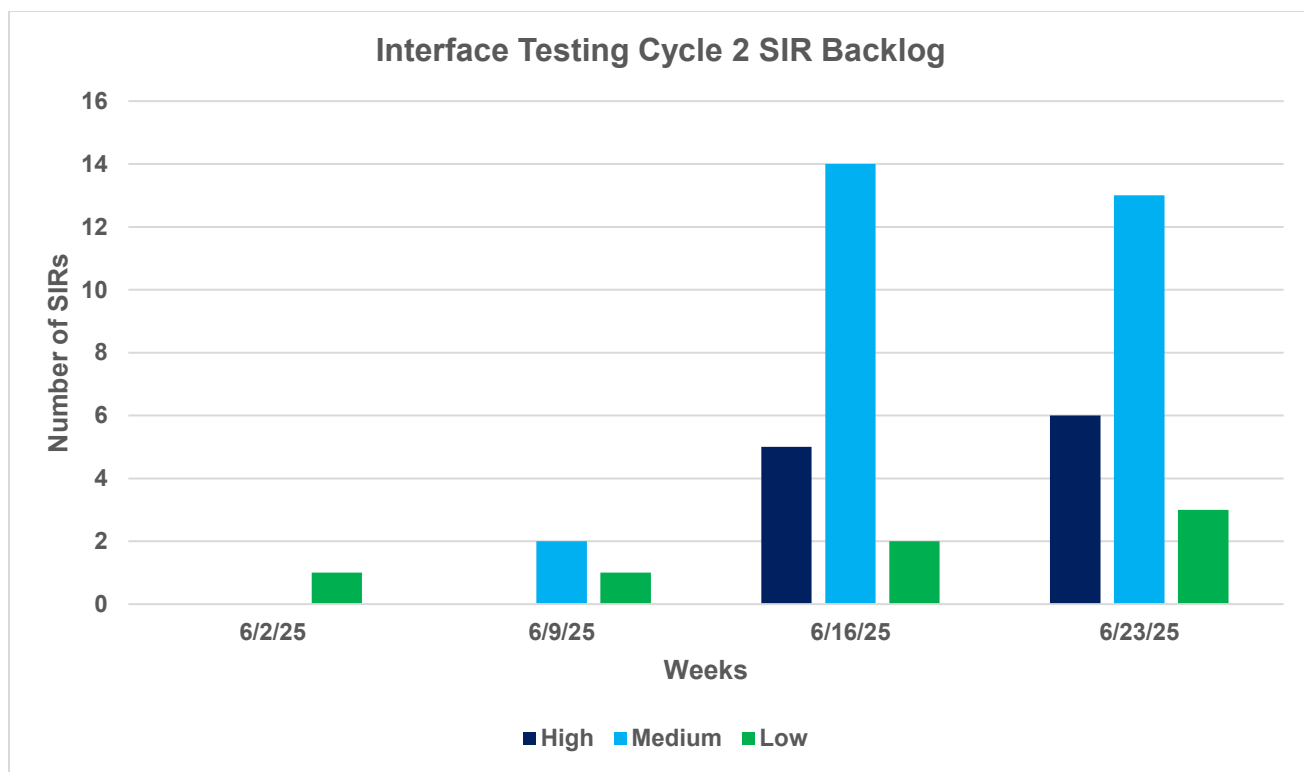


Figure 15: SIR Interface Backlog by Priority

Resolution efforts focused on High-priority SIRs, with 14 closed as compared to the eight Medium and two Low-priority SIRs also closed. This indicates a clear emphasis on addressing critical issues. As of 6/30/25, six High-priority SIRs, impacting seven Interfaces, remain open. As Interface Testing continues, backlog trends and closure rates will serve as key indicators of Interface quality and readiness. The reduction in the High-priority backlog reflects effective prioritization, and continued focus on resolving SIRs will help strengthen Florida PALM stability prior to testing with the Agencies and Interface Testing Cycle 3.

Data Warehouse/Business Intelligence

System Testing DW/BI began on 6/2/25 and is scheduled to continue through 7/25/25. The SSI Vendor temporarily suspended testing during the week of 6/16/25 due to a high volume of SIRs identified early in execution. The majority of these SIRs were related to environment setup and configuration, indicating that the DW/BI environment was not properly set up and that the smoke testing conducted by the SSI Vendor prior to the start of System Testing DW/BI was not sufficient to identify key issues. System Testing DW/BI resumed on 6/23/25, though the State DW/BI Team is continuing to work through challenges with the DW/BI environment. Thirty-one data issues have been identified and logged as SIRs by the SSI Vendor. The SSI Vendor created multiple consolidated data requests, resulting from the logged SIRs, and the consolidated data requests have been assigned to the appropriate SSI Vendor teams to troubleshoot and create a timely resolution.

The Table below reflects the status of System Testing DW/BI SIRs as of 6/30/25.

Table 1412: DW/BI SIRs

Priority	SIR Status		
	Resolve	Retest	Closed
High	52	3	21
Medium	28	6	23
Low	110	0	21
Total	190	9	65

As of 6/30/25, the SSI Vendor had completed 70 of the 144 planned Test Scripts, representing approximately 49% of the total Testing scope. The pass rate remained low at 51%, indicating a high rate of failure. The low pass rate, combined with the earlier pause due to the volume of SIRs, suggests quality issues that require attention before DW/BI will be ready for UAT, as described in Finding 24.

DW/BI Test Scripts are categorized by Subject Area, Report, Security Role, and Custom Table. As of 6/30/25, execution has been limited to Subject Area and Report Test Scripts. Query updates are still in progress for the Custom Table Test Scripts. To help meet the targeted completion date of 7/25/25, the SSI Vendor has begun working on weekends to accelerate Testing progress.

The Risk Rating for this Focus Area is worsening from a Medium Risk to a High Risk.

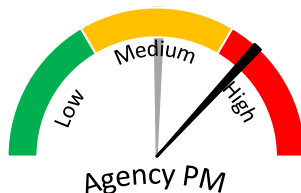
Florida PALM Implementation Readiness Updates

The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

Florida PALM Agency Focus Area Updates

Agency Project Management

Focus Area Indicator



Trend: Worsening

Agency Project Management Updates

The Florida PALM IV&V Team observed that the Agencies meet regularly with third-party vendors to discuss and coordinate enhancements required to support Florida PALM. Agencies have reported that they do not maintain additional documentation to support the remediation status of their business systems beyond what has been submitted through RW Tasks. This limits the Florida PALM Project and IV&V Teams' ability to accurately assess or verify the Agencies' remediation progress and readiness for Interface Testing Cycle 2. Although the Strategic Asset Tracking System (SATS) is not specific to a single Agency, and may be considered an enterprise tool, Agencies acknowledged responsibility to oversee related activities and do not expect the Florida PALM Project to manage this effort on behalf of the Agency.

Some Agencies reported actively preparing for UAT by developing user stories using internal spreadsheets and communicating their status through their RCs and Smartsheet. Agencies are also planning for staff to complete prerequisite training activities to ensure readiness before UAT begins. The Florida PALM IV&V Team observed that several Agencies have adopted a structured approach to testing, with many in the final stages of developing user stories. Some Agencies have created robust user stories that include follow-up questions to promote a deeper understanding of Florida PALM functionality.

Conversely, some Agencies have not yet begun developing detailed user stories. While these Agencies have expressed confidence in their readiness, citing ongoing internal discussions around testing strategy, a clear vision for structuring user stories, and comfort with their testing approach, the absence of verifiable progress poses a risk. With UAT scheduled to begin on 8/11/25, the lack of documented user stories, which are intended to reflect anticipated business processes and guide the development of test scenarios, may impact these Agencies' preparedness for UAT and the effectiveness of their testers once they gain access to Florida PALM.

The Florida PALM IV&V Team recommends the following for the Agencies:

- Agencies that have not yet begun or are in the early stages of developing detailed user stories should take immediate action to formalize this effort. This may include:
 - Actively engaging with the PML-CML and UAT Prerequisite Subgroups to ask questions and clarify expectations.
 - Reaching out to other Agencies that have successfully completed their user stories to gain insights and guidance.
 - Reviewing resources in the Agency Exchange Library, which includes examples of user stories and test cases that can support development efforts.
- Agencies are encouraged to incorporate follow-up questions and validation points in discussions with their RCs to ensure a thorough understanding of Florida PALM business processes. Timely development of user stories will support a successful UAT by helping identify potential gaps in business process readiness and understanding of Florida PALM prior to Going Live.
- Agencies with identified business system remediation dependencies should take proactive steps to assess, prioritize, and manage these dependencies to ensure timely alignment with the Florida PALM implementation timeline. Agencies should also document related assumptions, risks, and contingencies in their Agency-specific Risk logs and escalate any high-impact dependencies through their RC to enable close coordination with the Florida PALM Project Team.

Overall Task Completion

The Florida PALM IV&V Team analyzed the RW to assess Agency performance across all Tasks. Data was compiled for RW Tasks starting with Task 512, with deadlines before 6/30/25. A total of 89 Tasks were included in this analysis.

In the May Monthly Assessment Report, RW Tasks identified as Closed by the Florida PALM Agency Readiness Team, specifically 541-C, 541-D, 567-N, 658-A, and 658-D (all categorized as Direct Impact), were included in the Florida PALM IV&V Team's submission totals. These RW Tasks have since been removed from the submission totals for June.

Table 1513: Submission Totals by Florida PALM Project Impact

Task Status	Project Impact Totals			
	Direct	Indirect	N/A	Total
Verified as Complete	31	8	14	53
Submission Incomplete	5	3	20	28
N/A (No Task Rubric for Verification)	1	0	7	8
Total	37	11	41	89

Note: Verified as Complete indicates that an Agency has submitted 100% of the required information or data for the Task, and the Florida PALM Agency Readiness Team has reviewed and validated it against the Task Rubric. The Florida PALM Agency Readiness Team does not review Agency submissions to validate the accuracy of data or information against current Agency business processes and systems. Submissions deemed insufficient or incomplete, requiring resubmission by the Agencies, are excluded. This distinction underscores the importance of achieving Verified as Complete to ensure readiness and alignment with Florida PALM Project objectives.

All five Direct Impact Tasks due by 6/30/25 have been 100% submitted by all Agencies as of 6/30/25, but many submissions have been returned by the Florida PALM Agency Readiness Team for correction. The Florida PALM Agency Readiness Team established a firm due date of 6/20/25 for four of these Tasks, as delays would affect Mock 3 Conversion and result in Agency data not being available for UAT.

Tasks Not Verified as Complete

The Florida PALM IV&V Team also reviewed the categories and aging of Tasks not yet Verified as Complete across the following critical operational areas:

- **Data** – Information used in or produced from an Agency’s financial operations. This includes data supporting People, Processes, and Technology, which must be evaluated against those specific purposes.
- **People** – Staff and stakeholders impacted by the Agency’s transition to Florida PALM (e.g., leadership, technical and functional owners, SMEs, and end users). This category focuses on staffing levels, skill gaps, knowledge, awareness, and buy-in, which are key to successful transformation.
- **Process** – The sequence of activities used to accomplish business objectives. As business processes evolve at the State and Agency levels, this area emphasizes the need for resources to learn, adopt, and adapt to future-state workflows.
- **Technology** – The systems, tools, or applications used to process, track, or report on financial operations.

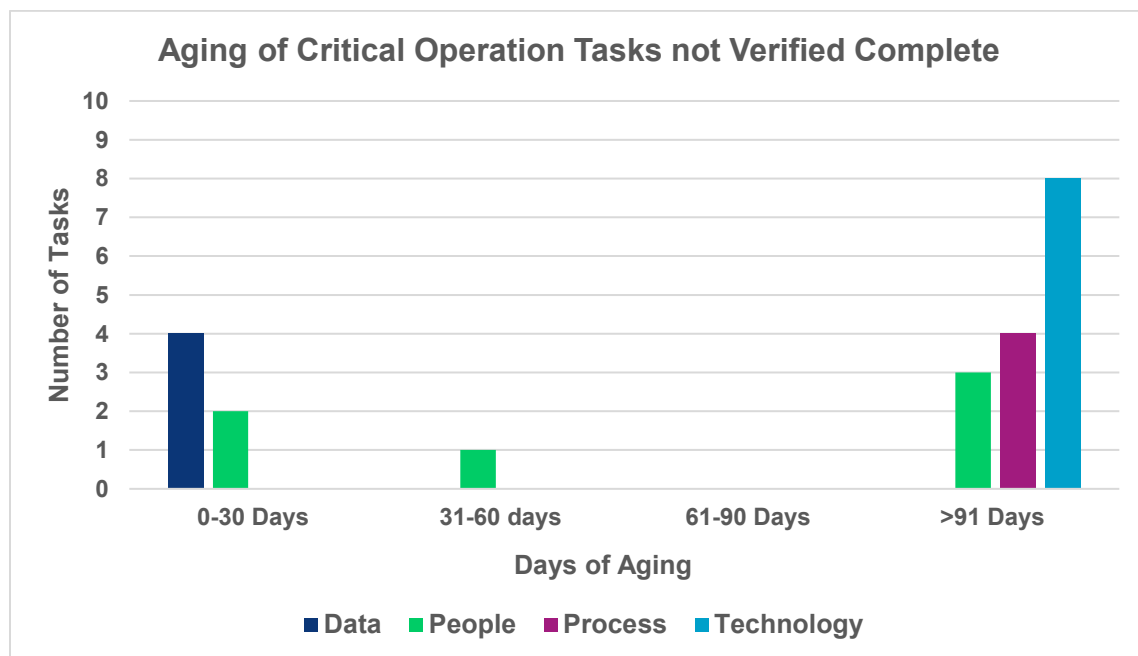


Figure 16: Aging of Tasks not Verified as Complete by Critical Operations

In the May Monthly Assessment Report, RW Tasks identified as Closed by the Florida PALM Agency Readiness Team, specifically 541-C, 541-D, 567-N, 658-A, and 658-D (all categorized as Direct Impact), were included in the Florida PALM IV&V Team's aging analysis. These RW Tasks have since been removed from the aging analysis for June.

Five Direct Impact Tasks remain incomplete, as reflected in Smartsheet. These Tasks fall under the Data and People categories. Four are less than 30 days past due, primarily because they are pending resubmission by the Agencies after the RCs communicated required corrections. The Florida PALM Agency Readiness Team has implemented a Readiness Certification Dashboard aligned with the Critical Operations categories used for RW Tasks that Agencies must manually complete as part of Certification.

The Florida PALM IV&V Team continues to recommend that Agencies regularly update RW task progress to accurately reflect ongoing work. If an impediment prevents them from completing the Task, Agencies should continue to utilize their Risks and Issues log, Agency Questions log, Agency Touchpoint meetings, and Sponsors.

Agency Certification Task Progress

The Florida PALM IV&V Team reviewed the Agencies' progress toward completing Task 593 – Update Agency Readiness Certification #1. The Task was opened on 6/23/25 and has a due date of 7/18/25. Per the criteria provided by the Florida PALM Agency Readiness Team, the following RW Tasks are prerequisites for Readiness Certification #1.

Table 16: RW Tasks for Readiness Certification #1

Task	Critical Operation	Task Planned Start Date	Task Planned End Date	Status
536-A – Create Agency Specific User Acceptance Testing Plan	People	6/17/24	12/13/24	All Agencies Verified as Complete
536-B – Create Agency Specific User Acceptance Testing Plan	People	8/19/24	10/11/24	34 of 35 Agencies Verified as Complete
557 – Confirm Interface Inventory for Cycle 2 Interface Testing	People	11/18/24	12/13/24	All Agencies Verified as Complete
536-C – Create Agency Specific User Acceptance Testing Plan	People	12/9/24	5/2/25	32 of 35 Agencies Verified as Complete
560 – Submit Change Analysis Tool	Processes	12/9/24	5/2/25	28 of 35 Agencies Verified as Complete
576 – Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 – Technical Interface Testing	Technology	1/6/25	7/25/25	Agency Submissions In Progress
578 – Confirm Identity Provider for Florida PALM	Technology	5/5/25	5/23/25	All Agencies Verified as Complete

Task	Critical Operation	Task Planned Start Date	Task Planned End Date	Status
571 – Complete Data Cleansing Based on Mock Conversion 2	Data	5/12/25	6/20/25	All Assigned Agencies Submitted; Verified as Complete in Progress
657 – Submit Updated Configuration Workbooks	Data	5/19/25	6/20/25	All Assigned Agencies Submitted; Verified as Complete in Progress
573-A – Complete and Submit End User Role Mapping Worksheet for UAT	People	5/19/25	6/20/25	All Assigned Agencies Submitted; Verified as Complete in Progress
574 – Prepare Documentation for User Acceptance Testing	Processes	6/2/25	8/8/25	Agency Submissions In Progress
591 – Confirm IdP Configuration for Florida PALM	Technology	6/23/25	7/11/25	Agency Submissions In Progress
659 – Update Conversion Field Mapping	Data	5/19/25	6/2/25	All Assigned Agencies Submitted; Verified as Complete in Progress

The Table below shows the overall Agency-reported progress toward completing Task 593 – Update Agency Readiness Certification #1.

Table 1714: Agency Progress for Certification #1

% Submission	# of Agencies
0%	10
25%	15
50%	8
75%	2
100%	0

As of 6/30/25, with 12 business days remaining to complete Certification #1, the Florida PALM IV&V Team anticipated that all Agencies would have reported some level of progress. Instead, approximately 29% of Agencies are reporting no submission activity. Agencies that do not complete Certification #1 will be unable to proceed to UAT. The Florida PALM IV&V Team recommends that Agencies update both their Task progress and the Certification Dashboard in real time to ensure accuracy and support timely readiness assessments.

Agency Risk and Issue Analysis

The Florida PALM IV&V Team observed that while the total number of Risks and Issues reported by Agencies increased in June, the number of new Risks and Issues opened was lower compared to May. The Table below shows the running total of open Risks and Issues reported by the Agencies each month.

Table 1815: Agency Risks and Issues

Issues	Jan-25	Feb-25	Mar-25	May-25	Jun-25
Open Issues	78	83	83	62	75
Critical or High	64	66	66	50	59

Risks	Jan-25	Feb-25	Mar-25	May-25	Jun-25
Open Risks	327	324	312	260	275
Risks Score 6+	167	155	147	127	140

One Issue has been closed, and 14 new Issues have been opened. Six Risks were closed, and 21 new Risks were opened. As of 6/30/25, the Florida PALM IV&V Team observed that 27 open Issues and 94 open Risks were marked as “Confirmed” by the Agencies for their Bimonthly Status Report.

The Florida PALM IV&V Team performed an analysis of the New open Issues that are Critical or High, and the New open Risks scored 6 or higher. The Issues and Risks are categorized in the Figure below.

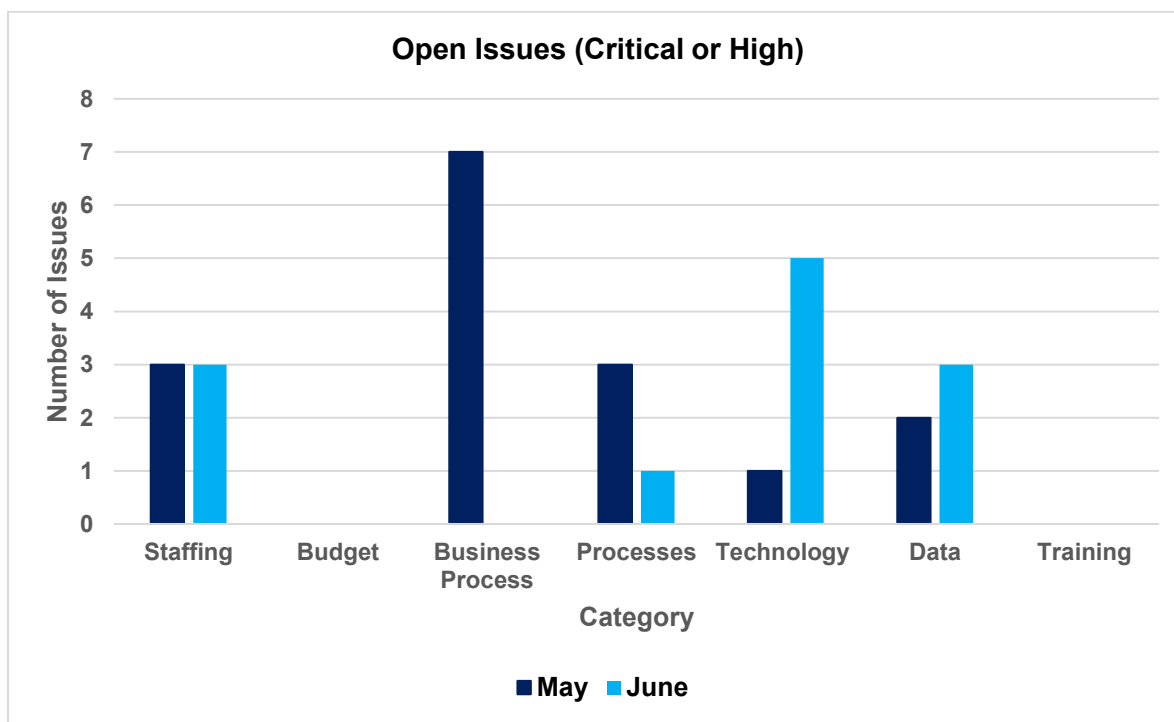


Figure 17: New Open Agency Issues by Category

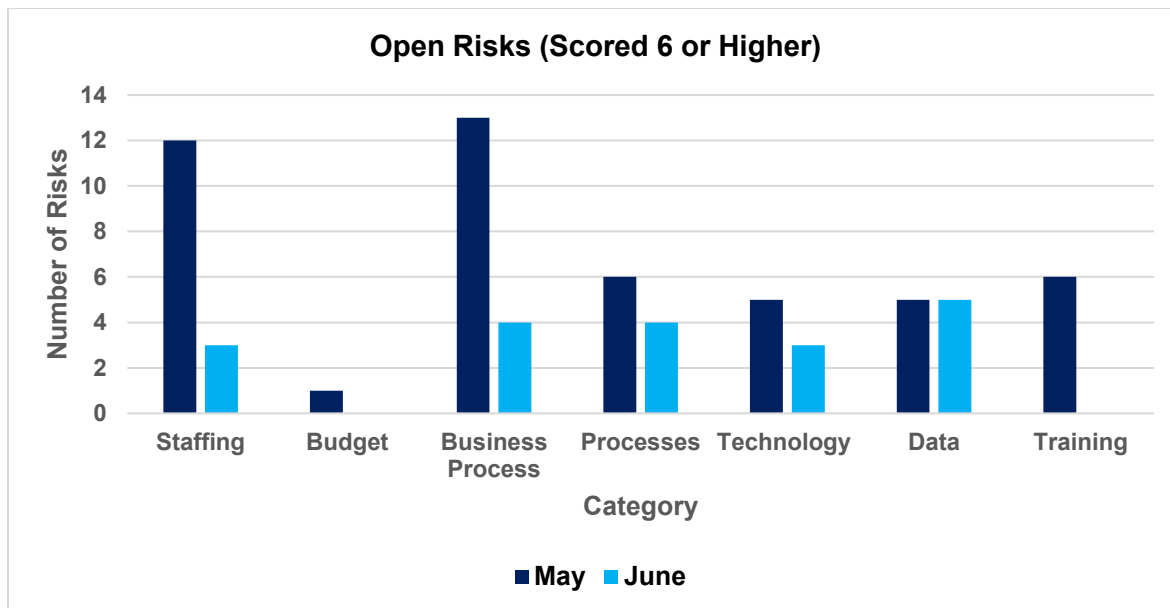


Figure 18: New Open Agency Risks by Category

Note: A business process consists of activities or tasks related to an Agency's transactional processes or business systems, such as financial reporting, budget management, payroll processing, and procurement. For example, Agencies need to determine how the Trial Balance, Schedule of Allotment Balances, Year-End Closure (YEC) processes, and Schedule processes will be completed using the new Account field, which combines the current FLAIR General Ledger Code and Object Code.

Processes refer to general Florida PALM Project-related activities such as communication, Task instructions, and clarifications. For example, changes to system scope (such as shifting certain features to post-implementation after Go-Live) may reduce core processing functions needed for operational efficiency.

The Florida PALM IV&V Team observed the following:

- Agencies are still navigating resource constraints, particularly the limited availability or loss of SMEs during critical phases of the Florida PALM Project. This ongoing challenge stems from the need to balance Florida PALM Project-related responsibilities with day-to-day operational demands. Without adequate SME support, there is a heightened risk of delays in meeting key readiness activities.
- Three Agencies face challenges due to limited IT resource availability and competing internal initiatives. These constraints are impacting the timely execution of business remediation tasks necessary for Florida PALM readiness. If not addressed, these delays may affect the accuracy of data alignment and overall testing preparation.
- Four Agencies expressed concerns regarding the absence of specific Local Fund codes in Florida PALM. Without these codes, Agencies may be unable to accurately convert, configure, or process local fund transactions within Florida PALM. These Agencies have discussed this limitation and the associated risks with their RCs. In at least one instance,

the Florida PALM Project Team and the relevant Enterprise Partner are considering adding a Local Fund code.

- Agencies have documented Risks related to the overlap between the Florida PALM Go-Live date and YEC activities. There is concern that this convergence may create competing priorities, potentially straining available resources and affecting the timely and high-quality execution of both implementation tasks and critical financial closeout processes. While this is a valid concern, there remains sufficient time before Go-Live for all Agencies reporting this risk to develop and implement appropriate mitigation strategies.
- Some documented Risks and Issues lack sufficient detail regarding their potential impact and the associated mitigation strategies, an area that the Florida PALM IV&V Team has reported little to no progress on for several months. The Florida PALM Agency Readiness Team has also conducted several workshops and training sessions on proper Risk and Issue documentation and has made supporting guidance available in Smartsheet and the Florida PALM Knowledge Center. Insufficient detail regarding Risk impact and mitigation strategies limits the Agencies' ability to assess their significance and develop effective response plans. This may also indicate that a well-defined Risk management process has not yet been fully established by some Agencies, which the Florida PALM IV&V Team expects would be in place at this stage of Florida PALM implementation.

The Florida PALM IV&V Team recommends the following for the Agencies:

- Agencies should reassess internal Florida PALM Project timelines and begin planning for resource needs to ensure sufficient coverage for both YEC activities and Florida PALM Go-Live. Establishing clear task prioritization and escalating resource constraints to executive leadership can help mitigate downstream delays, maintain continuity in remediation efforts, and reduce risk to critical operations. Agencies should also consider developing internal contingency plans or prioritization strategies.
- Agencies should collaborate with the Florida PALM Project Team and the relevant Enterprise Partner to discuss the impact of the Local Fund codes and work together towards a feasible solution with identified timelines.
- Agencies should enhance the quality of Risk and Issue documentation by articulating the potential impact on expected scope, schedule, and operations, along with specific and actionable mitigation or resolution plans. Leveraging standardized templates and guidance provided by the Florida PALM Project Team or following best practices described in PMBOK can support consistency and completeness in reporting.

Agency Training Plans

The Florida PALM Training and Education Development (TED) Team presented a review of Agency Training Plans during the ESC Meeting on 6/25/25. The Florida PALM IV&V Team concurs with the Florida PALM TED Team's observations regarding the Agency Training Plans, including the following key points:

- Agencies are using Florida PALM topics, activity lists, and UAT activities to help develop Training curricula.
- Agencies are leaning heavily on SMEs and Training Liaisons/Experts to develop and eventually deliver Training.
- Agencies are getting a head start on identifying and creating learning materials.
- Agencies are using existing end-user role mapping to identify learners.

Agencies should also follow the RW Training Plan Task instructions as more information becomes available. Those instructions include:

- Developing and documenting methods for evaluating learners' progress, such as quizzes, tests, or performance assessments.
- Gathering participant feedback on the effectiveness of Training for any future improvements, if necessary.
- Describe the planned timing for delivery of Training and end-user learning.

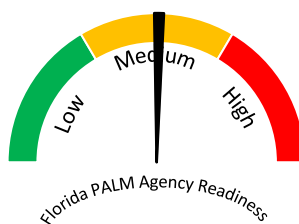
The Florida PALM IV&V Team recommends that Agencies also consider including the following information as they update their Training Plans:

- Ensure their Responsible, Accountable, Consulted, and Informed (RACI) matrix includes roles and identifies specific staff.
- Leverage their Change Champion Network (CCN) to provide updates regarding Training, anticipate resistance, and develop mitigation strategies.
- Consider what communications are necessary, such as newsletters or email spotlights for updates and status leading up to Florida PALM Go-Live.
- Determine whether a Microsoft Teams channel is necessary to support staff and increase collaboration and awareness.
- Assess whether error tracking should be utilized to analyze the frequency and types of errors made by users to identify common challenges and inform additional training needs.
- Maintain an internal Frequently Asked Questions (FAQ) that is regularly updated.
- Review their End User Readiness Survey Analysis action steps for effectiveness and incorporate them in the updated Training Plan.
- Update their Training timeline to align with the Florida PALM Project timeline.

The Risk Rating for this Focus Area is worsening from a Medium Risk to a High Risk.

Florida PALM Agency Readiness

Focus Area Indicator



Trend: No Change

Florida PALM Agency Readiness Updates

The Florida PALM IV&V Team met with Agencies to promote open dialogue around key readiness topics, including business system remediation with third-party vendors, Interface Testing, UAT participant identification, and staffing concerns. The Florida PALM IV&V Team observed the following:

- Agencies provided updates on finalized UAT participants during the Florida PALM IV&V Touchpoints.
- Agencies expressed that uncertainty around resource availability, particularly related to LBRs submitted for staff augmentation, could impact their readiness. It was reported in the Florida PALM/FL[DS] Touchpoint on 6/19/25 that all Agency LBRs were approved, which should help address these concerns.
- Some Agencies reported challenges with role mapping, citing system-enforced separation of duties and limited staffing. Agencies are adjusting by reassigning tasks but indicated that some conflicts may require Florida PALM Project-level exceptions.
- Some of the monthly Florida PALM IV&V Touchpoints were canceled due to competing priorities, including overlapping deadlines for multiple Direct Tasks and YEC activities.
 - Some Agencies agreed to a second brief meeting with the Florida PALM IV&V Team to further clarify their readiness, particularly in relation to third-party vendor remediation. Additional details are available in the Agency Project Management Focus Area.

Additional activities to support Agency readiness included discussions held during the Multi-Agency PML-CML Meetings. Key discussion topics included a plan to reconvene in July to collaboratively develop a “Trainer 101” resource to help Agency staff adopt a trainer mindset. This resource will be created jointly and made available to all Agencies. The group also discussed multiple repositories for Training materials, such as DFS SharePoint, the Agency Exchange Library, and the Florida PALM Knowledge Center. Agencies noted that limited or inconsistent access to these platforms has made locating and using available resources challenging. The following were key suggestions discussed with the Florida PALM Project Team:

- Consider centralizing resources in the Agency Exchange Library, accessible to all Agencies.
- Reorganize the Agency Exchange Library for easier navigation (e.g., add tiles for Training videos, collaboration materials, or “work in progress” vs. finalized documents). Participants acknowledged a general reluctance to share unfinished materials, so distinguishing between draft and final content may encourage broader contributions.
- Emphasize the importance of clear labeling and regular updates to keep materials current and easily identifiable.
- Develop an alphabetical listing or a searchable index to help users quickly find relevant resources.

The Florida PALM IV&V Team has observed that the Florida PALM Project Team has updated the Agency Exchange Library to support more straightforward navigation (e.g., by adding tiles indicating the file type, document description, and operational category).

During the June PML-CML meetings, the need for a cross-Agency Risk Log was discussed to enable tracking and management of shared Risks across Agencies. A working group was proposed to develop Risk management processes and a Risk tracker tool. This initiative will require broad agency participation and ownership, which raised concerns about the lack of engagement and participation in these meetings beyond a few Agencies.

The Florida PALM IV&V Team recommends that the Agencies develop a cross-Agency working group to develop a shared Risk tracking framework and foster broader Agency engagement. According to Project Management Book of Knowledge (PMBOK) best practices, maintaining a centralized Risk Register is essential for capturing both individual and shared Risks across multiple stakeholders. In a multi-Agency implementation, this translates into a cross-Agency Risk Log where interdependencies, cross-cutting issues, and joint mitigation strategies can be transparently tracked and managed. Collaboration among Agencies is critical for addressing common Risks such as resource limitations, role conflicts, and timeline constraints. A shared Risk Log promotes transparency, strengthens accountability, and supports coordinated problem-solving.

Agency Question Management

During Florida PALM IV&V Touchpoints, several Agencies reported that they wait until their monthly Readiness Touchpoints with their RCs to discuss open questions. The Florida PALM Agency Readiness Team recently revised the Agency Question Management process, which improved the timeliness of providing Agencies with the information they requested. The Florida PALM IV&V Team conducted an in-depth analysis of the Florida PALM Agency Question Management workbook in Smartsheet. The Table below shows the breakdown of Agency questions by category and the number of days the questions have been open without resolution.

Table 1916: Open Agency Questions with Days Open

Category	Number of Open Questions	Minimum Days Open	Maximum Days Open	Average Days Open
Business Process	11	6	215	92
Configuration	3	9	19	15
Conversion	14	5	68	18
Interface	11	2	216	52
Report	6	7	52	27
Readiness Activities	17	5	247	85

Category	Number of Open Questions	Minimum Days Open	Maximum Days Open	Average Days Open
Training Activities	4	7	66	29

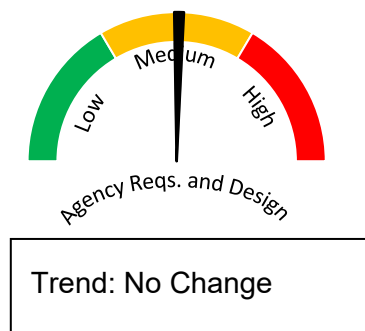
The Florida PALM IV&V Team recommends the following for the Agencies:

- **Proactive Follow-Up:** Agencies should avoid waiting for scheduled meetings with their RCs to address questions. Instead, Agencies should reach out early and often for updates or clarification. If necessary, Agencies should consider scheduling separate meetings outside of routine Touchpoints to ensure the timely resolution of critical questions.
- **Submit Questions Individually:** When submitting multiple questions to RCs, Agencies should email each question separately. This approach will prevent delays caused by bundling multiple questions into a single log entry, which can result in prolonged resolution times.

The Risk Rating for this Focus Area remains a Medium Risk.

Agency Requirements and Design

Focus Area Indicator



Agency Requirements and Design Updates

The Florida PALM IV&V Team observed 122 updates in the Florida PALM Knowledge Center Change Catalog. The Figure below depicts the Florida PALM Knowledge Center updates.

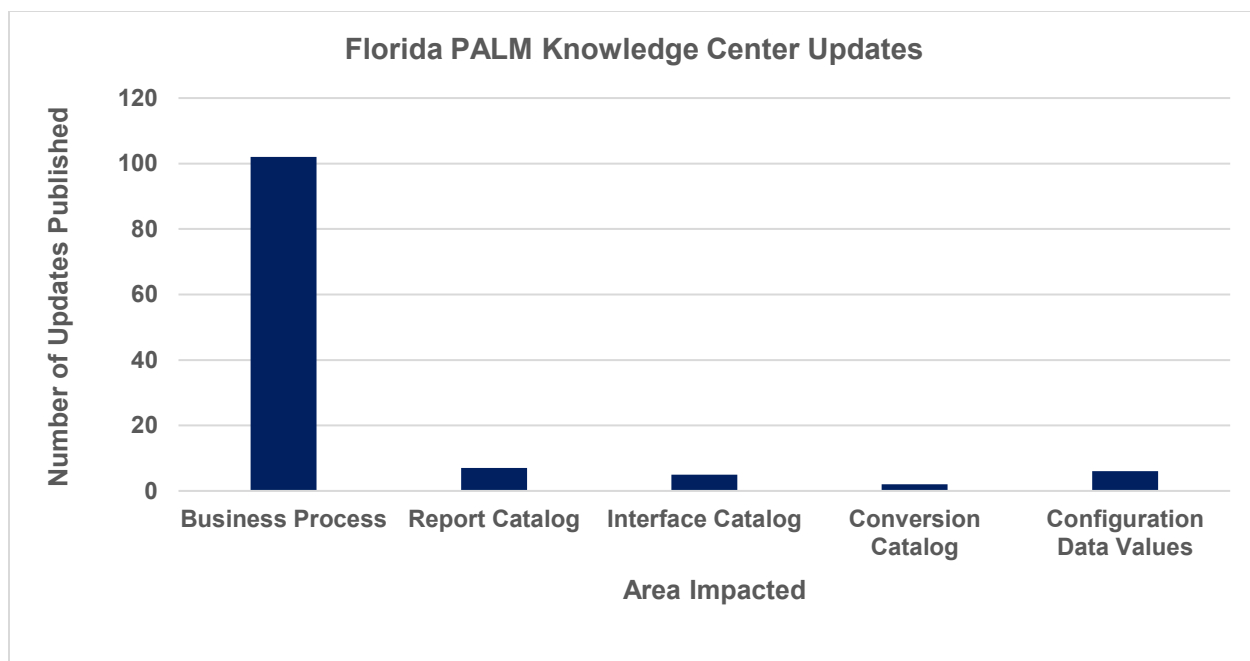


Figure 19: Updates Published to the Knowledge Center

Note: The Figure excludes newly added or removed items from the Florida PALM Knowledge Center and reflects only the number of updates made to previously published items.

While the Florida PALM IV&V Team observed that many of the published changes related to Business Process documentation updates, Agencies reported that these changes had minor impacts on their UAT preparations. Agencies should remain aware that updates to workflows may require revisions to test cases, training plans, or UAT plans, and could introduce changes to data requirements or dependencies.

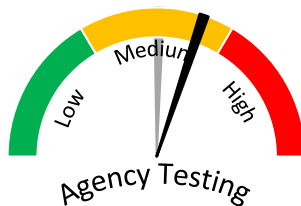
The Florida PALM IV&V Team recommends the following for Agencies:

- Establish a strong change control process and utilize the tools available in the Florida PALM Knowledge Center to stay aware of published changes.
- Maintain close collaboration between process owners and UAT SMEs.
- Inform RCs if any published changes directly impact business system readiness.

The Risk Rating for this Focus Area remains a Medium Risk.

Agency Testing

Focus Area Indicator



Trend: Worsening

Agency Testing Updates

Agency UAT Plan Analysis

The Florida PALM IV&V Team observed that the objectives and success criteria outlined in the I-WP127 – User Acceptance Test Plan emphasize familiarizing end-users with Florida PALM and supporting them through ongoing training efforts. Each Agency was also responsible for developing a UAT Plan designed to support their preparation efforts by outlining the test preparation and execution activities necessary to ensure a structured, organized, and well-defined UAT process. To support this effort, Agencies were provided with a UAT Plan template and phased guidance (RW Tasks 536-A, 536-B, and 536-C) to assist in completing each section of the plan methodically. The Florida PALM IV&V Team reviewed the UAT Plans submitted by Agencies and Verified as Complete by the Florida PALM Agency Readiness Team for the following:

- Alignment with RW Tasks 536A-C – Agency UAT Plan instructions and the following content:
 - Objectives and Scope to identify Agency-specific UAT goals.
 - Key Activities to identify activities and timelines to prepare the Agency's People, Processes, Technology, and Data for successful UAT completion.
 - Roles and Responsibilities to identify assigned resources for Florida PALM Project-provided UAT roles.
 - Test Execution to describe the Agency's approach to test and error management.
 - Testing Scope to describe the Agency's planned testing scope related to its People, Processes, Technology, and Data.
 - Success Criteria to describe desired UAT outcomes.
- Adherence to expected content within the RW Task instructions.
- Degree of completeness and detail provided in each UAT Plan section.
- Alignment with industry standards and best practices.

The Florida PALM IV&V Team reviewed 31 Agency UAT Plans. Three Agency UAT Plans were not available at the time of review because they were not submitted or Verified as Complete by the Florida PALM Agency Readiness Team. Although there are 35 Agencies, two Agencies submitted the same plan individually, and the Florida PALM IV&V Team evaluated it as a single plan. All percentages that follow are calculated based on the Florida PALM IV&V Team's review of the 31 plans Verified as Complete.

As the Table below shows:

- Thirteen Agency UAT Plans (38%) were assessed as Comprehensive by addressing all key content areas and providing levels of detail indicating a solid understanding of UAT planning.
- Fourteen Agencies submitted UAT Plans that were generally sound but may have lacked depth or completeness in certain areas.
- Four Agency UAT Plans were assessed as Limited in completeness and lacked key elements or sufficient detail. Agencies in this category may need additional targeted support or follow-up to ensure their readiness and alignment with Florida PALM Project standards.

Table 2017: Agency OAT Plan Review Summary

Level of UAT Plan Completeness	Definition	Number of Agency Plans	Percentage of Agency UAT Plans
Comprehensive	75-100% of content was addressed with a strong tendency toward in-depth understanding of required tasks, completeness, and detail	13	42%
Moderate	50-74% of content was addressed and demonstrated a moderate level of understanding of required tasks and detail. Some sections would benefit from augmentation	14	45%
Limited	Less than 50% of the content included details that demonstrated a clear understanding of the required tasks and/or sections were missing.	4	13%
Total	N/A	31	100%

The Table below summarizes the comprehensiveness ratings—Low, Medium, and High—assigned to the six primary sections across the 31 UAT Plans reviewed by the Florida PALM IV&V Team.

Table 2118: Overall Comprehensiveness Ratings by UAT Plan Section

UAT Plan Section	Overall Comprehensiveness		
	Low	Medium	High
<i>Objectives and Scope</i>			
<i>Key Activities</i>			
<i>Roles and Responsibilities</i>			
<i>Test Execution</i>			
<i>Testing Scope</i>			
<i>Success Criteria</i>			

Trends and Recommended Actions

Most Agency UAT Plans would benefit from additional details about how UAT tasks will be executed. While Agencies consistently referenced required tasks as outlined in the RW Task 536 instructions, they frequently did not elaborate on the specific actions needed to complete them. This level of detail is especially important given that Agencies are responsible for ensuring their own preparedness for Go-Live.

The Florida PALM IV&V Team shared detailed observations and recommendations with each Agency during Florida PALM IV&V Touchpoints, providing them with the opportunity to enhance their UAT Plans by addressing content gaps and adding detail. By strengthening the quality and utility of their plans, Agencies can improve the likelihood of a structured, efficient, and successful UAT experience, ultimately leading to greater end-user satisfaction with both the UAT process and Florida PALM. The Florida PALM IV&V Team recognizes that some Agencies may have limited experience with conducting UAT, which may have contributed to challenges in developing robust content for their UAT Plans. The Florida PALM IV&V Team recommends that Agencies identified as having gaps in key content areas consider reviewing one or more of the 13 Agency UAT Plans that were assessed as comprehensive, as this may offer helpful examples and strengthen planning efforts.

The Table below summarizes the most frequently identified observations from the Florida PALM IV&V Team's review, highlighting their significance and providing targeted recommended actions for improvement when applicable.

Table 2219: Most Common UAT Plan Observations

#	UAT Plan Section	IV&V Observation	Significance	Recommendation(s)
1	All Sections.	29 Agencies (93%) followed the RW Task 536 UAT Plan template	By providing content that aligns with the RW Task 536 UAT Plan template (which adheres to industry standards for UAT Plan creation), Agencies increase their chances of developing a robust UAT Plan	No recommendations

#	UAT Plan Section	IV&V Observation	Significance	Recommendation(s)
			that effectively supports successful UAT Planning and Execution.	
2	Objectives and Scope Testing Scope	RW Task 536-C states that Agencies will test and validate Agency business processes from end to end. For 16 Agency UAT Plans (52%), Agencies stated that one of their UAT objectives was to validate that "All business and technical requirements had been met."	Validation of all requirements aligns with traditional objectives of UAT and represents a level of effort that exceeds what is outlined in the RW Task 536-C instructions. The UAT Plans proposing this more intensive approach did not include details on how this validation would be supported. If Agencies find it challenging to demonstrate that their testing has verified "all of their requirements", it may delay their ability to confirm that UAT for the Agency is complete.	Agencies should: <ul style="list-style-type: none"> Define a testing approach that demonstrates that Florida PALM has been tested and supports critical business processes. Reduce effort to establish traceability by leveraging work already completed, such as User Stories and change impact analyses, to translate critical business processes into requirements that can be verified during UAT.
3	Key Activities (People) Test Execution (Testing Logistics)	Thirty Agency UAT Plans (97%) did not identify the need to plan for and mitigate anticipated resource availability and work prioritization challenges as suggested in the RW Task 536 instructions.	Identifying UAT resource contention issues is crucial to avoid project delays that may result from multiple projects or tasks competing for the same resource and maximize UAT quality by ensuring resources have sufficient dedicated time to perform thorough and accurate testing.	Agencies should: <ul style="list-style-type: none"> Identify resource contention issues that may jeopardize end users' ability to fully participate in UAT while maintaining their daily operational responsibilities to align with RW Task 536 instructions and industry best practices. Identify which resources are fully dedicated to supporting UAT and which have shared responsibilities, so that appropriate resource planning and scheduling can be conducted. Utilize the Agency Risk Smartsheet to define and document mitigation strategies aimed at minimizing potential

#	UAT Plan Section	IV&V Observation	Significance	Recommendation(s)
				negative impacts on end users' ability to successfully fulfill their UAT responsibilities.
4	Roles and Responsibilities	Twenty-six Agency UAT Plans (84%) identified named resources to fill the Roles and Responsibilities described in I-WP127	<p>Most Agency UAT Plans identified specific individuals for key UAT roles, enabling Agencies to:</p> <ul style="list-style-type: none"> Clarify resource responsibilities and improve communication during UAT by providing clear points of contact. Confirm resource availability and commitment. Demonstrate due diligence by showing that business users (not just IT) validated Florida PALM. Validate that the right expertise is in place to achieve UAT objectives. <p>In addition to identifying primary resources, identifying backup resources for complex projects is a best practice that:</p> <ul style="list-style-type: none"> Reduces risk to the schedule. Ensures continuity and maintains momentum if a primary resource becomes unavailable. 	<p>Agencies should:</p> <ul style="list-style-type: none"> Ensure resources are assigned to all key UAT roles where gaps may exist. Identify backup resources so they can be deployed quickly when needed, minimizing delays and maintaining continuity Incorporate training and shadowing opportunities for backups to ensure they are prepared to fulfill responsibilities if called upon.
5	Test Execution	Most Agency UAT Plans acknowledge the need to complete and submit monthly status reports to the Florida PALM Agency Readiness Team but often lack detail on the specific types of data to be collected and the tasks	According to RW Task 536-B, Agencies are responsible for "providing, managing, and tracking UAT activities" and must report progress and status to the Florida PALM Agency Readiness Team monthly. Additionally, I-WP127 requires Agencies to define how they will track progress, including measures of success and failure.	Agencies should consider enhancing their UAT Plans by including detailed descriptions of how UAT data will be collected, managed, and reported. This should include identifying responsible parties (SMEs, writers, reviewers, etc.) and methods for collection and

#	UAT Plan Section	IV&V Observation	Significance	Recommendation(s)
		necessary to ensure timely and accurate submissions.	Effectively collecting, storing, compiling, and presenting timely and accurate UAT statistics from multiple sources within each Agency will require significant coordination and effort during the intensive UAT execution period. A well-defined reporting process reduces last-minute stress, improves data accuracy, and supports timely decision-making by stakeholders.	consolidation of Agency-specific SNow data. The Florida PALM Agency Readiness Team should consider providing Agencies with a single standardized Status Report template that: <ul style="list-style-type: none"> Provides consistency across reports so that all Agencies report the same types of information. Reduces time spent for Agencies on determining what information to include or how to format their reports. Reduces the risk of missing critical information
6	Test Execution	Agency UAT Plans indicate that when issues are identified, Agencies are expected to conduct an internal issue triage process to determine whether the issue should be escalated to the Florida PALM Project for resolution or addressed internally. Many UAT Plans do not describe the tools or processes that will support this internal triage effort.	A defined internal issue triage process will help Agencies quickly assess the severity and impact of each defect, ensure accurate prioritization, and assign defects to the correct team for resolution. SNow will be used exclusively to track issues related to Florida PALM. During UAT, Agencies may also encounter internal challenges, such as issues with Agency-specific business systems, internal processes, or incorrect role assignments, that fall outside the scope of SNow, as outlined in I-WP127 and RW Task 536-B. These internal challenges will need to be independently tracked, managed, and resolved by each Agency prior to Go-Live.	Agencies should document a defined internal issue triage workflow, including the roles responsible for issue evaluation, criteria for escalation, and the tools (e.g., internal ticketing systems, spreadsheets, or collaboration platforms) that will be used to track and manage issues. Providing this level of detail will help ensure timely resolution and reduce the risk of delays during UAT.
7	Success Criteria	RW Task 536-C included prompts to help Agencies	Agency UAT Exit Criteria rely upon achieving verifiable success metrics. If not	Agencies should revise their success criteria (where applicable) to be

#	UAT Plan Section	IV&V Observation	Significance	Recommendation(s)
		<p>formulate success criteria.</p> <p>Twenty Agency UAT Plans (64%) cited success criteria that were primarily qualitative, such as “testing is successfully completed,” “issues are addressed promptly,” or “UAT results in a high level of confidence.”</p> <p>Qualitative criteria may make it challenging for agencies to determine definitively whether the success criteria were fully met.</p>	objectively verifiable could result in disagreement among testers, developers, stakeholders and the project team and result in delays to Agencies certifying UAT is complete.	quantitative, measurable, and verifiable. Doing so will enable Agencies to objectively assess whether their UAT objectives have been achieved.

Agency Interface Test Planning

The Florida PALM IV&V Team evaluated Agency-reported progress in the Interface Test Planning workbooks in Smartsheet. These workbooks list all Agency business systems associated with Interfaces and their respective status toward remediation and testing readiness. Preparation activities for Agency Interface Testing include business system remediation, updates to internal business processes, Interface consumption readiness, and data preparation. The Florida PALM IV&V Team observed the following trends:

- Five percent of business systems associated with selected Interfaces have unknown readiness dates. This represents a potential risk to the Florida PALM Project, as these Interfaces may be critical to Agency business processes. Without confirmation that these Interfaces have been successfully tested during the designated Interface Testing timeline, there is an increased likelihood of integration issues that could impact Agency operations and the Florida PALM implementation timeline.
- Additionally, of the full inventory of Agency business systems, 12% have not yet begun preparation or remediation activities, though more than half of those have also reported in Smartsheet that they will be ready to test during the Interface Testing Cycle 2 timeline.
- Fifty-six percent of business systems associated with selected Interfaces are expected to be ready for Interface Testing before or during August, aligning with the planned start of Interface Testing Cycle 2.
- Thirty percent of business systems associated with selected Interfaces are expected to be ready in September and October, which is still within the Interface Cycle 2 timeline.

- The remaining 9% of business systems listed in the Interface Test Planning documentation have been marked as “No Longer Needed”.

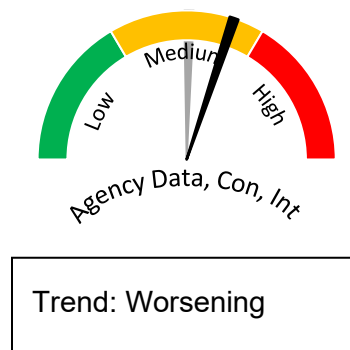
Agency reporting indicates that the projected percentage of business systems ready for Interface Cycle 2 Testing during the scheduled testing period dropped slightly from 86% in May to 85% in June. This is because the number of reported connections increased from 795 in May to 815 in June after Agencies met with the applicable Enterprise Partner and the Florida PALM Project Team to validate the necessary Interfaces.

Agencies mentioned during Florida PALM IV&V Touchpoints that they were focused on Florida PALM Project data cleansing and configuration tasks due in June, as well as preparation and performance of YEC activities, temporarily lowering the priority of business system remediation updates in some cases.

The Risk Rating for this Focus Area remains a Medium Risk but is worsening from Medium Yellow to High Yellow.

Agency Data, Conversion, and Interfaces

Focus Area Indicator



Agency Data, Conversion, and Interfaces Updates

As of 6/30/25, all Agencies completed the RW Tasks associated with Mock 2 Conversion data cleansing, Conversion Field Mapping, and Configuration Workbooks. The Florida PALM Agency Readiness Team returned several of these submissions due to errors, missing content, or incomplete documentation. Specifically:

- Fifteen Agencies have pending resubmissions for Mock 2 Data Cleansing workbooks (RW Task 571).
- Sixteen Agencies must resubmit corrected Conversion Field Mapping documents (RW Task 659).
- Eighteen Agencies are required to revise and resubmit their Configuration Workbooks (RW Task 657-A).

These activities are foundational to ensuring data integrity, mapping accuracy, and successful configuration within the Florida PALM system. Delays in resubmitting corrected versions may impact downstream activities, including Interface Testing and UAT, data conversion validation, and implementation readiness.

While Agencies largely reported confidence in their readiness for Interface Testing Cycle 2, approximately 5% of the identified Interfaces were marked as “Build Not Started” with no confirmed readiness dates as of 6/30/25.

The Florida PALM IV&V Team recommends the following for Agencies:

- Allocate adequate SME time and resources to promptly address the errors identified by the Florida PALM Project Team and submit corrected versions of data cleansing, mapping, and configuration workbooks.
- Agencies with Interfaces that have a business system remediation status of “Build Not Started” should define concrete build and testing schedules that align with Interface Testing Cycle 2 milestones. Proactive tracking and coordination with the Florida PALM Project Team will be essential.
- Agencies with interfaces flagged with business system remediation status as “Build Not Started” should define concrete build and testing schedules, aligned with Cycle 2 Testing milestones. Proactive tracking and coordination with the PALM interface team will be essential.
- Leverage regular project status meetings, Smartsheet updates, and Agency working sessions to flag barriers early and maintain alignment with Florida PALM Project timelines.

The Risk Rating for this Focus Area remains a Medium Risk but is worsening from Medium Yellow to High Yellow.

Agency Implementation Readiness

Agency Implementation Readiness Updates

The Florida PALM IV&V Team will report progress in this Focus Area once Agency Implementation efforts begin.

Key Metrics or Analysis

This section provides metrics the Florida PALM IV&V Team uses to assess processes or activities.

Development Metrics

Build Segment III DW/BI Final Approval

The Figure below shows the targeted number of AD documents that were expected to be approved versus the actual number approved. As of 6/30/25, all 18 AD documents have been approved. The last Build Segment III DW/BI AD document was approved on 6/5/25. All the AD documents were originally targeted for approval by 3/26/25.

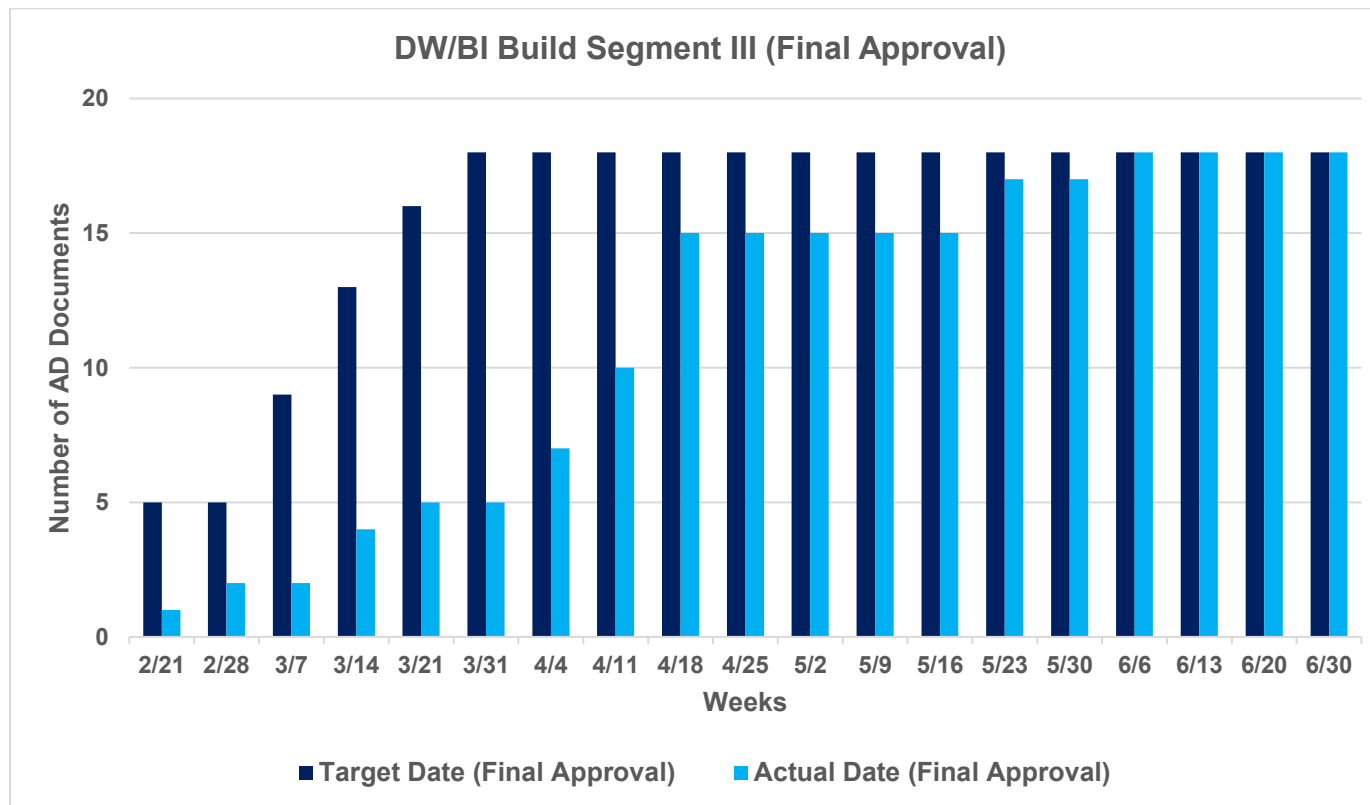


Figure 20: DW/BI Segment III Build Documents – Final Approval

Testing Metrics

Test Scripts Executed Planned versus Actual for All Cycles and Segments

The Figure below shows the number of planned versus actual Test Scripts executed by the SSI Vendor for all Cycles as of 6/30/25.

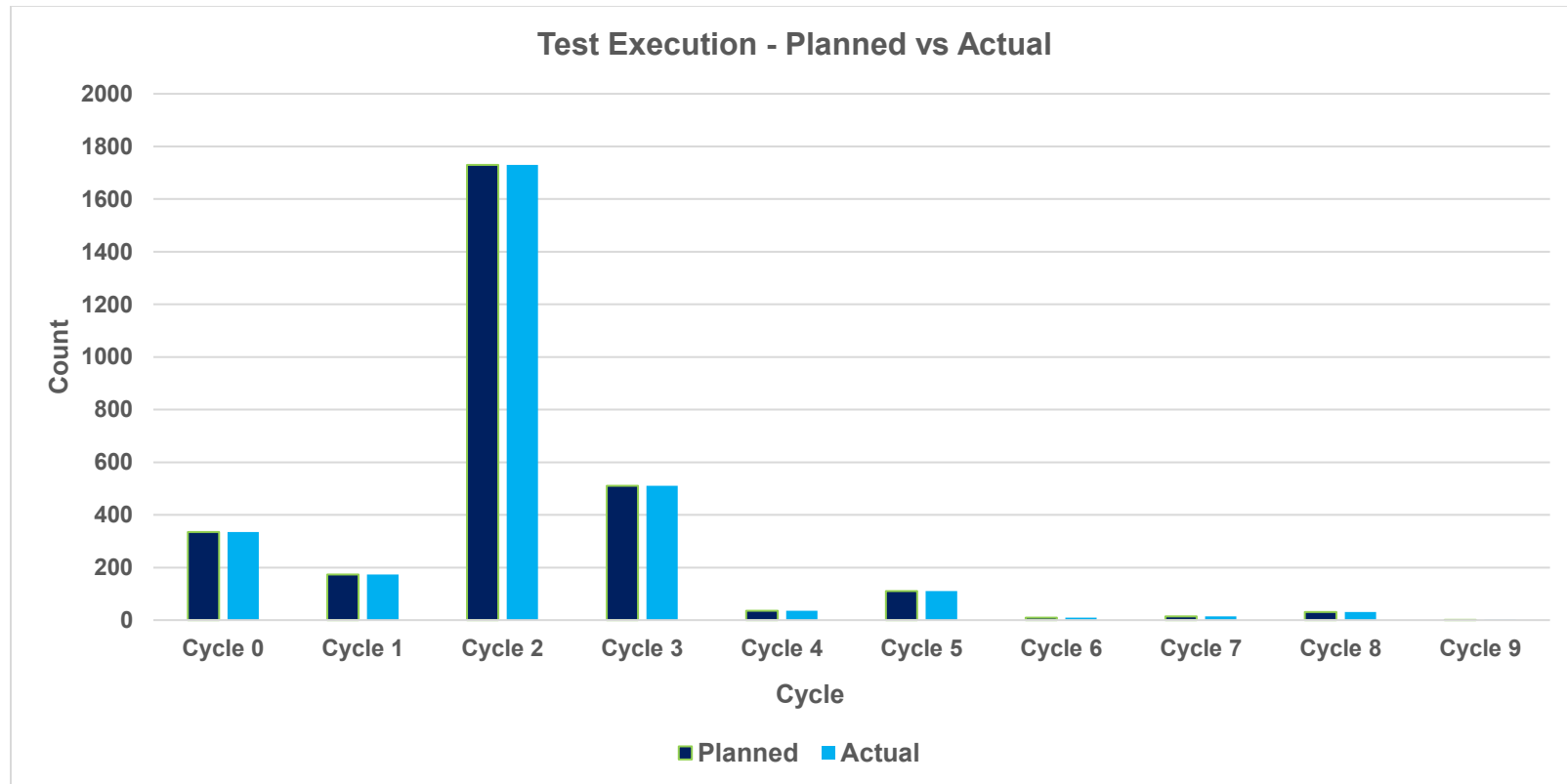


Figure 21: Planned and Actual Test Scripts Executed for all Segments

Cumulative Test Scripts Executed Planned versus Actual for Segment III

The Figure below shows the number of planned versus actual Test Scripts executed by the SSI Vendor for all Cycles as of 6/30/25.

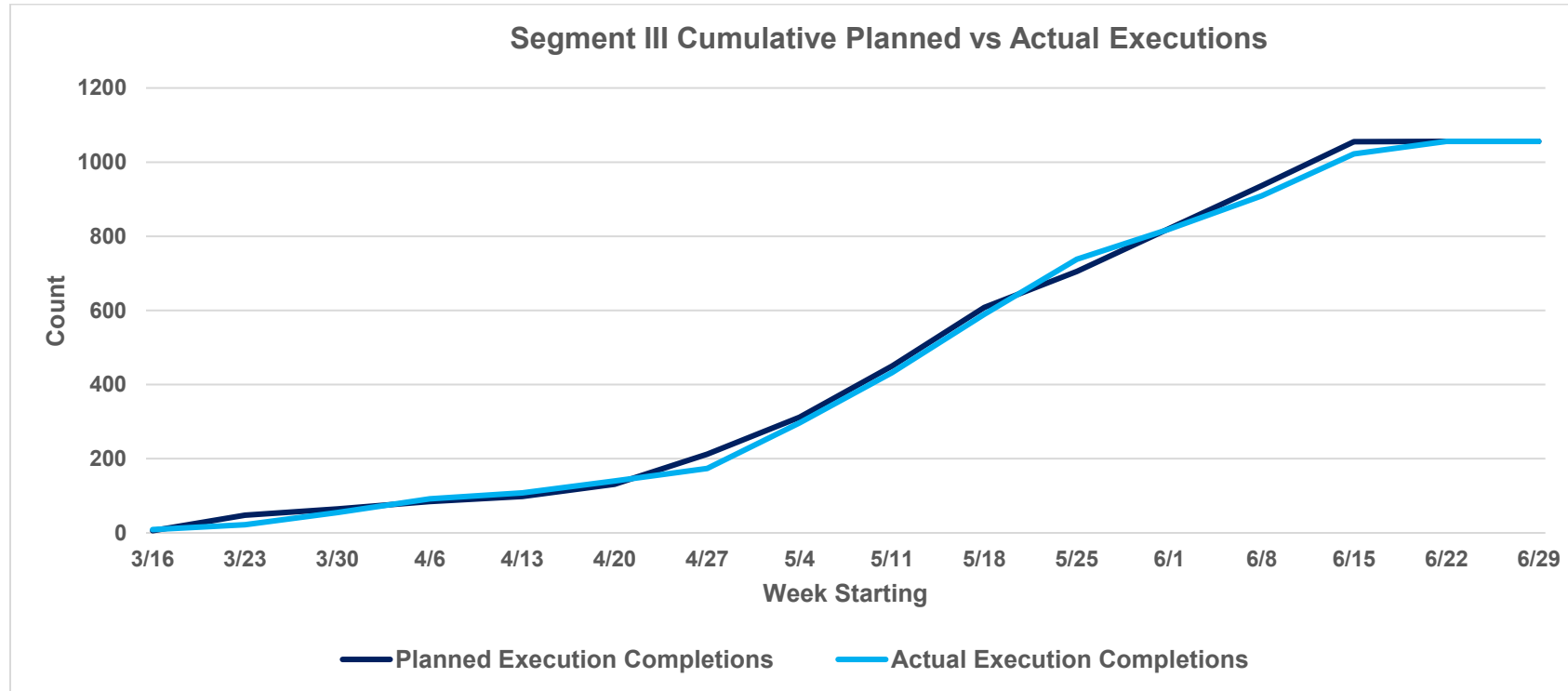


Figure 22: Cumulative Planned and Actual Test Scripts Executed for Segment III

IV&V Information Requests

The Table below includes the outstanding Florida PALM IV&V Team information requests from the Florida PALM Project Team.

Table 2320: IV&V Information Requests

Information Request	Date of Request	Status
None	NA	NA

Appendix A – Risk Priority Matrix

The Florida PALM IV&V Analysts will use the following Table to assign a Risk probability rating to each identified Risk.

Table 2421: Risk Probability Rating

Risk Probability Rating	Probability of Occurrence	Probability Description
1	Improbable	Risk has between a 1%-19% likelihood of occurring.
2	Unlikely	Risk has between a 20%-39% likelihood of occurring.
3	Possible	Risk has between a 40%-59% likelihood of occurring.
4	Likely	Risk has between a 60%-79% likelihood of occurring.
5	Probable	Risk has between an 80%-99% likelihood of occurring.

The Risk Impact Criteria the Florida PALM IV&V Analysts will use to assign a Risk impact rating to each identified Risk are described in the Table below.

Table 2522: Risk Impact Criteria

Risk Impact Rating	Magnitude of Impact	Impact Description
1	Negligible	Risk will have an impact so small that it can be ignored when studying the larger effect.
2	Minor	Risk will have a small impact on the Project that should not be ignored when studying the larger effect.
3	Moderate	Risk will have a noticeable impact on the Project.
4	Significant	Risk will have a significant impact on the Project
5	Critical	Risk will have a significant impact and may jeopardize the success of the Project.

The Table below outlines the Risk Priority Ratings for a Finding based on a combination of impact and probability of occurrence.

Table 2623: Risk Priority Ratings

Probability of Occurrence	Magnitude of Impact				
	Negligible 1	Minor 2	Moderate 3	Significant 4	Critical 5
Probable 5	Low	Medium	High		
Likely 4					
Possible 3					
Unlikely 2					
Improbable 1					

The Table below defines the levels of the Risk Priority Ratings.

Table 2724: Risk Priority Definitions

Rating	Definition
High	The possibility of substantial impact on product quality manageability cost or schedule. Major disruption is likely, and the consequences would be unacceptable. A different approach is required. Mitigation strategies should be evaluated and acted upon immediately.
Medium	The possibility of moderate impact to product quality manageability cost or schedule. Some disruption is likely, and a different approach may be required. Mitigation strategies should be evaluated and implemented as soon as feasible.
Low	The possibility of a slight impact to product quality manageability cost or schedule. Minimal disruption is likely, and some oversight is needed to ensure that it remains low. Mitigation strategies should be evaluated and considered for implementation when possible.