

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

Independent Verification and Validation
Monthly Assessment Report
May 2025

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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 May 2025:

- The overall Florida PALM Project Risk Rating remains a Medium Risk. No new Findings were opened, four Findings were closed, several Florida PALM Project Focus Areas are trending towards improved Risk Ratings, and all Agency Focus Areas remain a Medium Risk.
- Finding 16 related to compounding delays in Mock Conversion 0 and 1, Finding 17 related to the overlapping timelines for User Acceptance Testing (UAT), Training activities, and Year-end Close (YEC), Finding 20 related to delays in updating the Florida PALM Project Schedule, and Finding 21 related to the pace of execution for System Testing Segment III have been closed.
- The Florida PALM Project Team has approved all Segment IV Application Development (AD) documents as of 5/17/25, which is ahead of the planned finish date of 5/30/25 in Amendment 12.
- The Risk Rating for the Florida PALM Data, Conversion, and Interfaces Focus Area has improved from a High to a Medium Risk as all System Investigation Requests (SIRs) from Mock Conversion 0 and 1 have been resolved, and Mock Conversion 2 execution is complete.
- System Testing is ahead of schedule as of 5/31/25, with 787 scripts executed, surpassing the planned total of 767. High-criticality SIR resolution times have also improved.

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	Medium	No Change	<p>The overall Florida PALM Project Risk Rating remains a Medium Risk.</p> <p>No new Findings were opened, and four Findings were closed (16, 17, 20, and 21). Finding 15 related to initial failure rates for Reports, Interfaces, Conversions, Extensions, Forms, and Workflows (RICEFW)-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 also show improving trends.</p> <p>While Build Segment IV was completed on 5/17/25, one AD document in Build Segment III DW/BI remains overdue by approximately nine weeks, and the Employee Self-Service (ESS) Functional Design (FD) specifications are about four weeks behind schedule. These delays are not expected to impact Data Warehouse (DW)/Business Intelligence (BI) System Testing or readiness for Stage Gate 3 – Ready to Begin UAT.</p> <p>Several Florida PALM Project Focus Areas have shown improvement within the Medium Risk range. Notably, the Florida PALM Data, Conversion, and Interfaces Focus Area improved from a High to a Medium Risk. Most Agency Focus Areas also remain at a Medium Risk level.</p>
Florida PALM Project Management	Medium	Medium	Improving	<p>The Risk Rating for this Focus Area remains a Medium Risk but is improving from High Yellow to Medium Yellow due to the closure of Finding 20, which is related to the delay in publishing the updated Florida PALM Project Schedule.</p> <p>As of 5/31/25, the Schedule Performance Indicator (SPI) is .94, and the number of Delayed Tasks has decreased from February with the</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<p>release of the finalized Florida PALM Project Schedule.</p> <p>The Florida PALM IV&V Team has introduced additional schedule metrics and will provide trend analysis in future reports as more data becomes available.</p>
Florida PALM Organizational Change Management	Medium	Medium	Improving	<p>The Risk Rating for this Focus Area remains a Medium Risk but is improving from Medium Yellow to Low Yellow due to the closure of Finding 17, which related to the overlapping timing of UAT, Training, and YEC activities. The updated Readiness Workplan has addressed the key risks identified in Finding 17.</p> <p>The Florida PALM IV&V Team also observed ongoing stakeholder engagement and enhanced information sharing related to UAT and Training. The new Agency Questions Log process has improved response times and accuracy. Additionally, the Florida PALM Knowledge Center 2.0 offers a more user-friendly interface, enhanced search functionality, and the ability for Agencies to follow specific topics, increasing visibility.</p> <p>The Florida PALM IV&V Team's discussion with the Florida PALM Training, Education, and Development (TED) Team on 5/29/25 revealed an iterative approach to developing and delivering Florida PALM Project-level Training, reflecting effective collaboration.</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 RICEFW Items. The IV&V Team also observed that approval of the ESS FDs is approximately four weeks behind schedule due to prioritization of Build Segment IV. The Florida PALM IV&V Team does not</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				expect this delay to impact Stage Gate 3 – Ready to Begin UAT.
Florida PALM Development	Medium	Medium	Improving	<p>The Risk Rating for this Focus Area remains a Medium Risk but is improving from High Yellow to Low Yellow due to the completion of Build Segment IV and a decline in the initial failure rate of RICEFW-related Test Scripts.</p> <p>All Segment IV AD documents were approved as of 5/17/25, ahead of the 5/30/25 planned finish date in Amendment 12. While Build Segment III DW/BI is behind schedule, with one remaining AD document pending approval as of 5/31/25, this delay is not expected to impact System Testing DW/BI.</p> <p>Five major ESS extensions and 13 additional RICEFW items still require development. The 13 RICEFW AD documents are on track, but the ESS FDs are four weeks behind, delaying their development and likely affecting AD document approval timelines. Targeted AD document approval dates span May through October 2025.</p>
Florida PALM Testing	Medium	Medium	Improving	<p>The Risk Rating for this Focus Area remains a Medium Risk but is improving from High Yellow to Low Yellow due to the closure of Finding 21, which related to a risk that System Testing would not be completed by 6/30/25. The SSI Vendor achieved and sustained the necessary elevated test execution pace and remains on track to meet the deadline. Regression Testing Event 1 was also completed on 5/23/25 ahead of schedule.</p>
Florida PALM Data, Conversion, and Interfaces	High	Medium	Improving	<p>The Risk Rating for this Focus Area has improved from a High Risk to a Medium Risk due to the closure of Finding 16, which related to delays in Mock Conversions 0 and 1 that compressed the timeline for Mock 2. The SSI Vendor has resolved all outstanding SIRs from Mock Conversion 0 and 1 and completed all Mock 2 Test Script executions.</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<p>While the number of High-priority System Testing SIRs for Interfaces remained steady at 58 in April and May, the number resolved declined from 56 to 53, increasing the backlog from 3 to 8. This indicates that High-priority Interface SIRs are being opened at a faster rate than they are being closed. At the current pace, the Florida PALM IV&V Team projects that approximately 15 High-priority Interface SIRs may remain unresolved by the end of June.</p>
Florida PALM Implementation Readiness	NA	NA	NA	<p>The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.</p>

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	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>As of 5/31/25, 38 Direct Impact Tasks were due before 5/31/25, with six not Verified as Complete, showing a 1% improvement over April. The Florida PALM IV&V Team acknowledges that many Agencies have improved their Project Management practices and recommends they continue that focus, as Direct Impact tasks will intensify in preparation for upcoming testing. The Agencies will benefit from enhancing these principles by improving planning, increasing efficiency, and enhancing collaboration and communication.</p> <p>Agencies transitioned to the new Risk and Issue reporting template. The Florida PALM IV&V Team observed a decrease in the number of Open Issues and Risks since March. The number of open Issues decreased by 25% and the number of open Risks by 17%.</p>
Florida PALM Agency Readiness	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Agencies expressed cautious optimism about the updated Florida PALM Project Schedule, though some concerns remain regarding overlapping deadlines with YEC activities that may affect capacity. Multi-Agency Project Management Liaison (PML) and Change Management Liaison (CML) meetings continue to serve as collaborative forums for Agencies to share updates, raise concerns, and align efforts.</p> <p>Progress continues within the UAT prerequisite planning groups, where Agencies are actively developing and refining training materials to support a smooth transition into UAT and the new system. Key resources include:</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<ul style="list-style-type: none"> • Micro-trainings • UAT Prerequisite Training • Basic Terminology Guides • Process Documentation • Training Handouts and Job Aids <p>These resources are available on the Change Champion Network (CCN) SharePoint to promote readiness and knowledge-sharing among stakeholders.</p>
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 135 updates in the Florida PALM Knowledge Center Change Catalog across Interfaces, Business Processes, Reports, Conversions, and Configurations, an increase of 92 updates from April. Agencies have reported minimal impact regarding the Interface changes and are assessing the potential impacts of the business process changes to their Business System Remediation efforts.</p>
Agency Testing	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Across all Agencies, remediation efforts for 55% of selected Interfaces are expected to be ready for Interface Testing by August, aligning with the start of Interface Testing Cycle 2. Remediation efforts for the remaining Interfaces are expected to be ready in September (8%) or October (24%), with 5% having unknown readiness dates. Remediation has not started for 11% of selected Interfaces, and over half of those are expected to be ready during the Cycle 2 Testing period.</p> <p>The Florida PALM IV&V Team will meet with Agencies in June to clarify reporting inconsistencies and gain insight into Interface Test Planning efforts.</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Agency Data, Conversion, and Interfaces	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>As of 5/31/25, Agencies have completed 31% of the Direct Impact data cleansing Task due 6/20/25. Four Agencies reported data gaps and minor delays tied to pending Interface confirmations, but continue to make progress in both data cleansing and interface planning. Collaboration between Agencies and Readiness Coordinators (RCs) has improved, resulting in better communication, more timely guidance, and stronger alignment on data readiness and upcoming testing efforts</p>
Agency Implementation Readiness	NA	NA	NA	<p>The Florida PALM IV&V Team will begin reporting progress once Agency Implementation efforts begin.</p>

New Findings

No new Findings were opened in this reporting period.

Open 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		
Finding Description: Although System Testing execution is progressing, the Florida PALM IV&V Team has identified an initial failure rate of approximately 76% for Test Scripts associated with the RICEFW Items. As of 10/31/24, the failure rate for the second and third runs for RICEFW Items that failed initial execution is also high, with 30% failing during the second run and 38% failing on the third run. Compared to other types of Test Scripts, the failure rate of RICEFW-related Test Scripts for first, second, and third runs is substantially higher.		
Current Impact: Moderate	Previous Impact: Moderate	Trend: Improving
Current Probability: Possible	Previous Probability: Possible	Trend: Improving
Current Priority: Medium	Previous Priority: Medium	Trend: Improving

Status Update: The initial failure rate for RICEFW-related Test Scripts showed steady improvement from December 2024 through March 2025, averaging 39.1%. While April saw a spike to 56%, the rate decreased to 35% in May, returning to the trend observed during the earlier improvement period.

As of 5/31/25, 197 RICEFW-related Test Scripts remain unexecuted, and 96 are in a failed state, accounting for approximately 15% of all RICEFW-related Test Scripts. While this remains a risk, the Florida PALM IV&V Team has observed positive progress, including a decreased initial failure rate and increased execution activity.

Recommendation #1: The SSI Vendor should assign SIRs back to the original Developer that built the failed RICEFW Item.

Status: In Process

Update: Based on a review of Developers assigned to resolve SIRs, it does appear that most are being assigned back to the original Developer.

Recommendation #2: The SSI Vendor should add additional Development staff to focus on the remaining items for Build Segment IV.

Status: In Process

Update: Additional Development staff were added between June 2024 and February 2025. As Build Segment IV neared completion, staffing levels gradually decreased, from 94.5 equivalent Developers in February to 79.5 in May, with a further reduction to 76.5 expected in June 2025. With Build Segment IV now complete, these reductions are not expected to impact SIR resolution, even when accounting for Development work related to the five ESS extensions and the 13 remaining RICEFW Items.

Recommendation #3: The SSI Vendor should prioritize Test Scripts to facilitate early testing of the most critical business functionality.

Status: Closed

Update: All Segment IV Build items have been migrated to the System Testing environments and are now available to support the remaining System Testing activities.

Recommendation #4: The SSI Vendor should document and standardize approaches to maintain consistency in configuration, application security roles, and settings across different environments.

Status: In Process

Update: The percentage of SIRs classified as “configuration,” “application security,” “migration,” or “not a defect” averaged 17.24% from January through April. This percentage has increased to 25.25%, primarily due to a rise in application security and configuration-related defects. This increase is expected as ongoing updates to security roles and system configurations continue.

Recommendation #5: The SSI Vendor should enhance smoke testing performed on Builds migrated to the System Testing environments using automated Test Scripts. Smoke testing is intended to assess the stability and functionality of new code when it is released in a new environment.

Status: In Process

Update: As part of Regression Testing, 293 test scripts from the CMS Wave and Segment I and II System Testing are planned for automation to support future Smoke Testing. As of 5/31/25, 235 scripts have been automated, and 75 have been executed during Regression Testing Cycle 1.

Recommendation #6: The SSI Vendor should continue existing meetings and processes between the Development and Testing Teams to coordinate the availability of RICEFW Items for System Testing and identify any dependencies among RICEFW Items.

Status: Closed

Update: All Build Segment IV items have been migrated to the System Testing environments and are available for testing.

Recommendation #7: The SSI Vendor should continuously log and review the root causes of SIRs with testers to minimize future identification of SIRs that are not valid defects.

Status: In Process

Update: Root causes are now consistently being added to SIRs. 98.7% of the closed SIRs have a root cause entered.

Recommendation #8: The SSI Vendor should develop a burn-up chart based on the Stage Gate 3 Entry Criteria and track performance against it.

Status: No Change

Update: The Florida PALM IV&V Team has not observed the creation of a burn-up chart for System Testing based on the Stage Gate 3 criteria that can be used to determine whether the trajectory of progress is sufficient to meet the criteria. The Florida PALM IV&V Team continues to recommend the creation of this type of burn-up chart to track progress. Based on the Florida PALM IV&V Team's chart, the Florida PALM Project appears to be on track to meet the System Test Completion criteria outlined in Attachment 8 of the SSI Vendor Contract.

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		
Finding Description: The Florida PALM IV&V Team has observed that Florida PALM Project Risk statuses and mitigation strategies have not been updated or escalated in a timely manner per the CRAIDL management process outlined in the Florida PALM Project Management Plan (PMP). The Florida PALM IV&V Team began reporting on the CRAIDL process in the November and December 2024 Florida PALM IV&V Monthly Assessment Reports, emphasizing the need for a more proactive approach to Risk and Issue management for a project of this scale.		
Current Impact: Moderate	Previous Impact: Significant	Trend: Improving
Current Probability: Possible	Previous Probability: Probable	Trend: Improving
Current Priority: Medium	Previous Priority: High	Trend: Improving

Status Update: The Florida PALM IV&V Team observed that the Florida PALM Project Team has improved the risk management process by adding review dates and details to logged Risks, creating distinct entries for individual Risks, and including an indicator field to show whether a Risk is being mitigated, accepted, or avoided. Additional CRAIDL review meetings have also been introduced to enhance visibility and communication. As a result, this Risk is improving. Updates to the PMP should reflect these enhancements, along with additional processes for recommendations #1, #3, and #5 below.

Recommendation #1: Update the CRAIDL management process in the PMP to include a provision allowing exceptions in cases where extenuating circumstances prevent the Florida PALM Project Team from following the standard process for escalating Risks and documenting mitigation strategies that involve changes to scope, cost, and/or schedule.

Status: No Change

Update: The Florida PALM Project Team is drafting updates to the PMP, which will require approval from Florida PALM Project leadership.

Recommendation #2: Where possible, create distinct entries for individual Risks in the CRAIDL log and develop detailed mitigation plans specific to each Risk, rather than using broad, high-level descriptions to cover multiple Risks. For example, Risk #8, which was originally opened to track the overlap between System Testing and UAT, also includes scope expansion due to additional work related to the DW/BI and delays in the Financials and Payroll Build Segment IV. Separating these into individual Risks would provide greater clarity and more targeted mitigation strategies.

Status: Closed

Update: The Florida PALM IV&V Team observed that when new Risks are logged, they are detailed for distinct and specific risks.

Recommendation #3: Refine the process for reviewing and tracking Risk status updates to include:

- Action items
- Assigned resource for Action Item
- Expected Time of Completion (ETC) for each Action Item
- Chronological status history
- Current status of Action items providing visibility into mitigation efforts

Status: No Change

Update: The Florida PALM IV&V Team has not yet observed changes to the process.

Recommendation #4: Specify whether a Risk is being Mitigated, Accepted, or Avoided in the mitigation plan.

Status: Closed

Update: The Florida PALM Project Team has added an indicator field for Mitigating, Accepted, Monitoring, or Avoiding.

Recommendation #5: Include standardized reporting practices in the PMP to provide greater clarity regarding Florida PALM Project Risks and Issues in the Monthly Status Report and ESC Meetings.

Status: No Change

Update: The Florida PALM IV&V Team reviewed the PMP, and the language has not yet been updated.

Closed Findings

Finding Number and Title: **Finding 16** – Compounding delays in Mock Conversion 0 and 1 have led to a compressed timeline for Mock Conversion 2 and have the potential to impact multiple downstream activities, such as Interface Testing, future Mock Conversions, and UAT.

Date Opened: 11/29/24

Date Closed: 5/31/25

Finding Description: Mock Conversion 0B has been delayed due to delays with the development of critical Payroll Conversion interfaces, pushing the anticipated completion date of Mock Conversion 0B beyond November. As of 11/30/24, the Florida PALM Project Team completed Conversion activities for 10 out of the 14 interfaces for Mock Conversion 0B. Three of the remaining Conversion interfaces are 50% complete, and one is 25% complete. Additionally, there are two open High-priority SIRs, with one remaining unresolved since October, and 10 Medium-priority SIRs. These delays have pushed the completion of Mock Conversion 1B to early December, but Mock Conversion 1B cannot be finalized until Mock Conversion 0B is complete. Mock Conversion 1A has been reopened and new SIRs have been logged as a result.

Rationale for Closing: The SSI Vendor's resolution of all outstanding Mock Conversion 0 and 1 SIRs, completion of Mock Conversion 2, and the approval of a new timeline for Interface Testing Cycle 2 have all contributed to successfully mitigating the Issue identified in this Finding.

Finding Number and Title: **Finding 17** – The overlapping timing of UAT, Training activities, and YEC tasks can create resource constraints, potentially reducing the effectiveness of Training delivery.

Date Opened: 11/29/24

Date Closed: 5/31/25

Finding Description: Agency Subject Matter Experts (SMEs) and end users will depend on UAT and Training to gain the familiarity needed to perform their job functions in Florida PALM. The concurrent timelines for UAT, Training, and YEC activities may strain Agency resources and divide their focus across these overlapping efforts.

Rationale for Closing: The Florida PALMIV&V Team has completed a preliminary review of the updated Florida PALM Project Schedule (released 5/19/25) and the Readiness Workplan (released 5/27/25) in relation to Finding 17. Based on these updates and continued Agency Readiness activities, the Risk identified with Finding 17 has been mitigated. UAT no longer directly overlaps with the majority of YEC activities and has been extended from nine to 11 months. The UAT environment will remain available after formal UAT concludes and through Go-Live. Training has been shortened from five to four months per Amendment 12, but benefits from no longer coinciding with YEC. Agencies also continue to recognize the importance of supplementing staff and contracted resources to support the transition.

Finding Number and Title: Finding 20 – The updated Florida PALM Project Schedule is delayed, and no new confirmed release date has been set.

Date Opened: 4/30/25

Date Closed: 5/31/25

Finding Description: Following the execution of Amendment 12 on 3/3/25, the Florida PALM Project Schedule required updates to reflect the extended timeline. The Florida PALM Project Team also chose to incorporate all remaining tasks for future Deliverables, as well as Readiness Workplan Tasks, into the Florida PALM Project Schedule, rather than waiting until each Deliverable Expectations Document (DED) is submitted. This proactive approach increases visibility into the full scope of work required to meet the new go-live date of 7/13/26, allowing for better planning, risk identification, and resource alignment.

The original target date for completing the updated Florida PALM Project Schedule was 3/24/25. Due to the volume of new tasks and the need for additional planning sessions to verify the accuracy of the updates, the delivery date was extended to 4/22/25. As of 4/30/25, the updated Florida PALM Project Schedule has not been published, and a revised release date has not been communicated.

Rationale for Closing: The Florida PALM IV&V Team conducted a preliminary review of the Readiness Workplan tasks and the DEDs in the updated Florida PALM Project Schedule and confirmed that the Florida PALM Project Team incorporated them as expected. Additionally, the Florida PALM Project Team has been updating the Florida PALM Project Schedule to reflect actual progress and the current scope needed to meet the 7/13/26 Go-Live date.

Finding Number and Title: Finding 21 – Pace of execution for Segment III may impact the Florida PALM Project Team's ability to meet the planned finish date of 6/30/25 for System Testing.

Date Opened: 4/30/25

Date Closed: 5/31/25

Finding Description: Per the TEXT, 143 Test Scripts have been executed in the six weeks since System Testing Segment III began, an average of 24 Test Scripts per week, which is less than half the pace of the approximately 55 Test Scripts per week achieved during Segments I and II.

As of 4/30/25, 902 Test Scripts remain to be executed within the 8.5 weeks left for System Testing. Per the Test Execution Tracker (TEXT), 657 scripts are planned for execution in May (averaging 164 per week) and 245 in June (averaging 61 per week). To meet this accelerated pace, the Florida PALM Project Team plans to reallocate Functional and Development resources to support test execution.

The Florida PALM IV&V Team has not seen evidence of a formal analysis to support this plan, such as the number of additional testers required, transition timing, percent allocation to testing, expected execution capacity, or potential impacts on Design and Development activities.

Additional concerns include:

- The need for an even higher execution rate if more Test Scripts are introduced as Development concludes.
- The need for Testing staff to prioritize between retesting Critical and High-priority SIRs and executing planned Test Scripts.

Rationale for Closing: The SSI Vendor achieved and sustained the planned increase in test execution pace for May. As of 5/31/25, 787 Test Scripts had been executed since System Testing began on 3/17/25, exceeding the planned total of 767. The Florida PALM IV&V Team also observed a reduction in the time required to resolve High Criticality SIRs, alleviating concerns that test execution and SIR resolution efforts would conflict. Of the 285 scripts remaining, the weekly execution pace is scheduled to taper off, with the projected completion of System Testing one week ahead of the 6/30/25 deadline.

Metrics Related to Findings

The Figure below shows the open, closed, and new Findings the Florida PALM IV&V Team identified. No new Findings were opened this month. There are two open Findings and eight closed Findings.

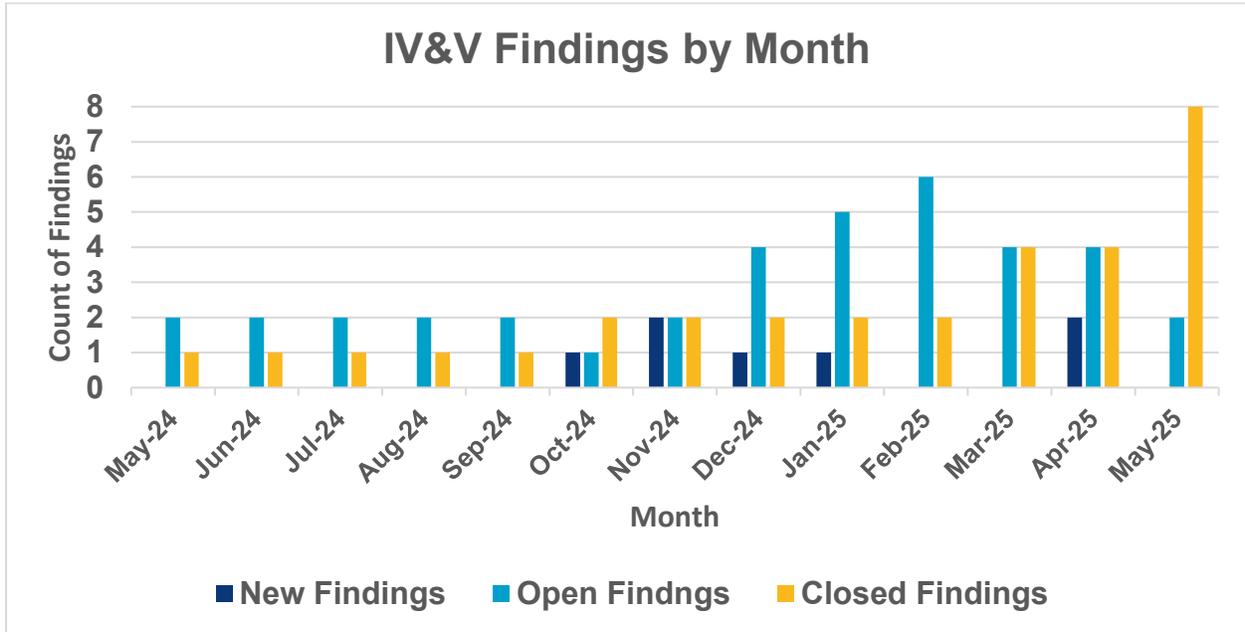


Figure 1: Florida PALM IV&V Findings by Month

Florida PALM Project Focus Area Updates

Florida PALM Project Management

Focus Area Indicator¹



Florida PALM Project Management Updates

The May End-of-Month (EOM) Florida PALM Project Schedule captures the finalized baseline and scope aligned with the changes introduced in Amendment 12. The Florida PALM IV&V Team will use the May EOM Florida PALM Schedule to report refreshed metrics, assess Florida PALM Project health, and support future trend analysis. With the updates to the Florida PALM Project Schedule finalized and the changes communicated by the Florida PALM Project Team, Finding 20 has been closed.

Following the finalization of the Florida PALM Project Schedule updates, the Florida PALM Project Team baselined the Amendment 12 changes, except for a few Deliverables whose dates remained unchanged due to their alignment with Service Level Expectations in the SSI Vendor contract. The newly baselined tasks offer a reliable reference point for tracking progress, managing performance, identifying deviations, and improving the accuracy of progress reporting, which supports proactive risk management and helps mitigate potential delays or cost overruns.

Florida PALM Project SPI

Utilizing the Florida_PALM_Project_ScheduleEOM.mpp file with a status date of 5/31/25, the Florida PALM Project SPI is .94 at the end of May. An SPI of .94 indicates that the Florida PALM Project is progressing at 94% of the planned pace, which is slightly behind schedule.

Florida PALM Project Delayed Tasks

The Florida PALM IV&V Team utilizes Steelray to quickly analyze the Florida PALM Project Schedule and identify which specific tasks are delayed. As of 5/31/25, there were 207 Delayed Tasks in the Florida PALM Project Schedule. Steelray defines Delayed Tasks as any task that should have started or finished but has yet to be completed. The finalized Florida PALM Project Schedule includes over 6,000 new tasks and categories. The Figure below highlights several major categories of Delayed Tasks, but does not include all of them.

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.

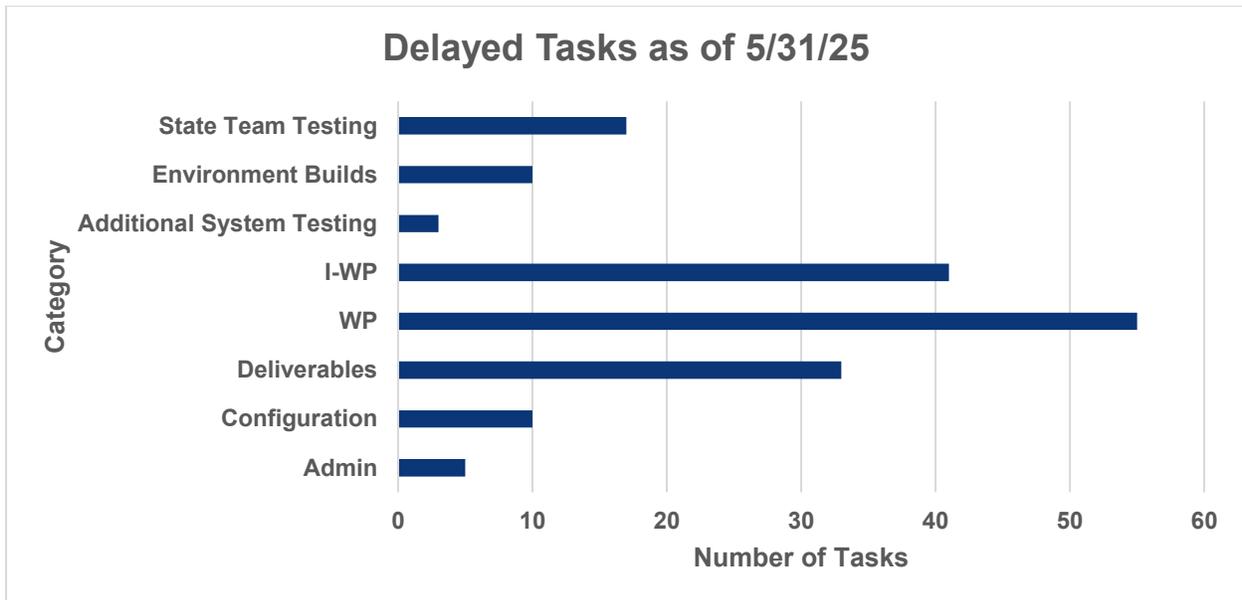


Figure 2: Delayed Tasks by Category

Most Delayed Tasks fall within the Work Product (WP) and Internal Work Product (I-WP) categories and are primarily related to Training. Specifically, delays are concentrated in I-WP112 – End User Manual and I-WP111 – UAT Training Materials. These deliverables are critical to ensuring Agencies are properly equipped for UAT and end-user training and understand Florida PALM.

Florida PALM Project Decisions

No new Decisions were submitted, approved, or denied. One Florida PALM Project Change Request (PCR), PCR 124 – Exchange for Interface Connections, was submitted, proposing to exchange unutilized Reports, Interfaces, and Florida PALM Project Team Training for additional Connections. This change does not introduce additional scope and is based on Connection needs identified by the Agencies. The Florida PALM IV&V Team reviewed the PCR and supports approval of the exchange. The Figure below illustrates the Decision trend over the past six months.

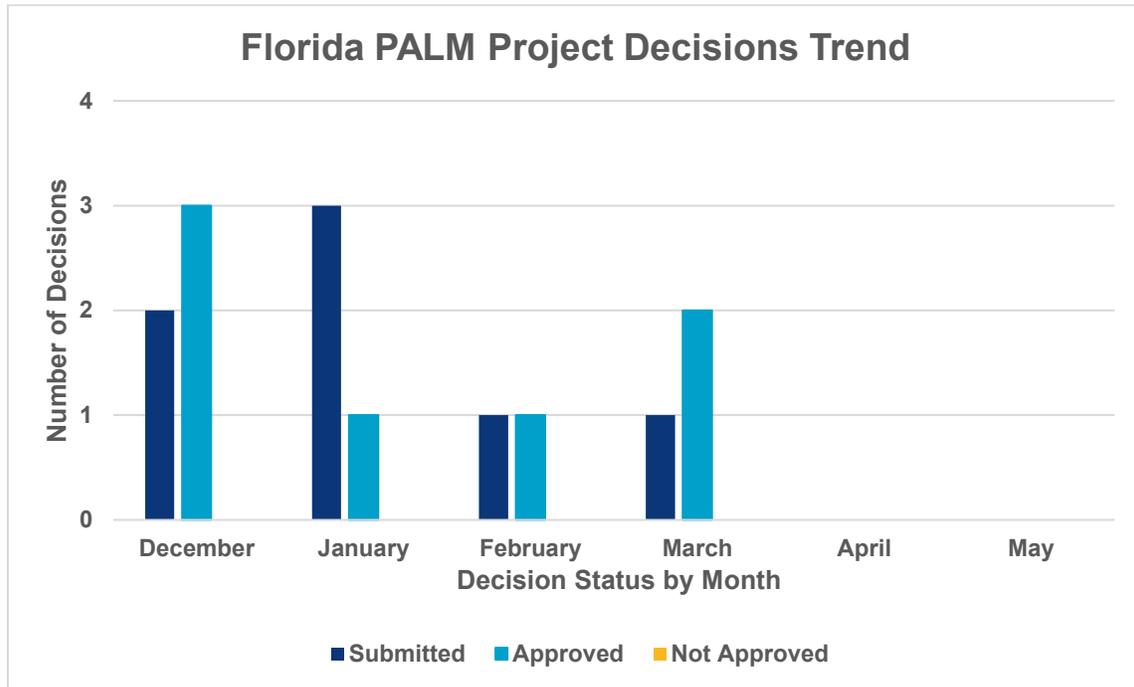


Figure 3: Florida PALM Project Decisions Trend

Overall Task Completion

The May EOM Florida PALM Project Schedule contains 12,909 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 Florida PALM Project’s status.

Status	Number of Tasks	Percent
Complete	8,497	66%
Future	4,105	31%
Late ¹	235	2%
On Schedule	72	1%
Total	12,909	100%

Table 3: Florida PALM Work Completed and Remaining

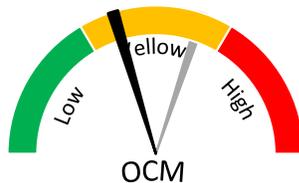
¹Microsoft Project considers a task late if the % complete value is less than the expected % complete as of the Status date, which is different than how Steelray calculates Delayed Tasks. The current date will be used if a status date is not set. For example, if a task should be 50% complete by the status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

During the Florida PALM Project Management Office (PMO) Touchpoint meetings, the Florida PALM IV&V Team was advised that additional attention would be directed toward overall schedule management practices. The Florida PALM IV&V Team will continue to assess the effectiveness of these practices in upcoming reports by leveraging schedule metrics and what-if analyses and will highlight any potential risks to the overall Florida PALM Project timeline.

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

Florida PALM Organizational Change Management

Focus Area Indicator



Trend: Improving

Florida PALM Organizational Change Management Updates

The Florida PALM IV&V Team participated in Agency Readiness Touchpoints, Task Talks, Readiness Strategy, and other Florida PALM Project meetings to observe Organizational Change Management (OCM) activities, stakeholder engagement, and UAT and Training planning.

Information Management and Sharing

The Florida PALM IV&V Team observed two key updates related to Florida PALM Project management and information sharing with Agencies. First, the RCs implemented a new Agency Questions Log process in mid-April, designed to better integrate functional and technical staff in categorizing, researching, and responding to Agency questions. This updated approach was communicated during Agency touchpoints, and several Agencies reported improvements in both the speed and accuracy of responses. RCs also noted that internal coordination with technical SMEs had become more efficient. Overall, this change has enhanced the effectiveness of question management for both Agencies and the Florida PALM Agency Readiness Team.

The second update was the release of the Florida PALM Knowledge Center 2.0 on 5/23/25, designed to help Agencies more easily find and track information, especially content updates within articles. Users can now follow specific pages to receive update notifications, replacing the previous weekly update emails. An earlier enhancement that lists page updates at the end of each article remains in place. These changes aim to address Agency concerns about receiving timely and detailed information. The Florida PALM Project Team also improved the search functionality and content structure, giving Agencies greater flexibility in locating relevant information while reducing the support burden on the Florida PALM Agency Readiness Team.

UAT and Training Discussion

On 5/29/25, the Florida PALM IV&V Team met with the Florida PALM TED Team to discuss the following topics:

- The Florida PALM TED Team's working processes and integration with the broader Florida PALM Project Team.
- Curriculum development.
- How feedback from Agencies is being incorporated during UAT and Training.

One key takeaway from the discussion was the strong integration of the Florida PALM TED Team with the broader Florida PALM Project Team. This alignment enables the Florida PALM TED Team to understand the terminology used by the functional and technical teams, translate it into the Training curriculum, and effectively communicate it to the Agencies. Much of the information shared also aligns with strategies that will be formalized in upcoming WPs and implemented during UAT and Training.

The RCs remain engaged with their respective Agencies, monitoring progress on Readiness Workplan (RW) Task completion and incorporating Florida PALM IV&V Team recommendations. They have begun asking Agencies targeted questions about:

- Agency-specific OCM efforts and progress.
- Training plans and development.
- Communication activities and strategies.

During Readiness Touchpoints, several Agencies reported ongoing OCM activities, including:

- Meeting with various business units to discuss the Florida PALM Project and complete required documentation.
- Establishing dedicated team channels to share updates and exchange information.
- Distributing newsletters and emails to keep staff informed about Florida PALM Project developments.

Agencies have also indicated that they notify various business units directly about any questions. Overall, several Agencies reported minimal resistance to change efforts and expressed a general willingness from end users to move forward with the Florida PALM Project.

During an Agency Readiness Touchpoint, one Agency shared concerns about the PML-CML Collaboration Subgroup, suggesting that a more structured meeting format could help reduce misinformation and improve updates on RW Task progress. The same Agency also expressed concern that some participants may feel hesitant to voice issues about the Florida PALM Project within the PML-CML Subgroup.

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

Florida PALM Requirements and Design

Focus Area Indicator



Trend: No Change

Florida PALM Requirements and Design Updates

The Florida PALM IV&V Team attended Design meetings, including sessions on outbound voucher and payment extract error details, 1099 balances, data masking for Accounts Payable (AP)/Purchasing (PO), and the supplier conversion crosswalk. The Florida PALM IV&V Team also attended a demonstration of the APE007 Fund-Based Escheatment Extension.

The Florida PALM IV&V Team observed that approval of the FD specifications for the ESS module is approximately four weeks behind schedule, per the Design Work Unit Tracker (DWUT). The Florida PALM IV&V Team understands that Build Segment IV work was prioritized over ESS functionality and will continue to monitor progress on the Design and Build of the ESS items. This delay is not expected to impact Stage Gate 3 – Ready to Begin UAT.

The Risk Rating for this Focus Area continues to remain a Low Risk.

Florida PALM Development

Focus Area Indicator



Trend: Improving

Florida PALM Development Updates

Build Segment IV

All AD documents for Build Segment IV have been approved, with the final document approved on 5/17/25, approximately two weeks ahead of the planned 5/30/25 Development finish date

outlined in Amendment 12. The Florida PALM IV&V Team will review D654 – Completion of Build Segment IV and supporting AD documents. Previous Florida PALM IV&V Team reviews have found the AD documents to be thorough, complete, and high-quality.

Miscellaneous RICEFW Build

Some RICEFW items are excluded from the contractual Development completion date outlined in Amendment 12. This includes 13 RICEFW items that were either associated with PCRs approved after the completion of all Design Segments or are required because of the revised timeline established in Amendment 12. These items will require separate Design and Development outside of Build Segment IV.

As seen in the Figure below, six of the RICEFW Items will be developed before the end of System Testing, three will be developed between the end of System Testing and the beginning of UAT, and four will not be developed until after the start of UAT. This will require additional coordination and communication with UAT testers regarding when the functionality will be available and identifying any scenarios that may need to be deferred until then.

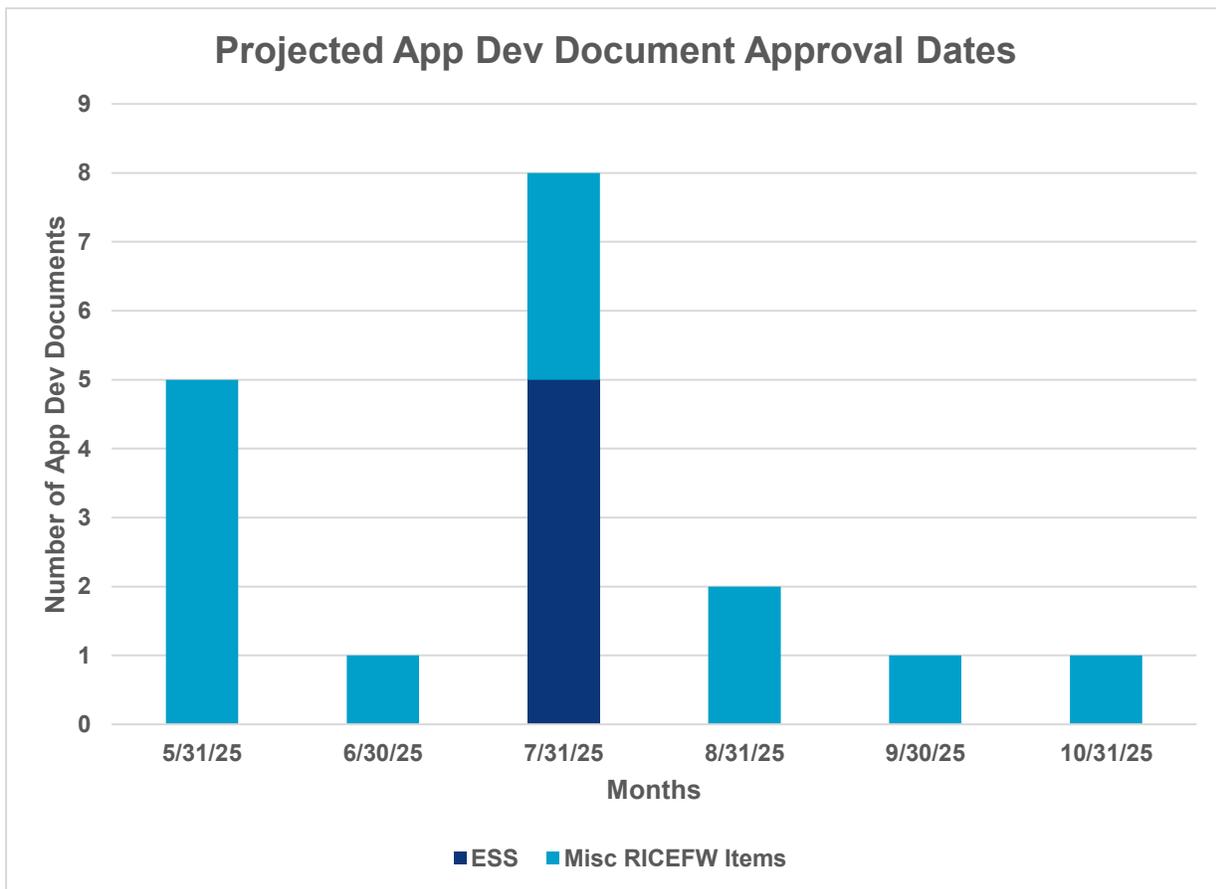


Figure 4: Projected AD Document Approvals per Month

As of 5/31/25, both the drafting and approval of the miscellaneous 13 RICEFW Items are on track as can be seen in the Figures below.

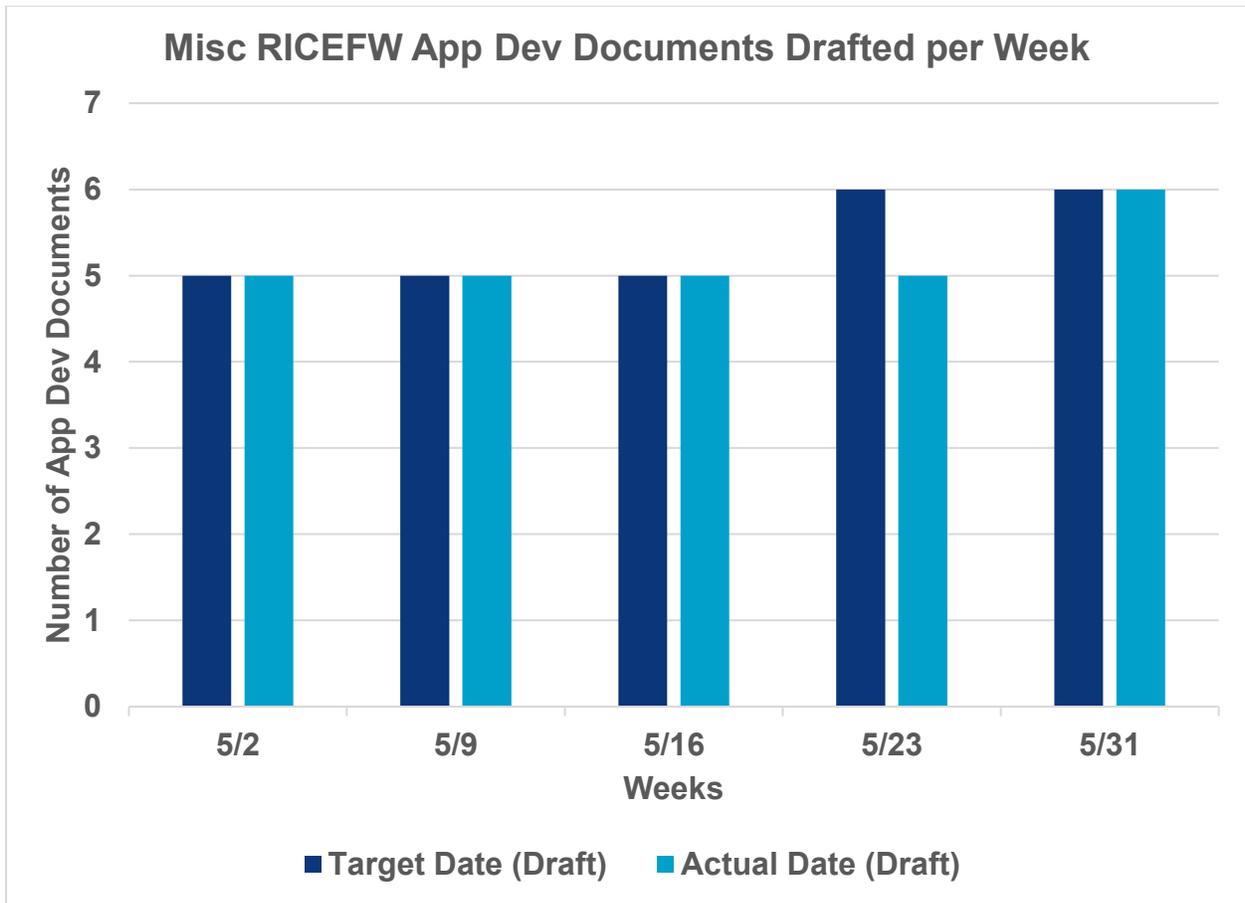


Figure 5: Misc RICEFW AD Documents Drafted per Week

All six of the AD documents that were expected to be drafted by 5/31/25 have been drafted.

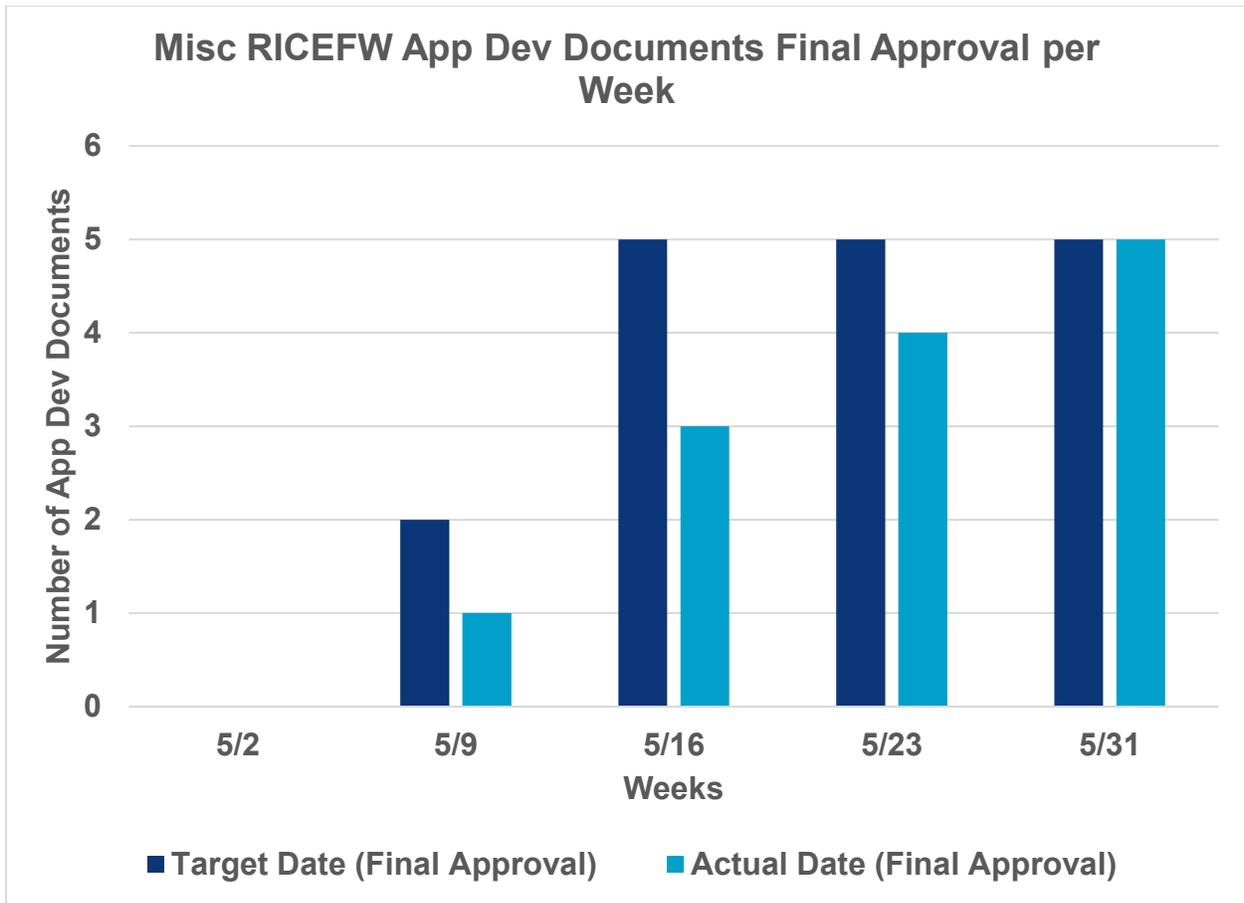


Figure 6: Misc RICEFW AD Documents Final Approval per Week

All five of the AD documents targeted for approval by 5/31/25 have been approved.

Overall, the 13 RICEFW Items are on schedule, but subsequent System Testing will mean that four of them will not be available until after the start of UAT.

ESS Build

Five large ESS-related Extensions approved under PCR 121 are being developed outside of the Build Segments. FD approval for these Extensions has been delayed by approximately four weeks, impacting the planned start of pre-Build activities originally scheduled for late April 2025. Additionally, the window between pre-Build meetings and draft AD document completion is 4.4 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 both this effort and ongoing SIR resolution. The Figure below displays actual and projected Development staffing levels from February through July 2025.

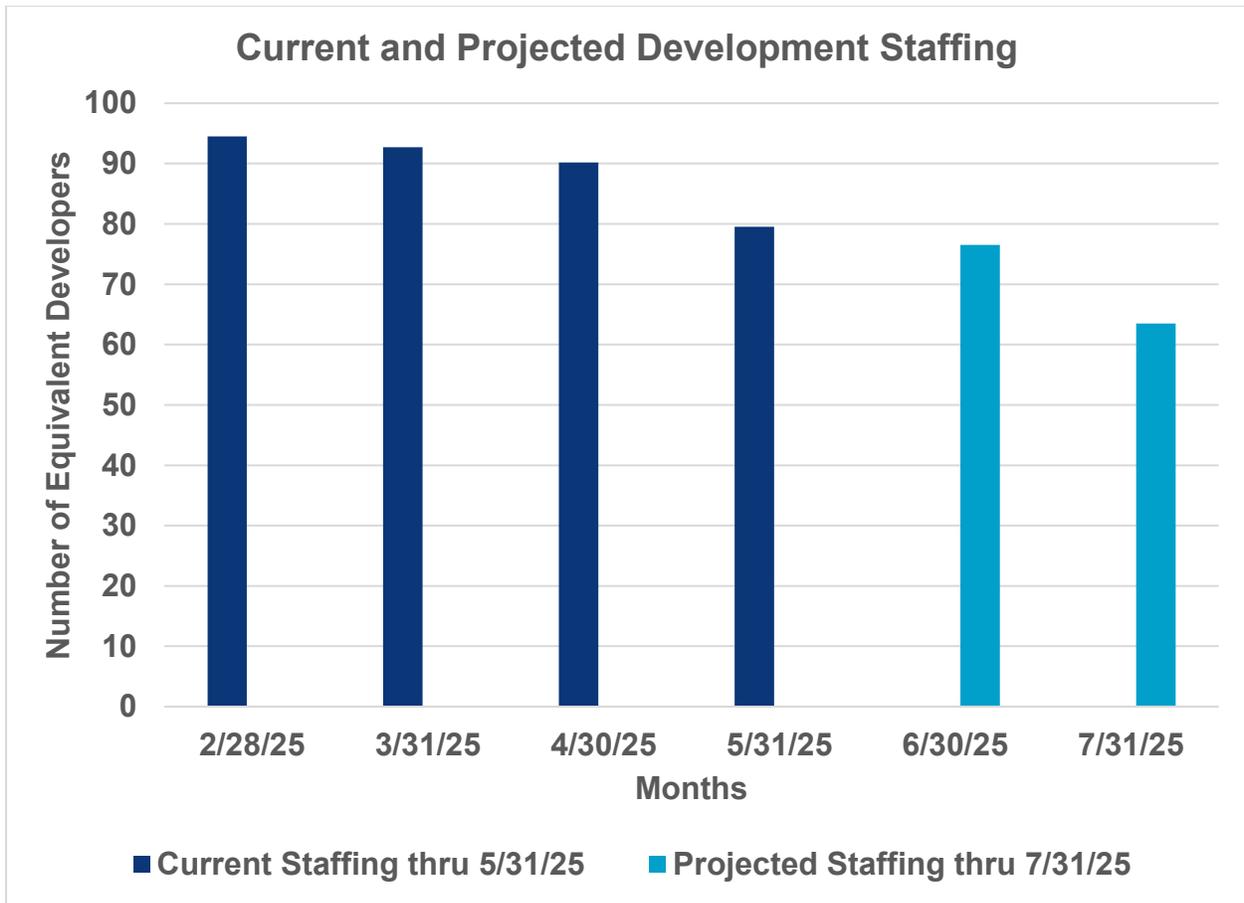


Figure 7: Current and Projected Development Staffing

Overall, 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, 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 System Testing activities. The Figure below shows the count of unresolved SIRs over time, categorized by their assigned Priority in Jira (ranging from “None” to “Highest”). As can be seen in the Figure, the overall number of unresolved SIRs remained consistent from April through May 2025 (average of 404 SIRs).

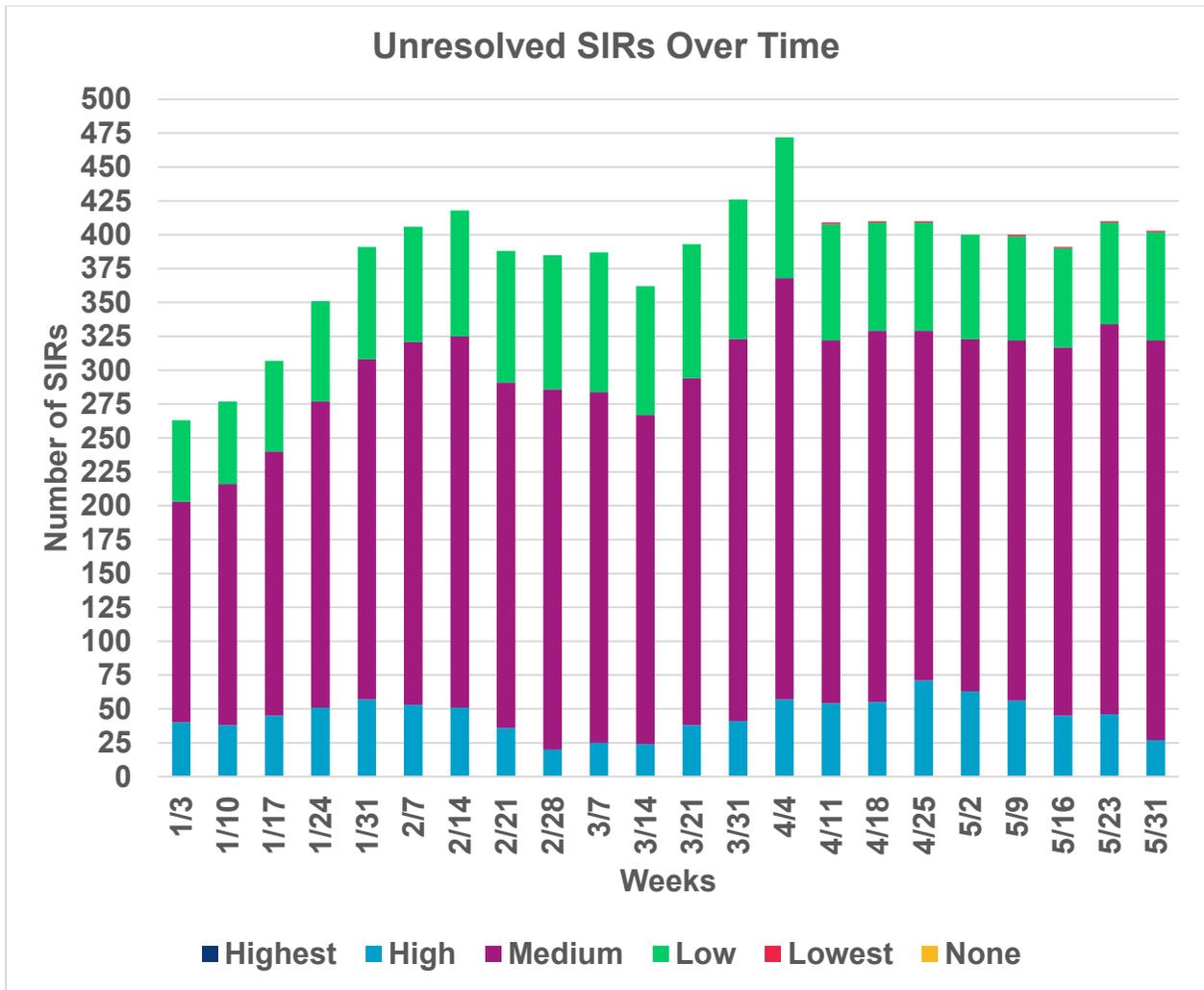


Figure 8: Unresolved SIRs over Time

Both the number of new SIRs being identified and the number that are closed per week have increased, which can be seen in the Figure below:

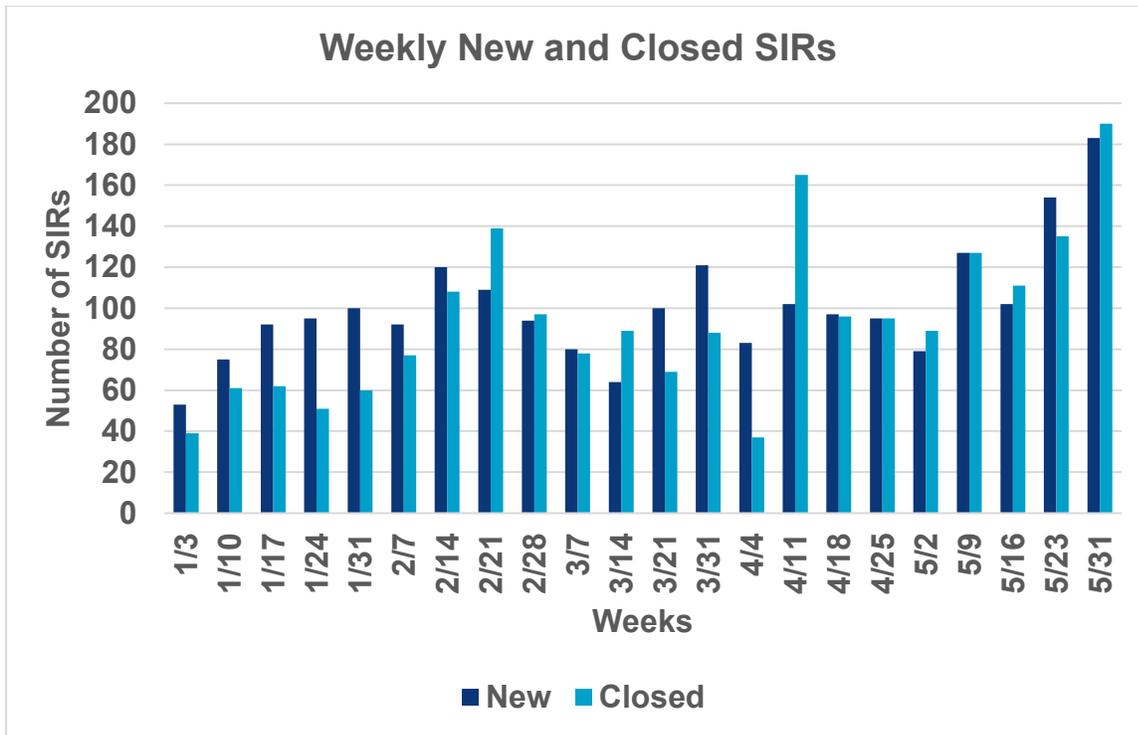


Figure 9: New and Closed SIRs over Time

The Florida PALM IV&V Team observed an improvement in the initial failure rate for RICEFW-related Test Scripts from December 2024 to March 2025, compared to October and November 2024. This trend shifted in April as the pace of System Testing Segment III increased, and the initial failure rate rose to 56%. The rate has returned to a more typical level of 35%, consistent with expectations for a project of this scale and complexity. This trend can be seen in the Figure below.

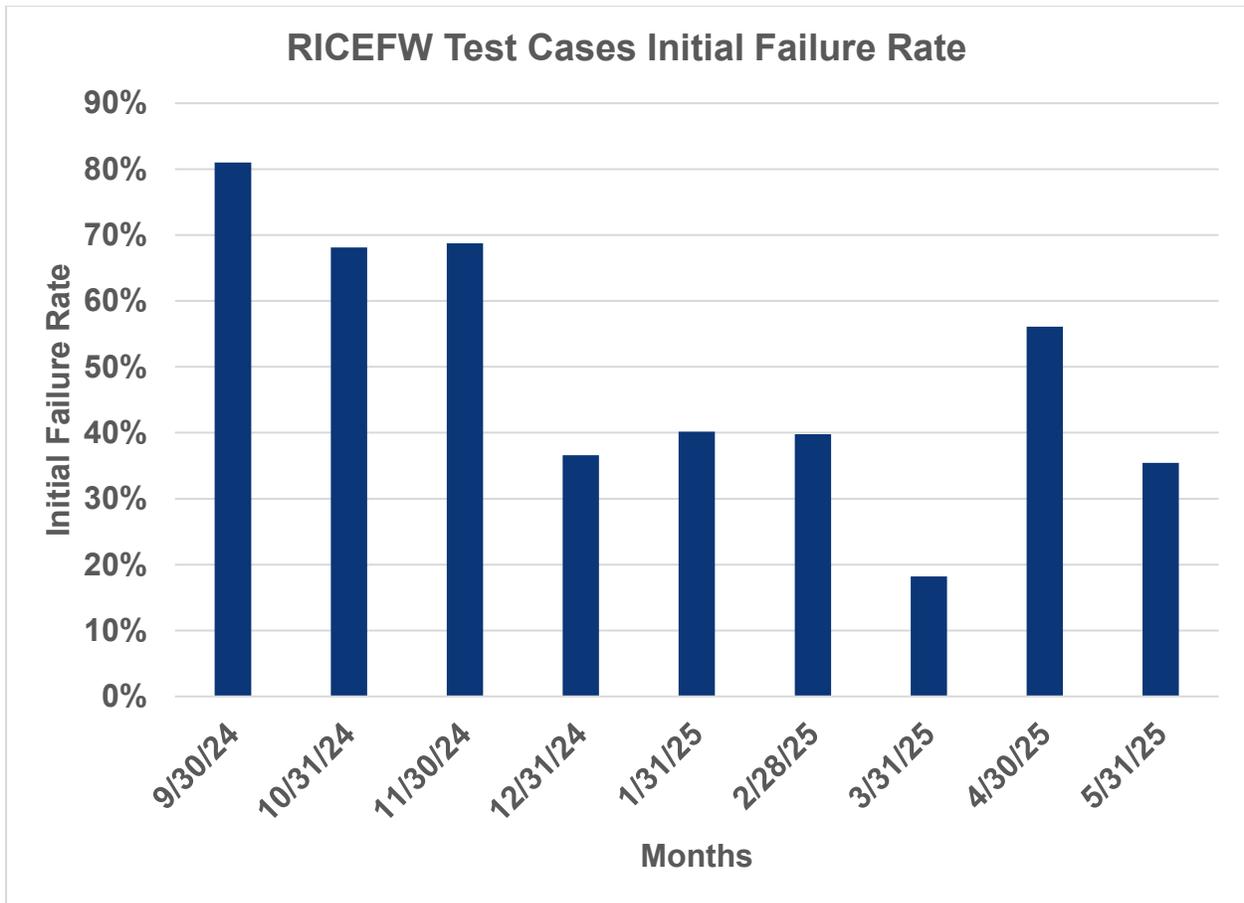


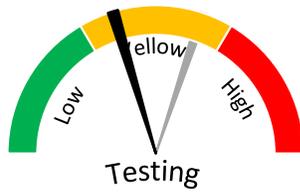
Figure 10: Monthly Initial Failure Rate for RICEFW-related Test Scripts

The average weekly SIR closure rate was 65 through April but increased to 141 in May. At this pace, the Florida PALM IV&V Team projects all remaining SIRs may be resolved in approximately three weeks, positioning the Florida PALM Project to complete SIR resolution ahead of UAT.

The Risk Rating for this Focus Area remains a Medium Risk but is improving from a High Yellow to a Low Yellow due to the completion of Build Segment IV, a reduced initial failure rate for RICEFW Test Scripts, and progress by the Florida PALM Project Team in drafting and approving the 13 remaining RICEFW Items.

Florida PALM Testing

Focus Area Indicator



Trend: Improving

Florida PALM Testing Updates

System Testing Segment III

The SSI Vendor executed 619 Segment III Test Scripts by maintaining an elevated pace that closely aligned with the planned rate of approximately 150 scripts per week. Upcoming in June, the planned execution pace gradually decreases from about 130 to 74 Test Scripts per week until all Test Scripts are completed, as shown in the Figure below. Based on recent execution rates, the Florida PALM IV&V Team projects that System Testing will be completed on schedule.

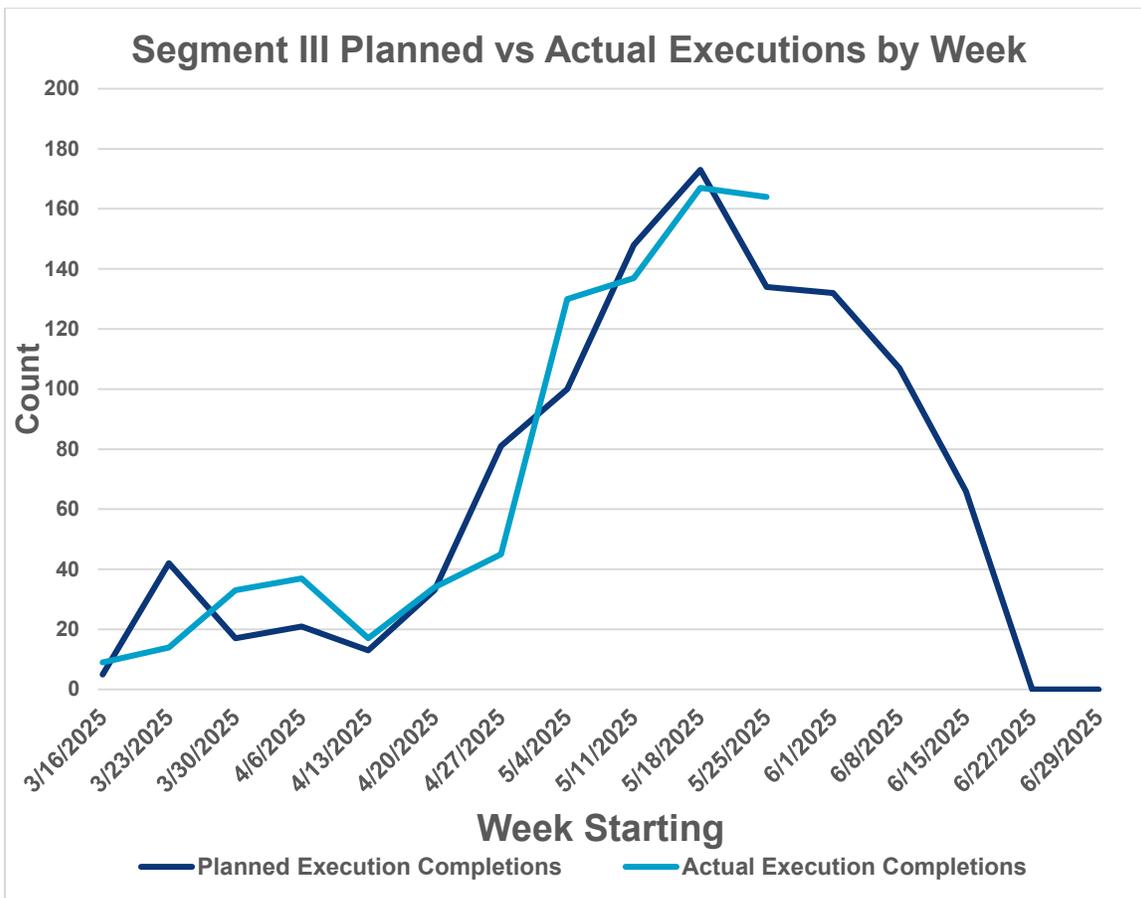


Figure 11: Weekly Planned Test Execution vs Completed Test Execution

Since System Testing began on 3/17/25, 788 Test Scripts have been executed, exceeding the 767 scripts planned for completion by 5/31/25. The Figure below shows the cumulative execution compared to the planned pace over the Segment III testing timeline. The TEXT also indicates that the SSI Vendor plans to complete the remaining 284 scripts by 6/20/25, which is ahead of the planned 6/30/25 System Testing finish date. As a result, Finding 21, related to the Florida PALM IV&V Team’s preliminary concern about a potential delay in System Testing, has been closed.

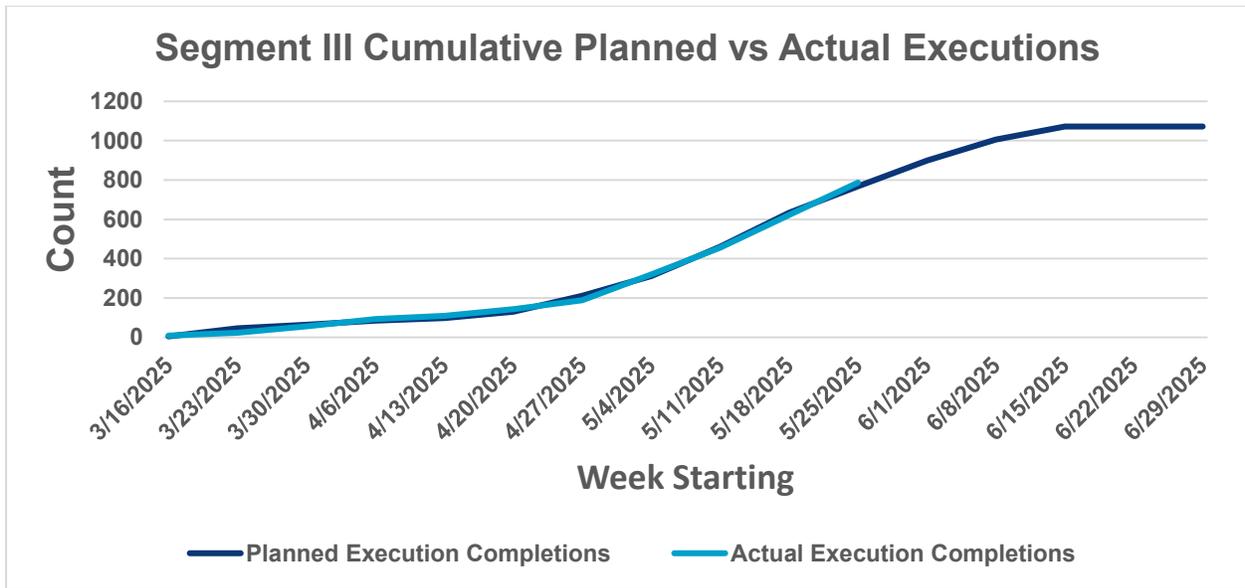


Figure 12: Cumulative Planned Test Execution vs. Completed Test Execution

Additionally, according to the Test Script Work Unit Tracker (TSWUT), 16 Test Scripts were added to the test bed in May, compared to 373 added in April. This smaller increase suggests stabilization in the planned System Testing scope, further supporting the SSI Vendor’s ability to complete System Testing on schedule. The updated Test Script counts are provided in the Table below.

Table 4: TSWUT Segment III Test Script Increase

D696 Initial Count	TSWUT March Count	TSWUT April Count	TSWUT May Count	Total Cancelled	Total Scripts Added
706	833	1206	1222	150	516

The Table below provides a snapshot of the execution status for System Test Segment III as of 5/31/25.

Table 5: Test Execution Status for System Testing Segment III

Cycle	Total No of Test Scripts	No. of Test Scripts Canceled	No. of Test Scripts Deferred	Actual No. of Test Scripts Execution Complete	Pass	Fail	Pass % (based on executed)	Fail % (based on executed)
Cycle 0	6	0	0	6	6	0	100%	0%
Cycle 1	16	1	0	15	14	1	93%	7%
Cycle 2	712	110	0	489	441	48	90%	10%

Cycle	Total No of Test Scripts	No. of Test Scripts Canceled	No. of Test Scripts Deferred	Actual No. of Test Scripts Execution Complete	Pass	Fail	Pass % (based on executed)	Fail % (based on executed)
Cycle 3	206	7	0	179	148	31	83%	17%
Cycle 4	43	3	0	5	1	4	20%	80%
Cycle 5	28	12	0	15	15	0	100%	0%
Cycle 6	116	2	0	46	41	5	89%	11%
Cycle 7	23	0	0	13	10	3	77%	23%
Cycle 8	12	5	0	5	5	0	100%	0%
Cycle 9	49	1	0	15	14	1	93%	7%
Grand Total	1211	141	0	788	695	93	88%	12%

Active SIRs for System Test Segment III

For System Testing Segment III, 204 SIRs remain unresolved (excluding those with a status of Cancelled, Closed, Marked as Duplicate, Works as Designed, or Rejected). As shown in the Figure below, this includes two unresolved SIRs with a Business Criticality of 1 – Critical, and 34 with a Business Criticality of 2 – High, across the State Quality Assurance (QA) Team and SSI Vendor. Per the System Test Exit Criteria, all of these must be resolved or have an agreed-upon disposition before exiting System Testing.

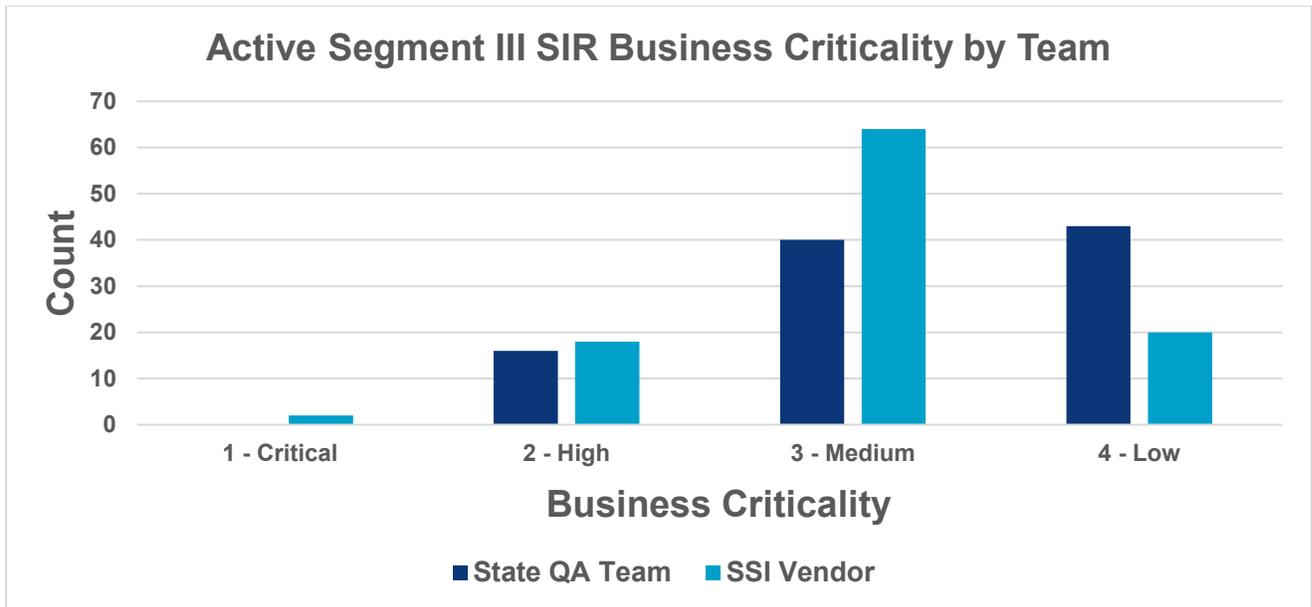


Figure 13: Active System Test Segment III SIR Business Criticality by Team

The Table below shows the overall count of unresolved SIRs decreased from 330 in April to 295 in May, most notably with decreases in numbers of unresolved Critical and High SIRs. There are 46 unresolved SIRs with Critical or High Business Criticality from System Testing Segments I, II, and III, a decrease of 28 SIRs compared to April. These must be resolved or have an agreed-upon disposition to meet the System Testing Exit Criteria.

Most High-criticality SIRs are concentrated in the AP, Payroll (PR), and PO modules, with all Critical SIRs in the PR module.

Table 6: Active SIRs by Business Criticality and Priority Across All Test Segments

Business Criticality	April	May	Most Frequently Impacted Module Based on Criticality	Priority	April	May
	Count	Count			Count	Count
1-Critical	4	2	PR (2)	Critical	0	0
2-High	70	44	AP (13) PR (7) PO (6)	High	63	26
3-Medium	178	160	PR (25) AM (18)	Medium	212	213
4-Low	68	89	AP (12)	Low	55	56
Totals	330	295	N/A	N/A	330	295

The TEXT shows that the SSI Vendor reduced the average resolution time for High-criticality SIRs from 9.7 to 9.4 days while maintaining an elevated System Testing pace. Per the Exit Criteria, priority assignments for outstanding Medium and Low SIRs must be agreed upon.

Regression Testing

Regression Testing Event 1 was scheduled from 4/1/25 to 5/30/25, with the SSI Vendor completing test execution early on 5/23/25. This phase focuses on re-executing previously passed Test Scripts from Segments I and II to ensure that recent changes and Build Segment IV updates have not impacted existing functionality. The goal was to validate that functionality tested in earlier Segments continues to perform as expected. The SSI Vendor’s planned approach included selecting a subset of System Test Scripts from the Financial and Payroll waves, along with targeted CMS Wave regression tests and scripts tied to approved PCRs.

The Table below shows System Testing coverage for Segments I and II (excluding Cancelled and Deferred Test Scripts) alongside Regression Test Event 1 coverage, which includes CMS Wave, Segment I, and Segment II modules and test types (excluding Cancelled Test Scripts). This comparison offers insight into how Regression Test coverage aligns proportionally with the original System Testing, except for CMS System Testing. By examining the distribution of Test Scripts by module, the Florida PALM IV&V Team can identify potential gaps in Regression coverage and compare SIR defects to highlight areas needing additional testing.

Table 7: Regression Test Coverage Proportionate to Segment I, II, and CMS Wave

Test Type by Module	RICEFW	BPM	FCMP	Regression Total	Regression % of Regression Test Total	System Test % of System Test Total	Regression Coverage % difference from Seg I & II
ALL	0	0	0	0	0	15%	-15%
GL	102	19	0	121	28%	13%	15%
AR	56	21	0	77	18%	14%	4%
CM	46	16	0	62	14%	4%	10%
AM	36	11	2	49	11%	12%	-1%
PO	23	7	0	30	7%	6%	1%
KK	20	6	0	26	6%	4%	2%
GM	19	0	0	19	4%	2%	2%
PC	3	0	12	15	3%	3%	0%
AP	12	2	0	14	3%	15%	-12%
PR	8	5	0	13	3%	1%	2%
CT	11	0	0	11	3%	1%	2%

Test Type by Module	RICEFW	BPM	FCMP	Regression Total	Regression % of Regression Test Total	System Test % of System Test Total	Regression Coverage % difference from Seg I & II
SD	3	0	0	3	1%	10%	-9%
Total	339	87	14	440	100%	100%	N/A

The Florida PALM IV&V Team observed a correlation between potential gaps in Regression module coverage and the occurrence of initial failures and deferred Regression Test Scripts.

The Table below provides the final disposition of Regression Testing Event 1 execution as of 5/31/25.

Table 8: final disposition of Regression Testing Event 1 Execution

Module	Total No. of Test Scripts	No. of Test Scripts Canceled	No. of Test Scripts Deferred	Actual No. of Test Scripts Execution Complete	Pass	Fail	Pass% (based on executed)	Fail% (based on executed)
GL	133	11	13	109	106	3	97%	3%
AR	78	1	2	75	75	0	100%	0%
CM	65	3	3	59	55	4	93%	7%
AM	49	0	3	46	45	1	98%	2%
PO	30	0	1	29	29	0	100%	0%
KK	26	0	0	26	26	0	100%	0%
GM	19	0	0	19	19	0	100%	0%
PC	15	0	1	14	14	0	100%	0%
AP	19	5	1	13	11	2	85%	15%
PR	13	0	10	3	3	0	100%	0%
CT	11	0	1	10	10	0	100%	0%

Module	Total No. of Test Scripts	No. of Test Scripts Canceled	No. of Test Scripts Deferred	Actual No. of Test Scripts Execution Complete	Pass	Fail	Pass% (based on executed)	Fail% (based on executed)
SD	4	1	0	3	3	0	100%	0%
Total	462	21	35	406	396	10	98%	2%

Out of 462 total Test Scripts for Regression Testing Event 1, 8% were deferred and 5% were canceled. Among the 406 Test Scripts that were executed, 98% passed and 2% failed. Of the 35 deferred Test Scripts, 25 (approximately 71%) had previously passed during System Test Segments I or II, but could not be executed in Regression Testing Event 1 due to issues introduced in the latest release.

The Florida PALM IV&V Team also observed that the SSI Vendor applied best practices by using a risk-based approach to select Regression Test Scripts. These included Test Scripts that had previously failed during System Testing but ultimately passed in Segment I or II. This demonstrates a targeted effort to validate historically unstable functionality. The Figure below represents the specific module Regression Test Scripts that failed, as well as those that were fixed and passed, based on the subset of module Test Scripts that were actually executed.

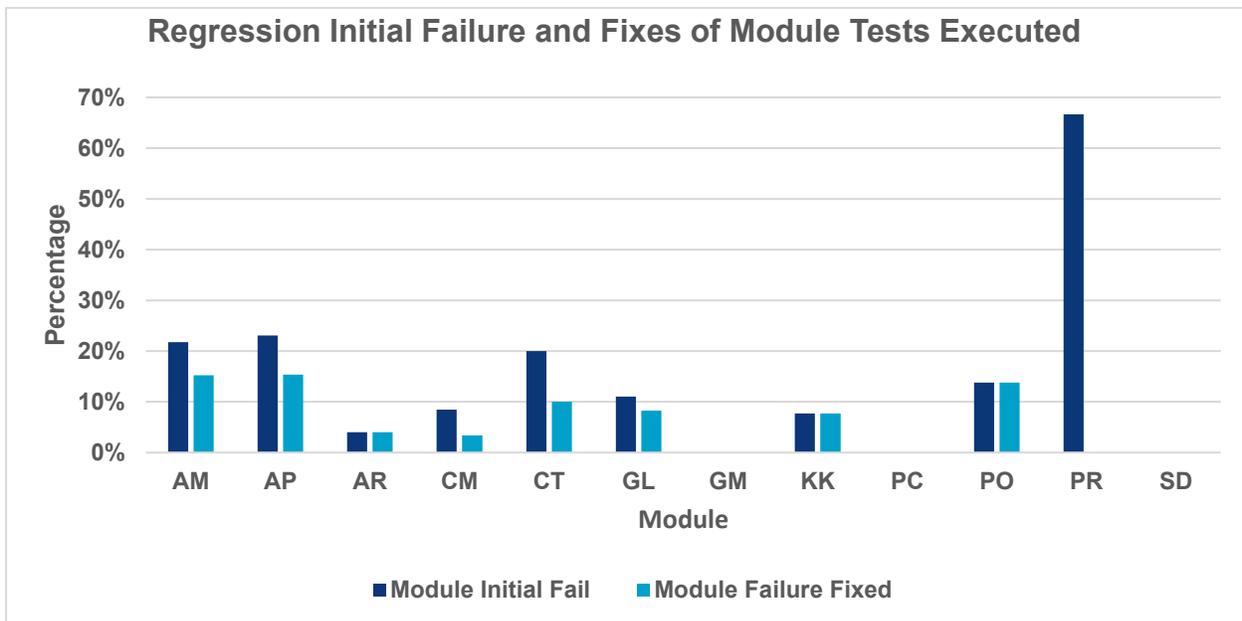


Figure 14: Regression Initial Failure and Fix of Module Test Scripts

The Florida PALM IV&V Team’s analysis of test failures and fixes revealed varying failure rates across module-specific execution. In the PR module, initial Regression Test Script execution showed that 2 of 3 Test Scripts failed, indicating that previously validated functionality may have been impacted by ongoing development in Build Segment IV. Due to the evolving nature of the

PR module and recent changes, the selected PR Regression Test Scripts were deferred. With Build Segment IV complete, it will be important to re-execute the deferred Test Scripts and a broader set of previously passed PR Test Scripts. Prioritizing the PR module in upcoming Regression efforts will be key to identifying unintended impacts early and minimizing the risk of compounding defects.

Other modules, such as Asset Management (AM), AP, and Contracts (CT), showed initial failure rates between 20% and 25%, followed by successful fixes. This suggests effective root cause analysis, comprehensive test coverage, and strong defect resolution practices. The General Ledger (GL) module reflected an 11% initial failure rate, with successful fixes, and an additional 9% of GL Test Scripts were deferred.

The Florida PALM IV&V Team estimates that approximately 68 Test Scripts (16%) experienced either initial failure or were deferred due to Build Segment IV during Regression Test Event 1 execution. The identification of defects during Regression Testing reflects positively on the quality and effectiveness of the Regression Test Scripts, but the recurrence of failures also suggests that new or unresolved issues continue to affect previously stable functionality.

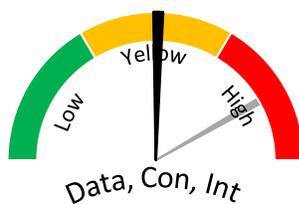
The Florida PALM IV&V Team recommends the following for the remaining Regression Testing Events:

- Adhering to the processes outlined in WP409 – Regression Test Plan and industry best practices by having the SSI Vendor log a new Regression Test SIR for any defect that reappears after previously passing System Testing and linking the former SIR.
- Enhancing risk-based Regression Test coverage to ensure the suite adequately addresses all critical functionalities impacted by recent changes.
- Strengthening unit and integration testing, along with expanding test automation in high-risk areas where feasible.

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

Florida PALM Data, Conversion, and Interfaces

Focus Area Indicator



Trend: Improving

Florida PALM Data, Conversion, and Interface Updates

Conversions

All SIRs from Mock Conversion 0 and 1 have been resolved. All Test Scripts for Mock Conversion 2 have been fully executed, and the SSI Vendor is actively addressing the outstanding Medium and Low-priority SIRs. Mock Conversion 3 is scheduled to begin on 7/1/25, allowing additional time for the SSI Vendor to complete resolution efforts and prepare. Continued focus on resolving the remaining SIRs is critical to avoiding schedule impacts and maintaining the overall Mock Conversion timeline.

Mock Conversion 1B SIRs

All Mock Conversion 1B SIRs have been resolved, as seen in the Table below.

Table 9: Status of SIRs for Mock Conversion 1B

Priority	Jira Status		
	Resolve	Re-test	Closed
High	0	0	0
Medium	0	0	3
Low	0	0	2
Total	0	0	5

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 2A SIRs

Seventeen new SIRs for Mock Conversion 2A were opened. The SSI Vendor closed five SIRs, leaving eight Medium-priority SIRs unresolved.

Table 10: Status of SIRs for Mock Conversion 2A

Priority	Jira Status		
	Resolve	Re-test	Closed
High	0	0	3
Medium	8	0	2
Low	5	0	0
Total	13	0	5

Mock Conversion 2B SIRs

Fourteen new SIRs for Mock Conversion 2B were opened. The SSI Vendor closed 10 SIRs, with 15 Medium-priority SIRs remaining unresolved.

Table 11: Status of SIRs for Mock Conversion 2B

Priority	Jira Status		
	Resolve	Re-test	Closed
High	0	0	7
Medium	14	1	3
Low	2	0	0
Total	16	1	10

Interfaces

While the number of new System Testing SIRs for Interfaces declined slightly from 145 in April to 140 in May, the resolution rate also decreased from 120 to 113. As a result, the backlog of unresolved SIRs grew from 56 to 83, an increase of 27, compared to April's increase of 25.

In April and May, the number of High-priority System Testing SIRs for Interfaces remained steady at 58, but resolution decreased from 56 to 53. This led to an increase in the backlog from three to eight High-priority SIRs. This trend suggests that High-priority System Testing SIRs for Interfaces are being opened faster than they are being resolved. Based on the current resolution rate, the Florida PALM IV&V Team projects that approximately 15 High-priority System Testing SIRs for Interfaces may remain unresolved by the end of June.

Table 12: High-Priority Interface SIRs

	Actual					Projected
	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25
Created	39	26	24	58	58	69
Closed	38	26	24	56	53	62
Variance	1	0	0	2	5	7
Backlog	1	1	1	3	8	15

Per the System Testing Exit Criteria outlined in D643 – Updated System Testing Plan, all Critical and High-priority SIRs must be resolved or have an agreed-upon disposition prior to exiting System Testing. With eight open High-priority System Testing SIRs for Interfaces at the end of May and a projected total of 15 by the end of June, the Florida PALM IV&V Team recommends that the Florida PALM Project Team prioritize resolving these SIRs to avoid potential delays to both the System Testing and Interface Testing timelines, as well as impacts to Stage Gate 3.

Data Warehouse/Business Intelligence

The Salary Adjustments Report (PRR004) is the last report pending approval in Build Segment III DW/BI. Smoke testing has been completed for all other reports, except for 14 that are awaiting data population. The SSI Vendor is actively working with the Extract, Transform, Load (ETL) team to resolve this.

System Testing for DW/BI began on 5/14/25 and is currently in progress. As of 5/30/25, three High-priority SIRs related to code defects have been identified, affecting the Asset Overview, AP Transactions, and Budget and Expenses (PeopleSoft Standard) reports.

The Risk Rating for this Focus Area is improving from a High Risk to a Medium Risk due to the completion of Mock Conversion 2 and the resolution of all Mock Conversion 0 and 1 SIRs prior to the start of Interface Testing Cycle 2.

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: No Change

Agency Project Management Updates

The Florida PALM IV&V Team attended monthly meetings, including Agency Monthly Readiness Touchpoints, RDNS/RW meetings, Readiness Team meetings, and Thursday Task Talks, to assess each Agency's Readiness progress. This included reviewing the Agency Dashboards, their CCN composition and engagement, Agency engagement in monthly Agency Readiness meetings, Agency documentation of Risks and Issues, and overall RW Task completion.

Agency PMO Updates

The Florida PALM IV&V Team observed the following improvements in Agencies' project management activities:

- At least five Agencies reported hiring new staff dedicated to the Florida PALM Project.
- Agencies reported organizing their Florida PALM resources more strategically to ensure they are prepared for the upcoming Interface Testing and UAT.
- Several Agencies reported dedicating resources for proactive efforts, such as assessing updates published in the Knowledge Center and updating Smartsheet workbooks.
- Agencies recognize potential conflicts with operational activities, such as multiple Direct Impact Tasks due during June, which overlap with YEC responsibilities. Agencies

proactively organized resources to align time and priorities to complete the Florida PALM Project work.

Agencies that continue to explore and incorporate stronger project management principles may benefit from:

- Improved planning, organizing, and management of resources, leading to increased efficiency and productivity.
- Streamlined workflows, reduced redundancies, and optimized resource utilization.
- Clarified roles and responsibilities, fostering a more focused and productive team.
- Enhanced communication and collaboration supporting effective and efficient teamwork.
- Improved budget and time management by creating realistic budgets and timelines, enabling effective monitoring and control of costs and time, and allowing for timely adjustments as needed.

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 5/31/25. A total of 90 Tasks were included in this analysis.

Table 13: Submission Totals by Florida PALM Project Impact

Task Status	Project Impact Totals			
	Direct	Indirect	N/A	Total
Verified as Complete	31	7	15	53
Submission Incomplete	6	4	19	29
N/A (No Task Rubric for Verification)	1	0	7	8
Total	38	11	41	90

One Direct Impact Task, Task 579 – Confirming UAT SME, was due in May. Direct Impact Tasks Verified as Complete increased slightly by 1% over April. The overall rate for all Tasks Verified as Complete is 59%, down 1% from April. The completion rate for Indirect Tasks declined again from 70% in April to 64% in May. This decline may be due to Agencies shifting their focus to completing data cleansing, configuration workbooks, conversion field mapping, and business system testing and remediation tasks, which have a firm completion deadline of 6/20/25.

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.

Trend of 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.

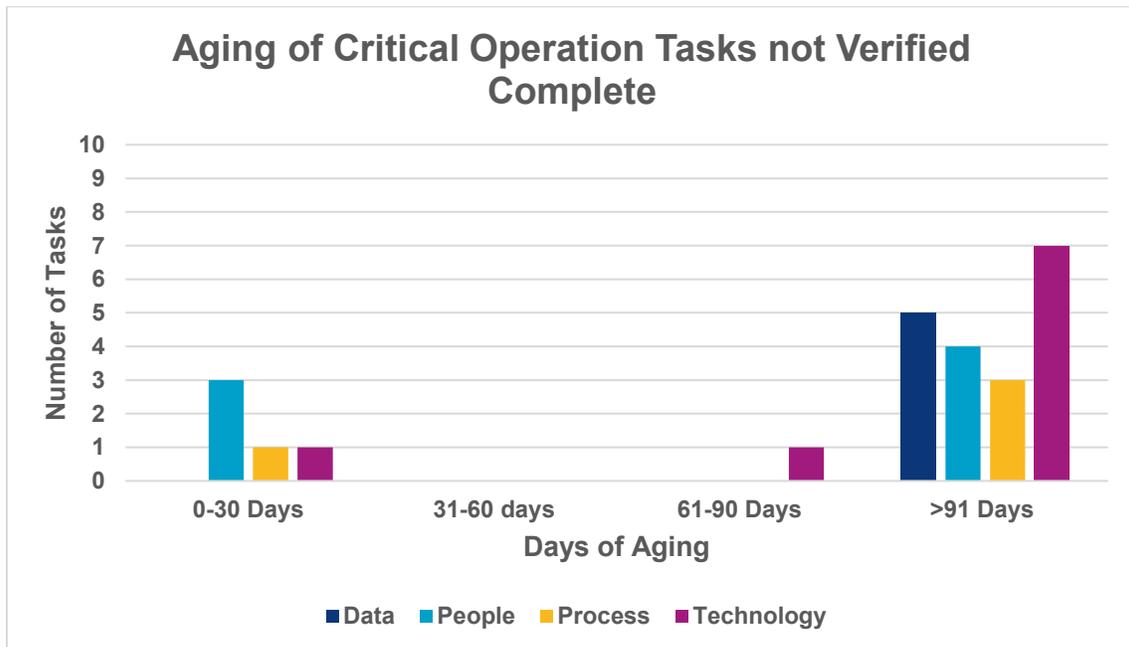


Figure 15: Aging of Tasks not Verified as Complete by Critical Operations

Six Direct Impact Tasks assigned to Agencies remain incomplete, as indicated in Smartsheet, with submission percentages below 100%. The Agencies made no progress on five aging Data-related tasks – specifically, Tasks for the Configuration Workbooks (Tasks 541C, 541D, and 567N) and Field Mapping Data (Tasks 658A and 658D), which have been outstanding for over 90 days. Task 579 – Confirm UAT SMEs is currently aging in the 0–30 day range.

The Florida PALM IV&V Team recommends that Agencies regularly update RW task progress to reflect ongoing work accurately. This will enable stakeholders to effectively assess the Agencies’ progress and help identify potential risks, issues, or roadblocks in a timely manner.

Direct Impact Task Progress

The Florida PALM IV&V Team evaluated the Agencies' progress toward completing four Direct Impact tasks due by 6/20/25. Monitoring the Agencies' ongoing progress for these Tasks is vital because they may influence the successful completion of Interface Testing Cycle 2. The Table below shows Agency-reported Task Progress as of 5/31/25.

Table 14: Reported Tasks Progress

Task	Agency Reported Task Progress as of 5/31/25				
	0%	25%	50%	75%	100%
571 - Complete Data Cleansing Based on Mock Conversion 2	9	10	16	0	0
657 - Submit Updated Configuration Workbooks	13	13	9	0	0
659 - Update Conversion Field Mapping	13	15	7	0	0
573-A - Complete and Submit End User Role Mapping Worksheet for UAT	14	13	8	0	0

The Florida PALM Project will perform a data refresh on 6/4/25. After this is complete, the Agencies may have additional data cleansing, mapping, and configuration activities. The Agencies have been advised not to mark these Tasks as 100% submitted in Smartsheet until the data refresh is complete, except for Task 573-A.

- 571 – Complete Data Cleansing Based on Mock Conversion 2 allows the Agencies to cleanse the data from Mock Conversion 2 results, improving the success rate of the data load results for Mock Conversion 3.
- 657 – Submit Updated Configuration Workbooks will ensure that Agencies have controls in place for processing and reporting. If the data in the configuration workbooks is inaccurate, the ability to transact in Florida PALM during UAT will be affected. It will also be used to support the Agency in remediating their business systems, documented process changes, reporting, and job aids. If this is delayed, the Agencies cannot test using their Agency-specific data.
- 659 – Update Conversion Field Mapping will help the Agencies support the end user's understanding of the data change from FLAIR to the new Florida PALM values. It will ensure more accurate conversion results for the Agencies.
- 573-A – Complete and Submit End User Role Mapping Worksheet for UAT is necessary for Agencies to prepare for UAT by confirming the responsibilities and functions of the end-user roles involved in testing.

Agency Risk and Issue Analysis

The Florida PALM IV&V Team observed that Agencies reported Risks and Issues in the newly developed template issued by the Florida PALM Project Team. The total number of open Issues and Risks reported by the Agencies decreased since March. April was not considered in the reporting comparison because Agencies were in the process of transitioning to the new reporting format during the month of April. The Table below shows the running total of open Risks and Issues reported by the Agencies each month.

Table 15: Agency Risks and Issues

Issues	Dec-24	Jan-25	Feb-25	Mar-25	May-25
Open Issues	76	78	83	83	62
Critical or High	61	64	66	66	50

Risks	Dec-24	Jan-25	Feb-25	Mar-25	May-25
Open Risks	325	327	324	312	260
Risks Score 6+	170	167	155	147	127

Since March, 33 Issues have been closed, while 12 new Issues have been opened. Also, 117 Risks were closed, and 65 new Risks were opened.

The Florida PALM IV&V Team performed a deeper 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.

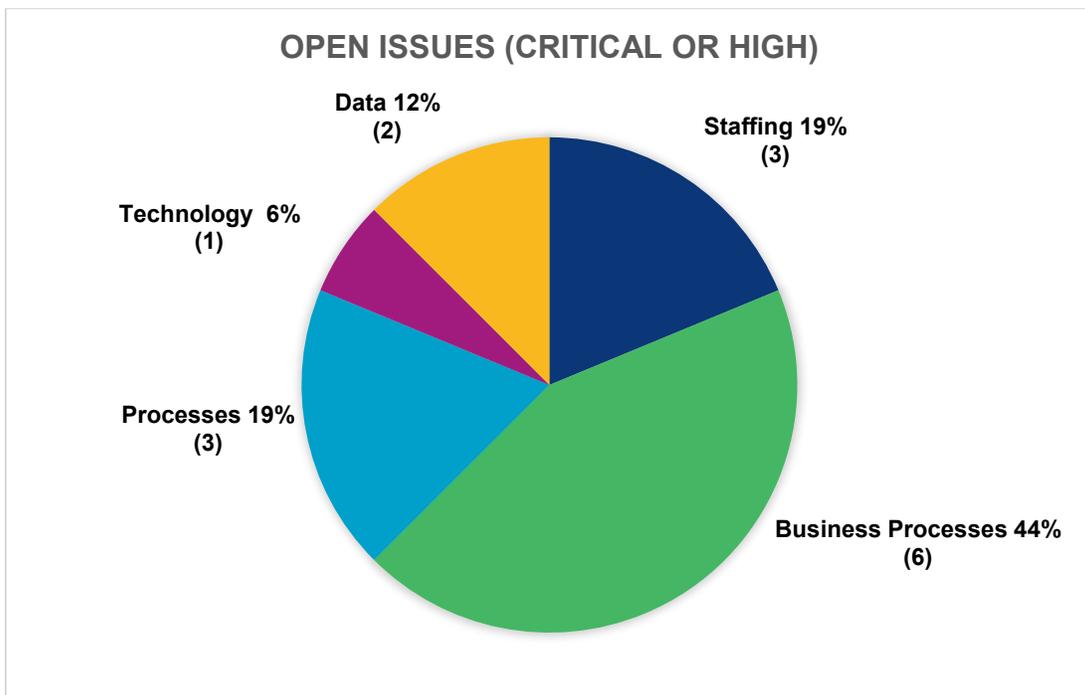


Figure 16: New Open Agency Issues by Category

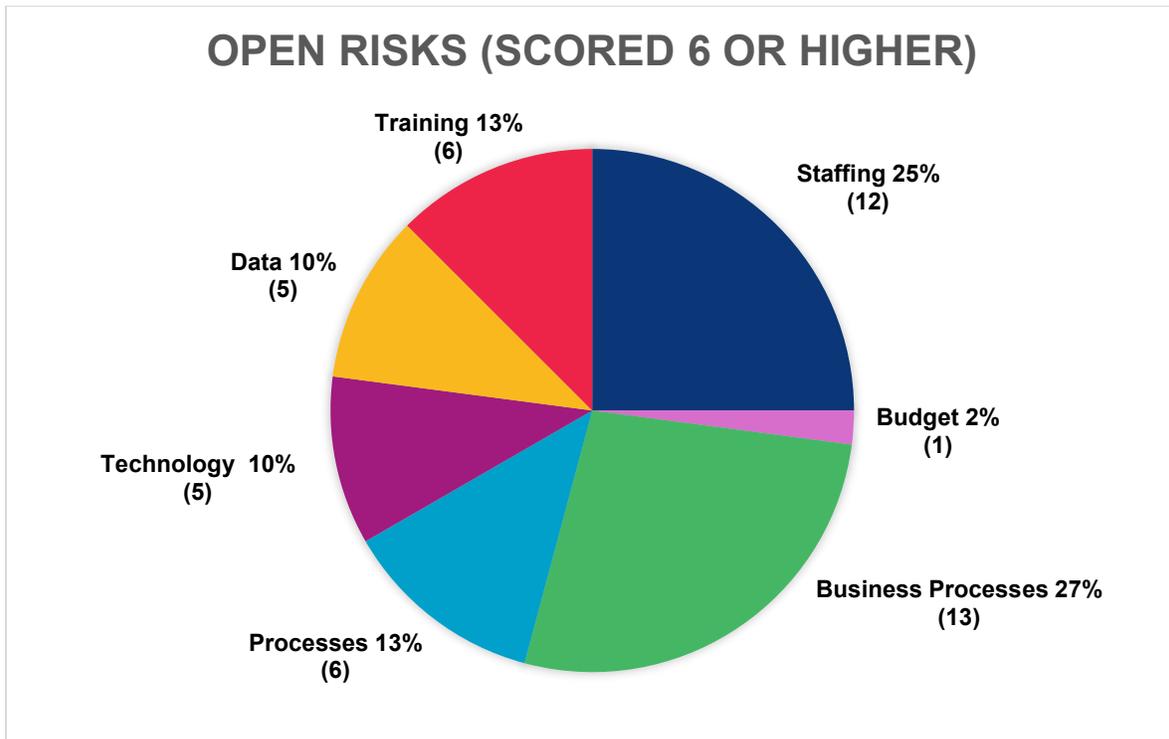


Figure 17: New Open Agency Risks by Category

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, 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 continue to experience challenges due to the loss of SMEs and skilled resources or face potential shortages of SMEs during critical phases of the Florida PALM Project. This is often attributed to competing demands between Florida PALM Project activities and ongoing operational responsibilities. The loss or limited availability of resources may impact the Agencies' ability to meet Readiness activities. Proactive planning and prioritization of Florida PALM Project-critical activities are essential to mitigate this risk.
- Agencies have documented open questions concerning the availability of specific system functionality in Florida PALM, transaction processing approaches, and clarity around the

cutover timeline, including system downtime and contingency procedures prior to implementation.

- Several Agencies have logged Risks based on hypothetical or "what-if" scenarios, some of which may not occur, may not be directly related to the Florida PALM Project, or may fall outside the Florida PALM Project Team's control. While risk identification is a good practice, the prevalence of speculative or non-Florida PALM Project-specific risks may dilute focus on actionable risks and issues.
- Agencies are still working through unresolved data dependencies from external Agency systems (e.g., Versa), and have raised questions regarding the scope and availability of reporting functionality through the DW/BI solution.
- While Agencies have reported Risks related to gaps in understanding or documentation of business processes transitioning from FLAIR to Florida PALM, many have also reported active efforts to utilize materials available in the Knowledge Center to address these concerns.

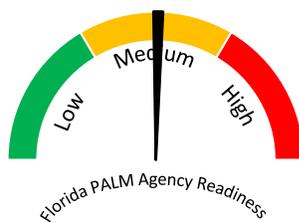
The Florida PALM IV&V Team recommends the following for the Agencies:

- **Prioritize Resource Planning:** Agencies should proactively identify SME gaps and develop mitigation strategies, such as cross-training or temporary augmentation, to ensure continuity during key upcoming Florida PALM Project phases.
- **Escalate Blocking Dependencies:** Any outstanding data or system dependencies from third-party vendors should be escalated through formal Florida PALM Project channels to avoid downstream impacts on testing or reporting.
- **Utilize the Questions Log:** Agencies are encouraged to add questions to their Questions Log regarding Florida PALM implementation planning, potential downtime, and required operational workarounds.

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

Florida PALM Agency Readiness

Focus Area Indicator



Trend: No Change

Florida PALM Agency Readiness Updates

The Florida PALM IV&V Team conducted touchpoints to foster open dialogue with Agencies on key topics such as data conversion, Mock Conversion 2 data remediation, Interfaces, Testing, and overall readiness.

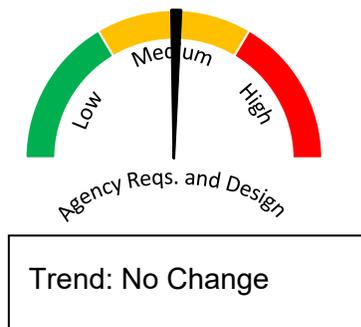
- Some Agencies stated they incorporated data validation activities into their UAT Plans, while others do not have a formal process to validate data loads from FLAIR to Florida PALM.
- Agencies raised concerns about multiple Direct Impact tasks overlapping YEC activities. Additionally, many reported a high volume of data errors in Task 571 – Complete Data Cleansing Based on Mock Conversion 2 to review and fix.
- Some Agencies have developed Agency-specific readiness success criteria that they will use in addition to the Florida PALM Readiness Certification. Others plan to utilize the Florida PALM Readiness Certification process alone. Approaches to mitigating unmet success measures varied across Agencies.

The Florida PALM IV&V Team observed the Multi-Agency PML-CML Meetings and acknowledges the collaborative efforts of the Multi-Agency Subgroup. These efforts align with the Project Management Book of Knowledge (PMBOK) Guide principles by fostering effective stakeholder engagement and supporting communication that advances Agency readiness goals. Agencies are encouraged to verify that their CCN points of contact receive meeting invitations. Meeting documentation will be shared with all PMLs and CMLs statewide, not just meeting attendees. Agencies not currently in the subgroup are welcome to join, and Training plans are shared across the Agencies.

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 Knowledge Center 2.0 has been released. Changes include decommissioning weekly email communications related to updates and adding a new feature that allows Agencies to leverage functionality to follow and receive instant notifications of updates.

The Florida PALM IV&V Team observed 135 updates in the Florida PALM Knowledge Center Change Catalog, an increase of 92 updates from April. The Figure below depicts the Florida PALM Knowledge Center updates.

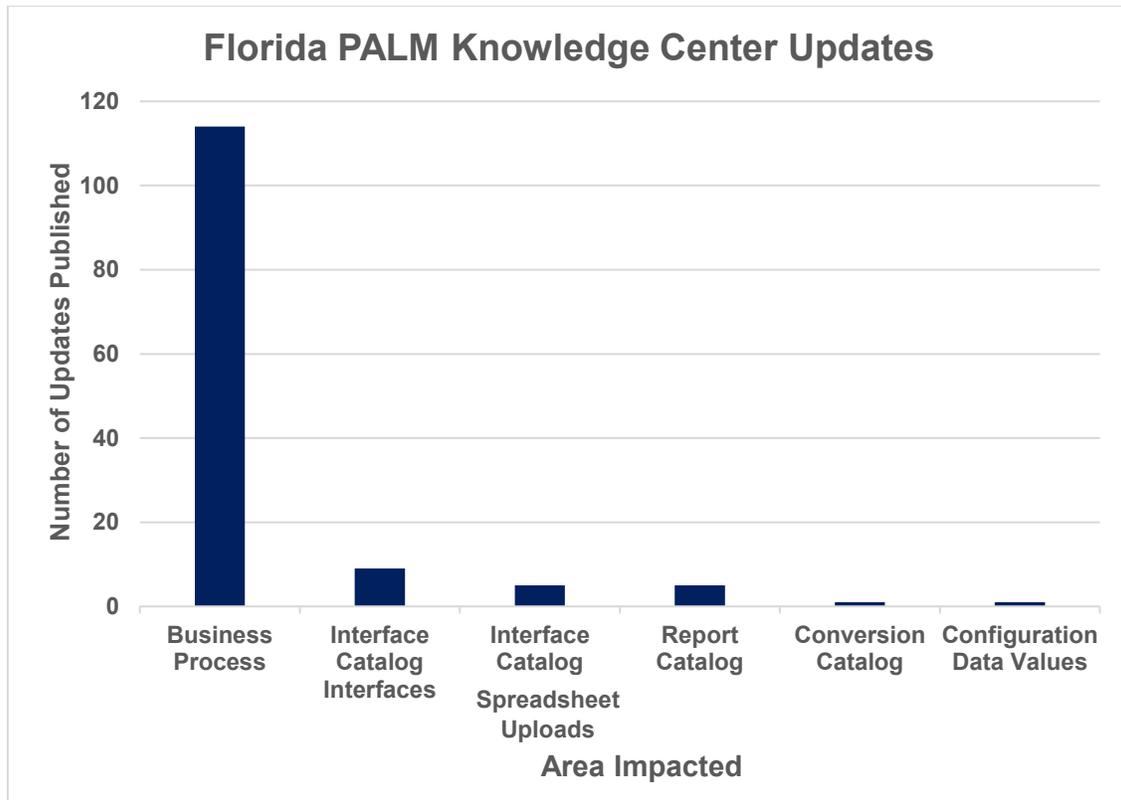


Figure 18: Updates Published to the Knowledge Center

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

While these updates may add complexity to Agency business system remediation efforts, they are intended to strengthen capabilities and support modernization. During the monthly Florida PALM IV&V touchpoints, Agencies reported minimal impact from the Interface Catalog updates. The Florida PALM IV&V Team is conducting additional analysis to assess how the business process updates may affect downstream business system remediation efforts.

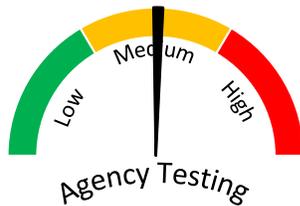
The Florida PALM IV&V Team acknowledges that some Agencies are proactively dedicating resources to reviewing the Florida PALM Knowledge Center Change Catalog updates and recommends the following:

- Communicate early and often with RCs when more information is needed, or if changes result in delays or workload related to business system remediation.
- Log risks with detailed explanations and mitigation strategies if changes cause potential delays to Agency readiness.

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

Agency Testing

Focus Area Indicator



Trend: No Change

Agency Testing Updates

The Florida PALM IV&V Team evaluated Agency-reported progress in the Interface Test Planning workbooks in Smartsheet. Across all Agencies, 55% 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. Preparation activities for Agency Interface Testing include updates to internal business processes, Interface consumption readiness, and data preparation. Five percent of business systems associated with Interfaces have unknown readiness dates. Additionally, 11% have not yet begun preparation or remediation activities, though more than half of those are planned to be ready during the Interface Testing Cycle 2 timeline.

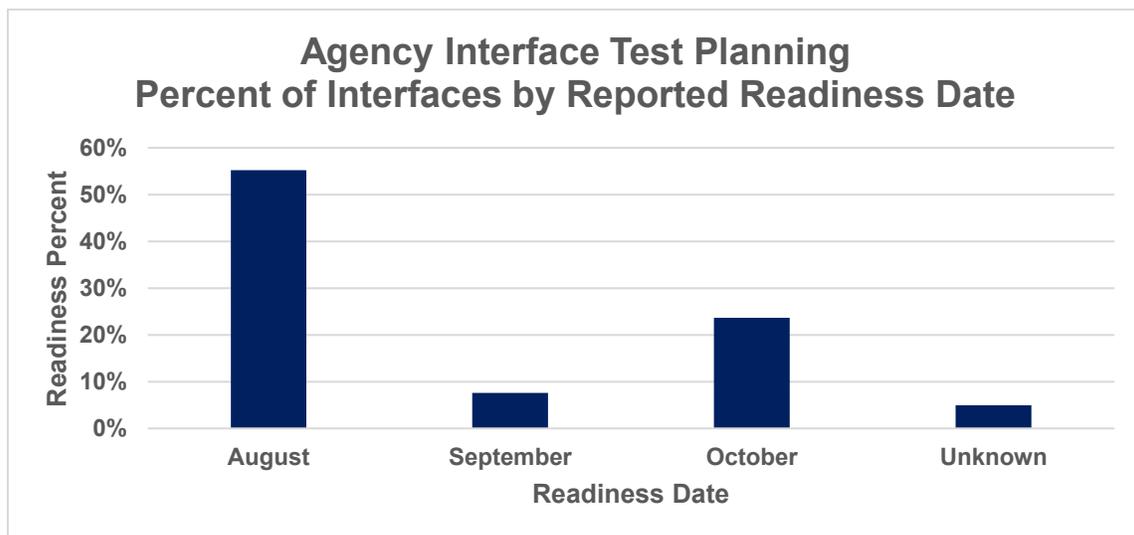


Figure 19: Percent of Interfaces by Reported Readiness Date

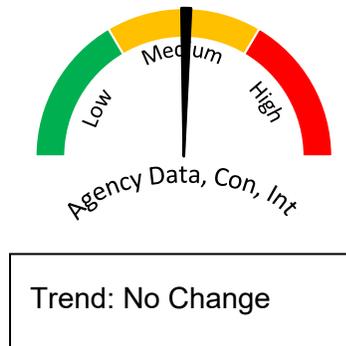
Agencies report that business system remediation activities for nearly 90% of the Agency-selected Interfaces will be finished and ready for testing during Interface Testing Cycle 2. Florida PALM IV&V Team touchpoints with Agencies in June will include discussions on Interface Test

Planning, clarification of reporting inconsistencies, and insights into Agency progress and planning efforts.

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

Agency Data, Conversion, and Interfaces

Focus Area Indicator



Agency Data, Conversion, and Interfaces Updates

The Florida PALM IV&V Team reviewed Agency progress on Mock Conversion 2 data cleansing and Interface planning. While many Agencies have made steady progress in addressing data quality issues and completing mapping efforts, some challenges remain.

Data

Some Agencies have identified data gaps in their legacy systems that may impact the completeness of the conversion files. For example, one Agency reported missing historical asset data that was not readily extractable from their current system of records, which may affect the accuracy of beginning balances in Florida PALM. Another Agency raised concerns about inconsistent vendor address formatting, which may impact the successful transformation of supplier records into Florida PALM’s data structure. These have been documented in the Agencies’ Risks and Issues Logs.

Conversion

As of 5/31/25, Agencies completed 31% of their Mock Conversion 2 Data cleansing tasks. During the Florida PALM IV&V touchpoints, most Agencies expressed confidence in completing the remaining work by the 6/20/25 deadline. While they acknowledged the effort is challenging due to competing responsibilities from RW Tasks and YEC activities, they remain focused and committed to timely completion.

Interfaces

Agencies have also made notable progress in preparing for Interface Testing Cycle 2. Many have already begun aligning their internal efforts and resources to support the upcoming Testing activities. The overall sentiment remains positive as many Agencies expressed confidence in their ability to be ready for Interface Testing and are actively working through the remaining technical details to ensure readiness.

The Florida PALM IV&V Team observed meaningful collaboration between the Agencies and the Florida PALM Project Team, particularly with support from RCs, who continue to serve as effective liaisons. Agencies have reported positive engagement during recent Florida PALM IV&V touchpoints, confirming that Florida PALM Project Team members provided timely clarification on data structure requirements and Interface formatting. Agencies have acknowledged improved responsiveness to submitted questions and greater alignment on expectations, contributing to stronger momentum in preparation for the upcoming Interface Testing Cycle 2.

The Risk Rating for this Focus Area remains a Medium.

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 IV Final Approval

The Figure below shows the targeted number of AD documents that were expected to be approved versus the actual count approved. As of 5/31/25, all 112 AD documents have been approved.

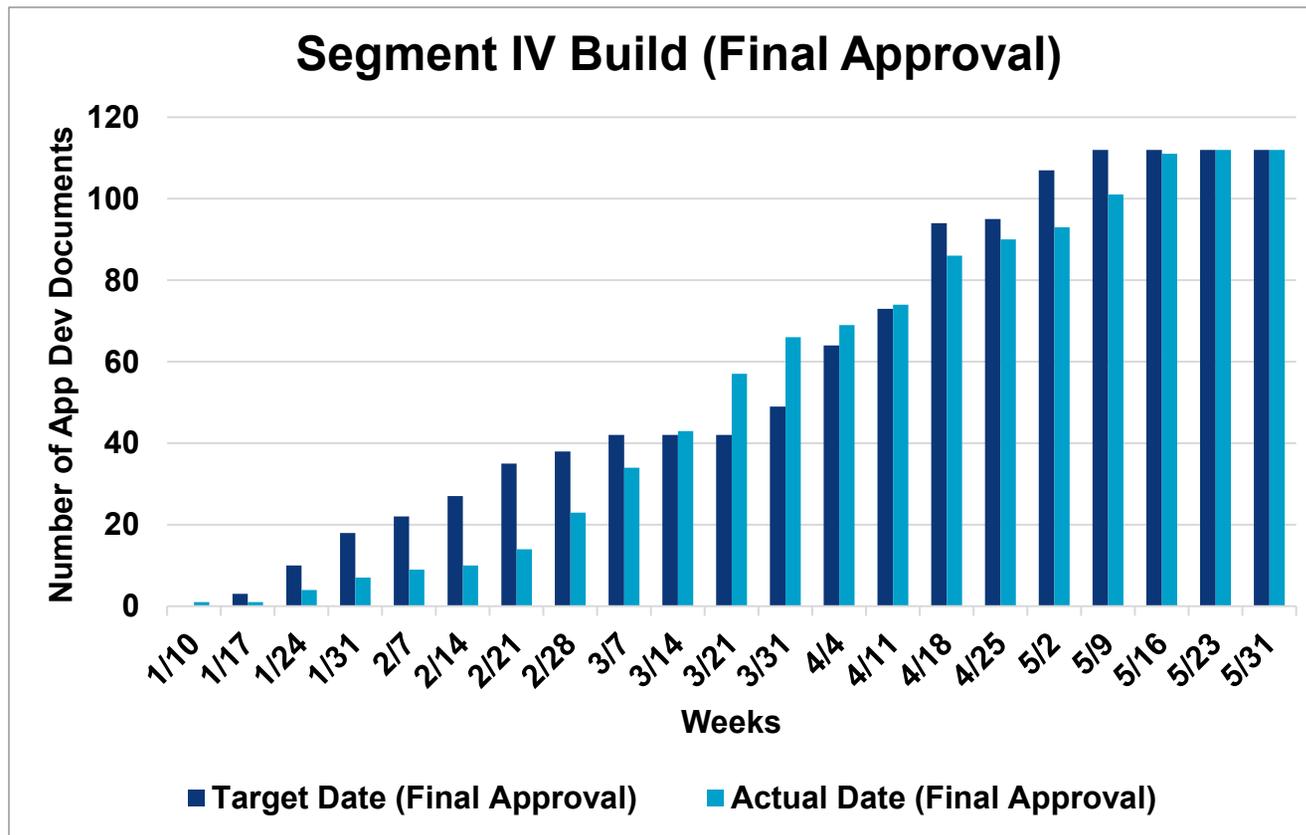


Figure 20: Segment IV Build Documents – Final Approval

DW/BI Build Segment III 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 5/31/25, 17 of the 18 AD documents have been approved. All 18 were targeted for approval by 3/26/25.

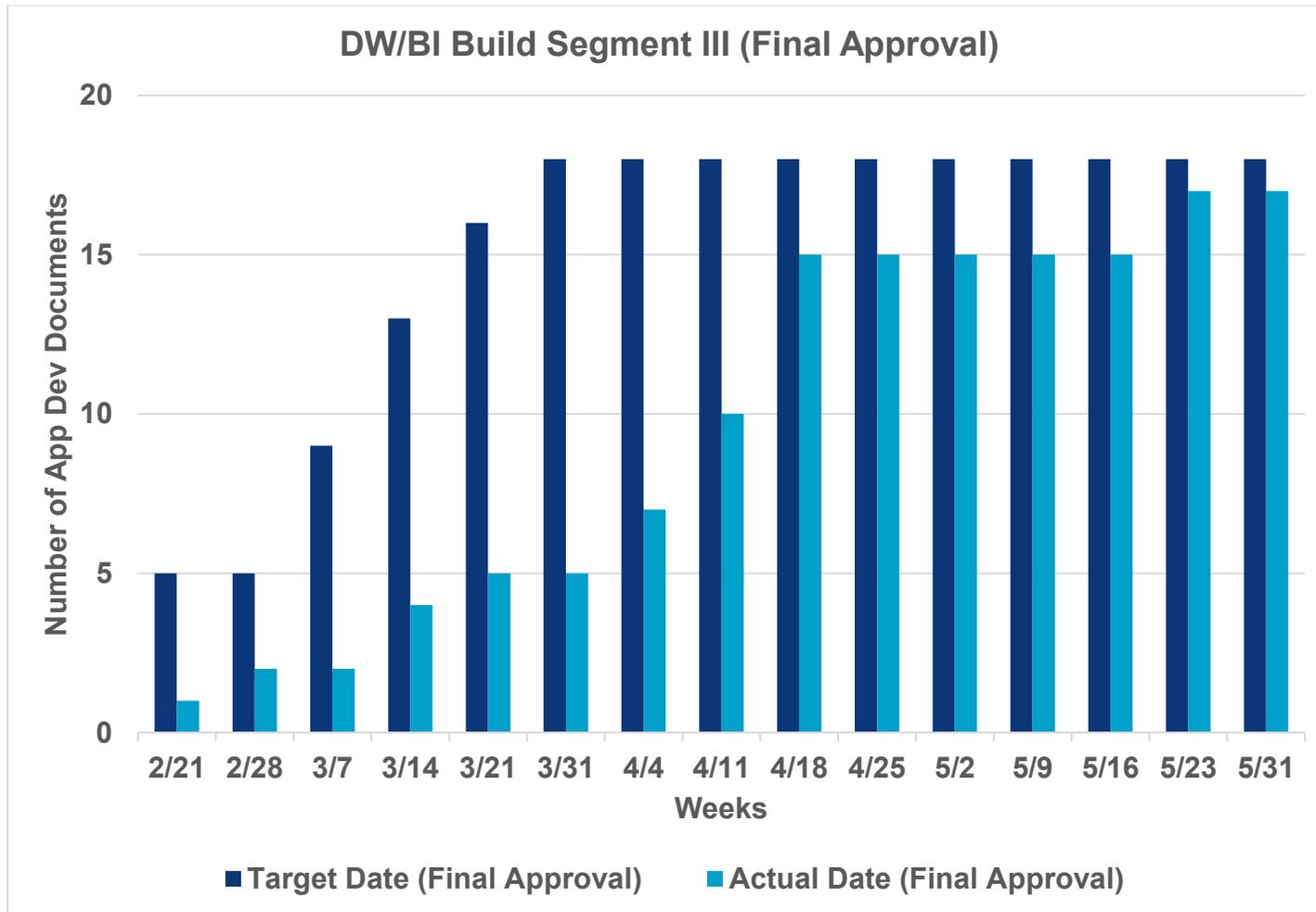


Figure 21: DW/BI Segment III Build Documents – Final Approval

Testing Metrics

Test Scripts Drafted Planned versus Actual for All Cycles

The Figure below shows the number of planned versus actual Test Scripts drafted by the SSI Vendor for all System Testing Cycles as of 5/31/25.

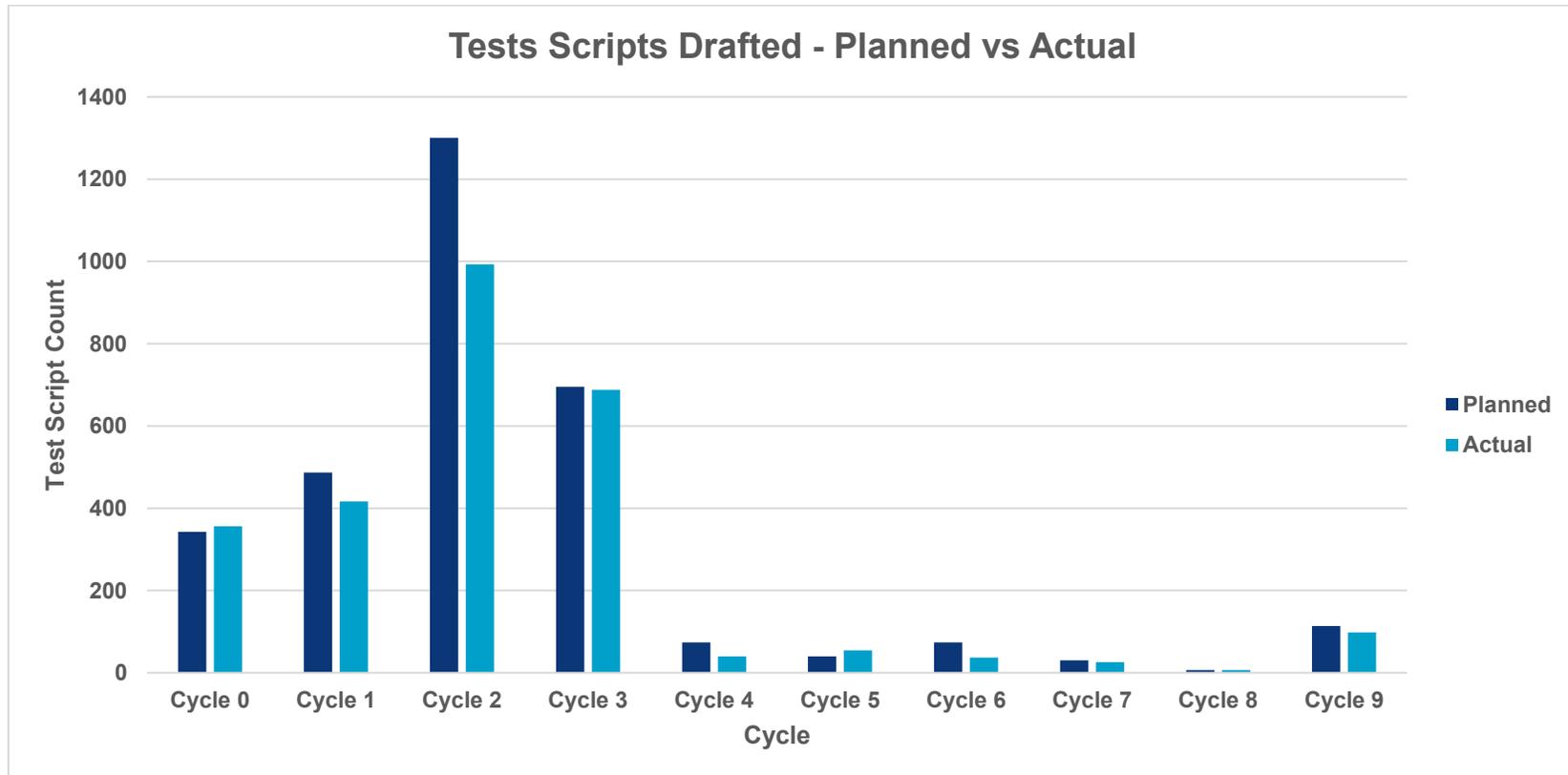


Figure 22: Planned and Actual Test Scripts Drafted

Test Scripts Peer Reviewed Planned versus Actual for All Cycles

The Figure below shows the number of planned versus actual Test Scripts Peer Reviewed for all Cycles as of 5/31/25.

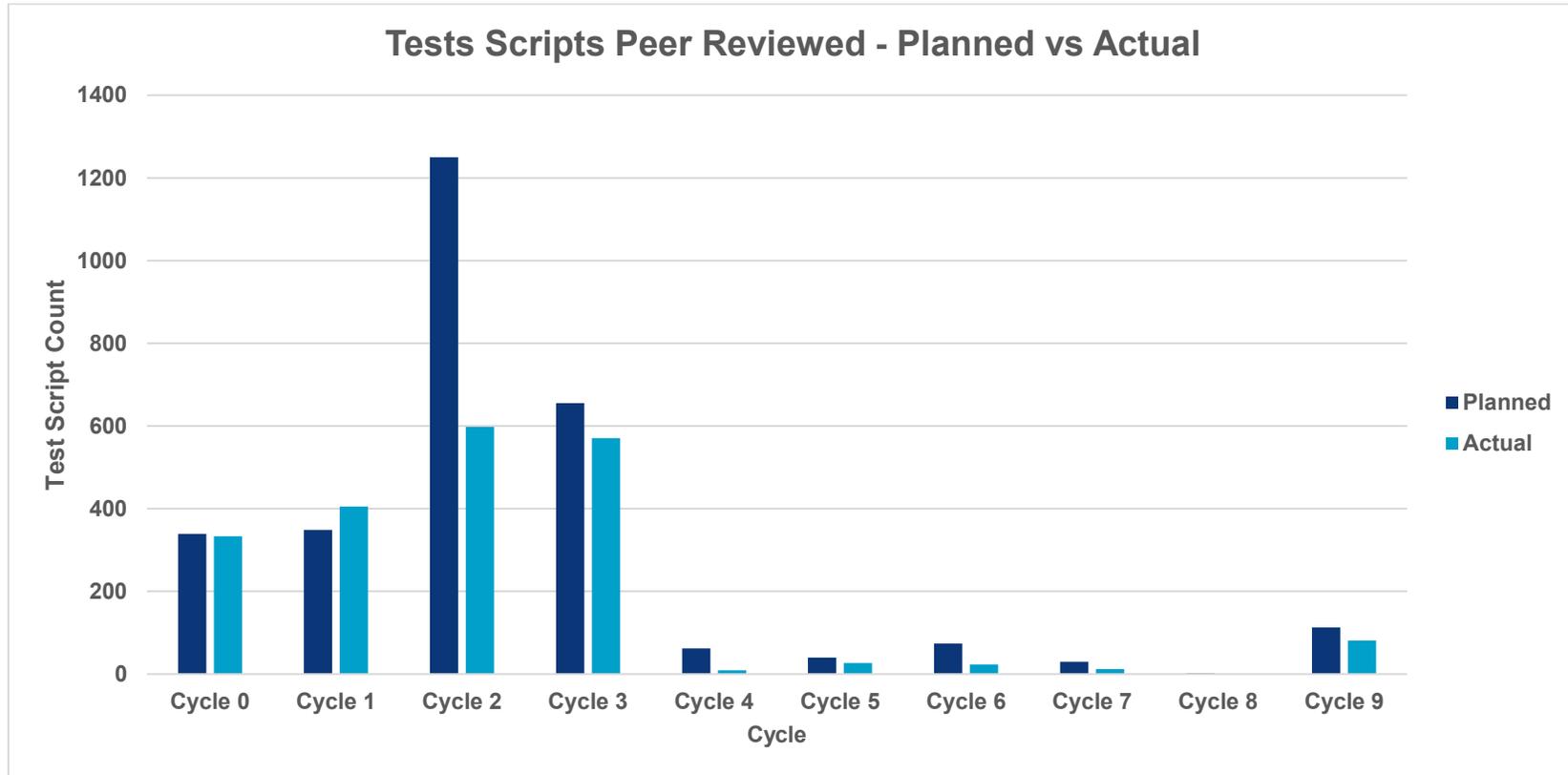


Figure 23: Planned and Actual Test Scripts Peer Reviewed

Test Scripts Executed Planned versus Actual for All Cycles

The Figure below shows the number of planned versus actual Test Scripts executed by the SSI Vendor for all Cycles as of 5/31/25.

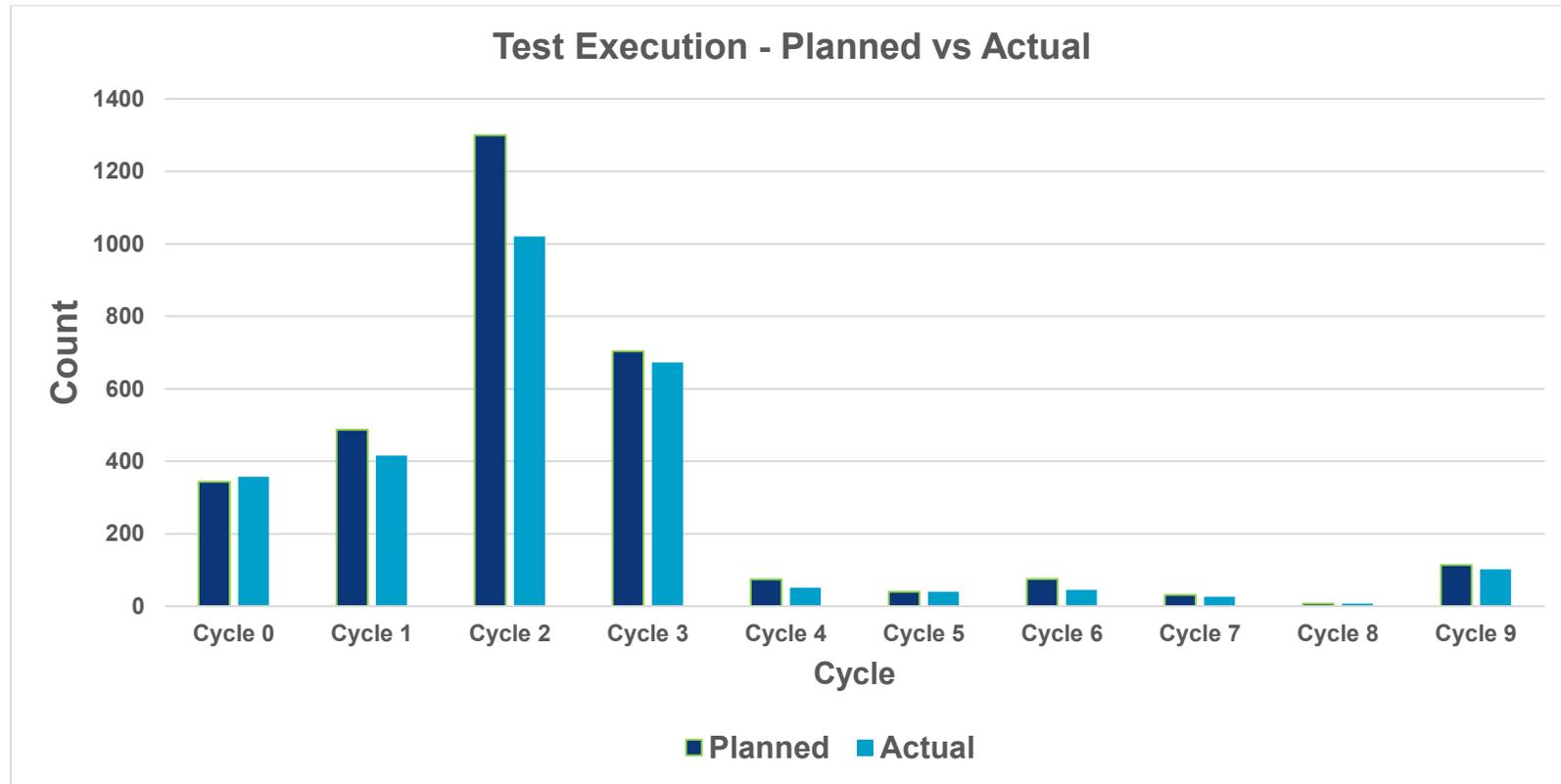


Figure 24: Planned and Actual Test Scripts Executed

IV&V Information Requests

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

Table 16: 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 17: 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 18: 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 19: 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			Medium	High	
Possible 3		Medium		High	
Unlikely 2				Medium	
Improbable 1		Medium		High	

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

Table 20: 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.