

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

Independent Verification and Validation Monthly Assessment Report July 2025

August 14, 2025

Contract: 80101507-21-STC

Engagement: C59CE1



PUBLIC
CONSULTING GROUP

Table of Contents

Table of Contents..... 2

Executive Summary 4

Focus Area Updates 5

New Findings10

Open Findings.....13

Closed Findings17

Metrics Related to Findings.....18

Florida PALM Project Focus Area Updates19

Florida PALM Agency Focus Area Updates37

IV&V Information Requests44

Appendix A – Risk Priority Matrix45

The information contained in this document may constitute confidential information that is exempt from disclosure under Florida or Federal law including, but not limited to, section 119.0725, Florida Statutes. The information is intended only for the addressee(s) indicated herein. If you are not the intended recipient, you are hereby notified that any disclosure, dissemination, distribution, copying or taking of any action in reliance on the content within is strictly prohibited. If you have received this document in error, please notify Public Consulting Group LLC immediately by email at nsuvada@pcgus.com and scrouch@pcgus.com and follow instructions thereafter.

Executive Summary

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

- The overall Florida PALM Project Risk Rating remained at a High Risk due to the factors listed below and challenges in meeting the documented criteria for proceeding into User Acceptance Testing (UAT).
- Two new Findings were opened:
 - Finding 26 raises an Issue that the SSI Vendor did not meet the Stage Gate 3 - Ready for UAT Entry Criteria by the planned completion date of 7/30/25.
 - Finding 27 documents a Preliminary Concern that remediation efforts for My Florida Market Place (MFMP) Interfaces may be delayed, which could delay completion of Interface Testing Cycle 2 and UAT.
- Finding 22 was escalated from a Risk to an Issue due to the SSI Vendor not meeting all System Testing Segment III Exit Criteria by the targeted completion date of 7/25/25.
- Finding 25 was closed following the 7/30/25 Executive Steering Committee (ESC) meeting due to the SSI Vendor addressing the Finding and adding detail to their July ESC slides.
- The Risk Rating for the Florida PALM Data, Conversion, and Interface Focus Area remains a High Risk but is worsening from Low Red to Medium Red due to missed Mock Conversion 3 deadlines and the increasing volume of the SIR backlog for Data Warehouse (DW)/Business Intelligence (BI) and Interface Testing.
- The Risk Ratings for the Florida PALM Development Focus Area remains a Medium Risk but improved from Medium Yellow to Low Yellow due to continued progress on Employee Self-Service (ESS) extensions and Reports, Interfaces, Conversions, Extensions, Forms, and Workflows (RICEFW) Items and the Florida PALM Project Team's approach to identifying System Investigation Requests (SIR) resolution timelines.

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	High	High	No Change	The overall Florida PALM Project Risk Rating remains a High Risk due to multiple missed deadlines for tasks critical to entering UAT and Agency readiness for UAT. As a key milestone, UAT verifies that Florida PALM meets business needs, supports user workflows, and is ready for production, enabling the Florida PALM Project to proceed to go-live with confidence
Florida PALM Project Management	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>The Florida PALM Project Schedule Performance Indicator (SPI) remains at .92 for the month of July. This indicates that the Florida PALM Project is progressing at 92% of the planned pace. Delayed Tasks decreased from 212 in June to 186 in July.</p> <p>The Florida PALM IV&V Team observed in the Florida PALM Project Schedule that the Stage Gate 3 milestone was missed due to delayed tasks for Mock Conversion 3, DW/BI, and UAT Environment build activities.</p>
Florida PALM Organizational Change Management	Low	Low	No Change	<p>The Risk Rating for this Focus Area remains a Low Risk.</p> <p>The Florida PALM Agency Readiness Team could consider performing a post-UAT survey with Subject Matter Experts (SMEs) to assess what worked well, areas for improvement, and whether</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				expectations were met after they have completed UAT Online.
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 considering using the U.S. address format for printing checks to foreign addresses, with further discussion planned for August. This low-volume functionality is not required for the start of UAT.</p> <p>Eleven of the 14 Miscellaneous RICEFW Functional Design (FDs) have been approved. Of the remaining three FDs, two are expected to be canceled in an upcoming Project Change Request (PCR), and one is on schedule for approval by 8/20/25.</p>
Florida PALM Development	Medium	Medium	Improving	<p>The Risk Rating for this Focus Area remains a Medium Risk but is improving from Medium Yellow to Low Yellow.</p> <p>Five ESS extensions and 14 additional RICEFW items are in various stages of development. All five Application Development (AD) documents for the ESS extensions are projected to be 4–6 weeks behind schedule, and one additional RICEFW item (GLE011) is projected to be 5 weeks behind. Despite these delays, all items are still expected to be available by the start of Full UAT.</p> <p>Open SIR volume remains high at 665 total unresolved SIRs as of 7/31/25, but the Florida PALM Project Team is categorizing them by when the functionality needs to be available for testing (i.e., UAT Online, Full UAT, etc.) to better coordinate fixes with Development staff and ensure timely resolution.</p>
Florida PALM Testing	High	High	No Change	<p>The Risk Rating for this Focus Area remains a High Risk.</p> <p>Finding 22 was escalated to an Issue after the SSI Vendor did not meet all System Testing Exit Criteria by the</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				<p>targeted completion date of 7/25/25, which may impact the start of UAT.</p> <p>The Florida PALM IV&V Team also opened Finding 26 to document a Risk that the SSI Vendor did not meet all Entry Criteria for Stage Gate 3 by the planned completion date of 7/30/25, which could impact the start of UAT.</p>
Florida PALM Data, Conversion, and Interfaces	High	High	Worsening	<p>The Risk Rating for this Focus Area remains a High Risk but is worsening from Low Red to Medium Red.</p> <p>Mock Conversion 3 missed its 7/25/25 target, with two conversions still pending and 11 High-priority SIRs unresolved.</p> <p>Interface Testing Cycle 2 experienced an increase in High-priority SIRs, with 35 opened and 23 resolved.</p> <p>While System Testing DW/BI execution improved and the pass rate rose from 51% to 79% with 135 test cases executed, the number of DW/BI SIRs also increased, requiring additional code and data fixes. Findings 23 and 24 have been updated to reflect these worsening trends.</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	High	High	No Change	<p>The Risk Rating for this Focus Area remains a High Risk.</p> <p>Thirteen Agencies reported key personnel changes in July that could affect Agency Readiness and UAT success. Ongoing challenges, such as staffing shortages and misaligned remediation timelines for third-party vendor systems, should be communicated, documented, and tracked to maintain Testing readiness.</p>
Florida PALM Agency Readiness	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Role mapping remains a concern for several Agencies that face staffing constraints and system-enforced separation of duties. Completed role mapping tasks still contain errors, indicating unresolved issues that must be addressed to meet separation of duties requirements.</p> <p>Agencies discussed the initiative launched to set up a cross-Agency Risk Register to identify and manage shared risks, and participants plan to coordinate offline to formalize the Risk Register process.</p>
Agency Requirements and Design	Medium	Medium	No Change	<p>This Risk Rating for this Focus Area remains a Medium Risk.</p> <p>Forty-one updates were released in the Florida PALM Knowledge Center Change Catalog across Business Processes, Reports, Interfaces, and Configurations, (Conversions did not have any updates). Agencies reported having established processes to identify and assess changes and noted no adverse impacts.</p>
Agency Testing	Medium	Medium	No Change	<p>The Risk Rating for this Focus Area remains a Medium Risk.</p> <p>The Florida PALM IV&V Team has observed that some Agencies may not be ready for UAT based on incomplete</p>

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				Readiness Workplan (RW) Tasks that are past due, reported staffing shortages, and insufficient UAT and Training plans. The Florida PALM IV&V Team will continue to conduct a deeper analysis into Agencies' readiness for UAT.
Agency Data, Conversion, and Interfaces	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 improved Agency participation and task completion related to Mock 3 Data Conversion, Configuration Workbook updates, and End User Role Mapping, but some Agencies still face challenges with data quality, role provisioning, and third-party interface readiness. Recent requests for additional Interfaces may further impact Interface Testing Cycle 2 readiness and strain Florida PALM Development and Testing resources.</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: Issue

Impact: Moderate

Probability: Possible

Priority: Medium

Finding Number and Title: **Finding 26** – Issue that the SSI Vendor did not meet all Entry Criteria for Stage Gate 3 – Ready for UAT by the targeted completion date of 7/30/25, which contributed to the delay of the Stage Gate 3 vote and may impact the start date of UAT.

Finding Description: As of 7/31/25, Mock Conversion 3 and UAT Environment build tasks were still in progress, leaving the Stage Gate 3 Entry Criteria for UAT Environment readiness unmet. This delayed the planned ESC vote for Stage Gate 3 on 7/30/25 and may affect the Florida PALM Project's ability to begin UAT on the planned start date of 8/11/25.

Criteria: Per the SSI Vendor's Contract, Attachment 1 – Statement of Work, the ESC is responsible for determining whether the Florida PALM Project may proceed to UAT. The decision is contingent upon the SSI Vendor's successful fulfillment of the following Stage Gate 3 Entry Criteria

1. Design and build are complete.
2. Contractor System Test is at least 90% complete, or as mutually agreed to based on ESC direction.
3. UAT environment is ready for testing.

Cause: As of the July End-of-Month (EOM) Project Schedule, the UAT Environment build was still underway, with final validation of the UAT Environment scheduled for 8/14/25 and the DW/BI Environment for 9/24/25. The Mock Conversion 3 data, originally due by 7/25/25, was also delayed, with the "Mock 3 Execution Complete" milestone moved to 8/4/25.

Effect: Delays in meeting Stage Gate 3 Entry Criteria resulted in the postponement of the ESC vote on 7/30/25 and may delay the start of UAT. To maintain the July 2026 implementation date, the UAT timeline may need to be shortened, reducing test coverage and increasing the risk of more issues at go-live. Preserving the full UAT timeline could require extending resource availability, potentially increasing costs for both the Agencies and the Florida PALM Project Team. Continued schedule slippage without mitigation may also erode stakeholder confidence and readiness for deployment.

Recommendations: The Florida PALM IV&V Team recommends the following for the SSI Vendor:

1. Prioritize and allocate resources to complete UAT Environment build and Mock Conversion 3 tasks to ensure readiness for UAT prior to the planned start date. This includes infrastructure, application, Mock Conversion 3 data, user roles and preferences, and the DW/BI environment.

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

1. Review and prioritize critical path activities that can proceed in parallel.
2. Utilize the additional time to enhance and expand UAT training materials and content.
3. Elevate and track this delay as a formal Risk in the Florida PALM Project's Risk Register, including mitigation and contingency plans tied to schedule, cost, and quality.

Finding Type: Preliminary Concern

Impact: High

Probability: Possible

Priority: High

Finding Number and Title: **Finding 27** – Preliminary Concern that remediation of MFMP Interfaces may be delayed, which could impact Interface Testing and UAT.

Finding Description: During the Changes, Risks, Action Items, Issues, Decisions, and Lessons Learned (CRAIDL) Meeting on 7/24/25, the Florida PALM Project Team discussed a possible risk to the ongoing Ariba On-Demand remediation efforts for the MFMP Interfaces. If remediation of the MFMP Interfaces is delayed, MFMP may not be able to complete Interface Testing Cycle 2 or proceed to End-to-End Interface Testing with the Agencies. The Florida PALM Project Team is involved in discussions with MFMP and other State teams to discuss possible workarounds if remediation is delayed to keep progress on the Florida PALM Project moving forward.

Criteria: Interface Testing between MFMP and Florida PALM was scheduled before testing with the Agencies, as the MFMP Interfaces provide critical data and connections for many of the Agencies. The successful execution of Interface Test Scripts with MFMP is required before the Florida PALM Project can move into End-to-End Interface Testing. Interface Testing Cycle 2 was intended to validate and, if needed, remediate data and file transfers between the Florida PALM and all Enterprise Partner Interfaces so that Agency end-users can test Interfaces in a production-like environment as part of their standard business processes during UAT.

Cause: A lack of funding for the remaining MFMP remediation and testing efforts may be a contributing factor to the potential delay. The Florida PALM IV&V Team will continue to conduct a deeper analysis into the cause of the potential delay.

Effect: If remediation of the MFMP Interfaces is delayed, the completion of Interface Testing Cycle 2 may be delayed, which could impact the start of End-to-End Interface Testing during Full UAT since MFMP is a critical Enterprise Partner.

Recommendations: The Florida PALM IV&V Team recommends the following:

1. All parties should continue to work to reach a mutually agreed approach that ensures the Ariba on Demand remediation work is completed within the timelines needed to support Interface Testing and UAT.
2. The Florida PALM IV&V Team should continue weekly meetings to identify mitigation strategies or workarounds that will allow the continuation of MFMP remediation and testing activities.

Open Findings

Finding Number and Title: **Finding 22** – Issue 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.

Date Opened: 6/30/25		
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.		
Current Impact: Significant	Previous Impact: Significant	Trend: No Change
Current Probability: Probable	Previous Probability: Likely	Trend: Worsening
Current Priority: High	Previous Priority: High	Trend: No Change

Status Update: Finding 22 has been escalated from a Risk to an Issue because the SSI Vendor did not meet all System Testing Segment III Exit Criteria before the targeted completion date of 7/25/25. Specifically, the criterion that “Critical or high business criticality SIRs are resolved or have an agreed-upon disposition” remains unmet, with five High Business Criticality SIRs still unresolved. Failure to exit System Testing Segment III prior to the vote for Stage Gate 3 – Ready to Begin UAT may delay the start of UAT.

Recommendation #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.

Status: Closed

Update: The Florida PALM Project Team implemented a review process for all unresolved System Test SIRs, assessing each item's Priority and Business Criticality. They have updated the Known Issues and Enhancements List with final dispositions and estimated completion dates.

Recommendation #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.

Status: In Process

Update: While the Florida PALM Project Team is following a process to review and update SIR Business Criticality and Priority during triage meetings, the Florida PALM IV&V Team has

observed that approximately 40 participants continue to attend the entire 1.5-hour meetings. To improve efficiency, the meeting structure could be revised to focus on specific topics. This could involve splitting into separate sessions for areas such as Interface Testing, DW/BI, Conversion, or Functional Testing, including only those directly involved in each topic. An advanced agenda with timeboxing could be distributed in advance to keep discussions on track. Additionally, the standardized Priority criteria should be consistently applied to prioritize issues effectively.

Recommendation #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.

Status: In Process

Update: The High Business Criticality SIRs that remain unresolved will require continued focused attention from Development and Testing staff to achieve timely resolutions and meet Exit Criteria.

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.

Date Opened: 06/30/25		
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.		
Current Impact: Moderate	Previous Impact: High	Trend: No Change
Current Probability: Possible	Previous Probability: Possible	Trend: Worsening
Current Priority: Medium	Previous Priority: Medium	Trend: Worsening

Status Update: While the number of Test Scripts executed for System Testing DW/BI nearly doubled from 70 to 135, the pass rate of 79.2% remains below 90% as defined in the Exit Criteria documented in WP429 – Updated System Testing Plan DW/BI. As of 7/31/25, four test scripts remain to be executed, and 34 failed Test Scripts will need to be re-executed within the six remaining business days to meet the planned UAT start date of 8/11/25.

Recommendation #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.

Status: No Change

Update: No documentation has been provided to define a plan that prioritizes the execution of higher-risk Test Scripts early to identify and mitigate potential SIRs sooner.

Recommendation #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.

Status: Closed

Update: The Florida PALM IV&V Team has observed daily stand-up meetings between the SSI Vendor and the State DW/BI Team.

Recommendation #3: The SSI Vendor should develop a burn-down plan showing the number of known unresolved SIRs, the anticipated number of future SIRs based on remaining Test Scripts, the projected completion dates for those SIRs, and their actual resolution dates. This will allow tracking of progress and help determine when System Testing DW/BI may be complete.

Status: No Change

Update: The Florida PALM IV&V Team has not observed the creation of a burn-down chart to plan and track the resolution of SIRs. The Florida PALM IV&V Team continues to recommend the creation of this type of burn-down chart to track progress.

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.

Date Opened: 06/30/25		
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%.		
Current Impact: High	Previous Impact: High	Trend: No Change
Current Probability: Possible	Previous Probability: Possible	Trend: Worsening
Current Priority: Medium	Previous Priority: Medium	Trend: Worsening

Status Update: While the DW/BI System Testing pass rate has improved to 79.2%, the number of Critical and High Business Criticality SIRs has risen to 61. Based on an average SIR resolution time of 14 days and a 40% increase rate for SIRs, the Florida PALM IV&V Team is trending that Critical and High Business Criticality SIRs may not be resolved until 8/7/25, and the remaining Medium Business Criticality SIRs may not be resolved until 9/17/25.

Recommendation #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.

Status: In Process

Update: The Florida PALM IV&V Team has observed that the SSI Vendor is prioritizing the resolution of data-related issues for DW/BI.

Recommendation #2: The SSI Vendor should consider using a small group of dedicated resources to analyze the root cause for missing or incorrect data and develop a more holistic approach to addressing the underlying data issues.

Status: No Change

Update: The Florida PALM IV&V Team has not observed documentation regarding root cause analysis or mitigation strategies for data-related issues.

Recommendation #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.

Status: In Process

Update: The Florida PALM IV&V Team has observed that targeted timeframes for resolution for all SIRs in Jira, including those for DW/BI, have been added to indicate when the functionality is required for testing (i.e., UAT Online, Full UAT, etc.).

.

Closed Findings

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

Date Opened: 6/30/25

Date Closed: 7/31/25

Rationale for Closing: The Florida PALM IV&V Team has closed this Finding. During the ESC meeting held on 7/30/25, the SSI Vendor addressed the Finding, and the Florida PALM Project Team expressed disagreement with the Florida PALM IV&V Team's assessment of the June ESC slides, which were used as the basis of the Finding.

The Florida PALM IV&V Team observed that the SSI Vendor's slides for the July ESC meeting included revised data on outstanding SIRs related to System Testing and System Testing DW/BI. Additionally, a new slide was introduced to report progress on UAT Environment Readiness. Although the slide indicated the Schedule as "On Track," the UAT Environment build tasks were not completed by their targeted dates. The Florida PALM Project Team recognized and corrected this discrepancy during the meeting. The Florida PALM Project Team demonstrated collaboration with the SSI Vendor to identify and present information for ESC reporting.

Metrics Related to Findings

The Figure below shows the open, closed, and new Findings identified by the Florida PALM IV&V Team. Two new Findings were opened this month. There are three open Findings and 11 closed Findings.

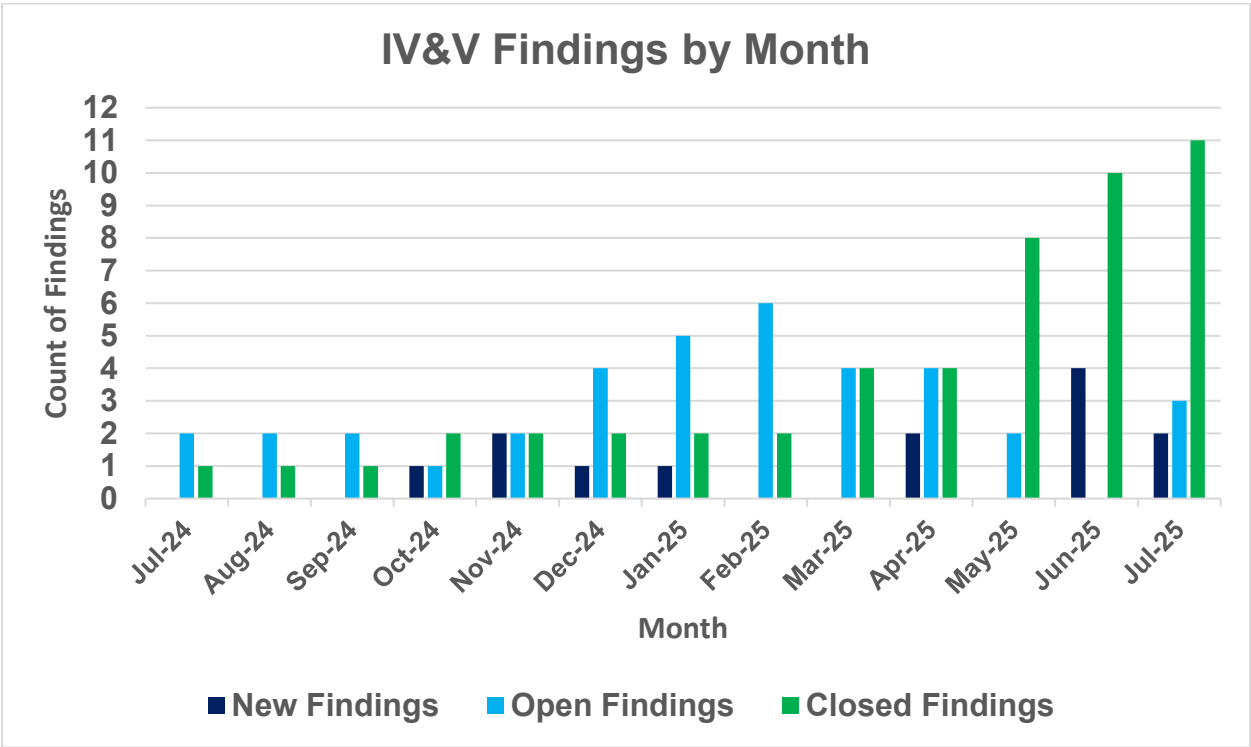
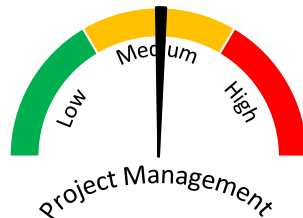


Figure 1: Florida PALM IV&V Findings by Month

Florida PALM Project Focus Area Updates

Florida PALM Project Management

Focus Area Indicator¹



Trend: No Change

Florida PALM Project Management Updates

Florida PALM Project SPI

Per the Florida_PALM_Project_ScheduleEOM.mpp file with a status date of 7/31/25, the Florida PALM Project Schedule Performance Index (SPI) is .92, the same as June, indicating that the Florida PALM Project is progressing at 92% of the planned pace.

The Florida PALM Project Management Office (PMO) Team is working with Task Coordinators to set expectations for accurately reporting status within the Florida PALM Project Schedule. The Florida PALM IV&V Team observed improvement, and the shifts within the Florida PALM Project Schedule were expected. This process allows for identifying trends and specific tasks contributing to any variance from the baseline dates. This is also a proactive approach to resolving variances.

Florida PALM Project Delayed Tasks

As of 7/31/25, there were 186 Delayed Tasks in the Florida PALM Project Schedule, a 13% decrease from 212 in June. The Florida PALM IV&V Team defines Delayed Tasks as any task that should have started or finished but has yet to be completed. The Figure below highlights the major categories of Delayed Tasks.

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.

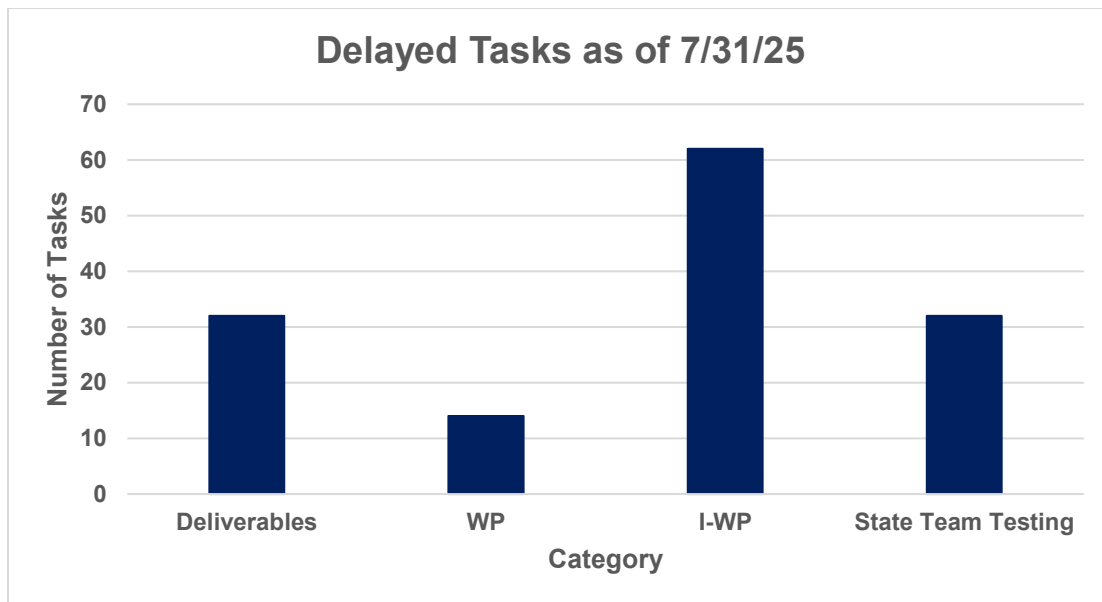


Figure 2: Delayed Tasks by Category

Internal Work Products (I-WPs) remain the largest category of Delayed Tasks. The UAT Training Materials (I-WP111 and I-WP112) account for a combined total of 62 delayed tasks, as these tasks were dependent on the availability of documented test results from System Testing. D657 – Completion of Mock Conversion 3 has 16 Delayed Tasks, which have contributed to the delay to the Stage Gate 3 vote. State Team Testing has 32 Delayed Tasks due to the delays in System Testing Segment III and dependencies on the availability of Test Scripts for ESS and Miscellaneous RICEFW Items.

Florida PALM Project Decisions and Change Requests

Four new decisions were submitted, three of which were approved:

- Decision 364 – Environment Update for DW/BI Extract, Load, and Transform (ELT) Testing, which establishes a dedicated space for DW/BI ELT testing of both incremental and full data loads from Florida PALM.
- Decision 365 – Solution Design and Training Environment Updates, which updates names and descriptions of existing RICEFW inventory items, adds new RICEFW work units and related Florida PALM Project Schedule tasks, adds and cancels certain configuration items, and schedules environment refreshes for Training development and delivery after the start of UAT Online and UAT Full.
- Decision 366 – Removal of Tasks Associated with ServiceNow Business Owner Quick Guides, which removes Florida PALM Project Schedule tasks associated with the ServiceNow Business Owner Quick Guides.
- Decision 367 – Alignment of UAT Training Materials with UAT Calendar, which aligns the creation of UAT Training Materials with UAT Calendar process steps and removes the preparation of UAT Kick-Off materials.

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

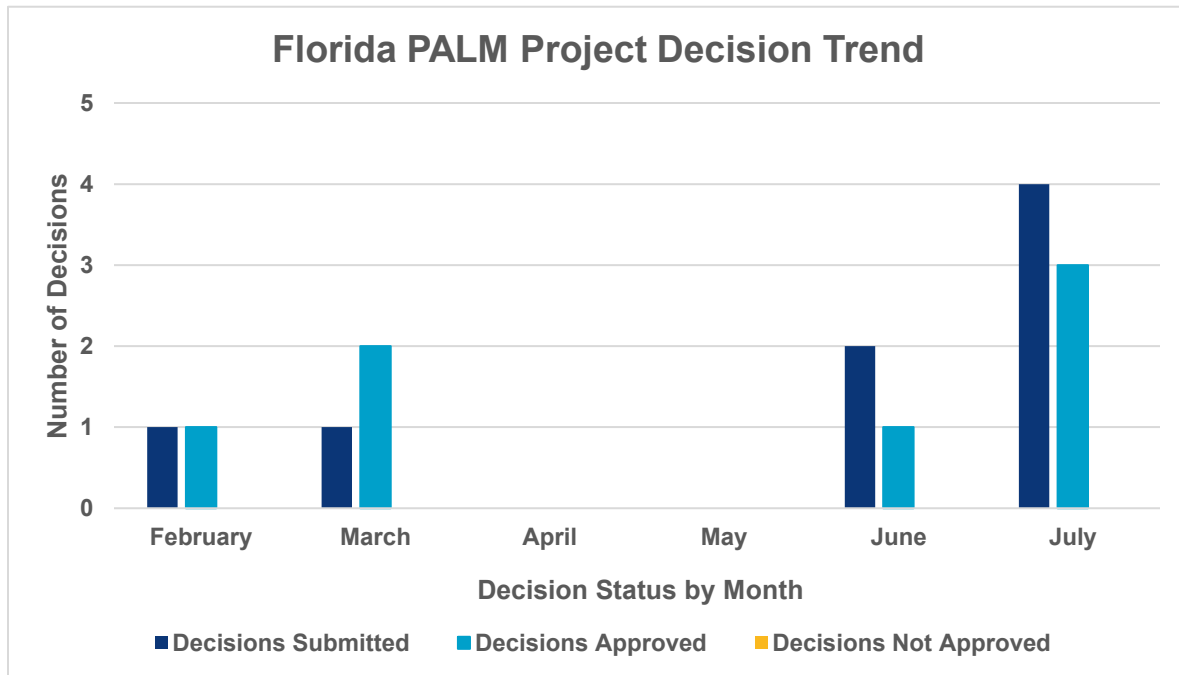


Figure 3: Florida PALM Project Decisions Trend

The Figure below illustrates the PCR trend over the past six months. No PCRs were submitted in July

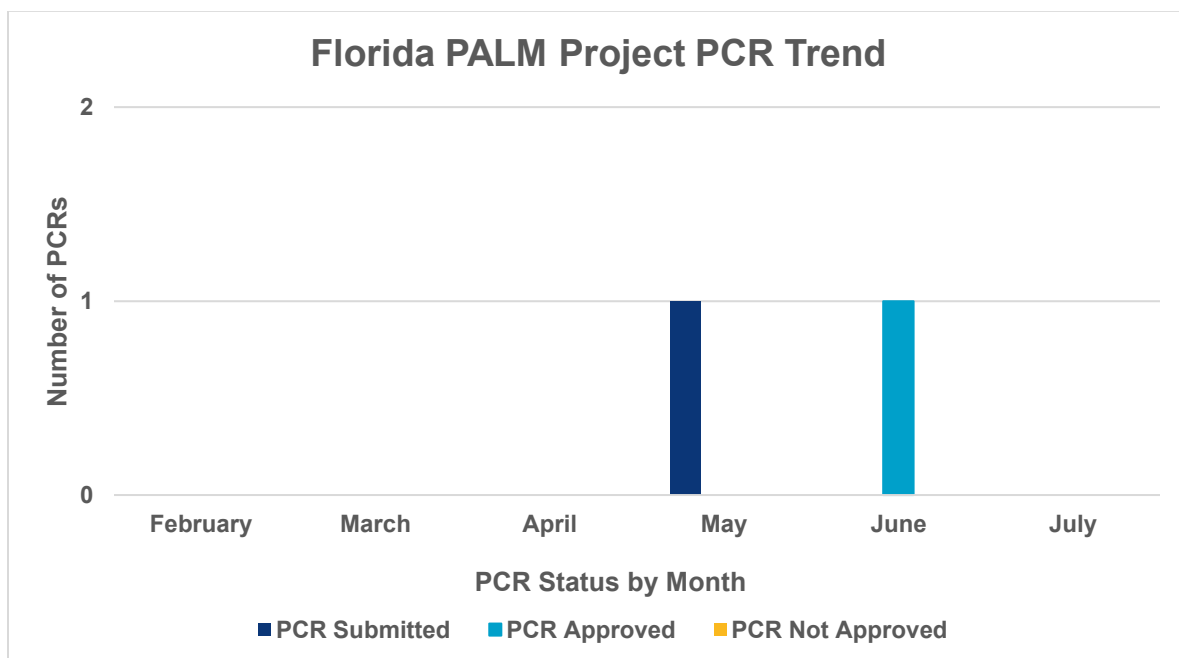


Figure 4: Florida PALM Project PCR Trend

The above Decisions mainly involve adding or removing unnecessary tasks and renaming tasks to better reflect the work being done. Decision 364 specifically updates the environment to enhance testing capabilities and prevent future disruptions during DW/BI System Integration Testing.

Overall Task Completion

The July EOM Florida PALM Project Schedule contains 12,841 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 3: Florida PALM Work Completed and Remaining

Status	Number of Tasks	Percent
Complete	9,478	74%
Future	3,017	23%
Late ¹	275	2%
On Schedule	71	1%
Total	12,841	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 from how the Florida PALM Project Team 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 Team also compared the June and July EOM Florida PALM Project Schedules. July showed 564 more completed tasks than June. The areas with the most completed tasks included:

- D657 – Completion of Mock Conversion 3 with 241 completed tasks.
- 84 Work Product (WP) and I-WP tasks, including WP436 – Security Roles and Matrix and WP402 – Requirements Traceability Matrix.
- Various RW tasks, totaling approximately 60 tasks.

The Florida PALM IV&V Team analyzed tasks in the Florida PALM Project Schedule related to Stage Gate 3 – Ready to Begin UAT and observed that the milestone date has been missed. The delay is partially related to predecessor DW/BI activities, along with delays to the completion of Mock Conversion 3 and the UAT Environment build.

Risks and Issues Trend

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

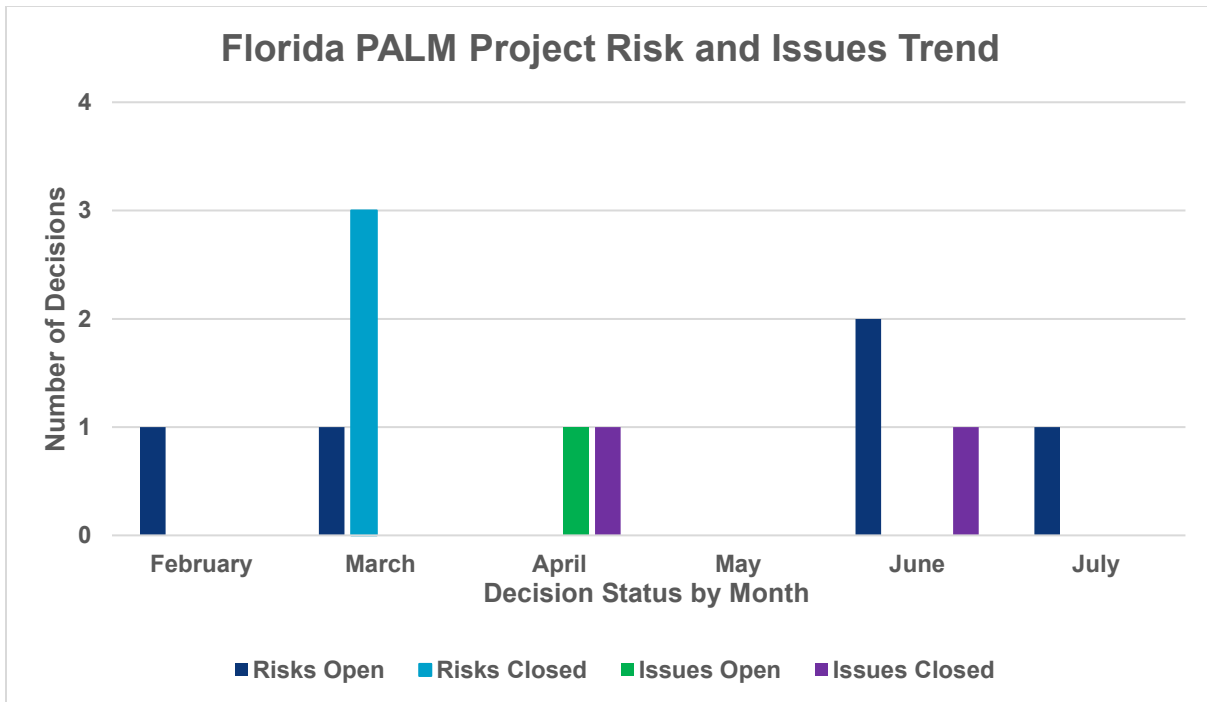
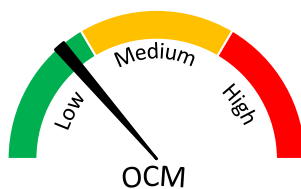


Figure 4: Project Risks and Issues Trend

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

Florida PALM Organizational Change Management

Focus Area Indicator



Trend: No Change

Florida PALM Organizational Change Management Updates

The Florida PALM Agency Readiness Team could consider developing a standardized post-UAT Online survey directed towards individual SMEs to highlight what worked well, areas for improvement, and whether participants' expectations were met.

A holistic assessment of the SMEs would complement the Florida PALM Agency Readiness Team's data at the Agency level, providing stronger insights for decision-making. This information could help the Florida PALM Agency Readiness and Training and Education Development (TED)

teams adjust UAT Process Steps before UAT Full to improve end-user understanding, plan Instructor-Led Training materials based on direct experience and refine post-Go-Live support strategies. This example illustrates how a Change Readiness Assessment can be implemented, and similar efforts can be applied before or after other milestones using the same approach. Elements that may be assessed in a Change Readiness Assessment survey include:

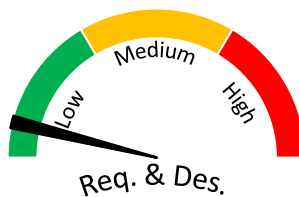
- Desire and willingness to change, measuring levels of support for the change while capturing any associated concerns.
- Individual end user confidence and competence levels.
- Ability and confidence to adopt new skills and new Florida PALM technology.
- Measure engagement levels and support from Agency leadership.
- Evaluate communication effectiveness in preparing Agency staff and corresponding internal information sharing.

Establishing a routine cadence of Change Readiness Assessment surveys to be disseminated during critical Florida PALM Project milestones, coupled with consistent and well-defined KPIs and metrics, can help the Florida PALM Agency Readiness Team to better track Agency trends, needs, and concerns.

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

Florida PALM Requirements and Design

Focus Area Indicator



Trend: No Change

Florida PALM Requirements and Design Updates

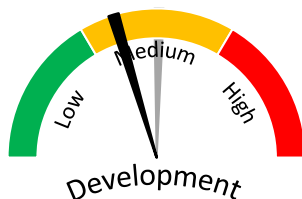
The Florida PALM IV&V Team observed discussions during the EPA weekly meeting about the check printing process for foreign (non-U.S.) addresses, where the Florida PALM Project Team suggested printing foreign addresses using the U.S. address format. Disposition of this functionality will continue to be discussed in August. The volume of this processing is anticipated to be low and is not required for the start of UAT Online, as Agency SMEs can focus on prerequisite steps during initial testing before testing the check printing process for non-U.S. addresses.

As of 7/31/25, 11 of the 14 Miscellaneous RICEFW FDs have been approved. Two remaining FDs (PRE050 and PRC022) are expected to be canceled based on an upcoming PCR. One remaining FD, API134 (Inbound Supplier Certification and Unique Entity Identifier), was recently added and is targeted for approval by 8/20/25.

The Risk Rating for this Focus Area remains Low Risk.

Florida PALM Development

Focus Area Indicator



Trend: Improving

Florida PALM Development Updates

Delays in the remaining Development (five ESS extensions and 14 additional RICEFW Items) are not expected to impact the start of UAT, and the Florida PALM Project Team's proactive identification of SIR resolution timelines is enabling more efficient resource assignment and ensuring SIRs are addressed before they are needed for subsequent testing activities.

ESS Extensions and Miscellaneous RICEFW Items

Five ESS Extensions and 14 additional RICEFW Items remain in Development, though two of the RICEFW Items are expected to be canceled. An additional interface, API134, has been added to the Development scope. This inbound Interface with MFMP will provide supplier certifications and unique entity identifiers. Development is scheduled to begin on 8/21/25 and conclude by 9/17/25.

As of 7/31/25, all five AD documents for the ESS Extensions are trending four to six weeks behind schedule, and one RICEFW Item (GLE011) is trending five weeks behind. Despite these delays, all Items are still expected to be available by the start of Full UAT. The Figure below presents the actual, planned, and projected approval dates for the ESS Extensions and the additional RICEFW Items by month.

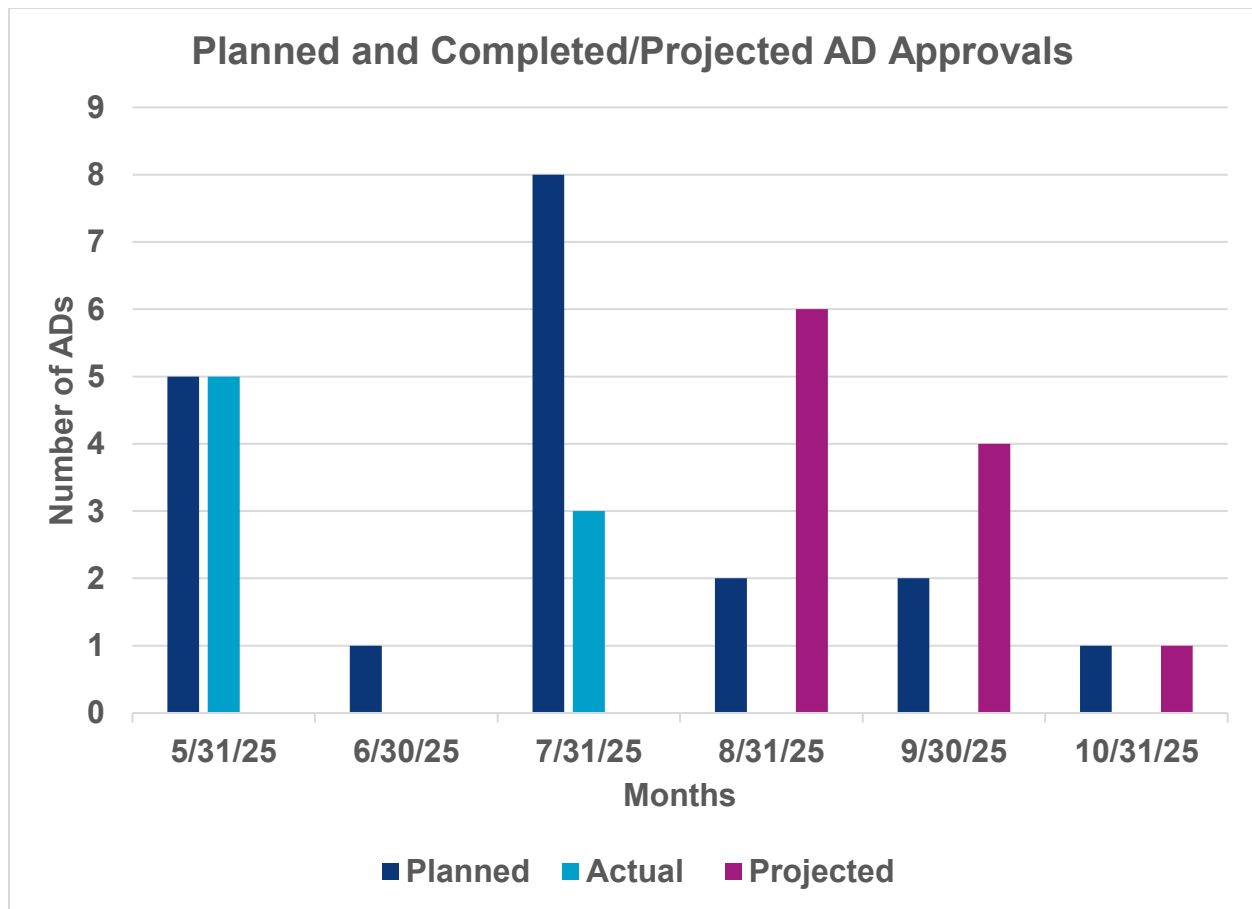


Figure 5: Planned, Actual and Projected AD Document Approvals per Month

SIR Resolutions

Development staff are also supporting SIR resolutions. As of 7/31/25, 665 SIRs remain open, a volume that remained relatively unchanged throughout the month as new SIRs are being identified at the same rate as existing SIRs are being closed. The Figure below shows the weekly count of open SIRs.

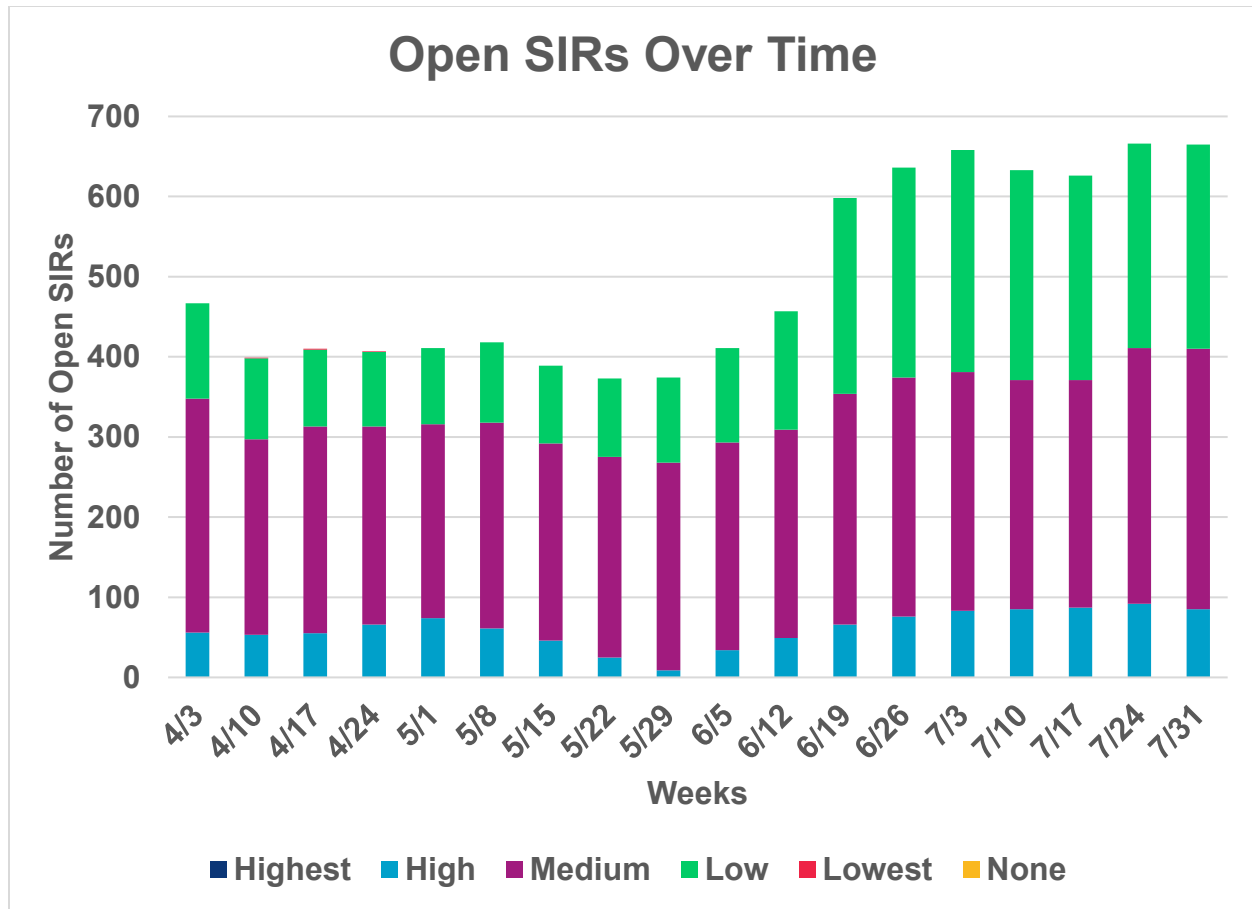


Figure 6: Open SIRs Per Week

The Florida PALM Project Team is reviewing open SIRs to categorize them based on when they need to be resolved. This approach should help coordinate fixes with the Development staff so that resolutions are in place before the affected functionality is needed for testing. As of 7/31/25, 191 SIRs are in the “Fix Before UAT Online” bucket. With an average closure rate of 168 SIRs per week, the SSI Vendor has the capacity to resolve these before 8/11/25, but 105 SIRs still require dispositioning by the Florida PALM Project Team to determine their appropriate bucket. This could affect the total number that must be resolved prior to UAT Online. The Table below shows the disposition of open SIRs as of 7/31/25.

Table 4: Open SIRs by Test Type and Bucket

Bucket	Additional Test	Batch Test	Interface & Integration Test	IVV Testing	Mock Conversion Test	Performance Test	Regression Test	Smoke Test	State Functional Testing	System Test	Unit Test	User Acceptance Test	Grand Total
Confirm Before UAT Online	0	0	0	0	0	0	0	0	1	0	0	0	1
Fix Before UAT Online	4	0	1	7	5	0	0	2	51	117	3	1	191
Fix Before UAT Online - Self Service	0	0	0	0	0	0	0	0	0	116	0	0	116
Fix Before UAT Full	1	2	2	0	0	1	0	2	9	36	7	0	60
Fix Before Parallel Test	2	0	0	0	0	1	0	0	0	1	0	0	4
Interface Cycle 2	0	1	34	1	0	1	0	7	2	42	3	0	91
Mock 2	0	0	0	0	0	0	0	0	0	0	1	0	1
Mock 3	0	0	0	0	5	0	0	0	0	0	0	0	5
Mock 4	0	0	0	0	15	0	0	0	0	0	0	0	15
TBD	1	0	0	0	0	0	0	0	2	2	2	0	7
Known Issue	0	0	0	0	0	0	1	0	3	57	4	0	65
Enhancement	0	0	0	0	0	0	0	0	1	3	0	0	4
Blank	0	4	14	0	1	1	0	8	2	62	13	0	105
Grand Total	8	7	51	8	26	4	1	19	71	436	33	1	665

Development Resources

Development staff are supporting both ongoing work on the five ESS Extensions and 14 additional RICEFW Items, as well as SIR resolutions. While Development staffing has been gradually ramping down since its peak in February 2025, the reduction has been slower than anticipated. Current staffing levels appear sufficient to support both SIR resolution and the remaining Development. The Figure below compares the planned February 2025 staffing levels with the actual and projected staffing in the July 2025 plan.

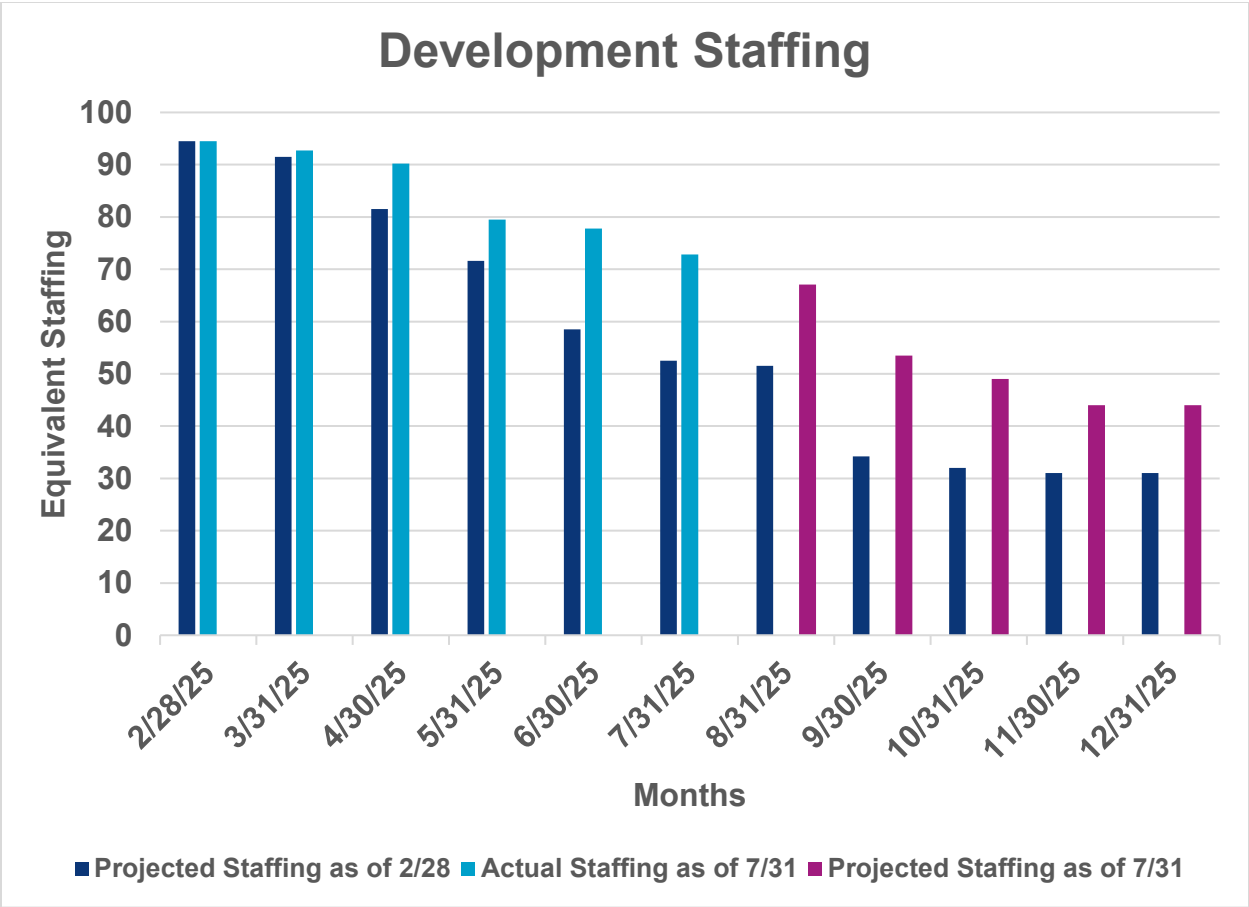
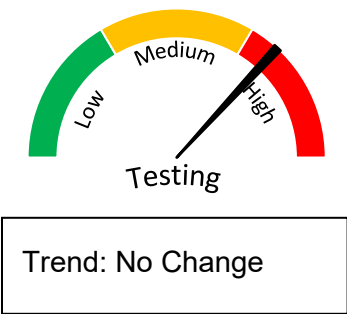


Figure 7: Development Projected and Actual Development Staffing

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

Florida PALM Testing

Focus Area Indicator



Florida PALM Testing Updates

Finding 26 highlights that the SSI Vendor may not meet all Entry Criteria for Stage Gate 3 – Ready to Begin UAT before the planned UAT start date of 8/11/25. Since the ESC must formally approve Stage Gate 3 before UAT can begin, any further delay in approval poses a risk to the UAT timeline.

Additionally, Finding 22 has escalated from a Risk to an Issue, as the SSI Vendor did not meet all System Testing Exit Criteria by the targeted date of 7/25/25, with five High Business Criticality SIRs still unresolved. Approximately 243 (or 8%) of the SSI Vendor's System Test Scripts are also pending review by the State Quality Assurance (QA) Team. Any new SIRs discovered during this review will require evaluation against System Testing Segment III Exit Criteria and potentially necessitate additional fixes and retesting, which could further delay the completion of System Testing.

State Quality Assurance Testing

Since mid-May, the State QA Team has prioritized System Testing activities with approximately 243 System Test Scripts remaining for review. As a result, has not tested any additional Gap Scenarios identified during their review of the SSI Vendor's System Test Scripts. The Florida PALM IV&V Team recommends that, after completing the review of the remaining SSI Vendor Test Scripts, the State QA Team prioritize the 1,014 outstanding Gap Scenarios and execute them in order of criticality to identify issues that could impact the quality of the application delivered to UAT.

State Functional Testing

As of the planned completion date of 7/23/25, the State Functional Team had executed approximately 70% of their 629 planned test scenarios. The General Ledger, Commitment Control, Inter/Intra Unit, and Purchasing modules had the most untested scenarios, partly due to open SIRs and the need to stage testing data. Of the 180 SIRs logged, 66 SIRs remain unresolved, including 10 classified as High Business Criticality. Based on the number of SIRs generated per test scenario executed, the Florida PALM IV&V Team has identified a trend that if the remaining scenarios were to be tested, approximately 70 additional SIRs could be logged.

Unresolved Functional – Financial/Payroll SIRs

In addition to the SIRs considered for System Testing Segment III Exit Criteria, the Florida PALM IV&V Team reviewed unresolved Financial/Payroll SIRs (excluding DW/BI SIRs and those marked as Canceled, Closed, Duplicate, Works as Designed, or Rejected). A total of 263 defects remain unresolved, representing a 26% decrease from June.

The HCM-Payroll/HCM-PR module has the largest number of open SIRs, with 43. Of the 17 unresolved SIRs classified as High Business Criticality, five originated from System Testing, 10 from the State Functional Testing Team, and two from Additional Testing. The FIN-PO module holds the highest concentration of High Business Criticality SIRs, as shown in the Figure below.

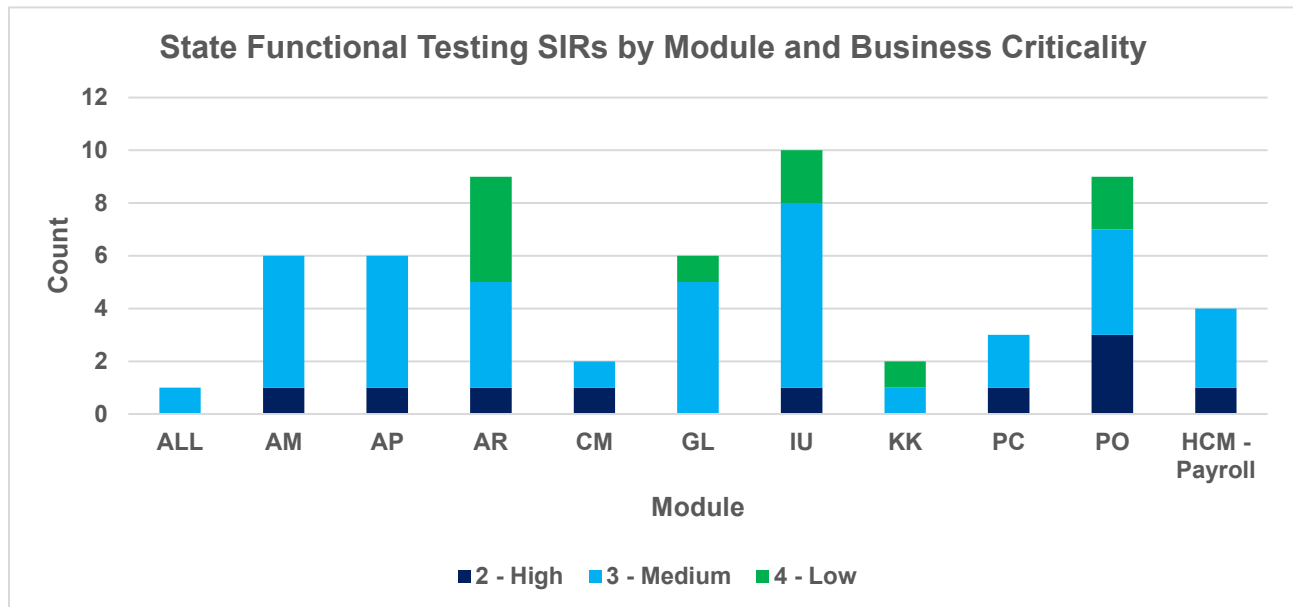


Figure 8: SIR Backlog by Module and Business Criticality (Non-DW/BI)

The Table below shows that Medium-priority SIRs (193) make up the largest share of unresolved SIRs, representing about 73% of the total. While this reflects a decrease from June, the overall high volume may indicate potential issues with system stability and performance, particularly in Payroll and Asset Management.

Table 53: Unresolved State QA, State Functional, and SSI Vendor SIRs by Priority

SIR Priority	June Unresolved Count	July Unresolved Count	Highest Number of Impacted Modules
Highest	0	0	N/A
High	6	6	Purchase Order
Medium	207	193	Payroll, Asset Management, General Ledger
Low	146	64	Accounts Payable, General Ledger
Total	359	263	Purchase Order, Payroll, Asset Management, General Ledger, Accounts Payable

The volume of unresolved low-priority SIRs saw a 56% reduction, suggesting that underlying issues are being effectively addressed. The Florida PALM IV&V Team recommends that the SSI Vendor consider increasing coverage for the Purchase Order, Payroll, Asset Management, and General Ledger modules in the next Regression Testing Event based on the count of SIRs.

The Figure below displays the Known Issues and Enhancement List of SIRs for Testing Services in Functional Financials and Payroll, categorized by Business Criticality and grouped into resolution timeframe “buckets.” As of 7/31/25, five High Business Criticality SIRs are confirmed for resolution before UAT Online. An additional six SIRs are pending Florida PALM Project Team agreement and are shown as “blank” (excludes DW/BI).

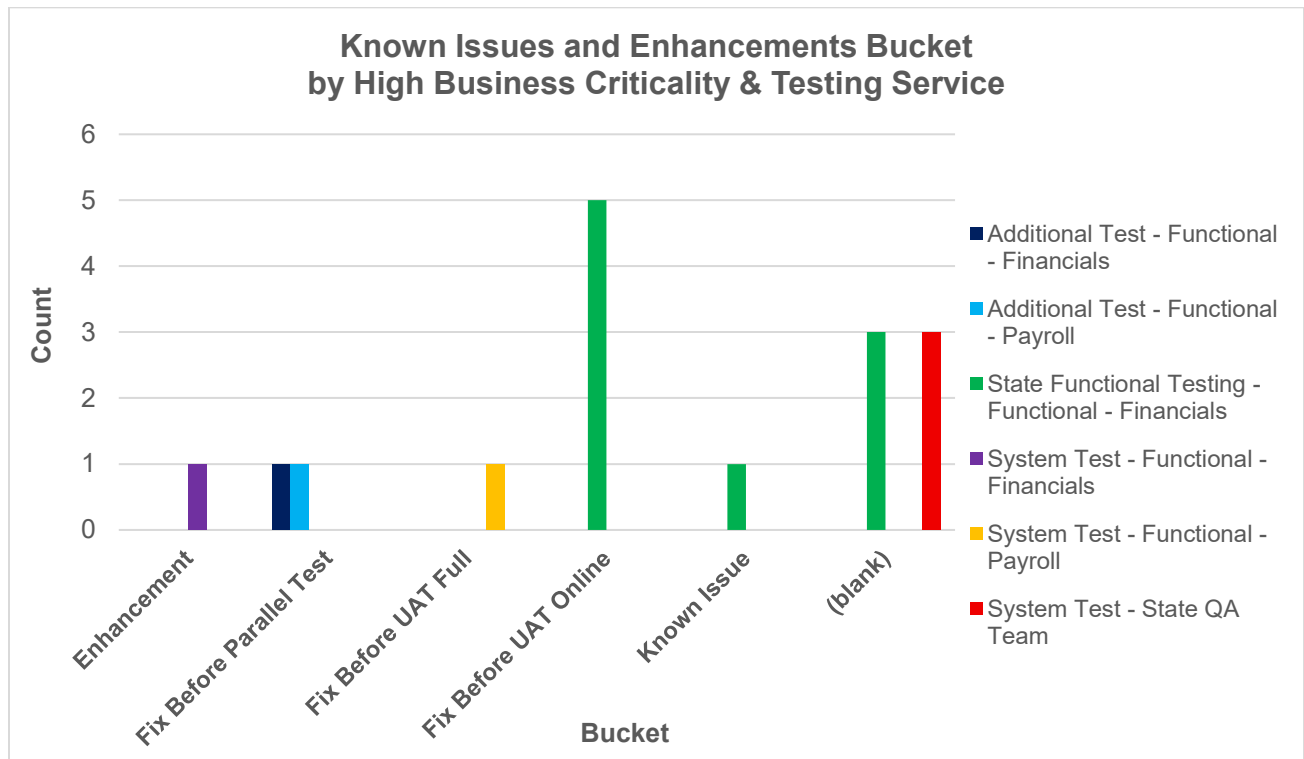
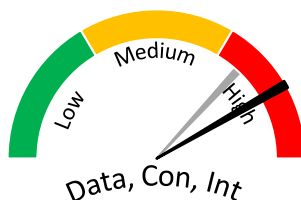


Figure 93: Known Issues and Enhancements Fix Buckets by Testing Service, Business Criticality

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

Florida PALM Data, Conversion, and Interfaces

Focus Area Indicator



Trend: Worsening

Florida PALM Data, Conversion, and Interface Updates

Delays in Conversion activities and an increasing SIR backlog continue to pose risks to UAT readiness and future Interface Testing phases.

Mock Conversion 3

The SSI Vendor began Mock Conversion 3 on 7/2/25, while concurrently working to close outstanding SIRs from Mock Conversion 2. All but two Medium-priority SIRs from Mock Conversion 2 have been resolved and are scheduled for retesting during Mock Conversion 4. The SSI Vendor did not meet the targeted completion date for Mock Conversion 3 of 7/25/25. This delay impacted the Stage Gate 3 vote, as the data produced from Mock Conversion 3 will be used to populate the UAT environment.

As of 7/31/25, all Mock Conversion 3 Test Scripts have been executed except for two (KKC002 and APC004), which will need to be manually converted by the SSI Vendor. Completing these remaining conversions, along with resolving any Critical or High-priority SIRs, is essential to ensuring readiness for the scheduled UAT start on 8/11/25. A total of 55 SIRs have been opened during Mock Conversion 3 (11 High, 41 Medium, and three Low-priority). Of these, 31 have been closed, meaning they have successfully passed re-testing. The remaining 24 unresolved SIRs are detailed in the Table below.

Table 64: Status of SIRs for Mock Conversion 3A

Priority	SIR Status	
	Resolve	Retest
High	0	0
Medium	7	0
Low	1	0
Total	8	0

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.

Table 75: Status of SIRs for Mock Conversion 3B

Priority	SIR Status	
	Resolve	Retest
High	0	0
Medium	3	0
Low	0	0
Total	3	0

General SIRs are tickets in Jira that do not carry a 3A or 3B designation, but are categorized under the Testing Service “Mock Conversion Test.”

Table 86: Status of SIRs for Mock Conversion 3-General

Priority	SIR Status	
	Resolve	Retest
High	1	0
Medium	11	0
Low	1	0
Total	13	0

Ongoing collaboration between the Florida PALM Project Team and the SSI Vendor, along with timely issue resolution, will be critical to minimizing delays.

Interfaces

The backlog of SIRs for Interface Testing Cycle 2 increased as execution progressed. The Table below shows the number of SIRs open, resolved, and active as of 7/31/25 by Priority.

Table 97: Interface Testing SIRs by Priority

Priority	Opened	Resolved	Active
High	35	23	12
Medium	39	26	13
Low	2	2	0
Total	76	51	25

Increased SIR closure rates will be necessary to maintain the testing timeline and ensure readiness for Interface Testing Cycle 3.

Data Warehouse/Business Intelligence

System Testing for DW/BI is targeted for completion by 8/5/25. The comparison below summarizes execution results from the start of July through month-end, showing a notable improvement in the pass rate.

Table 108: Execution Results During Reporting Period

Status	July 1	July 31
Test Cases Planned	144	139
Test Cases Executed	70	135
Pass	36	107
Fail	34	28
% Pass Rate	51%	79.2%

The Figure below illustrates a rising trend in high-business criticality SIRs as test script execution progresses. The SSI Vendor continues to triage and resolve these issues, with a significant portion of the resolved items linked to code and data-related concerns.

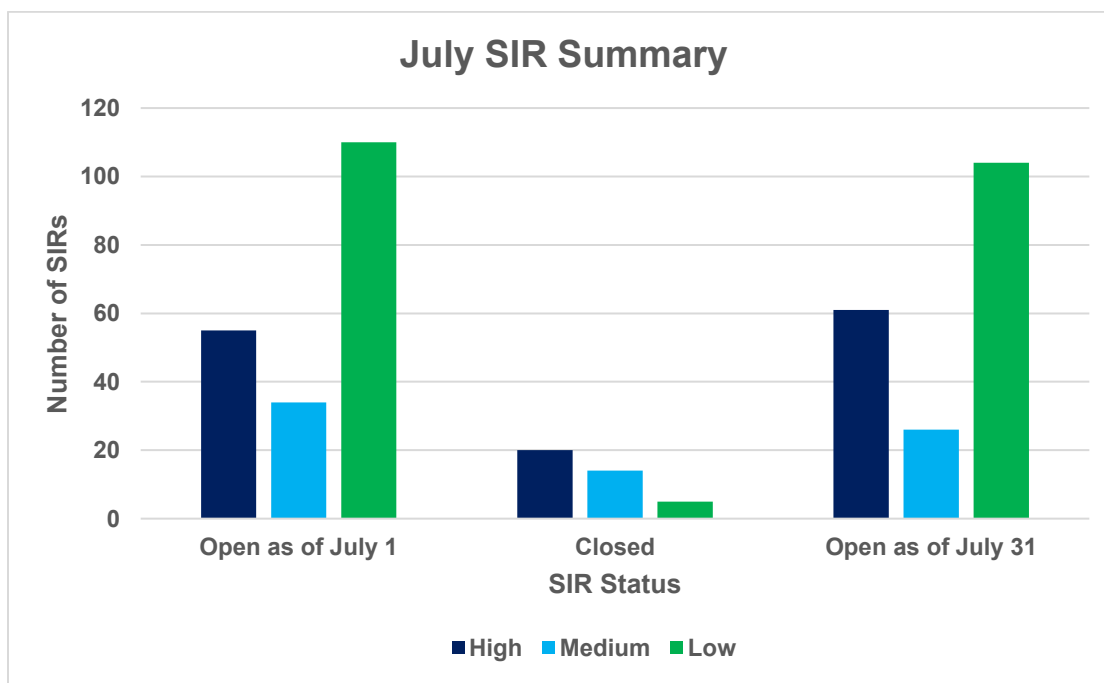


Figure 10: SIR Trends for the Reporting Period

The SSI Vendor is still preparing the UAT DW/BI Environment for UAT Online. The Gap Analysis document, which evaluates Self-Service coverage, is also in progress. Self-Service reports are expected to be completed before UAT begins.

The Risk Rating for this Focus Area remains a High Risk and is worsening from Low Red to Medium Red.

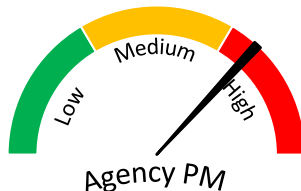
Florida PALM Implementation Readiness Updates

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

Thirteen Agencies reported to the Florida PALM IV&V Team during monthly IV&V interviews that they experienced changes in key personnel in July. Some Agencies are managing multiple vacancies amid broader staffing constraints, including impacts from statewide personnel reductions. While most Agencies report having processes to retain institutional knowledge and adequate backup, some acknowledge that recent or pending staff losses could affect readiness for UAT activities. Mitigation strategies vary, with some Agencies leveraging existing resources, while others are encouraged to formally document resource risks and maintain continuity plans to support ongoing Florida PALM Project needs. Also discussed were internal reorganizations, SME reassignments, and ongoing recruitment to backfill critical roles.

Overall Task Completion

Data was compiled for RW Tasks starting with Task 512, with deadlines prior to 7/31/25, encompassing 87 tasks. Closed tasks were excluded from this analysis.

Table 119: Submission Totals by Florida PALM Project Impact

Task Status	Project Impact Totals			Total
	Direct	Indirect	N/A	
Verified as Complete	32	10	15	57
Submission Incomplete	4	3	16	23
N/A (No Task Rubric for Verification)	1	0	6	7
Total	37	13	37	87

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.

Agency Certification Task Progress

Task 593 – Update Agency Readiness Certification #1 was due 7/18/25 and has been Verified Complete by all 35 Agencies. The Florida PALM IV&V Team recommends that Agencies complete the following Tasks as they are meant to assist them in being prepared for UAT. This will help prevent any gaps or risks in preparation for UAT.

Table 12: RW Tasks for Readiness Certification #1

Task	Critical Operation	Task Planned Start Date	Task Planned End Date	Status
536-B – Create Agency Specific User Acceptance Testing Plan	People	8/19/24	10/11/24	One Agency has not submitted.
536-C – Create Agency Specific User Acceptance Testing Plan	People	12/9/24	5/2/25	One Agency has not submitted, and one Agency submission is incomplete.
560 – Submit Change Analysis Tool	Processes	12/9/24	5/2/25	Three Agencies have not submitted, and two Agency submissions are incomplete.
576 – Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 – Technical Interface Testing	Technology	1/6/25	7/25/25	Five Agencies have not submitted, and one Agency submission is incomplete.
574 – Prepare Documentation for User Acceptance Testing	Processes	6/2/25	8/8/25	Agency submissions are in progress.
591 – Confirm IdP Configuration for Florida PALM	Technology	6/23/25	7/11/25	One Agency has not submitted.

Agency Risk and Issue Analysis

The Florida PALM IV&V Team observed that the overall volume and criticality of the Agency-reported Risks and Issues remained relatively stable in July compared to June. The Table below shows the running total of open Risks and Issues reported by the Agencies each month.

Table 1310: Monthly Counts of Agency Open Risks and Issues

Issues	Feb 25	Mar 25	May 25	Jun2 5	Jul 25
Open Issues	83	83	62	75	75
Critical or High	66	66	50	59	58

Risks	Feb 25	Mar 25	May 25	Jun 25	Jul 25
Open Risks	324	312	260	275	289
Risks Score 6+	155	147	127	140	149

As of 7/31/25, the Florida PALM IV&V Team observed that one open Issue and 40 open Risks were marked as “Confirmed” by the Agencies for their Bimonthly Status Report. Key observations include:

- Nineteen Agencies report persistent vacancies and limited dedicated resources, especially in Finance and Accounting roles and Florida PALM Project support staff. This directly affects Interface Testing, role mapping, and UAT readiness.
- Risks and Issues related to misaligned remediation schedules and enhancements to third-party systems could impact Interface Testing completion, UAT readiness, and the ability to participate in cutover.
- Sixty-four percent of the identified Risks and Issues have been reported with a stable or decreasing trend, indicating progress in mitigation efforts.
- The remaining Risks and Issues require periodic review and assessment by the Agencies, as the status has not been changed for a very long time despite the progress made on the related tasks and activities.

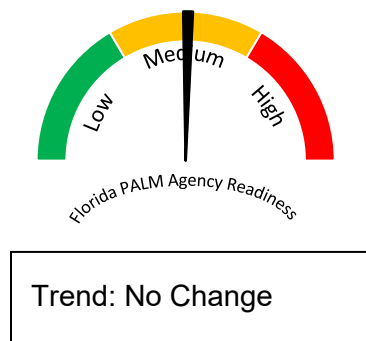
The Florida PALM IV&V Team recommends the following for Agencies:

- Consider filling long-term vacancies with outside staff augmentation such as contractors.
- Engage early with internal compliance officers and fiscal teams to map statutory deadlines to Florida PALM milestones and identify potential points of conflict. Joint transition planning should be facilitated to simulate Year-End Closure (YEC) processes using new workflows and to identify mitigation strategies for timing conflicts.

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

Florida PALM Agency Readiness

Focus Area Indicator



Florida PALM Agency Readiness Updates

The Florida PALM IV&V Team met with Agencies to assess progress on critical readiness areas, including business system remediation, risk and issue management, staffing capacity, knowledge transfer, and Agency Readiness Certification. Key observations include:

- Agencies are working toward completing the required UAT Training Prerequisites. Most Agencies have developed internal tracking mechanisms or will use the Learning Management System (LMS) reporting capabilities to ensure SMEs complete training aligned with their assigned Florida PALM modules and the UAT online schedule.
- Eleven Agencies noted that limited staffing may result in exception requests to address separation of duties conflicts.
- Most Agencies have identified backup SMEs to support UAT in the event of scheduling conflicts or availability issues. Still, some Agencies do not have enough staff with the required institutional knowledge to cover this contingency.
- Agencies shared their internal procedures for defect identification and documentation, which include triaging through a central point of contact before escalating issues further.

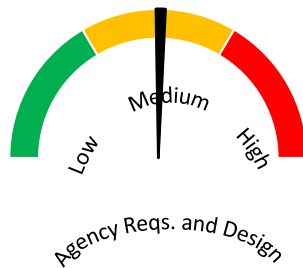
The Florida PALM IV&V Team recommends the following for the Agencies:

- Proactively develop and maintain cross-training plans and knowledge transfer documentation to mitigate the impact of SME turnover or reassignment.
- Participate in cross-Agency collaboration to provide structured forums that reduce duplication of effort and support successful UAT execution. Prioritize in-person training for key SMEs while using virtual options to address broader training needs.

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

Agency Requirements and Design

Focus Area Indicator



Trend: No Change

Agency Requirements and Design Updates

The Florida PALM IV&V Team observed 41 updates in the Florida PALM Knowledge Center Change Catalog. The Figure below depicts the Florida PALM Knowledge Center updates by area impacted.

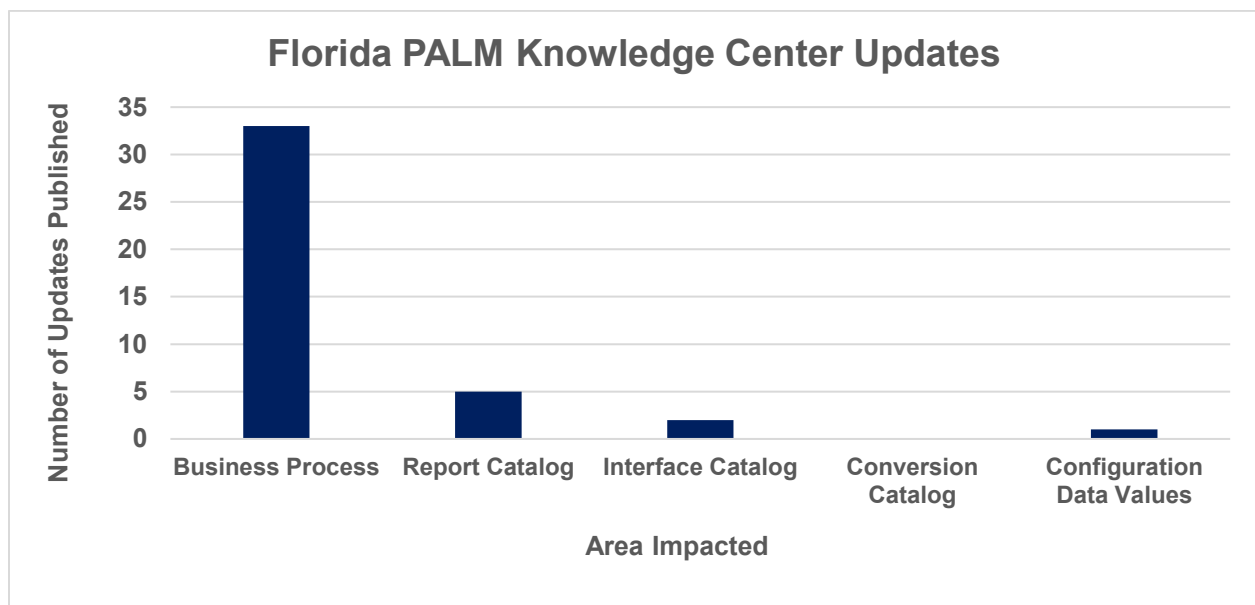


Figure 11: Number of Florida PALM Knowledge Center Updates

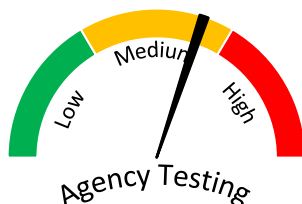
Note: The Figure shows only the number of updates published to existing items in the Florida PALM Knowledge Center; newly added or removed items are excluded.

Most of the published changes in the Florida PALM Knowledge Center related to documentation updates to Business Processes and the Reports Catalog. Agencies have well-established strategies for identifying changes and their impacts, and they did not express any adverse effects.

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

Agency Testing

Focus Area Indicator



Trend: No Change

Agency Testing Updates

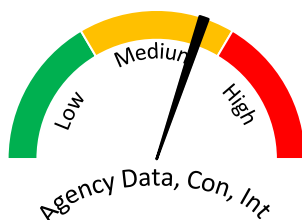
Readiness Coordinators (RCs) and technical SMEs provided support in preparing Interface test files and resolving issues tied to technical integration. While most Agency interfaces were self-reported as built and unit tested, some dependencies remain unresolved, particularly for third-party vendor-managed systems.

The Florida PALM IV&V Team has observed that some Agencies may not be ready for UAT based on incomplete RW Tasks that are past due, reported staffing shortages, and insufficient UAT and Training plans. The Florida PALM IV&V Team will continue to conduct a deeper analysis into Agencies' readiness for UAT.

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

Agency Data, Conversion, and Interfaces

Focus Area Indicator



Trend: No Change

Agency Data, Conversion, and Interfaces Updates

While the Florida PALM IV&V Team observed improvements in Agency participation and Task completion related to Mock 3 Data Conversion, Configuration Workbook updates, and End User Role Mapping when compared to prior months, a few Agencies continue to face challenges

related to data quality, role provisioning, and Interface readiness dependencies involving third-party vendor systems.

Two Agencies recently requested additional Interfaces. While these requests reflect progress in remediating third-party business systems, their timing may affect readiness for Interface Testing Cycle 2 and place added strain on Development and Testing resources during a critical phase of the Florida PALM Project.

The Florida PALM IV&V Team recommends that Agencies relying on third-party vendor systems should confirm and document integration timelines and testing windows. Where delays exist, develop contingency plans with the third-party vendor.

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

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.

IV&V Information Requests

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

Table 1411: 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 1512: 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 1613: 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 1714: 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 1815: 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.