Florida Department of Financial Services

Planning, Accounting, and Ledger Management Project

Independent Verification and Validation

Monthly Assessment Report

November 2025

December 9, 2025

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PUBLIC CONSULTING GROUP

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Executive Summary

The following list summarizes the key items from the Florida PALM IV&V Team Focus Area details in the Monthly Assessment Report for November 2025:

- The overall Florida PALM Project Risk Rating remains a Medium Risk. While Amendment 13 was approved, and additional time will be provided for Interface Testing and User Acceptance Testing (UAT), there is no slack in the Amendment 13 timeline.
- Two New Findings have been opened:
    - Finding 30 documents a preliminary concern that low engagement during Pre-UAT may signal similar low engagement during All Agency UAT, potentially resulting in insufficient testing and issue reporting.
    - Finding 31 documents a preliminary concern related to the unconfirmed testing dates for critical PCard Works Interfaces, which could delay End-to-End Interface Testing and All Agency UAT.
- Finding 27 regarding the preliminary concern that remediation of My Florida Marketplace (MFMP) Interfaces may be delayed has been closed. Remediation of the MFMP Interfaces for Interface Testing Cycle 2 is complete, and testing remains on track to be completed by the targeted completion date of 12/19/25.
- The updated targeted completion date of 12/19/25 for Interface Testing Cycle 2 is at risk of not being met, as documented in Finding 29.
- The Agency Testing Focus Area Risk Rating is worsening from a Medium Yellow to High Yellow. Lack of engagement from some Agency participants in Pre-UAT may be an indicator of lower engagement levels during All Agency UAT, which could impact testing efficacy and issue reporting.

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	The Risk Rating remains a Medium Risk. Amendment 13 was approved, extending the Go Live timeline and providing more time for Interface Testing and UAT. There is no additional slack included in the Amendment 13 timeline, making it critical for the Florida PALM Project to remain on track with its targeted completion dates. A new Finding has been opened to address preliminary concerns about some Agencies' lack of engagement during Pre-UAT, which could lead to insufficient testing and issue reporting during All Agency UAT. Another new Finding documents the uncertainty regarding testing dates for the PCard Works Interfaces. Since most Agencies use PCard Works data, they may be unable to test their customized Speedkeys for these interfaces until after End-to-End Interface Testing has begun. The Finding related to remediation and testing of the MFMP Interfaces has been closed, as remediation is complete and testing is on track to meet the 12/19/2025 target completion date.
Florida PALM Project Management	Medium	Medium	No Change	The Risk Rating remains a Medium Risk. The Florida PALM Project Schedule is currently being revised to reflect the changes in the approved Amendment 13. For this reporting period, the Florida PALM IV&V Team will not provide schedule metrics, as several variables are still in flux and could result in metrics that do not

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				accurately represent the Florida PALM Project's overall status and health. The Florida PALM IV&V Team recommends rebaselining the Florida PALM Project Schedule once all updates have been incorporated to ensure that schedule metrics are both accurate and reliable. This will support informed decision-making and help identify potential risks or opportunities that could impact the critical path.
Florida PALM Organizational Change Management	Low	Low	No Change	The Risk Rating remains a Low Risk. The Florida PALM Project Team's Organizational Change Management (OCM) efforts centered on supporting Advisory Council Agencies during Pre-UAT, preparing for the All Agency UAT scheduled for February, and coordinating stakeholder engagement activities. The Florida PALM Agency Readiness Team maintained ongoing communication with Agencies through regular updates and meetings, including distributing key information such as the Agency Sponsor Scoop and UAT preparedness guidelines. They also shared insights from a recent survey and planned an Agency Sponsor Summit for 12/10/25, all aimed at ensuring Agencies are well-prepared for upcoming UAT activities.
Florida PALM Requirements and Design	NA	NA	NA	Requirements and Design have been completed, and there are no updates to report for this Focus Area.
Florida PALM Development	NA	NA	NA	Development has been completed, and there are no updates to report for this Focus Area.
Florida PALM Testing	Medium	Medium	No Change	The Risk Rating remains a Medium Risk. As of 11/28/25, the Financials UAT environment had approximately 195 open System Investigation Requests (SIRs), including one Critical SIR related to managed file transfer configuration and 24 SIRs classified as High Business Criticality. Of these, 21% are code-related defects, indicating potential system quality issues that may impact available functionality during Pre-UAT.

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				In addition to testing in the UAT environments, the State Functional Team continues testing in the System Testing environments, with November seeing an equal number of SIR closures and new SIRs opened. One hundred ninety open SIRs remain in the System Testing environments, with 12 classified as High Business Criticality and 38% with a defect type of code.
Florida PALM Data, Conversion, and Interfaces	High	High	No Change	*Data* State Data Warehouse (DW)/Business Intelligence (BI) Team System Testing for Self-Service Reports continued to progress. State DW/BI Team Functional Testing for Self-Service Reports will begin on 12/1/25 and is expected to conclude by 12/19/25. *Conversions* Mock Conversion 4 started on 11/7/25 and is scheduled to be completed by 12/12/25. The SSI Vendor reported being two days behind schedule as of 11/28/25. *Interfaces* The Interface SIR backlog increased from 101 in October to 133 in November, primarily due to a decrease in SIR resolution activity. This trend and the need for an increased average weekly pass rate put the updated Interface Testing Cycle 2 completion date of 12/19/25 at risk of not being met, as documented in Finding 29. Additional Interface connections have been added to the Work Product (WP) 441 Interface list, which has a separate testing schedule from December 2025 through April 2026. Some WP441 Interface connections, including three critical for PCard Works, may not have completed testing before the start of All Agency UAT in February 2026.
Florida PALM Implementation Readiness	NA	NA	NA	The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

Florida PALM Agency Focus Areas

Table 2: Florida PALM Agency Focus Areas

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
Agency Project Management	High	High	No Change	The Risk Rating remains a High Risk. For Readiness Workplan (RW) Task completion: The Florida PALM IV&V Team observed that: • Approximately 50% Agencies are behind on RW Task 573-B for end-user role mapping, with three weeks left to complete it. • Two Agencies did not complete RW Task 587-A for Mock Conversion 3 data cleansing, and 1 Agency did not complete RW Task 661 for conversion field mapping, but this is not expected to impact Mock Conversion 4. • Three Agencies revised their submission status for RW Task 574 regarding UAT documentation from 100% to 75% to strengthen their UAT plans in light of the extended due date. • Thirty Agencies have not updated their progress on RW Task 573-B, and 27 have not updated their progress for RW Task 574 since 10/31/25. Timely and accurate reporting by Agencies is crucial for tracking RW Task completion, identifying where Agencies may be encountering challenges, and ensuring readiness for important Florida PALM Project milestones. The Florida PALM IV&V Team also observed that Agencies reported varying preparedness for training their staff in Florida PALM. Some found the prerequisite training materials provided by the Florida PALM Project Team sufficient, while others will need to provide their staff with additional

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				training in areas such as accounting, Payroll, Budgeting, and related tasks.
Florida PALM Agency Readiness	Medium	Medium	No Change	The Risk Rating remains a Medium Risk. Some Agencies have demonstrated limited involvement in cross-Agency collaboration groups, which could result in inconsistent understanding and readiness for the upcoming All Agency UAT. This may impact the quality and consistency of testing and requirement validation. The Florida PALM IV&V Team recommends that Agencies increase participation in cross-Agency collaboration and knowledge-sharing to close gaps, strengthen User Story development, and proactively identify risks. Agencies are adopting varied approaches to All Agency UAT, with some planning for all end-users to test simultaneously due to operational needs or a smaller number of end-users primarily consisting of Subject Matter Experts (SMEs), while others will begin with SMEs to manage workload and build process familiarity before expanding access. As the Florida PALM Project nears All Agency UAT, continued emphasis on staff preparation is critical. Some Agencies view OCM activities as RW fulfillment rather than change management. Staffing shortages and competing priorities pose additional challenges. To address these, Agencies are encouraged to share effective communication plans, Key Performance Indicators (KPIs), and strategies for overcoming resistance to change, and to document lessons learned for broader knowledge sharing.
Agency Requirements and Design	Medium	Medium	No Change	The Risk Rating remains a Medium Risk. The Florida PALM Knowledge Center released fewer updates in November than in October, with approximately

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				one-third focused on UAT materials. Key updates included streamlined financial transaction procedures, improved user role management, refined documentation, removal of outdated codes, and interface adjustments. New articles were published to guide agencies on transaction approvals, asset management, and voucher modifications
				Agencies should review these updates to ensure their systems and processes remain accurate for successful testing and implementation. Although interface changes are not expected to impact Agency Business Systems (ABS), Agencies should confirm that no modifications are needed, as updates may affect ongoing interface testing.
Agency Testing	Medium	Medium	Worsening	The Risk Rating remains a Medium Risk but is worsening from a Medium Yellow to High Yellow. Although many Pre-UAT Agency participants have made it a priority to attend Florida PALM Project-hosted sessions and conduct independent testing, some remain less engaged, which could result in insufficient testing. Finding 30 has been opened to monitor this preliminary concern. Pre-UAT Agencies report mixed understanding of issue tracking and ticket submission processes, though the Florida PALM IV&V Team has observed improvements following the reiteration of expectations from the Florida PALM Project Team. Limited SME availability and similar issues documented in the Know Issues and Enhancements Log (KIEL) have contributed to lower ticket submissions from some of these Agencies.
Agency Data, Conversion, and Interfaces	High	High	No Change	The Risk Rating remains a High Risk. *Data* Agencies are currently using outdated reporting tools and have reported strong

Focus Area	Last Month Indicator	Current Month Indicator	Trend	Update Summary
				preferences to move to Florida PALM's enhanced reporting and ad hoc query capabilities. The Florida PALM IV&V Team advises Agencies to proactively review available report designs and sample results in the Florida PALM Knowledge Center using obfuscated data from System Testing to help validate new business processes and inform the creation of relevant User Stories and test cases for future reporting needs.
				Conversion
				All Agencies except two have completed Mock Conversion 3 cleansing tasks. The two remaining Agencies reported completing approximately 75% of their data cleansing (as noted in Smartsheet), with the outstanding tasks primarily related to General Ledger Conversion or Open Encumbrances. One Agency required assistance from an Enterprise Partner to address historical data issues, and the other Agency experienced some Vendor ID mismatches, which were expected to result in failures. These remaining data cleansing activities are not expected to impact Mock Conversion 4.
				Interfaces
				As of 11/28/2025, 812 of 969 Agency Interface tests have started, and 352 are complete. Some testing is blocked by upstream processing, such as needing the inbound file to be tested before the corresponding outbound file can be evaluated, or because of unresolved SIRs.
Agency Implementation Readiness	NA	NA	NA	The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

New Findings

Finding Type: Preliminary Concern

Impact: Moderate

Probability: Possible

Priority: Medium

Finding Number and Title: Finding 30 – Lack of engagement during Pre-UAT may be an indicator of engagement levels during All Agency UAT, which could lead to insufficient testing and issue reporting.

Finding Description: Advisory Council Agencies were granted access to the Financials UAT environment in Florida PALM for Pre-UAT testing. Pre-UAT is intended to help Agencies prepare themselves and support the preparation efforts of other Agencies ahead of All Agency UAT. Each participating Agency was permitted to register up to three testers, with the guidance that these individuals should be SMEs who possess relevant business process expertise and have availability to prioritize testing during Pre-UAT.

Although every participating Agency has had some level of representation in the Pre-UAT Training sessions, not all testers have joined the Florida PALM Project office hours or performed independent testing between Training sessions. This lack of engagement during Pre-UAT may indicate that Agency testers could remain disengaged during All Agency UAT, potentially resulting in insufficient testing.

Criteria: Pre-UAT has approximately 48 registered testers representing 16 Agencies. Of these:

- One Agency has a registered tester who has not logged in since October.

- Additionally, the same Agency has two registered testers who have missed more than one Pre-UAT Training session and have not attended any office hours.

- Two other Agencies each have a registered tester who has missed more than one Pre-UAT Training session, with one of these testers having attended one of the seven office hours hosted between October and November.

- Another Agency had multiple testers absent from the same Pre-UAT Training session.

- At least three other Agencies consistently show little to no participation in most office hours.

- Twenty-two testers did not respond to the second survey sent by the Florida PALM Agency Readiness Team in November.

Cause: Several Pre-UAT Agencies have reported that competing work priorities and daily operational duties make it difficult to allocate time for testing outside of the scheduled Pre-UAT Training sessions. Additionally, some Pre-UAT Agencies have indicated that a limited understanding of Florida PALM or challenges in comprehending the provided materials have hindered their ability to perform thorough testing.

Effect: The involvement and engagement of participating Agencies during Pre-UAT serve as a useful predictor of what the Florida PALM Project can expect during All Agency UAT. Pre-UAT has revealed that some Agencies and testers are not fully engaged and participating in the Florida PALM testing process. If Agencies do not prioritize testing during All Agency UAT, their testing

may be insufficient or incomplete. This could potentially impact the All Agency UAT timeline or require individual Agencies to develop workarounds if their business processes are not properly validated before Florida PALM goes live.

Recommendations: For the remainder of Pre-UAT, participating Agency testers could consider the following:

1. Prepare and document detailed examples of transactions, specific error messages, and related issues prior to scheduled office hours to facilitate more focused and effective discussions.

2. Block time on calendars to collaborate with other testers to review testing outcomes, submit tickets, and document any questions for the Florida PALM Project Team.

All Agencies could consider implementing the following Florida PALM IV&V Team recommendations either before or during All Agency UAT:

1. Schedule dedicated group planning sessions with testers to collaborate on test script drafting and assignments, review relevant documentation and the ticket submission process, and develop internal triage processes.

2. Collaborate with Agency leadership and/or other staff to temporarily reassign operational responsibilities so that testers can dedicate sufficient time and attention to testing activities.

Finding Type: Preliminary Concern

Impact: Significant

Probability: Possible

Priority: Medium

Finding Number and Title: Finding 31 – Unconfirmed testing dates for the PCard Works Interfaces may delay completion of testing and potentially impact End-to-End Interface Testing and All Agency UAT.

Finding Description: As of 11/28/25, testing has not started on three PCard Works Interfaces that provide critical functionality for a majority of the Agencies. These Interfaces are included in scope for WP441, which is scheduled to be tested between December 2025 and April 2026. The PCard Works Vendor has not yet confirmed specific testing dates for these Interfaces and has had minimal engagement with the Florida PALM Project Team. As a result, these Interfaces may not be ready for the start of End-to-End Interface Testing in February 2026.

Additionally, multiple Agencies have expressed concerns about the unconfirmed testing dates for the PCard Works Interfaces and the availability of PCard Works data. Current limitations in the data provided by the PCard Works Interfaces will require Agencies to create specific Speedkeys, but they are unable to test these until the Interfaces are available.

Criteria: The planned finish date for Interfaces in scope for WP441, including PCard Works, is April 2026, which is two months after the expected start of End-to-End Interface Testing and All Agency UAT in February 2026. With planned execution dates for the PCard Works Interfaces not confirmed as of 11/28/25, these Interfaces may not be completed within the testing timeframe for

WP441, and there is no slack in the current End-to-End Interface Testing and All Agency UAT timeline to accommodate delays.

Cause: Although the Florida PALM Project Team has attempted to engage with the PCard Works Vendor, the Vendor has not yet confirmed dates for when the PCard Works Interfaces will be ready for testing.

Effect: If remediation and testing of the PCard Works Interfaces are delayed, Agencies may be unable to test with PCard data and the required Speedkeys. This could potentially impact the timeline for End-to-End Interface Testing and All Agency UAT.

Recommendations: The Florida PALM Project Team could consider implementing the following Florida PALM IV&V Team recommendations:

1. Continue working with the PCard Works Vendor to establish and confirm specific testing dates for the PCard Works Interfaces.

2. Assess potential impacts on downstream testing phases and determine the latest date by which testing for the PCard Works Interfaces must be completed.

3. Provide timely and appropriate status updates regarding the PCard Works Interfaces to all Agencies as information becomes available.

Open Findings

Finding Number and Title: Finding 28 – The volume and type of SIRs identified in the UAT environment may impact the availability of some functions during Pre-UAT testing.

Date Opened: 9/30/25
Finding Description: Since the State Functional Team's Testing began in the UAT environment on 9/9/25, a total of 167 SIRs has been logged, including 2 Critical, 39 High, and 126 Medium Business Criticality SIRs. This does not include SIRs related to items other than defects, such as service requests. The State Functional Team has averaged approximately 55 new SIRs opened per week, which indicates potential system quality issues that could impact the availability of some functionality at the start of Pre-UAT. Careful management of the testing scope and timing by the Florida PALM Project Team could help reduce the potential impact these SIRs on Pre-UAT. The Florida PALM IV&V Team also observed that approximately 45 of the SIRs show a misalignment between the initially assigned Defect Type and the actual root cause.

Current Impact: Significant	**Previous Impact:** Significant	**Trend:** No Change
Current Probability: Likely	**Previous Probability:** Likely	**Trend:** No Change
Current Priority: High	**Previous Priority:** High	**Trend:** No Change

Status Update: The PALM IV&V Team reviewed Financial UAT SIRs across all defect categories, excluding monitoring alerts/events and data issues tied to inbound interface activity. The trend indicates that new SIRs are being opened faster than they are being closed, causing the backlog to grow. As of 11/28/25, there are approximately 197 open Financial UAT SIRs. Of these, 24 are considered High Business Criticality, which could continue to impact the functionality available for testing during Pre-UAT.

Recommendation #1: Communicate known issues from open SIRs and the related impacted functionality to testers before they receive access to the UAT environment. Continue to share updates as additional issues or impacts are identified throughout UAT testing.

Status: In Process

Update: During the SIR triage process, the Florida PALM Project Team determines which open SIRs should be added to the Known Issues and Enhancements List for Pre-UAT. On two occasions in November, manual updates to this list were delayed by up to nine days. These delays may indicate that manually maintaining the list may not be practical during All Agency UAT, and could result in delayed communication of new or resolved issues to Agencies.

Recommendation #2: Conduct root cause analysis to determine whether process improvements are needed in areas such as code promotion, environment setup, or test coverage.

Status: In Process

Update: The Florida PALM Project Team continues to collaborate with the SSI Vendor to document enhancements for the migration process resulting from the discussions during the October Review of UAT Issues – Improvement Opportunities and Agency UAT Readiness meetings.

Recommendation #3: Consider assigning lead resource(s) to oversee code deployment across environments to reduce discrepancies between the lower and higher environments.

Status: Complete

Update: This recommendation has been completed, and the Florida PALM IV&V Team has no further updates to report.

Recommendation #4: Consider additional SIR defect type classifications and root cause alignment to isolate SIRs, such as code deployment items, so that needed process improvements can be identified swiftly and easily. This supports efficient resolution and resource allocation and helps distinguish between logic errors and environment deployment/migration issues.

Status: In Process

Update: The Florida PALM IV&V Team has observed that some closed SIRs do not have a root cause code assigned. The Florida PALM IV&V Team will continue to monitor root cause assignment, and if additional codes are developed to track root cause for future SIRs.

Finding Number and Title: Finding 29 – The completion date of 10/24/25 for Interface Testing Cycle 2 is at risk of not being met.

Date Opened: 9/30/25		
Finding Description: Interface Testing Cycle 2 is scheduled for completion by 10/24/25. Progress is behind schedule, and the Florida PALM Project Team is unlikely to meet the targeted completion date based on current test execution trends. Interface Testing Cycle 2 builds on Connectivity Testing and focuses on validating file exchanges, ensuring Florida PALM can process files from Interface Partners and vice versa.		
Current Impact: Moderate	**Previous Impact:** Moderate	**Trend:** No Change
Current Probability: Probable	**Previous Probability:** Probable	**Trend:** No Change
Current Priority: High	**Previous Priority:** High	**Trend:** No Change

Status Update: To meet the exit criteria for Interface Testing Cycle 2, a total of 431 Interfaces must be successfully passed by the target completion date of 12/19/25. As of 11/28/25, 311 Interfaces have been passed, leaving 120 Interfaces remaining to be completed over the next three weeks. This requires an average of 40 Interfaces to be passed each week. The Florida PALM IV&V Team observed that the average weekly pass rate in November was five Interfaces, with 19 total new passes recorded. Based on this pace, the updated targeted completion date of 12/19/25 for Interface Testing Cycle 2 is at risk of not being met.

Recommendation #1: Prioritize resolution of High-priority SIRs and other blockers to ensure critical functionality is available for testing and to minimize delays.

Status: In Process

Update: High-priority SIRs rose from 21 to 34 over the month of November. Execution of 13 Interfaces is delayed due to limitations in Oracle's CSV handling. The SSI Vendor is tracking this as a bug, has raised a ticket with Oracle, and expects a response by mid-December. Execution could potentially be delayed until mid-to-late January. These issues put the 12/19/25 completion date for Interface Testing Cycle 2 at risk.

Recommendation #2: Trace root cause issues across all entities to identify bottlenecks and determine where targeted support or coordinated improvements may help solve the issues and keep the testing moving.

Status: No Change

Update: No documentation has been found to indicate that a root cause analysis has been conducted to identify trends that may impact multiple Interfaces. The root cause for individual SIRs continues to be documented in Service Now (SNow).

Closed Findings

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

Date Opened: 7/31/25

Date Closed: 11/28/25

Rationale for Closing: Although the amendment for Ariba On-Demand has not yet been executed, remediation of the MFMP Interfaces for Interface Testing Cycle 2 is complete, and testing remains on track to be completed by the targeted completion date of 12/19/25.

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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 two open Findings and 16 closed Findings.
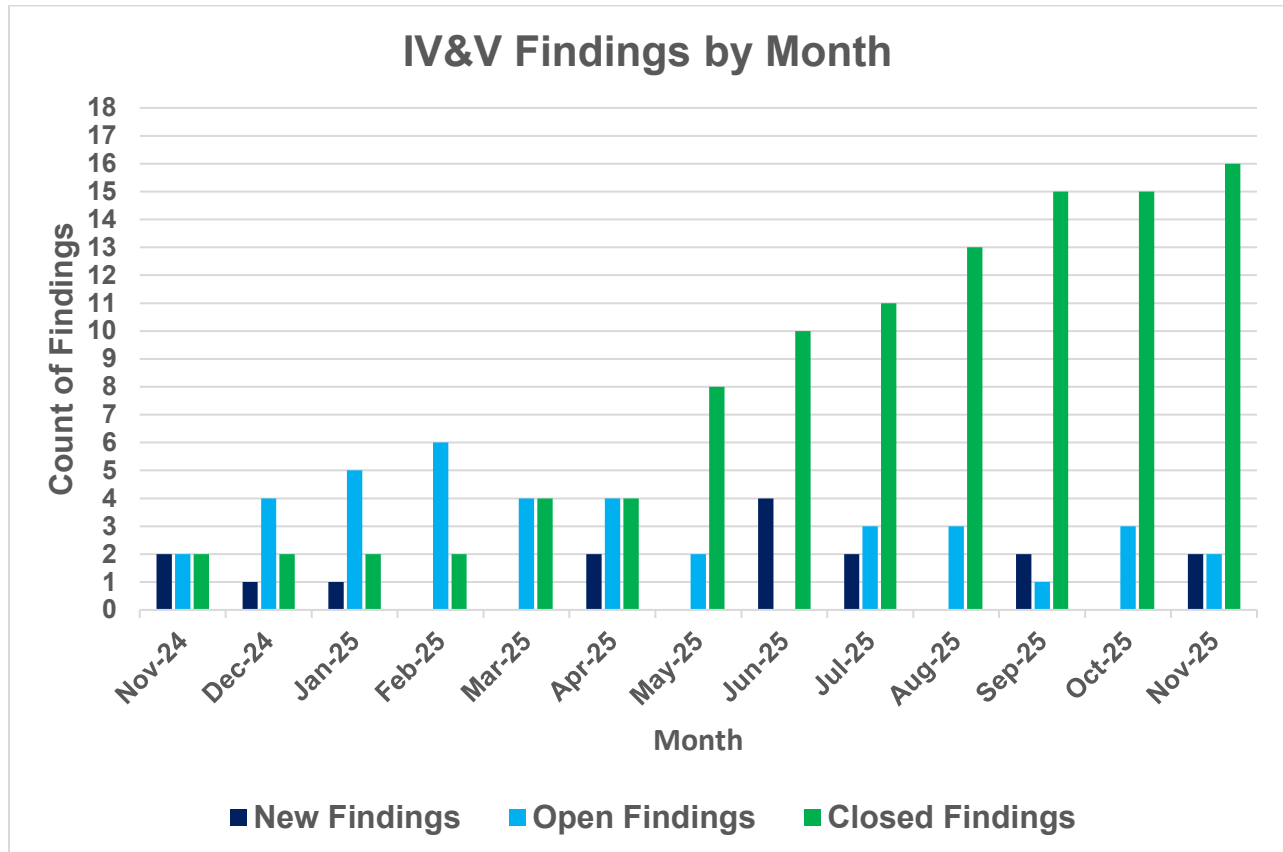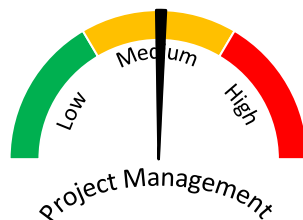

Figure 1: Florida PALM IV&V Findings by Month

Florida PALM Project Focus Area Updates

Florida PALM Project Management

Focus Area Indicator[1]

Trend: No Change

Florida PALM Project Management Updates

Overall Schedule Metrics

Because the Florida PALM Project Schedule is currently being updated to incorporate changes from the approved Amendment 13, the Florida PALM IV&V Team will not include schedule metrics in this report. Providing metrics before these updates are finalized may give an inaccurate picture of the Florida PALM Project's overall health and status. Once the revised Florida PALM Project Schedule is finalized, the Florida PALM IV&V Team will resume tracking and reporting on key indicators, including the Schedule Performance Indicator (SPI), delayed tasks, task completion status, and related analyses. This approach is intended to help the Florida PALM Project Team proactively identify and address any potential issues. Since Amendment 13 does not introduce additional slack to the Florida PALM Project's critical path, it remains crucial to maintain adherence to the Florida PALM Project Schedule for continued success.

Similar to Amendment 12, the Florida PALM IV&V Team recommends that the Florida PALM Project Team rebaseline the entire Florida PALM Project Schedule once the Amendment 13 updates are complete. Establishing a new baseline will help the Florida PALM Project Team track milestones and key metrics, such as Schedule Variance and SPI, against the revised timeline. This approach enables more accurate progress monitoring, better forecasting of costs and timelines, earlier identification of delays or resource issues, and clearer communication with stakeholders about status and expectations.

Decisions

There were two Florida PALM Project Decisions approved in November.

- Decision 374 – Removal of Test Scripts from D661. This Decision approves the removal of 49 Test Scripts from the original set of 141 for D661 – Completion of System Test DW/BI. These Test Scripts were canceled because they were either duplicates or did not

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

represent valid scenarios. During testing, new valid Test Scripts were also added to address updated requirements, including those related to security roles, custom tables, and enhancements to Self-Service reporting. The revised D661 will incorporate these updates to ensure thorough testing coverage of all DW/BI functions.

- Decision 376 – GLI088 Transparency Florida Interface and Related Task Updates. This Decision proposes moving the planned testing activities for the GLI088-S Transparency Florida Interfaces, as well as eight Agency Interface connections, from D663 to WP411, which covers the completion of additional Interface testing. Additionally, the Decision recommends canceling Test Scripts from D652 – Completion of System Test Segment I and aligning Information Warehouse (IW) migration tasks with the revised Go-Live timeline. These changes are intended to improve scheduling accuracy, ensure deliverables meet acceptance criteria, and accurately represent the work being performed.

Risks and Issues

No new Florida PALM Project Risks or Issues were opened, and one Issue was closed in November. Issue #35 regarding the delay to the start of Online UAT was closed on 11/24/2025, following the approval of Amendment 13. The trend for Risk #5, which concerns the timing and effectiveness of information sharing between Enterprise Partners, Agencies, and the Florida PALM Project Team, was changed from stable to increasing, as both the Agencies and the Florida PALM Project Team have raised concerns that the PCard Works Vendor has not yet implemented the required file layout changes and started testing the PCard Works Interfaces, which could impact End-to-End Interface Testing and All Agency UAT.

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

Florida PALM Organizational Change Management

Focus Area Indicator
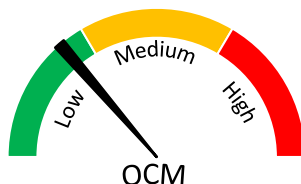
Trend: No Change

Florida PALM Organizational Change Management Updates

The Florida PALM Project Team's OCM efforts in November focused on supporting Advisory Council Agencies during Pre-UAT, preparing for All Agency UAT in February, and coordinating upcoming stakeholder engagements. The Florida PALM Agency Readiness Team maintains active communication through regular touchpoints, Thursday Task Talks, and other channels to help guide Agencies with their readiness activities. The Florida PALM Agency Readiness Team also distributed several communications, including the Agency Sponsor Scoop, updates on UAT

preparedness and process steps, and observations from the "Managing Resources in Florida PALM" survey for Weeks 3-5. Additionally, an Agency Sponsor Summit is scheduled for 12/10/25. These initiatives provide comprehensive stakeholder engagement as Agencies prepare for All Agency UAT.

During the monthly meeting with the Florida PALM Agency Readiness Team, the Florida PALM IV&V Team shared the following recommendations for consideration:

- Organize breakout sessions and pre-work groups for the Agency Sponsor Summit based on topics identified by Agencies in advance. These topics could include UAT preparedness, OCM strategies, Interface testing issues and challenges, etc.
- Summarize the progress of the Florida PALM Project from its inception to the present and restate the responsibilities of the Agency Change Champion Networks (CCNs) in supporting OCM within their Agencies.
- Establish regular CCN Town Hall meetings as the Florida PALM Project moves toward Go-Live, with increased frequency during All Agency UAT and other major milestones.

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

Florida PALM Requirements and Design

Florida PALM Requirements and Design Updates

Requirement and Design efforts for the Florida PALM Project are complete at this time, and the Florida PALM IV&V does not have any updates to report.
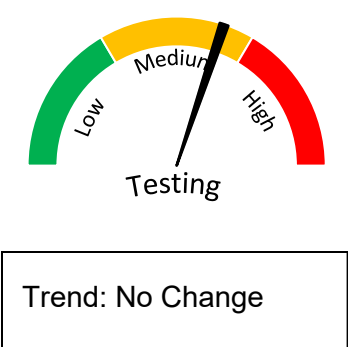
Florida PALM Development

Florida PALM Development Updates

Development efforts for the Florida PALM Project are complete at this time, and the Florida PALM IV&V Team does not have any updates to report.

Florida PALM Testing

Focus Area Indicator

Trend: No Change

Florida PALM Testing Updates

The Florida PALM Project continues to make consistent progress in all phases of testing. The Figure below shows monthly trends in SIR activity, tracking both newly opened and closed SIRs since October 2024. This data excludes SIRs related to inbound Interface data and SNow monitoring alerts/events. Generally, the number of SIRs being closed kept pace with the number of new SIRs being opened, except in June, when there was a sharp rise in newly opened SIRs. This led to an increase in the overall backlog of SIRs. Following this spike, the rates of opening and closing SIRs stabilized again.
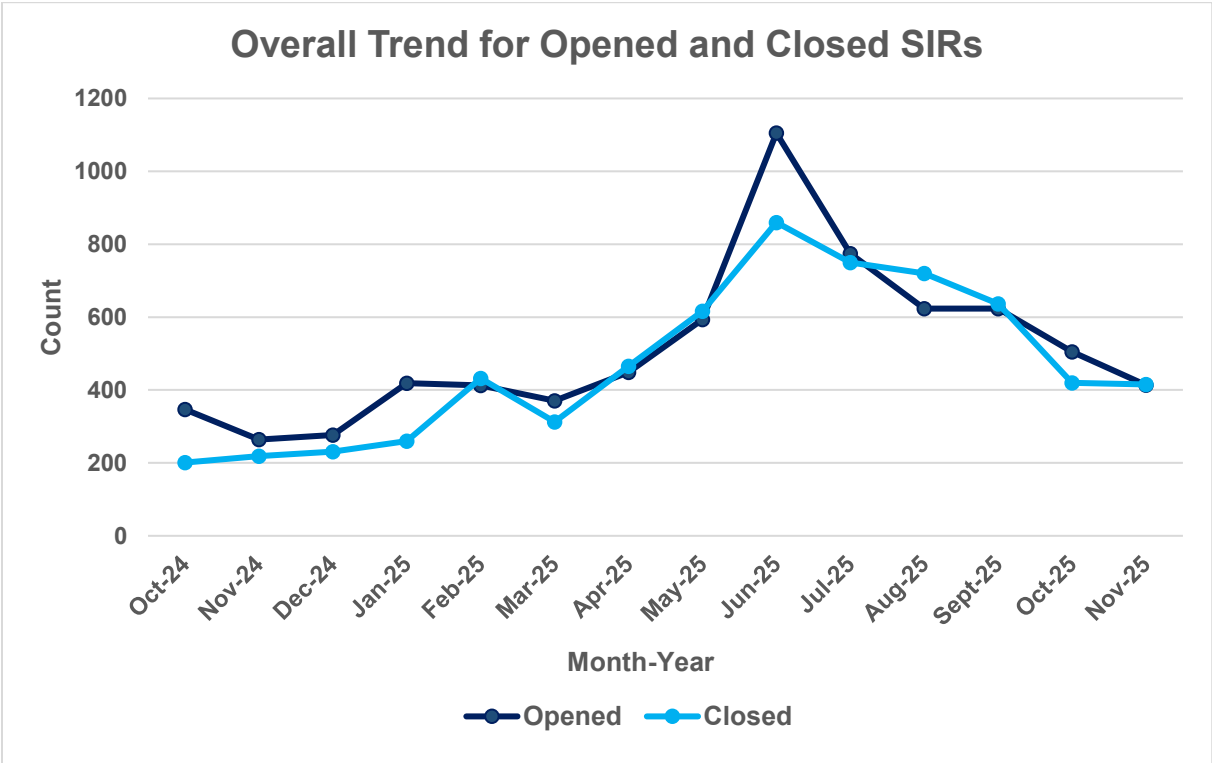

Figure 2: Overall Trend for Opened and Closed SIRs

As of 11/30/25, there are approximately 631 open SIRs across all testing areas, as demonstrated in the Figure below. Approximately 40% of these open SIRs are related to coding defects. Although this is expected for a large-scale project, it remains an important measure of Florida PALM's overall system maturity. The number of code-related SIRs may indicate that several components still need additional stabilization. This is particularly important with the upcoming All Agency UAT in February, when the number of newly identified SIRs is likely to rise due to a larger group of testers, expanded test coverage, and cross-functional workflows on a large scale.
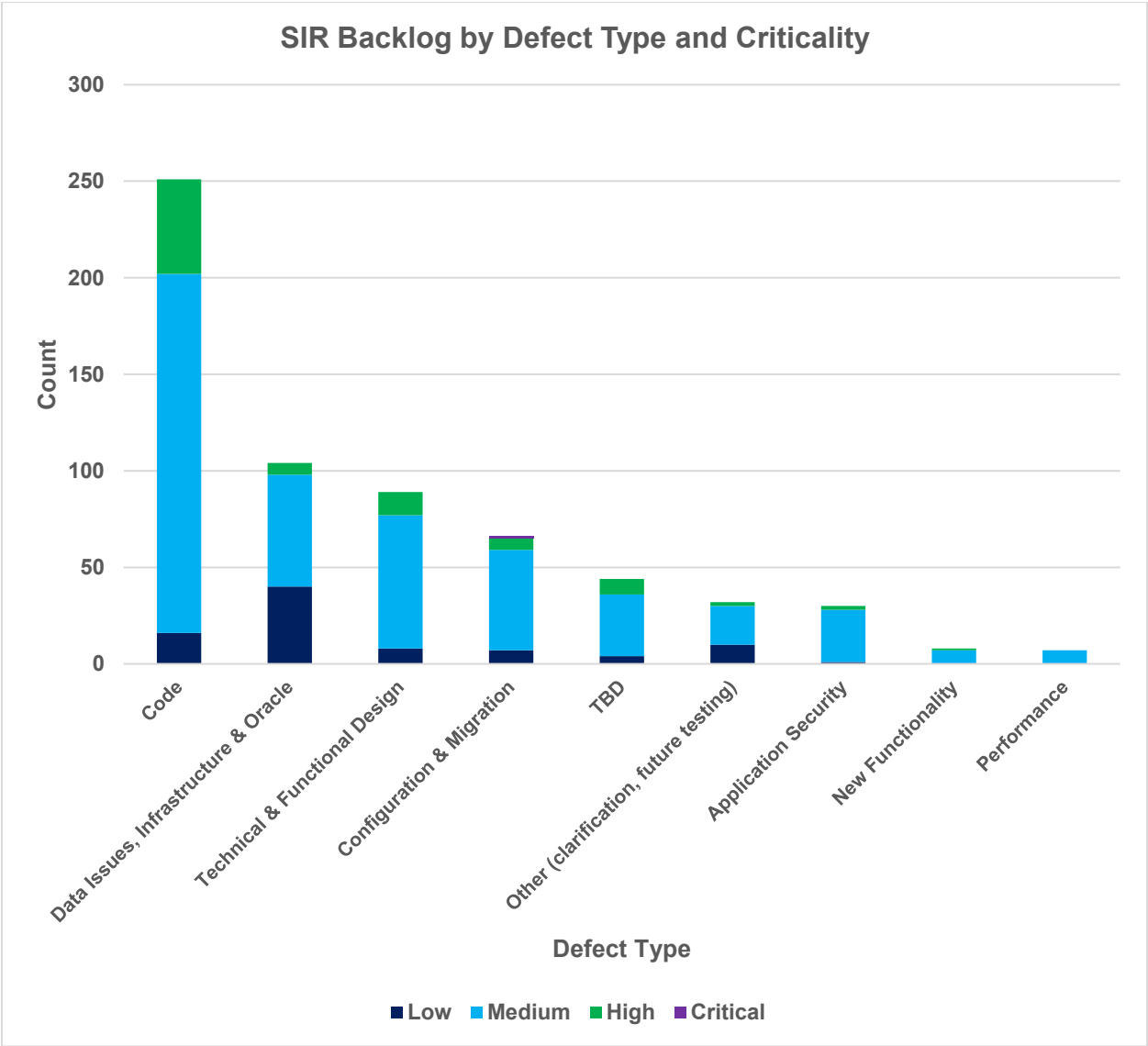

Figure 3: SIR Backlog by Defect Type

Achieving UAT and implementation readiness will rely on maintaining a steady pace of SIR resolution, conducting thorough regression testing, and ensuring the Development staff can address both existing and newly identified SIRs. The SSI Vendor Staffing Plan as of 11/28/25 shows a planned reduction of 27.5% across Functional and Technical staffing between December 2025 and January 2026. The Table below shows the specific planned reductions between November 2025 and February 2026.

Table 3: SSI Vendor Staffing

Category	11/30/25	12/31/25	1/31/26	2/28/26
Functional Staff	85.1	85	66	63
Technical Staff	104	100.3	68.4	64.6
Total Staff	189.1	185.3	134.4	127.6
% Change (Functional)		-0.12%	-22.35%	-4.55%
% Change (Technical)		-3.56%	-31.80%	-5.56%
% Change (Total)		-2.01%	-27.47%	-5.06%

During a weekly status meeting, the Florida PALM Project Team indicated that the SSI Vendor Staffing plan is being reevaluated based on the approved Amendment 13 and the updated timeline for All Agency UAT.

Financial UAT Environment Testing

The Financial UAT SIR activity in November reflects SIRs opened by both the State Functional Team and Agency testers participating in Pre-UAT. The Figure below is inclusive of all defect types except data issues associated with inbound Interfaces and monitoring alerts/events. The overall Financial UAT closure rate sits at 64%.
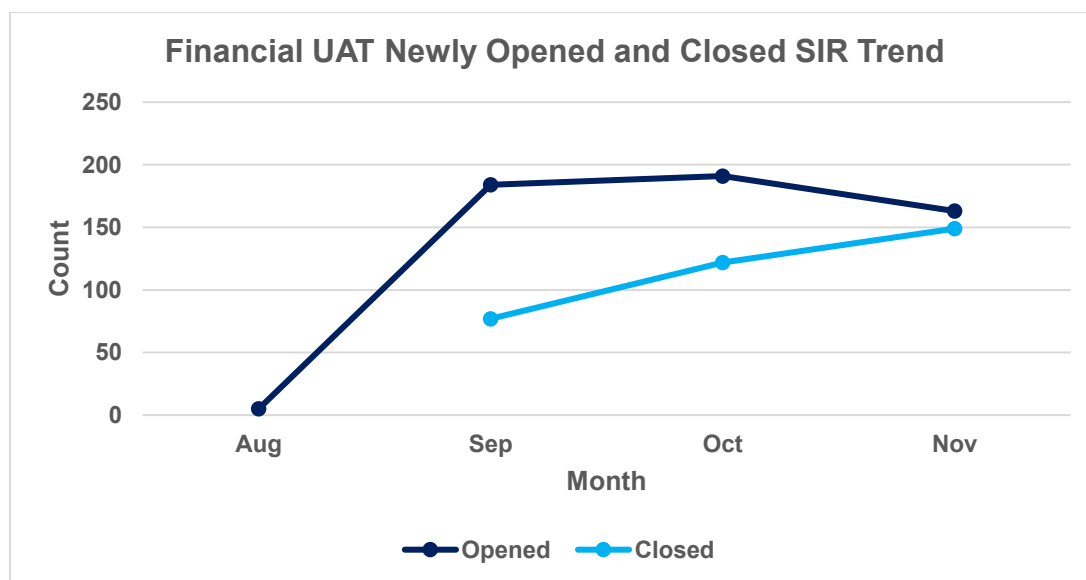
Figure 4: Financials UAT Newly Opened and Closed SIR Trends

The Figure below provides a comprehensive view of all SIRs for Financials UAT Environment testing, categorized by Defect Type and Business Criticality (excluding data issues for inbound Interfaces and monitoring alerts/events). Details regarding the unresolved SIRs as of 11/28/25 are included in Finding 28.
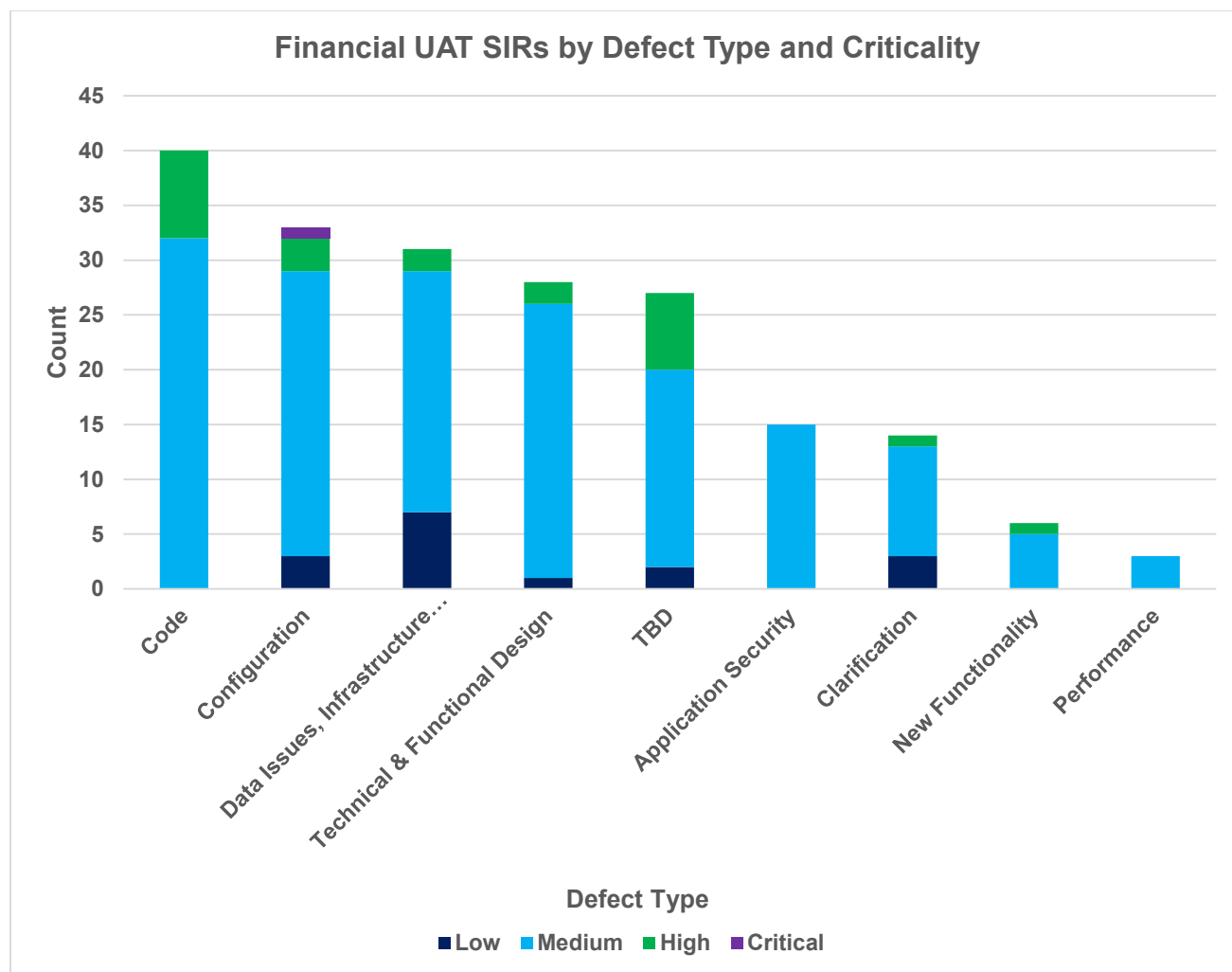
Figure 5: Financial UAT SIRs by Defect Type and Criticality

Known Issues and Enhancements

The KIEL tracks SIR resolution and priority groups as determined in SIR Triage meetings. With Pre-UAT for Weeks 7-9 beginning on 12/1/25, the KIEL shows a growing backlog of SIRs that may not be resolved before Pre-UAT ends, given the current resolution pace. Specifically, unresolved SIRs from Pre-UAT Weeks 1-2 and 3-5 are carrying over into Weeks 7-9. Based on November closure rates, Pre-UAT Weeks 1-2 SIRs are estimated to be completed by 12/16/25, while Weeks 3-4 SIRs are expected to be resolved by 12/31/25. Estimates for Weeks 7-9 SIRs cannot be determined yet, as more SIRs continue to be added. The Florida PALM IV&V Team observed that:

- Weeks 1-2 had 18 SIRs with resolution ETAs of over a month ago.
- Weeks 3-4 had two SIRs overdue by more than two weeks and six items without a set ETA.
- Weeks 7-9 have 17 SIRs with resolution ETAs before 12/1/25.

Table 4: SIRs by Pre-UAT Resolution and Priority Group

Pre-UAT Resolution Timeframe	Business Days Remaining as of 11/28/25	Priority				Total
		Critical	High	Medium	Low	
Weeks 1-2	None	0	5	24	1	30
Weeks 3-5	None	0	2	18	2	22
Weeks 7-9	19	0	0	25	0	25

Combined, these indicate a growing backlog of Pre-UAT SIRs that will likely remain on the KIEL until after the completion of Pre-UAT.

Payroll UAT Environment Testing

In addition to testing in the Financial UAT environment, the State Functional Team is also conducting testing in the Payroll UAT environment. As of 11/28/25, there is a backlog of 43 open SIRs, with 14 classified as High Business Criticality. Approximately 13% of all logged SIRs were identified as Clarifications, which can be typical in large-scale projects as users become familiar with the application. This could provide insight into where training materials may benefit from additional clarification prior to All Agency UAT.

System Testing SIRs

The SIR trend for the System Testing environments demonstrates that the number of new SIRs opened each month is decreasing. While the number of SIRs closed kept pace with the number of new SIRs opened in November, a cumulative backlog of 190 SIRs remains to be resolved, including 11 High Business Criticality SIRs.
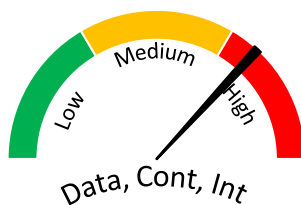
System Testing Opened & Closed SIR Trends
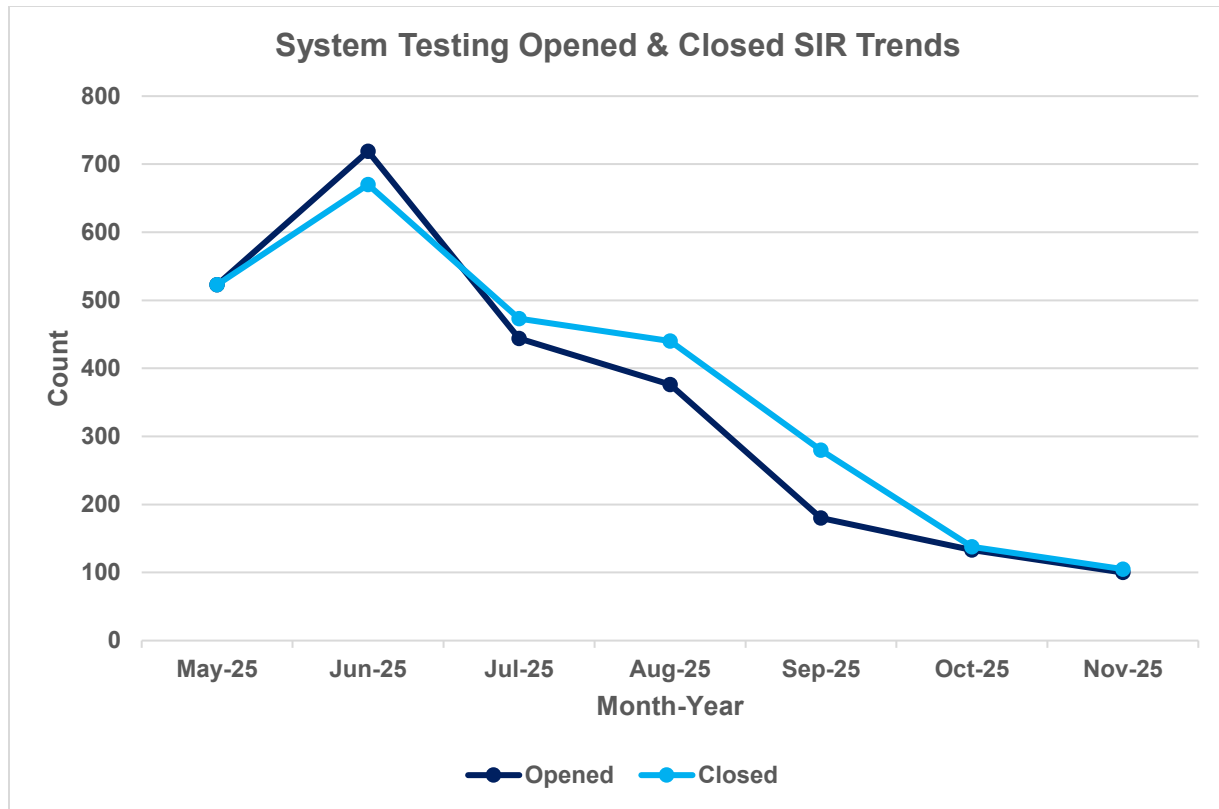
Figure 66: System Testing Open & Closed SIR Trends

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

Florida PALM Data, Conversion, and Interfaces

Focus Area Indicator

Trend: No Change

Florida PALM Data, Conversion, and Interface Updates

Data

State DW/BI Team System Testing for Self-Service Reports continued with a reported pass rate of 93% (139 out of 148 Test Scripts reviewed) as of 11/28/25. State DW/BI Functional Testing for

Self-Service Reports is scheduled to begin on 12/1/25, with an anticipated completion date of 12/19/25.

Fifty-nine SIRs in SNow remained open for DW/BI Testing as of 11/28/25, which is demonstrated in the Table below:

Table 5: Open DW/BI SIRs

Business Criticality	Cancelled	Closed	Open	Resolved	Total
Low	0	2	9	0	11
Medium	1	34	50	1	86
High	0	0	0	0	0
Critical	0	1	0	0	1
Total	1	37	59	1	98

Conversion

Mock Conversion 4 began on 11/7/25 and is scheduled to be completed on 12/12/25. As of 11/28/25, the SSI Vendor reported being two days behind schedule. To reduce this delay, the SSI Vendor is prioritizing the completion of all testing environments and conversion dependencies. This approach aims to ensure that the remaining conversions can be executed and completed on time.

Thirty-three SIRs remained open in SNow for Mock Conversion 4 as of 11/28/25, which is demonstrated in the Table below:

Table 6: Open Conversion SIRs

Priority	Closed	New	Ready to Migrate	Retest	Work In Progress	Total
2 - High	0	1	0	0	1	2
3 - Medium	11	2	1	6	17	39
4 - Low	1	2	0	2	1	6
Total	12	5	1	8	19	47

Interfaces

The Interface SIR backlog grew from 101 SIRs in October to 133 in November. While the number of new SIRs opened during November decreased, the pace of resolving existing SIRs also slowed, resulting in fewer closures and an overall increase in the backlog. As shown in the Figure below, the number of High-priority SIRs increased from 21 to 34, and Medium-priority SIRs rose from 77 to 95. As documented in Finding 29, the updated completion date of 12/19/25 for Interface Testing Cycle 2 is at risk of not being met.
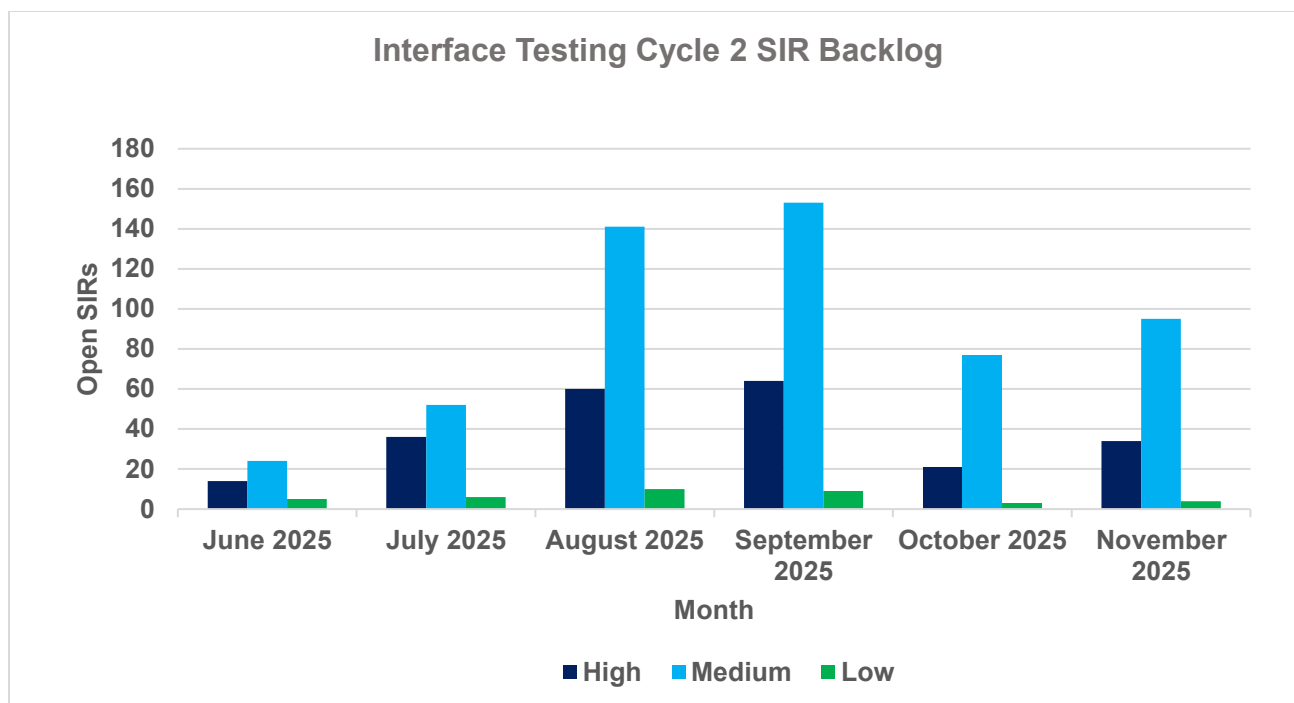
Figure 77: Interface Testing Cycle 2 SIR Backlog

In addition to Interface Testing Cycle 2, there is a set of Interface connection tests associated with WP441. These include connections that were identified after the baseline list of 75 Interface connections was defined and an additional 21 connections that were deferred from Interface Testing Cycle 2. Testing for WP441 Interface connections will follow a separate schedule, which is currently planned for December 2025 through April 2026. As a result, some of these Interfaces may not be available for testing before All Agency UAT begins in February 2026. Notably, three WP441 Interfaces are specifically related to PCard Works. Further information about the uncertainty surrounding PCard Works Interface testing dates and the possible impacts on End-to-End Interface Testing and All Agency UAT can be found in Finding 31.

Once confirmed by all applicable parties, the Florida PALM Project Team should communicate the WP441 Interface connection testing dates to all relevant Enterprise Partners and Agencies. This will ensure they are informed about which WP441 Interface connections will not complete testing before the start of All Agency UAT, helping them to prioritize their testing efforts effectively.

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

Florida PALM Implementation Readiness

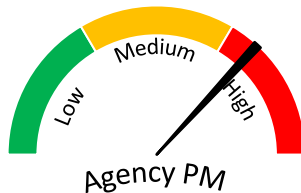### Florida PALM Implementation Readiness Updates

The Florida PALM IV&V Team will begin reporting progress once implementation readiness efforts have begun.

Florida PALM Agency Focus Area Updates

Agency Project Management

Focus Area Indicator

Trend: No Change

Agency Project Management Updates

Agency RW Task Completion

The Florida PALM IV&V Team continues to review the RW Tasks related to preparing for UAT and Mock Conversion activities. As demonstrated in the Table below:

- Approximately half of the Agencies have reported less than 75% progress for RW Task 573-B, with three weeks left to finish. This task is crucial for ensuring that end users can access Florida PALM using the appropriate roles for All Agency UAT. Delays in completing this task may result in the need for Agencies to add end users manually once testing has commenced, which can impact the efficacy and timeliness of testing.
- Three Agencies have not completed RW Tasks 587-A and 661, which could lead to additional work being required for future data cleansing. One of these Agencies has reported a dependency on an Enterprise Partner to clean up their remaining records, as noted both in their November meeting with the Readiness Coordinator (RC) and in a comment on their Smartsheet. The RC has been asked to contact the Enterprise Partner to resolve an error that the Agency is unable to fix in FLAIR and to close entries that date back to 2018. Once the Enterprise Partner resolves these records, the task can be marked complete for the Agency.
- Three Agencies that had previously reported 100% completion for RW Task 574 in October have now updated their status to 75%. They are taking advantage of the extension to further strengthen their UAT plans. The Florida PALM IV&V Team supports this, as it allows the Agencies to incorporate new insights from Pre-UAT and updated UAT information, leading to more thorough preparation.

Table 7: Agency RW Tasks-Preparing for UAT

RW Task	Category	Start	Finish	0%	25%	50%	75%	100%
573-B Complete and Submit End User Role Mapping Worksheet for Remaining End Users	People	7/14/25	12/19/25	3	2	12	18	0
574 Prepare Documentation for User Acceptance Testing	People	6/2/25	1/09/26	0	4	6	21	4
587-A Complete Data Cleansing Based on Mock Conversion 3	Data	8/11/25	11/7/25	0	0	0	2	32
662 Submit Updated Configuration Workbooks	Data	8/11/25	11/5/25	0	0	0	0	34
661 Update Conversion Field Mapping	Data	8/11/25	11/5/25	0	0	0	1	33

The Florida PALM IV&V Team observed that 30 Agencies working on RW Task 573-B and 27 Agencies working on RW Task 574 had not reported any updates to their percentage completion since 10/31/25. Agencies that had already reported 100% completion in October are excluded from these counts. The Florida PALM IV&V Team advises that Agencies update Smartsheet to accurately reflect their current progress. Keeping this information up to date helps determine whether Agencies are on track to finish their tasks or if they may need extra support to overcome potential obstacles. Completion of these RW Tasks is required for Agency Certification #2 and could impact the readiness dashboards that will be shared with the Executive Steering Committee (ESC) prior to the Stage Gate 3 vote in January.

Training Progress

During monthly touchpoints with Agencies participating in Pre-UAT, the Florida PALM IV&V Team observed varying levels of confidence and readiness for training their staff in Florida PALM. Several Agencies reported that existing prerequisite materials and Knowledge Center videos will sufficiently train their teams on most Florida PALM processes, while others indicated that they will need to develop and provide supplemental training for their end users, particularly in areas involving accounting fundamentals, Chart of Accounts, Payroll, Budgeting, Invoice submission, navigating multiple screens, and spreadsheet uploads. Feedback from Florida PALM IV&V Team touchpoints and the second Florida PALM Agency Readiness Team survey indicated that while process step documentation and Pre-UAT Training materials clearly explain how to complete transactions in Florida PALM, Agencies would also like additional information on the rationale behind why certain processes are performed in specific ways.

Based on these observations, the Florida PALM IV&V Team recommends that the Agencies consider:

- Providing staff with supplemental training in the key areas identified above before All Agency UAT begins to help enhance testers' understanding and effectiveness during testing.
- Prioritizing testing relevant functionality once the Florida PALM Project Team completes Payroll processing early in All Agency UAT and the required data becomes available.

Risk and Issue Analysis

The Florida PALM IV&V Team observed that the volume and criticality of Agency-reported Risks and Issues continued to remain stable since October 2025. The Table below shows the running total of open Risks and Issues reported by the Agencies each month.

Table 8: Agency Open Risks and Issues

Issues	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25
Open Issues	76	69	76	82	80
Critical or High	57	53	59	66	65

Risks	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25
Open Risks	298	300	314	312	313
Risks Score 6+	141	148	153	148	151

The specific updates to the Agency-reported Risks and Issues as of 11/30/25 include:

- One new Issue was opened, and three Issues were closed.

- Seven new Risks were opened, and six Risks were closed.

The Florida PALM IV&V Team assessed the Risks and Issues that have been opened in the last three months to identify trends. The Tables below show the results of the top four categories in which new Risks were identified, along with the corresponding priority.

Table 9: Top Risk Categories for the Last Three Months

Risk Category	1 (Low/ Low)	2 (Medium/ Low)	3 (High/ Low)	4 (Medium/ Medium)	6 (High/ Medium)	6 (Medium/ High)	9 (High/High)	Total
Interface	0	0	1	6	2	1	2	12
Conversion/ Configuration	0	0	0	3	3	0	4	10
User Acceptance Testing	0	2	0	2	2	2	1	9
Agency Business System	0	0	0	2	0	0	4	6
Total	0	2	1	13	7	3	11	37

Most of the new Risks are related to Interface Testing, Conversion, or UAT activities. Of the 37 new Risks identified in the last three months, 16 are identified as having a stable trend, but 17 are identified as having an increasing trend.

Table 10: Top Issue Categories for the last Three Months

| Issue Category	Critical	High	Low	Total
Interface	1	5	0	6
User Acceptance Testing	0	4	0	4
Agency Business System	4	0	0	4
Conversion/Configuration	0	3	0	3
Total	5	12	0	17

The same trend can be seen for new Issues that were identified in the last three months. As with Risks, the top Issue categories are related to Agency Business System remediation, Interface Testing, Conversion, or UAT. All the new Issues are either Critical or High.

This indicates growing concern among the Agencies about the completion of Interface Testing Cycle 2 (as detailed in the Agency Data, Conversion and Interfaces Focus Area), finalizing testing processes and readiness activities prior to the start of All Agency UAT, and anticipated efforts for Mock Conversion 4 data cleansing.

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

Florida PALM Agency Readiness

Focus Area Indicator
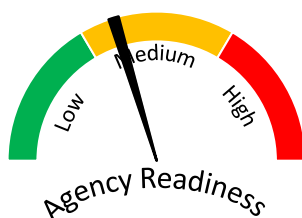
Trend: No Change

Florida PALM Agency Readiness Updates

Cross-Agency Collaboration

The Florida PALM IV&V Team has observed that some Agencies not participating in Pre-UAT have demonstrated minimal involvement in collaboration and knowledge-sharing sessions. This may create disparities in Florida PALM comprehension and readiness for All Agency UAT, potentially affecting consistent testing practices, requirement validation, and overall preparedness and engagement. To address these risks and help close knowledge gaps, the Florida PALM IV&V Team recommends that Agencies that are not participating in cross-Agency collaboration groups

increase their involvement. Increased participation will help ensure a shared understanding, better User Story development, and facilitate earlier identification of potential risks or issues.

All Agency UAT Preparation

For All Agency UAT, some Agencies intend to have all end-users begin testing at the start, primarily due to their operational requirements or because they have a small number of end-users that are mostly comprised of SMEs. In contrast, many Agencies will initially have only their SMEs to begin testing at the start of All Agency UAT. This phased approach is designed to avoid overwhelming staff and to align testing with interdependent business processes, helping to build process familiarity before expanding UAT access to all end-users. Most Agencies anticipate that testers will conduct UAT activities from their individual workstations, although some are exploring the option of setting up a centralized coordination area, which is highly recommended by the Florida PALM IV&V Team.

Organizational Change Management

As the Florida PALM Project approaches All Agency UAT, it is essential for Agencies to maintain a strong focus on preparing their people for this important milestone. RCs have been consistently engaging their Agencies through regular monthly meetings, placing greater emphasis on tester engagement for both Pre-UAT and All Agency UAT. The ongoing Pre-UAT sessions provide participants with early, hands-on experience with Florida PALM, while other Agencies prepare for their roles in All Agency UAT. The Florida PALM IV&V Team's observations include:

- The Project Management Leadership (PML) – Change Management Leadership (CML) working group has recently placed greater emphasis on discussing current challenges, which has led to a shift in focus from its original objectives of identifying solutions.
- Participating Agencies are exhibiting varying degrees of engagement during Pre-UAT, as documented in Finding 30.
- Some Agencies view OCM activities, such as training development and delivery, communications, and stakeholder engagement, as tasks to fulfill RW requirements, rather than as change management efforts focused on preparing people to adopt Florida PALM.

Several Agencies have identified competing priorities and staffing shortages as potential roadblocks to achieving Florida PALM Project milestones. To support continued progress, Agencies that have overcome similar challenges could consider developing targeted, resolution-focused communications to be shared with peers. These communications could include practical guidance on overcoming common obstacles, such as limited staff resources, time constraints, unfamiliarity with new processes, change fatigue, and negative attitudes that could affect user adoption. Agencies would also benefit from sharing examples of effective communication plans, particularly those related to upcoming business process changes, as well as sample KPIs and success measures that can help structure readiness and adoption activities.

In addition, Agencies are encouraged to document and share strategies they have successfully used to overcome resistance to change. They could also proactively consider what mitigation actions they would take if resistance were to emerge. Exchanging tools, guidance, and peer examples will help Agencies better anticipate challenges, respond effectively, and maintain momentum toward successful implementation.

Agencies can also help strengthen readiness and adoption efforts by sharing examples of effective communication plans for upcoming business process changes with each other, as well as sample KPIs and success measures. Documenting and exchanging proven strategies for overcoming resistance to change and mitigation actions will further support positive outcomes. Sharing practical tools, guidance, and peer experience will help Agencies anticipate challenges, respond effectively, and maintain progress toward successful implementation. Agencies could also consider implementing the following recommendations:

- Maintaining the focus of cross-Agency working groups on their intended goals, objectives, and scope.
- Ensuring that Agencies participate in all Florida PALM Project-led sessions related to UAT, Training, and OCM so that they receive essential updates and have the opportunity to ask questions. Additionally, Agencies should establish a plan to share key information from these sessions with staff members who are unable to attend.
- Developing a repository of Lessons Learned from Pre-UAT and making it accessible so that all Agencies can refer to these insights as they prepare for All Agency UAT. The Lessons Learned repository could be published in the Agency Exchange Library to increase visibility and support broader knowledge sharing.
- Collaborating with the Florida PALM Agency Readiness Team to identify ways the CCNs can more effectively deliver OCM activities, foster people readiness, and encourage adoption of new processes.

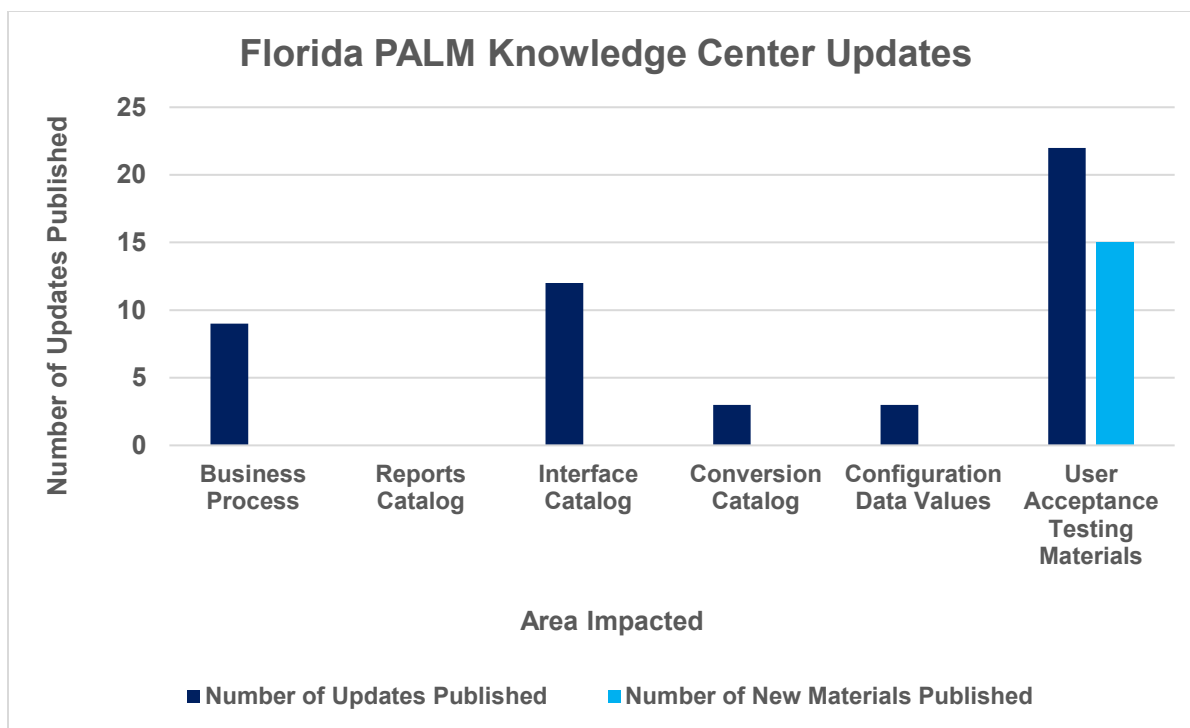The Risk Rating for this Focus area remains a Medium Risk.

Agency Requirements and Design

Focus Area Indicator
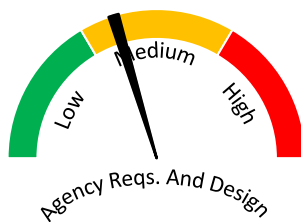
Trend: No Change

Agency Requirements and Design Updates

Florida PALM Knowledge Center Updates

Figure 8: Florida PALM Knowledge Center Updates

In November, the Florida PALM Knowledge Center had 59% fewer updates compared to October, with approximately one-third of these updates related to UAT materials. The updates were primarily in the following areas:

- Streamlined financial transaction procedures to enhance user role management, and updated system configurations to increase operational efficiency and keep documentation up to date.
- Refined ChartField Request and Fund Questionnaire process steps.
- Removal of inactive Deduction Codes to enhance configuration data.
- Revised allowable category values and exceptions for Earnings Code Descriptions and IU Configuration Values to support more precise transaction handling.
- Updated Interface catalog to reflect changes to the Inbound Budget Journal Spreadsheet Upload and the modification of two Interfaces to align with recent layout and template updates.
- Added a new process step documentation related to manual deposit and accounting entry processes.
- Published new articles to provide guidance on approving and denying IU transactions, deleting pending IU encumbrances, adjusting and closing IU accrual balances, modifying vouchers, managing asset costs, and reviewing asset disposal requests.

The Florida PALM Knowledge Center updates are intended to provide Agencies with the most current information for successful testing and implementation. Although the recent Interface updates are not expected to require changes to ABS, it is important for each Agency to review

their ABS to confirm that no modifications are needed, since these updates could potentially impact 42 Agency Interface Testing Cycle 2 Tests.

The Florida PALM IV&V Team continues to recommend that any Agencies that have not already done so establish a process for reviewing these updates. This will help determine if any changes to business processes or planning documents are necessary, ensuring Agencies have accurate information and are prepared to test effectively.

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

Agency Testing

Focus Area Indicator
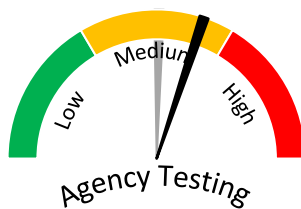
Trend: Worsening

Agency Testing Updates

Pre-UAT

While many Agencies participating in Pre-UAT have prioritized attending Florida PALM Project-hosted sessions and conducting independent testing, the Florida PALM IV&V Team has observed less engagement from some Pre-UAT Agencies. This ongoing lack of engagement could persist into All Agency UAT, and Finding 30 has been opened to document this preliminary concern and its potential impact on All Agency UAT.

Additionally, Agencies participating in Pre-UAT reported mixed understanding of issue tracking and the ticket submission process during Florida PALM IV&V touchpoints, despite multiple instances where SIR creation expectations have been communicated and documented by the Florida PALM Project Team. After the Florida PALM Project Team reiterated these expectations, several Agencies began submitting tickets more regularly and found the Florida PALM Support Team to be highly responsive. Some Agencies have still submitted few or no tickets, citing limited SME availability to test and report SIRs, or because the issues they encountered were already recorded in the KIEL.

Agencies participating in Pre-UAT have reported improvements following each Pre-UAT Training session. Additional optimization of the Pre-UAT Training curriculum, continued guidance from the Florida PALM Project Team, and greater staff availability to support more independent testing will help further strengthen readiness. Agencies also consistently praised the Florida PALM Project staff for providing strong on-site support, promptly addressing questions, assisting with processes, and helping diagnose issues.

User Story Documentation

Agencies are continuing to develop and refine User Stories. The extension of the RW Task 574 deadline, along with access to Florida PALM Financials functionality through Pre-UAT, has provided an opportunity for Agencies to review their respective User Stories and make enhancements based on insights gained during Pre-UAT testing.

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

Agency Data, Conversion, and Interfaces

Focus Area Indicator

Trend: No Change
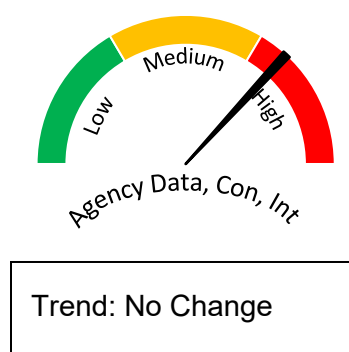
Agency Data, Conversion, and Interfaces Updates

Data

Agencies have reported dependencies on DW/BI reports to support business system remediation, test preparation, and future-state operations. Many identify as heavy reporting users, relying on outdated or inefficient internal tools such as nightly FLAIR-driven Access databases, and express a strong preference for transitioning to Florida PALM's reporting and ad hoc query capabilities rather than continuing to maintain custom solutions.

Although DW/BI functionality is expected to be available for testing at the start of All Agency UAT, several Agencies have raised concerns that the DW/BI reporting capabilities cannot be reviewed or tested in advance. The Florida PALM IV&V Team recommends that Agencies review the report designs and results with obfuscated data from the System Testing environments, available in the Florida PALM Knowledge Center. Doing so will help Agencies validate updated business process documentation and support the development of User Stories and test cases for their anticipated reporting needs.

Conversion

RW Task for 587-A for Mock Conversion 3 data cleansing was scheduled for completion on 11/7/25, coinciding with the start of Mock Conversion 4 activities. All Agencies except two met the deadline for their cleansing tasks. The two remaining Agencies reported completing approximately 75% of their data cleansing (as noted in Smartsheet), with the outstanding tasks primarily related to General Ledger Conversion or Open Encumbrances. One Agency required

assistance from an Enterprise Partner to address historical data issues. This dependency was reported to the RC in November, who has since notified the Enterprise Partner. The other Agency experienced some Vendor ID mismatches, which were expected to result in failures. These remaining data cleansing activities are not expected to impact Mock Conversion 4.

Agencies also reported challenges with grant-related fields. Out of 15 grant fields, 12 were left unpopulated, resulting in three expected fields being picked up. The Florida PALM Project Team is aware of these limitations from Mock Conversion 3 and has communicated to the Agencies that additional data fields will be made available in Mock Conversion 4.

Interfaces

Out of the 969 total Interface Testing Cycle 2 tests identified for all ABS in Smartsheet, 812 have begun, and 352 have been marked as complete as of 11/28/25. Some Interface tests remain incomplete due to dependencies on upstream processing, such as needing the inbound file to be tested before the corresponding outbound file can be evaluated, or because of unresolved SIRs. Currently, 13 High-priority and 39 Medium-priority SIRs are affecting 208 Agency Interface tests. As noted in Finding 29, the revised target completion date of 12/19/25 for Interface Testing Cycle 2 is at risk.

The Risk rating for this Focus area remains a High 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 11: 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 12: 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 13: 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 14: Risk Priority Ratings

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

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

Table 15: 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 on 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 on 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.