

Project Sponsor:	Steven Fielder	Project Director:	Jimmy Cox
Status Report Period:	January 1, 2026 – March 31, 2026	Current Project R&C Category:	4
Project Start Date:	Project funding began July 1, 2014	Project End Date:	July 19, 2027 (Funding appropriated through June 30, 2026)

1 – FLORIDA PALM STATUS OVERVIEW

A. Summary Update

Executive summary of project activities during the reporting period

During this reporting period, the Project remained within budget and on schedule. Project work focused on several areas: Interface Testing, including Cycle 2 and Cycle 3; Parallel Payroll Testing; Regression Testing; Financials and Payroll Mock Go-Live (a.k.a. Dry Run 1); Preparation for, and support and execution of, All Agency User Acceptance Testing (UAT), which began in February; design and build of end user training materials; and finalizing the Project’s schedule following approval of Amendment 13 to the Software and System Integrator (SSI) contract.

In support of agency engagement, readiness and training, the Project conducted Agency Sponsor and agency touchpoints; hosted Thursday Task Talks; held focused conversations with agencies and enterprise partners in areas of specific importance; hosted an All-Agency UAT Kickoff, facilitated 25 in-person UAT sessions, and administered 7 virtual office hours in support of All Agency UAT; launched a UAT-focused Communications page; implemented a UAT Ticket Management process whereby agencies log tickets in ServiceNow; and published 30 new agency-requested resources to the Agency Exchange Library and various process steps, demo videos, resources and articles to support end user testing on the Knowledge Center.

B. Implementation Status			
	Yes	No	Explain:
Is the project on schedule? <small>If no, explain why and what corrective action(s) are planned to bring the project back on schedule</small>	✓		The Project is on schedule.
Will the project complete on schedule?	✓		
Is the project currently within budget? <small>If no, explain why and what corrective action(s) are planned to bring the project back within budget</small>	✓		The Project is currently within budget.
Will the project remain within budget?	✓		Spend Plan details provided in Section 4.

B. Implementation Status			
	Yes	No	Explain:
Were any Project Change Requests approved during this reporting period?		✓	
Have any issues or risks impacted the project during the reporting period?	✓		See Sections 3A and 3B.

C. Scope Changes			
<i>List all scope changes (any changes from the original project objectives and deliverables that impact the project schedule or budget) identified during this reporting period, including those that may impact the project in later reporting periods.</i>			
Scope Change Description	Cost Impact	Schedule Impact	Status (if approved, include approval date) / Variance Explanation / Comment
None	N/A	N/A	N/A

D. SPI				
<i>Project Schedule Performance Index (SPI) per quarter</i>				
	Quarter 1 <i>(July – September)</i>	Quarter 2 <i>(October – December)</i>	Quarter 3 <i>(January – March)</i>	Quarter 4 <i>(April – June)</i>
Project Schedule Performance Index (SPI)	0.92	0.91	0.98	N/A
Explanation of SPI Variance / Trend	Project Schedule updates resulting from Amendment 13 to the SSI contract were finalized on January 20, 2026.			

2 – IMPLEMENTATION PROGRESS

A. Stage Gate Decisions (Milestones) <i>Stage Gate Decisions planned for action by the Project Director and/or Executive Steering Committee, and the status of each item listed (Completed, In Progress, Future).</i>			
Stage Gate Decision Name	Contractual Due Date	Actual Finish Date <i>(completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
SG1 – Ready to Start Build	12/29/2023	11/08/2023	C
SG2 – Ready to Begin System Testing	08/30/2024	08/05/2024	C
SG3 – Ready to Begin UAT	01/21/2026	01/21/2026	C
SG4 – Agency Readiness	11/18/2026	N/A	IP
SG5 – Deployment Readiness	12/16/2026	N/A	IP
SG6 – Confirm Deployment	01/04/2027	N/A	F
SG7 – Go-Live	01/11/2027	N/A	F

B. Deliverables <i>Project deliverables which were due to be completed and/or completed during the reporting period, and those that are past due.</i>				
Deliverable Name	Contractual Due Date	Actual Finish Date <i>(completed)</i>	Planned Cost	Actual Cost
D662 – Completion of Mock Conversion IV	01/28/2026	01/23/2026	\$1,500,000.00	\$1,500,000.00
D666 – Support of UAT Segment I	02/06/2026	01/21/2026	\$1,691,000.00	\$1,691,000.00
D663 – Completion of Interface Testing Segment I	02/26/2026	02/24/2026	\$2,081,700.00	\$2,081,700.00

3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues <i>Issues created, opened, or closed within this reporting period related to implementation.</i>					
Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
Issue 37 – Difficulty Filling Procurement-to-Payment (P2P) Co-Lead Positions	Closed	High	The Project will: <ol style="list-style-type: none"> 1. Continue targeted recruitment efforts, including outreach to specialized networks and professional associations. 2. Reassess advertisement to refine requirements to better target candidates with the experience and skillset needed by the Project. 3. Implement interim staffing solutions (e.g., staff augmentation or temporary internal reassignment). 4. Crosstrain among existing team members to cover essential P2P responsibilities until the role is filled. 	01/05/2026	Deana Metcalf
Issue 38 – BOA Delayed Interface Testing	Open	High	The Project recommends prioritization of PCard interface remediation relative to other integration efforts and specifically recommends the following actions on scope, timing, and prioritization: <ol style="list-style-type: none"> 1. Work with BOA and A&A to confirm if the small API131 file was acceptable, or if additional design and build changes are needed. Completed December 30, 2025. 2. Process BOA provided an initial API058 file based on the small API131 file. Due January 16, 2026. Completed January 16, 2026. The file was received on January 16 but had numerous issues. Additionally, BOA advised 	04/30/2026	Tanya McCarty

A. Implementation Issues					
<i>Issues created, opened, or closed within this reporting period related to implementation.</i>					
Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
			<p>that the file was not a true test file, and it would take them 10-12 weeks to build the program. (Based on the results of Action Item #2, Action Item #5 was created.)</p> <ol style="list-style-type: none"> 3. Continue to participate in regularly scheduled meetings with BOA and A&A to review progress, issues, and next steps. 4. Confirm and complete design and build changes required for API058, API131 and API132 and prioritize resolution of any identified design and build updates for these files. Due March 27, 2026. Note: This action item is delayed due to an unplanned requirements gathering and confirmation processes required by BOA prior to the begin of the build process. 04/14/2026 - All design and build changes have been completed for API058, API131, and API132. API058 entered Cycle 2 Testing on 04/14/2026. API131 is currently progressing through SIT Testing and Defect Resolution. API132 is ready for testing with BOA. 5. BOA to create the API058 program and provide a true test file to the Project. Due April 17, 2026. 04/14/2026 - First file was received from BOA on 04/14/2026. 6. Implement a phased testing strategy, beginning with targeted retesting of corrected interfaces in the Cycle 2 environment, followed by progression to remaining interfaces as dependencies are resolved. Due April 30, 2026. 		

A. Implementation Issues <i>Issues created, opened, or closed within this reporting period related to implementation.</i>					
Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
			7. The Project will continue proactive communication with agencies to assist agencies with planning and reduce downstream impacts: <ol style="list-style-type: none"> a. PCard testing status b. Impacts to agency testing schedules c. Updated timelines and readiness expectations d. Due TBD. 		

B. Implementation Risks <i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 1 – The Project may have negative impacts due to insufficient staffing or delays in onboarding.	Open	6	The Project will track the status of all positions to identify, where possible, which positions will be coming vacant and when. The Project will use, at a minimum, the following resources and strategies to decrease the time needed to fill the vacancy, onboard the new team member, and to bring the team member up to speed quickly: <ol style="list-style-type: none"> 1. Florida PALM Orientation and Onboarding materials and process 2. Standard Operating Procedures 3. Florida PALM Project Management Plan 4. Project Team member mentoring 5. Accenture Staffing Plan 6. Onboarding Checklist The Project will also: <ol style="list-style-type: none"> 1. Identify backups for decision-making resources to be kept informed and be able to 	Stable	Angie Robertson

B. Implementation Risks					
<i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			assist if a position is vacated unexpectedly or a replacement is not on-boarded timely. 2. Hold regular staff meetings with the Team Managers, Project Architects and Project Directors to provide updates on Project progress, planning, and needs. 3. Where possible, hire replacements to overlap current resources and allow for knowledge transfer. 4. Keep the ESC and Executive Sponsors informed of staffing issues, as appropriate. 5. Review the SSI contractor staffing regularly to ensure alignment with the planned activities or Schedule tasks. 6. Partner with other DFS Divisions and Bureaus to enhance awareness and understanding of the needs of the Project with regard to personnel and technology resources. 7. Leverage staff augmentation resources, where possible, to perform planned activities. 8. Transition resources from other Project activities when those activities have been completed and the resources become available.		
Risk 2 – External stakeholders (e.g., Legislature, EOG) and agencies expectations may not be aligned with the Florida PALM cost, schedule, or scope.	Open	6	Project Directors will provide Project cost, schedule, and scope updates to external stakeholders regularly using the monthly Project status report, other required reports per Proviso, legislative meetings (e.g., committee meetings) and other ad hoc opportunities.	Stable	Jimmy Cox

B. Implementation Risks					
<i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			The Project will: <ol style="list-style-type: none"> 1. Share information about business process models, interface designs, and reports through the Knowledge Center as they are approved. 2. Share comprehensive details about the Solution (FIN/Payroll/DW) as it becomes available and is ready for distribution. 3. Share information through activities, such as Advisory Council meetings and Sponsor Summits, and through written materials, such as Newsletter, Sponsor Scoops, and articles in the Knowledge Center. 4. Work with agencies, as needed, to educate on available reports, queries, and interface files, and to support the agencies' determinations on whether their agency-critical business needs are met by these solutions, or if additional agency-specific solutions are required. 5. Address agency questions during Readiness Touchpoints, review and resolve agency submitted ServiceNow tickets, and publish Known Issues and Enhancements List on the Knowledge Center. 6. Support agency evaluation of business system needs as they relate to data and reporting. 		
Risk 4 – Agencies' ability to adequately engage and participate may impact agency readiness.	Open	9	The Project will utilize one or more of the following mitigations to manage the risk:	Increasing	Angie Robertson

B. Implementation Risks					
<i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			<ol style="list-style-type: none"> 1. Conduct monthly meetings between Readiness Coordinators and agency Change Champion Network members to discuss their internal readiness and preparation to transition to Florida PALM. 2. Conduct meetings between Project leadership and Agency Sponsors to discuss the agency's progress, concerns, needs, or roadblocks that the agency is facing in their transition activities. 3. Lead meetings and workshops designed to share timely and relevant information with agencies throughout the Project lifecycle. 4. Provide tools and information (e.g., graphics and content) to support messaging and communication within the agency regarding key implementation activities and change impacts. 5. Review Bimonthly Agency Status and Monthly Progress Reports, and All Agency UAT participation metrics and surveys for indicators and trends relating to engagement difficulties. 		
Risk 5 – The timing and efficiency of information sharing between enterprise partners and agencies and the Project could impact the success of the Project.	Open	6	<ol style="list-style-type: none"> 1. The Project will leverage existing meetings and schedule additional as needed to discuss: <ol style="list-style-type: none"> a. The Project's timeline and status identifying timing for key work to be completed. b. Projected changes to: <ol style="list-style-type: none"> i. enterprise systems and their potential impact on the Project ii. the Project and its potential impact on enterprise systems. 	Stable	Jimmy Cox

B. Implementation Risks					
<i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			c. Progress of integration. 2. The Project will look for potential connections between the applications identified during design and development and Florida PALM and their impacts to enterprise partners.		
Risk 6 – The execution of contracts and procurement activities outside of the Project may impact Florida PALM implementation and agency readiness.	Open	6	The Project will utilize one or more of the following strategies to manage the risk: <ol style="list-style-type: none"> 1. Provide the Project's timeline and key Project dates essential for agency and enterprise partner readiness (e.g., milestones). 2. Engage regularly with agency and enterprise partners to share information and to report progress towards key milestone dates. 3. Request updates and status reporting on key readiness activities. 4. Provide support or information to agency, enterprise partner, or oversight body planning or decision making or needs. 5. Continue regular meetings and develop mitigation actions should specific contracts not be executed and applications ready at Florida PALM Go-Live. 	Increasing	Angie Robertson
Risk 11 - Delays in or extended duration of interface testing with enterprise partners for cycle 2 will result in testing overlaps which impact resource allocation as well as activity timing and completion.	Closed	6	The Project will take one or more actions listed below: <ol style="list-style-type: none"> 1. Continue to meet regularly with enterprise partners, increasing the cadence where needed, to stay up to date on their progress. 2. Create and use partner-specific (e.g., People First, MFMP) testing alignment documents to 	Increasing	Jimmy Cox

B. Implementation Risks					
<i>Risks created, opened, or closed within the reporting period with risk score of 6 or greater.</i>					
Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			support detailed activities and tracking of progress. 3. Support a testing approach that allows each partner to have an approach that supports their readiness scenario and timeline. For example, the FACTS integration can be something that is tested first. 4. Expand testing duration for enterprise partners. 5. Move additional Project staff to support Technical Interface Testing.		

4 – SPEND PLAN AND PROJECT COSTS

A. Spend Plan

Additional information provided in the attached Project Spend Plan and Release notes

The Florida PALM Project was appropriated \$72,323,194 for FY 2025-26. As of the end of this reporting period, \$55,641,378 has been released, \$36,388,186 has been projected fiscal year to date, \$35,425,929 has been incurred, and \$34,985,878 has been paid. See the Florida PALM Project Spend Plan for additional details.

B. Invoices

Invoices paid during the reporting period.

Information for each invoice paid relating to the Software and System Integrator (SSI) Contract can be found here: [Florida PALM Project SSI Invoices Paid Report](#)

Information for all other invoices can be found here: [Florida PALM Project Invoices Paid Report](#)

C. Purchase Orders / Contracts

Purchase Orders approved or Contracts or Contract Amendments executed during the reporting period.

Information for each purchase order authorized during this reporting period can be found here: [Florida PALM Project Purchase Order / Contracts Report](#)

5 – STAKEHOLDER ENGAGEMENT

A. Agency Engagement

Agency engagement activities completed during the reporting period

During this reporting period, the Project completed the following agency engagement activities:

- Updated key project planning documents, including the [Readiness Workplan](#), [Testing Timeline](#), and [Agency Implementation Roadmap](#), to align with the approved Project Schedule (Amendment 13).
- Collected and published [Agency Certification #2](#) submissions confirming agency readiness for UAT.
- Successfully launched All Agency UAT on February 2, 2026.
- Conducted 25 in-person sessions and 7 Office Hours to support All Agency UAT.
- Expanded UAT session to include two additional days for Working with Projects.
- Hosted key events and workshops, including:
 - All Agency UAT Kick-off
 - “Supporting Your Agency’s UAT” Workshop
 - Sponsor Touchpoints and outreach sessions
- Published and maintained a wide range of [Knowledge Center](#) resources, including process steps, demo videos, articles, and a dedicated [UAT Communication](#) page.
- Launched new training and communication tools, including:
 - “[Be Prepared](#)” UAT attendee guide
 - [PALMcast](#) for Agency Sponsors on UAT roles and responsibilities
 - “Knowledge Center Advantage” interactive training in the People First LMS
- Enhanced agency support tools, including a new query for Security Access Managers (SAMs) to manage organizational security.
- Introduced additional Readiness Workplan tasks to support agency needs in data configuration, data cleansing, and role mapping.
- Expanded the [Agency Exchange Library](#) with over 30 agency-requested resources to promote knowledge sharing across People, Process, Technology, Data, and Project Management areas.
- Published [January – February 2026](#) Agency Bimonthly Status Report
- Published Agency Monthly Progress Reports:
 - [January 2026](#)
 - [February 2026](#)
 - [March 2026](#)
- Released the Quarter 3 [Project Newsletter](#) highlighting past achievements and upcoming activities.
- Facilitated ongoing engagement through:
 - Weekly [Thursday Task Talks](#)
 - Agency Touchpoints
 - Targeted meetings with agencies and enterprise partners

A. Agency Engagement

Agency engagement activities completed during the reporting period

- Continued providing focused, personalized support to agencies and enterprise partners to address critical needs and ensure readiness and UAT success.

B. Training Activities

Training-related activities completed or in progress during the reporting period.

Training activities to develop and update Process Steps associated with all Business Process Groupings as part of UAT continued during this reporting period. To prepare for UAT, training activities focused on the development and publication of materials to be used by participants involved in UAT activities. These materials focused on Suppliers, Encumbrances, Vouchers, Inter/IntraUnit, Accounts Receivables, Projects, Payroll and Assets transactions. Materials were published to the Knowledge Center within the dedicated [User Acceptance Testing Materials](#) section. In addition to publishing new materials, the Training team continued to refine and update materials used during UAT based on feedback received from users and as a result of changes that came about during testing activities.

C. Agency Readiness Progress

Agency activities towards readiness for Florida PALM across People, Process, Technology, and Data released, active or closed during the reporting period.

During this reporting period, agencies completed, continued, or began working on the following readiness tasks included in the RW:

Direct Project Impact

- Task 592 – Agency IdP SMEs Add End Users to Agency’s Identity Provider – Released 12/08/2025 – Due 01/09/2026 (Complete)
- Task 597 – Complete Data Cleansing Based on Mock Conversion 4 – Released 01/12/2026 – Due 03/13/2026 (Complete)

Indirect Project Impact

- Task 574 – Prepare Documentation for User Acceptance Testing – Released 06/02/2025 – Due 01/09/2026 (Complete)
- Task 688 – Update UAT Plan – Released 12/08/2025 – Due 01/09/2026 (Complete)
- Task 606 – Update Agency Readiness Certification #2 – Released 12/15/2025 – Due 01/09/2026 (Complete)
- Task 696 – Maintain Role Mapping Worksheet – Released 03/23/2026 – Due 04/30/2026

No Project Impact

- Task 671 – Submit Bimonthly Agency Readiness Status Report – Released 12/29/2025 – Due 01/14/2026 (Complete)
- Task 669 – Submit Monthly Progress Report – Testing – Released 01/05/2026 – Due 01/30/2026 (Complete)
- Task 672 – Submit Monthly Progress Report – Testing – Released 02/02/2026 – Due 02/27/2026 (Complete)
- Task 673 – Submit Bimonthly Agency Readiness Status Report – Released 03/02/2026 – Due 03/10/2026 (Complete)
- Task 674 – Submit Monthly Progress Report – Testing – Released 03/02/2026 – Due 03/31/2026 (Complete)