

Project Sponsor:	Steven Fielder	Project Director:	Jimmy Cox
Status Report Period:	July 1, 2025 – September 30, 2025	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 has remained within budget with no scope changes. Project work focused on several areas: System Testing; Interface Testing; Environment build completion; Preparation for User Acceptance Testing (UAT); and Agency engagement and training.

In support of agency engagement and training, the Project published 24 new resources for agencies on the Project website including flyers, newsletters, and Agency Exchange Library materials. The Project published UAT Prerequisite training to the People First Learning Management System, added numerous UAT process steps and pre-materials to the Knowledge Center, and created a new Interface Testing page in the Knowledge Center.

Delays in several key areas caused a delay in the start of UAT and a need to shift the Project Go-Live date. In part due to the delay, the Project has:

Created a new Financials only Pre-UAT testing period and engaged a subset of agencies with the goal of familiarizing these agencies with the Financials UAT environment and to assist in identifying more significant issues prior to the full, all-agency UAT.
Begun negotiating a contract amendment to the SSI contract.

B. Implementation Status			
	Yes	No	Explain:
Is the project on schedule? <i>If no, explain why and what corrective action(s) are planned to bring the project back on schedule</i>		✓	The Project is currently behind schedule in several key areas, which has delayed the “Stage Gate 3 – Ready to Begin UAT” ESC Vote, the start of Agency UAT and subsequent downstream activities. Due in part to these delays, the Project notified the Florida PALM Executive Steering Committee on September 30, 2025, that the go-live date will need to be moved from July 2026 to January 2027. The Department is currently negotiating Amendment 13 to officially move the go-live date.
Will the project complete on schedule?		✓	

B. Implementation Status			
	Yes	No	Explain:
Is the project currently within budget? <i>If no, explain why and what corrective action(s) are planned to bring the project back within budget</i>	✓		The Project is currently within budget.
Will the project remain within budget?	✓		Spend Plan details provided in Section 4.
Were any Project Change Requests approved during this reporting period?		✓	None
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
N/A	N/A	N/A	N/A

D. SPI <i>Project Schedule Performance Index (SPI) per quarter</i>				
	Quarter 1 (July – September)	Quarter 2 (October – December)	Quarter 3 (January – March)	Quarter 4 (April – June)
Project Schedule Performance Index (SPI)	0.92	N/A	N/A	N/A
Explanation of SPI Variance / Trend	The Project's SPI is 0.92 for this quarter indicating the Project is progressing at 92 percent of the expected progress, thus trending slightly behind schedule.			

2 – IMPLEMENTATION PROGRESS

A. Stage Gate Decisions (Milestones)

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).

Stage Gate Decision Name	Contractual Due Date	Actual Finish Date (completed)	Status (C=Completed IP= In Progress F=Future)
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	07/30/2025	N/A	IP (Delayed)
SG4 – Continue Deployment	01/30/2026	N/A	F
SG5 – Agency Readiness	05/27/2026	N/A	IP
SG6 – Deployment Readiness	06/17/2026	N/A	IP
SG7 – Confirm Deployment	07/02/2026	N/A	F
SG8 – Go-Live	07/13/2026	N/A	F

B. Deliverables

Project deliverables which were due to be completed and/or completed during the reporting period, and those that are past due.

Deliverable Name	Contractual Due Date	Actual Finish Date (completed)	Planned Cost	Actual Cost
D697 - Completion of Build ESS	9/26/2025	9/9/2025	\$994,983.00	\$994,983.00
D657 - Completion of Mock Conversion III	8/27/2025	8/26/2025	\$2,000,000.00	\$2,000,000.00
D696 - Completion of System Test Segment III	7/29/2025	8/28/2025	\$2,000,000.00	\$1,909,731.00
D661 - Completion of System Test DW/BI	8/27/2025	In progress	\$1,338,840.00	
D658 - Develop the Deployment and Contingency Plan	8/27/2025	9/29/2025	\$2,000,000.00	\$1,909,731.00

3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues

Issues created, opened, or closed within this reporting period related to implementation.

Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
Issue 35 - Failure to Begin UAT as Defined in the Project Schedule	Open	Critical	There are four primary items that will drive the ability for the Project to determine and move towards the appropriate new start date for UAT. 1. Determine the approach for UAT for DW/BI – Due Date: 10/20/2025 2. Confirm the impact of a PeopleTools Upgrade on UAT – Due Date: 09/26; Completed 10/08/2025 3. Engage a select subset of agencies (i.e., Advisory Council Member Agencies) and the Divisions of Accounting and Auditing and Treasury in Pre-UAT activities to familiarize them with the UAT environment and navigation and begin testing processes in the system. Due Date: 10/20/2025 4. Earliest execution of SSI Contract Amendment 13 or Release of the start date for UAT.	11/21/2025	Jimmy Cox

A. Implementation Issues

Issues created, opened, or closed within this reporting period related to implementation.

Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
Issue 36 - DW/BI Readiness for UAT	Open	High	The Project will complete the following, at a minimum, to resolve this issue: - Accenture will create an action plan to address the delays in DW/BI readiness for UAT for State approval – Due Date: 10/03/2025; Completed 10/01/2025 - Key Project team members will hold daily coordination meetings to facilitate completion of the: - Resolution of all high-level – Due Date: 10/03/2025; Completed 09/26/2025 - Execution of System Tests for DW/ – Due Date: 11/14/2025 - Update of DW for Self Service – Due Date: 11/14/2025 - Update of the DW/BI Test Environment – Due Date: 11/14/2025 - Completion of Smoke Testing – Due Date: 11/26/2025 - Make DW/BI UAT available for Project Testing – Due Date: 12/01/2025	12/01/2025	Jennifer Reeves

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

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	9	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,	Increasing	Angie Robertson

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			onboard the new team member, and to bring the team member up to speed quickly: 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: 1. Identify backups for decision-making resources to be kept informed and be able to 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		

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			with regard to personnel and technology resources. - Leverage staff augmentation resources, where possible, to perform planned activities. - 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	9	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. The Project will: - Share information about business process models, interface designs, and reports through the Knowledge Center as they are approved. - Share comprehensive details about the Solution (FIN/Payroll/DW) as it becomes available and is ready for distribution. - 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. - Work with agencies, as needed, to educate on available reports, queries, and interface files, and to support the agencies	Increasing	Jimmy Cox

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			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 and as follow-ups to agency submitted questions, including publishing questions to the public view of the Question Log on the Florida PALM website. 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: 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 and any concerns, needs, or roadblocks 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.	Stable	Angie Robertson

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			5. Review bimonthly agency status reports 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	The Project will leverage existing meetings and schedule additional, as needed, to discuss: 1. The Project's timeline and status identifying timing for key work to be completed. 2. Projected changes to: a. enterprise systems and their potential impact on the Project. b. the Project and its potential impact on enterprise systems. 3. Progress of integration. 4. The Project will look for potential connections between the applications and Florida PALM identified during design and development and their impacts to enterprise partners.	Stable	Jimmy Cox
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: 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.	Stable	Angie Robertson

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			- Provide support or information to support agency, enterprise partner, or oversight body planning or decision making or needs. - Continue regular meetings and develop mitigation actions should specific contracts not be executed and applications ready at Florida PALM Launch.		
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.	Open	6	The Project will take one or more actions listed below: - Continue to meet regularly with enterprise partners, increasing the cadence where needed, to stay up to date on their progress. - Create and use partner-specific (e.g., People First, MFMP) testing alignment documents to support detailed activities and tracking of progress. - Support a testing approach that allows for 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. - Expand testing duration for enterprise partners. - Move additional Project staff to support Technical Interface Testing.	Increasing	Jimmy Cox
Risk 13 - Data Warehouse/Business Intelligence (DW/BI) Data Readiness for UAT	Closed	9	To fulfill the requirements for User Acceptance Testing (UAT), close coordination and collaboration is required to complete the work needed to ensure that reports and self-service reporting functionality are ready for UAT, including:	Increasing	Jennifer Reeves

B. Implementation Risks

Risks created, opened, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			1. The State and Accenture teams will conduct daily stand ups to prioritize work effort and SIR resolution. Reports should be addressed first. Delivered self-service functionality is second priority. Adding the custom Florida PALM fields is the third priority. These priorities are to allow for sufficient testing by the State in time for UAT readiness. 2. Accenture will update the security roles to limit access to the designated (implemented) subject areas within the Financials, Payroll and Projects folders. These two approaches include: (1) removing subject areas and columns (fields) that will never be implemented, such as student related topics; and (2) hiding those using role security for subject areas where additional functionality is planned for Optional Services, such as Grants, Contracts and Projects. 3. The State will identify the relabeling needed for the DW data structure. The State will coordinate with Accenture, after their system testing is completed, to upload the applicable changes and test for any impacts to the pre-built reports that will be available to users.		

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 \$72,229,636 for FY 2025-26. As of the end of this reporting period, \$38,645,953 has been released, \$10,498,455 has been projected fiscal year to date, \$10,498,455 has been incurred, and \$9,302,893 has been paid. See the [September 2025 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](#)

The Project did not execute any new contracts, or amendments to existing contracts, during this reporting period.

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:

- Published the following internet resources for agencies:
 - o User Acceptance Testing Prerequisite training to the People First Learning Management System.
 - o “Know Your Change Impact” flyer for agencies to consider [Will Life to Date \(LTD\) balances be converted?](#).
 - o 17 resources, as requested from agencies, in the [Agency Exchange Library](#) to share knowledge with other agencies in areas of People, Process, Technology, Data, or Project Management.
 - o UAT Pre-Materials on the Knowledge Center: 22 process steps and 21 demonstration videos for the topics Account Management and Financial Reporting; Budget Management and Cash Control; Revenue Accounting; Accounts Receivable; and Banking.

A. Agency Engagement

Agency engagement activities completed during the reporting period

- o “Know Your Change Impact” flyer to help agencies understand the impact of [special characters in Florida PALM](#).
- o [ChartField summary graphic](#) to assist agencies with reading interface error reports for ChartFields.
- o [Quarter 1 Project Newsletter](#) for fiscal year 2025-2026.
- o [September Monthly Progress Reports](#), capturing agency testing progress.
- o “Know Your Change Impact” flyer for agencies to consider [How will current year Expenditure Refunds be handled?](#)
- o [Learning to Work in Florida PALM](#) as a helpful guide for future end users when navigating available learning resources alongside User Acceptance Testing activities.
- o [Finding FIN/PAY UAT Prerequisite Trainings](#) in the Knowledge Center to help User Acceptance Testing end users locate the correct courses within the People First LMS.
- o [August Monthly Progress Reports](#), capturing agency testing progress.
- Created a new page in the Knowledge Center focused on [User Acceptance Testing](#) materials and resources.
- Enhanced the Florida PALM Solution Center Customer Portal registration process in preparation to support agencies for UAT and go-live.
- Created an [Interface Testing](#) section in the Knowledge Center where agencies can subscribe to specific interface articles for immediate updates regarding testing information.
- Met with agencies to discuss:
 - o Current and upcoming Readiness Workplan (RW) tasks
 - o Cycle 2 Interface Testing – Technical Testing
 - o Areas of specific importance to agencies and enterprise partners

B. Training Activities

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

Training activities to develop Process Steps associated with all Business Process Groupings as part of UAT began during this reporting period. To prepare for UAT activities, 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, and Assets transactions. Materials were published to the Knowledge Center within the dedicated [User Acceptance Testing Materials](#) section.

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 591 – Confirm IdP Configuration for Florida PALM – Released 06/23/2025 – Due 07/11/2025 **(Complete)**

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.

- Task 573-B – Complete and Submit End User Role Mapping Worksheet for Remaining End Users – Released 07/14/2025 – Due 12/19/2025
- Task 587-A – Complete Data Cleansing Based on Mock Conversion 3 – Released 08/11/2025 – Due 11/07/2025
- Task 587-B – Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers – Released 08/11/2025 – Due 10/17/2025
- Task 587-C – Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects – Released 08/11/2025 – Due 10/29/2025
- Task 661 – Update Conversion Field Mapping – Released 08/11/2025 – Due 10/29/2025
- Task 662 – Submit Updated Configuration Workbooks – Released 08/11/2025 – Due 11/05/2025
- Task 662-A – Submit Updated Configuration Workbooks – State Program Selection for Budget Allotments – Released 09/15/2025 – Due 10/29/2025

Indirect Project Impact

- Task 576 – Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing – Released 01/06/2025 – Due: 07/25/2025 **(Complete)**
- Task 574 – Prepare Documentation for User Acceptance Testing – Released 06/02/2025 – Due 12/19/2025
- Task 593 – Update Agency Readiness Certification #1 – Released 06/23/2025 – Due 07/18/2025 **(Complete)**
- Task 660 – Submit Monthly Progress Report – Testing – Released 08/04/2025 – Due 08/29/2025 **(Complete)**
- Task 664 – Submit Monthly Progress Report – Testing – Released 09/02/2025 – Due 09/30/2025 **(Complete)**

No Project Impact

- Task 610 – Update Authorized Smartsheet Users – Released 06/23/2025 – Due 07/11/2025 **(Complete)**
- Task 611 – Submit Bimonthly Agency Readiness Status Report – Released 07/01/2025 – Due 07/10/2025 **(Complete)**
- Task 616 – Share Florida PALM Updates – Released 07/14/2025 – Due 07/25/2025 **(Complete)**
- Task 617 – Submit Bimonthly Agency Readiness Status Report – Released 08/29/2025 – Due 09/10/2025 **(Complete)**