

Date	November 19, 2025	Time	10:00 a.m. – 12:00 p.m.
Location	First District Court of Appeal		
Objective	Advisory Council Monthly Meeting		
Attendees	<p>Advisory Council: Amy Barrow (DOR); Stephanie Cabrera (FLHSMV); Ramon Evans (APD); Lyndell Francis (DBPR); Lydia Griffin (DEP); Renee Hermeling (DFS); Robert Herron (DOH); Jim Lewandowski (FDACS); Tanya Maphis (FWC); Nona McCall (JAC); Mike Moore (FDLE); Cheryl Morgan (FDOT); Stephen Russell (DMS); Lisa Simpson (COM); Erica Starling (FDC); Mary Sweat (DCF); Alexandra Weimorts (DFS)</p> <p>Facilitators: Jimmy Cox (DFS); Robert Herron (DFS); Angie Robinson (DFS)</p>		
Related Documents	Presentation		

<i>Topic</i>	<i>Facilitator(s)</i>
Opening Remarks	
Welcome and Roll Call	Robert Herron
Discussion Topics	
User Acceptance Testing	Angie Robertson
Amendment 13 Timeline	Jimmy Cox
Open Discussion	All
Closing Remarks	
Reminders and Action Items	Robert Herron

Welcome and Opening Remarks

Facilitated by Robert Herron

Mr. Robert Herron, Chair, opened the meeting with roll call of the Advisory Council (Council) members and welcomed the group. A representative was present in place of the Advisory Council member for DCF.

User Acceptance Testing

Facilitated by Angie Robertson

Ms. Angie Robertson led a discussion on the progress of Pre-UAT and the preparations for All Agency UAT planned to begin in February 2026.

Pre-UAT

Pre-UAT is progressing through two of three topic groupings: *Transacting in Florida PALM* and *Managing Resources in Florida PALM*. Ms. Robertson summarized the Project-hosted in-person sessions and Office Hours that have been held to date. The final set of in-person sessions and Office Hours will be held in December, with Pre-UAT concluding December 19. Pre-UAT participants should be focusing on two things; a) learning Florida PALM functionality, and b) helping prepare their agency for All Agency UAT based off their Pre-UAT experience and knowledge of the system.

Participating Council members shared firsthand feedback from Pre-UAT. The Council is grateful for the experience; time in the UAT environment has confirmed their level of preparedness of their agency. One agency shared they are testing slowly in order to focus on understanding one transaction at a time before testing other transactions. It was mentioned how performing business processes in Florida PALM is very different than FLAIR; from the look and feel, to the data fields, to the process flow and batch processing.

The discussion transitioned to the importance of change management and concerns for end users' learning and adopting of the system. The Council discussed strategies for engaging the resisters of change and leveraging the go-getters. End users who have worked in modern systems, such as AOD and PCard Works, may have an easier time transitioning because Florida PALM technology has a similar intuitive navigation. It was also mentioned some university students use PeopleSoft and the employees who may be newly graduated could likely learn Florida PALM more easily and serve as mentors. End users who have had a career with the State of Florida using FLAIR may need alternative strategies due to several factors such as creating long-term habits and resistance to the required level of effort.

The Council gave suggestions on change management strategies. Suggestions included exposing end users to the environment slowly to help them gradually acclimate to the changes. This can be done through demonstrations or screen shots from those testing in the UAT environment (during Pre-UAT or All Agency UAT). Having mentors that participated in Pre-UAT or who are subject matter experts that can spend time with new learners guiding them and answering questions. Having detailed desk procedures was also discussed as being a key resource.

The Council was in agreement that slowly rolling out UAT access within their agency was the best approach for All Agency UAT. One agency suggested beginning All Agency UAT with a limited number of end users and adding the remaining end users after the mid-point data refresh. Another agency suggested to also begin with a limited number of end users but roll on new end users before the mid-point data refresh. It was reiterated that DFS Accounting and Auditing (A&A) will allow Separation of Duties (SOD) conflicts for the start of All Agency UAT, but after the mid-point data load, SOD conflicts will need to be resolved or approved. A&A is planning to share a guide for agencies to help with internal controls. A question was asked about temporary SOD conflicts and their expiration date. Ms. Hermeling said agencies will be notified in advance of SOD conflicts expiring.

Continuing the Pre-UAT presentation, Ms. Robertson shared a summary of results of a participant survey for Pre-UAT weeks 2 & 3. Participants felt supported by the Project and their agency but wish they had more time to test. Generally, participants felt they were prepared for in-person sessions. She gave an overview on the amount of time participants spent testing in the system and the tickets (quantity and level of priority) that have been submitted. She encouraged participation in the Office Hours even if an agency doesn't have specific questions. A second

survey was sent to participants prior to today's meeting requesting feedback on Pre-UAT weeks 3 – 5. Ms. Robertson asked for additional suggested topics they would like included in the upcoming sessions. The Council suggested viewing budget, release, cash (like viewing in current-day State Accounts), understanding the timing of DFS A&A and Treasury request processes, additional demonstrations or training on Spreadsheet Upload, and spacing out the Office Hours from the in-person sessions in order to allow participants to test and prepare adequate questions.

All Agency UAT

Ms. Robertson shared the UAT preparation campaign the Project is conducting through January 2026. Thursday Task Talks (TTT) are focused on All Agency UAT preparations with a new topic focus area each week; new flyers and graphics are published weekly that support the TTT's topic focus; PALMcasts will focus on change management strategies; and a Sponsor Summit will be held in December for Agency Sponsors. Readiness Workplan tasks were highlighted that will be new or updated to support agency UAT preparations as well.

Ms. Robertson shared information about All Agency UAT, while noting there are some details that have not yet been determined, see slide 9. Leading up to testing in February, agencies should be completing RW tasks, completing UAT Prerequisite trainings, documenting user stories, reviewing their UAT Plan for their agency, and preparing supporting materials for agency testers.

Amendment 13 Timeline

Facilitated by Jimmy Cox

Mr. Jimmy Cox shared the updated draft Testing Timeline. The timeline aligns to the Florida PALM contract Amendment 13. Highlights of the timeline include:

- Shifting the go-live date to January 2027
- Updating UAT activities by including Pre-UAT, UAT Prep, and UAT Refresh during All Agency UAT
- Mock Conversion 4 date changes
- Adding a fourth Dry Run to simulate go-live
- Updating the timing of Agency Readiness Certifications and Stage Gates

Mr. Cox reminded the Council that their interfaces must successfully complete Interface Cycle 2 – Technical Testing before being tested in the UAT environment. Interface Cycle 3 – End to End Testing continues to parallel with UAT.

Closing Remarks

Facilitated by Robert Herron

Mr. Steven Fielder supported the UAT preparation conversations by reminding the Council to review their UAT Plan. 2026 is an election year and some agencies may be in transition of agency leadership during the time of Florida PALM go-live. Contingency plans and interim designees should be included in their agency UAT Plan.

The next Advisory Council meeting will be held on December 17. Mr. Herron adjourned the meeting.