

<b>Date</b>	March 25, 2026	<b>Time</b>	10:00 a.m. – 12:00 p.m.
<b>Location</b>	Department of Revenue		
<b>Objective</b>	Advisory Council Monthly Meeting		
<b>Attendees</b>	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)  Facilitators: Canopy One Representatives; Jimmy Cox (DFS); Yorke Davis (DFS); Robert Herron (DOH); Kimberly Kemp (DFS); Nikki Klein (DFS); Angie Robertson (DFS)		
<b>Related Documents</b>	<a href="#">Presentation</a>		

<i>Topic</i>	<i>Facilitator(s)</i>
Opening Remarks	
Welcome and Roll Call	Robert Herron
Discussion Topics	
Canopy One Presentation on Agency UAT Support	Canopy One Team
Testing Activities	Jimmy Cox Nikki Klein Angie Robertson
Training	Kimberly Kemp Angie Robertson
Walk-on Topics	Robert Herron
Closing Remarks	
Reminders and Action Items	Robert Herron

## Welcome and Opening Remarks

*Facilitated by Robert Herron*

Mr. Robert Herron 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, DEP, DOT, and FDACS.

## Canopy One Presentation

*Facilitated by the Canopy One Team*

Canopy One was selected to fulfill the Proviso requirement of procuring agency support during User Acceptance Testing (UAT). The Canopy One team shared an update on their progress. They've been meeting with agencies to record and understand agency user stories, test cases, business processes, interfaces and reports for the purpose of building a Standardized UAT Test Suite. Current challenges include pending agency responses, scheduling delays with 13 agencies, and timeline constraints. Canopy One remains on track with deliverables, and reported that risks are being mitigated and, overall, the process is going well. The Committee asked about system validation and if the system can be used in post-implementation as well as in UAT. The Canopy One team said, yes, it can be used for testing in UAT and post-implementation (e.g. system upgrade) to test and validate agency interfaces. Mr. Cox said the system will not test end-to-end processes, only the file layout which will be akin to cycle 2 interface testing.

## Interface Testing

*Facilitated by Jimmy Cox*

Mr. Cox gave an update on agency interface testing; several agencies still have one or more files in cycle 2. All inbound files must complete cycle 2 testing by the end of April, or they will be delayed until at least six months following go-live. All outbound files must complete cycle 2 testing by the end of July, or they will be delayed until at least six months following go-live. Mr. Fielder added agencies should be mindful that if interfaces are delayed, it could affect agency funding in the 2027-2028 fiscal year. While there are over 400 connections set up in cycle 3 testing, the volume of testing is minimal. The slowness of testing may mean agency business systems are not ready to test. All inbound files must complete multiple iterations of cycle 3 testing by the end of July, or they will be delayed until at least six months following go-live.

Ms. Robertson presented an update on UAT, sharing the in-person session attendees should be more prepared. Several attendees have limited knowledge of the subject matter, have not completed the prerequisite trainings, and have little to no awareness of the Knowledge Center. To support agency preparation, the Project recently published a new PALMcast for Agency Sponsors focusing on UAT, a new flyer with pre-session reminders was shared with all in-person session participants, and a new interactive video on how to find UAT resources on the Knowledge Center was published in the People First LMS. Ms. Robertson reiterated the approach for growing the testing footprint in UAT is for the focused groups attending in-person sessions to take the information learned back to their agency and facilitate knowledge-share with other testers. The internal facilitation should include end-to-end testing, including all business systems and future Florida PALM end users. The Committee discussed ways they've been facilitating knowledge sharing with their testers, to which many had the same approach. An example are mini-sessions, sharing bite-sized information with groups of people directly after attending a Project-hosted UAT session.

Additional observations from UAT in-person sessions include agencies continue to add new users, logins and the time spent testing is growing, and the highest volume of testing aligns to when Project-hosted in-person sessions are being held. Ms. Robertson shared the Known Issues and Enhancements list is now published via a live view, new queries are being built for SAMs to help manage log-in activity was built and shared, a mid-point survey was sent to everyone who attended at least one UAT in-person session, and the Project added on two additional sessions for the subject matter, Working with Projects.

Ms. Nikki Klein discussed the updated Progress Reports that shared new data in February. Fourteen out of 27 agencies reported they have begun Interface Cycle 3 Testing, with only half of the connections being tested to date. Sixty-two percent indicated an inadequate performance outcome, 50 percent reported it was due to 'timing' or the 'batch schedule'. Twenty-three out of 35 agencies reporting they have begun testing their user stories. Eighty-three percent indicated they were satisfied with the performance outcome. Additional reporting on testing will be captured in the March progress reports.

Ms. Kimberly Kemp shared an overview on Project-provided training resources. Agencies are expected to complete UAT through agency-guided exposure and hands-on experience in the system. Then training will be provided through various channels and methods, and an End User Manual will be published in the Knowledge Center that encapsulates all information from the trainings. The types of training delivery will include web-based, in-person, and support sessions. The web-based will be housed in People First LMS and be self-paced. In-person training will be held in a classroom or virtually and will target subject areas where complex activities cross business process modules and/or topics. Support sessions will be held virtually to help agencies upon demand. They are topic-specific and based on the end users' needs.

Ms. Kemp then shared an idea for open discussion related to specialized cross module teams within each agency. These teams would receive additional, specialized in-person training to support "pulling it all together". Topics may include module interactions, monitoring processes, understanding ledger impacts, and triaging errors. Due to the lack of time in the meeting, the members were asked to consider the idea for discussion at a future Council meeting.

## Walk-on Topics

*Facilitated by Robert Herron*

Ms. Alexandra Weimorts led a discussion on the coordination of testing with other agencies, namely for Inter/IntraUnit (IU) transactions. The consensus of the Committee was to communicate through the UAT Coordinators during UAT, while working on a longer-term solution for post-implementation. For post-implementation, the Committee suggested setting up an inbox within each agency for monitoring IU correspondence or creating a team that will manage the workflow of IU transactions and correspondence between agencies. Ms. Weimorts asked the Project leadership if IU script executions should be paused during DFS Accounting and Auditing (A&A) reevaluation of IU configuration-eligible COA values. Mr. Cox said to continue testing and report blockers. The Committee made one suggestion to Project leadership for system functionality, requesting an indicator that someone has started processing an IU transaction once it is received. Mr. Cox said the integrated system will require agency staff to communicate more than they are used to, and they should build that into their process updates.

Ms. Terri Mulkey requested support, such as a workshop, on role mapping. She mentioned DOH has had difficulty mapping FLAIR processes and users to Florida PALM user roles, and it hinders their testing progress. The Committee gave a few suggestions based on their experience, such as setting up templates for the Florida PALM roles and adding user names to them as they determine that position's responsibilities, or to create business rules by position needs. Ms. Robertson reminded the Committee of the information available on the Knowledge Center.

## Closing Remarks

*Facilitated by Robert Herron*

There will be no April next Advisory Council, therefore the next meeting will be held on May 13. Mr. Herron adjourned the meeting.