

## User Acceptance Testing Planning

### Overview

All agencies are expected to participate in User Acceptance Testing (UAT) to prepare for the next major implementation of Florida PALM. UAT will include testing for the next major implementation which includes Financials Wave, Payroll Wave, and the Data Warehouse/Business Intelligence (DW/BI).

UAT will begin after the ESC approves Stage Gate #3 – Ready to Begin UAT. Upon ESC approval, agencies will have access to the UAT environment beginning in February 2026. During that time, agencies should test all their processes comprehensively from end-to-end, including the integration of necessary agency business systems and enterprise systems. The full end-to-end testing with enterprise partners may be time-limited depending on the enterprise system.

The UAT effort includes independent and coordinated testing activities between the Project, enterprise partners (entities and systems) and agencies.

Agencies will use UAT to:

- Test and validate:
  - updated agency business processes from end to end, including processes that integrate with their agency business systems and other enterprise systems (e.g., STMS, MFMP);
  - business system remediation (where applicable);
  - end user role assignments;
  - agency-specific configurations; and
  - reporting needs and solutions.
- Develop agency-specific end user training and education materials.
- Provide all end users exposure to, and practice in, Florida PALM (i.e., host agency-led UAT sessions).
- Confirm agency change impacts to people, processes, technology and data.

The Project will complete the following to support agency UAT activities:

- Prepare the UAT environment for the start of UAT including:
  - Initial load of end users and role assignments;
  - Initial load of agency-specific configuration values, as confirmed by agencies; and
  - Initial load of agency conversion data, based on Mock Conversion 4.
- Refresh the UAT environment including:
  - Load/update all end users and role assignments;
  - Update agency-specific configuration values, as confirmed by agencies; and
  - Load of agency conversion data, based on Dry Run 2.
- Host limited in-person UAT sessions for initial testers in UAT and for targeted audiences for end of year testing.
- Provide training materials (e.g., navigation, process steps, demo videos) to support end user UAT activities.
- Implement a process through ServiceNow (SNow), the Florida PALM Testing Customer Portal, for agency UAT participants to log and track testing errors requiring Project team resolution.

- Provide support during testing activities.

Completion of UAT activities are tied to [Agency Readiness Certifications](#) and will support information provided to the ESC to inform the Stage Gate 4 – Agency Readiness decision. The purpose of Stage Gate 4 is to confirm agencies have completed UAT and the criterion for approval is that Agency Readiness Certifications have been received. The four Agency Readiness Certifications will include Agency Sponsor assertion of the progressive completion of readiness activities, culminating with the final certification, aligning with the conclusion of agency UAT participation.

## Agency UAT Planning

Agencies will develop an agency-specific UAT plan to document their approach, key activities, and essential resources needed to complete UAT. Agencies will develop their plan through a series of four RW tasks/subtasks associated with creating an Agency-Specific User Acceptance Testing Plan. Table 1 lists each task, their objectives and dates for each.

Table 1: UAT Plan RW Subtasks

Subtask	Subtask Planning Objectives	Planned Dates
536-A	536-A will require agencies to establish their testing objectives, scope, key activities, and their agency roles and responsibilities.	June 17, 2024 – Aug. 16, 2024
536-B	536-B will require agencies to identify key components of test execution, including test management.	Aug. 19, 2024 – Oct. 11, 2024
536-C	536-C will require agencies to confirm their business processes to be tested and to identify UAT success criteria.	Dec. 9, 2024 – May 2, 2025
668	Update UAT Plan	Dec. 8, 2025 – Jan. 9, 2026

In addition to the UAT planning activities, agencies will also complete RW tasks focused on preparing documentation and participants for UAT.

## Agency Preparation for UAT

Agency preparation for UAT includes readying their four critical operational elements: people, processes, technology and data. Agencies will be asked to confirm their readiness to begin UAT. Agencies must provide a mitigation strategy for any readiness criteria not met. Agency UAT readiness criteria and related RW tasks are provided in Table 2.

**NOTE:** Agencies may receive access to UAT even if all readiness criteria are not met. Only agency business systems that have successfully completed Interface Cycle 2 – Technical Interface Testing will be integrated into the UAT environment for full end-to-end testing.

Table 2: UAT Readiness Criteria

Critical Operational Element	Readiness Criteria <i>Update 2: Begin All Agency UAT</i>	Related RW Tasks or Project Activity
People	<ul style="list-style-type: none"> <li>Agency testers have been identified and prepared for the first portion of all agency UAT.</li> </ul>	<ul style="list-style-type: none"> <li>Task 573-B – Complete and Submit End User Role Mapping Worksheet</li> <li>Task 688 – Update UAT Plan</li> </ul>

Critical Operational Element	Readiness Criteria <i>Update 2: Begin All Agency UAT</i>	Related RW Tasks or Project Activity
	<ul style="list-style-type: none"> <li>Identified testers have been assigned end user roles based on job functions.</li> <li>UAT Roles and Responsibilities have been updated in agency-specific UAT Plan.</li> </ul>	
Processes	<ul style="list-style-type: none"> <li>UAT user stories have been created for all Project-recommended standard scenarios.</li> <li>Agency UAT Plan has been updated to align the Project's revised UAT Approach.</li> </ul>	<ul style="list-style-type: none"> <li>Task 574 – Prepare Documentation for User Acceptance Testing</li> <li>Task 688 – Update UAT Plan</li> </ul>
Technology	<ul style="list-style-type: none"> <li>Technical interface testing has been successfully completed.</li> <li>Agency business system documentation has been updated based on technical interface testing results.</li> <li>Agency business system testing environments are ready for end-to-end integration testing.</li> <li>Test scenarios for end-to-end integration testing have been developed.</li> <li>Agency end users identified for the first portion of UAT have been added to the agency's IdP for the Florida PALM UAT environment.</li> </ul>	<ul style="list-style-type: none"> <li>Task 592 – Agency IdP SMEs Add End Users to Agency's Identity Provider</li> <li>Submit Monthly Progress Reports - Testing</li> </ul>
Data	<ul style="list-style-type: none"> <li>Agency specific test data has been identified and documented, including source documents required for UAT scenarios.</li> <li>Changes to agency specific configurations have been documented and provided to the Project, if applicable.</li> <li>Agency data is cleansed based on Mock Conversion 3.</li> <li>Agency has provided updated data mapping to support Mock Conversion 4.</li> </ul>	<ul style="list-style-type: none"> <li>Task 574 – Prepare Documentation for User Acceptance Testing</li> <li>Task 587-A – Complete Data Cleansing Based on Conversion 3</li> <li>Task 587-B - Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers</li> <li>Task 587-C - Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects</li> </ul>

Critical Operational Element	Readiness Criteria <i>Update 2: Begin All Agency UAT</i>	Related RW Tasks or Project Activity
		<ul style="list-style-type: none"> <li>• Task 662 - Submit Updated Configuration Workbooks</li> <li>• Task 662-A – Submit Updated Configuration Workbooks – State Program Selection for Budget Allotments</li> <li>• Task 661 – Update Conversion Field Mapping</li> </ul>

## User Acceptance Testing Execution

### Testing Timeline

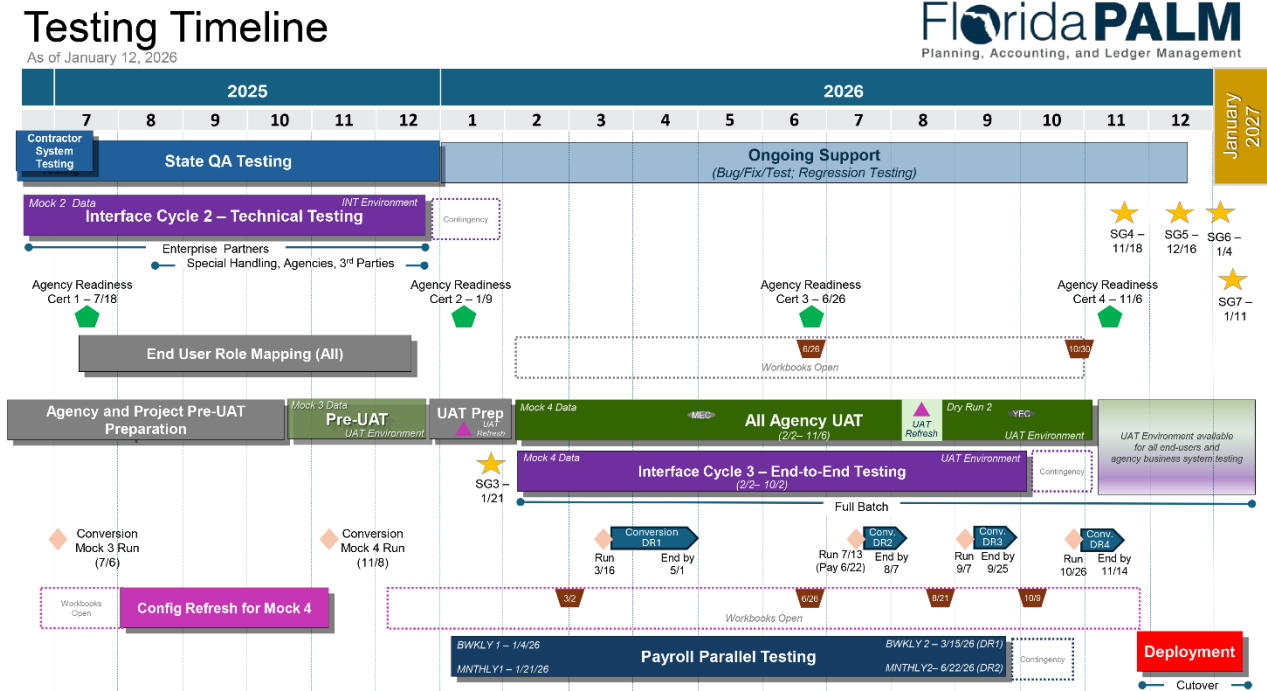


Figure 1: Testing Timeline

As depicted in Figure 1, a Pre-UAT period was conducted in advance of All Agency UAT, which included a small group of testers from Advisory Council agencies. The purpose of Pre-UAT was to identify and resolve any significant system issues prior to the start of UAT and build a small contingency of super-users.

All Agency UAT is planned to begin in February 2026, which includes the ability for testers to complete online transactions and spreadsheet uploads. All Agency UAT will also include Interface Cycle 3 – End-to-End testing and a fully enabled batch schedule. Once agency business systems have successfully completed Interface Testing – Cycle 2 Testing, they will be integrated into the UAT environment for Cycle 3 – End to End testing. A UAT environment refresh of agency data and agency of end users is planned for August 2026, during which time the UAT environment will be unavailable for approximately 2 weeks.

DFS enterprise partner entities (e.g., A&A and Treasury) will support the completion of online processing activities (e.g., executing approvals, denials), reviewing and validating enterprise level reports, and generally completing their daily activities in the test environment in a similar fashion to how they will operate upon implementation.

UAT will be the opportunity for agencies to complete full integration testing. Agencies will use this time to test end-to-end processes with end users, including the integration of agency business systems and enterprise systems (e.g., People First, MFMP, STMS, Works). The full end-to-end testing with enterprise partners may be time limited depending on the enterprise system. Agencies should use the UAT environment to create agency-specific UAT and training materials. The UAT

environment will continue to be available to agencies and their end users until go-live. End users should use the UAT environment to practice job functions and reinforce what has been learned through training.

Agencies must have testing activities completed in October 2026. During this month, agencies are expected to finalize and resolve outstanding testing issues to prepare for submission of the final Agency Readiness Certification to support the Agency Readiness Stage Gate decision in November 2026.

## Project Responsibilities During Test Execution

During UAT execution, the Project will:

- support agency testing activities by providing in-person and virtual assistance, answering questions, providing process input and overall encouragement to agency testers;
- develop and share testing materials (e.g., step-by-step);
- allow agency access to the testing environment; and
- provide the ability for agencies to report and track testing errors.

### Testing Materials

The Project will provide basic testing materials before and during UAT and can be used to support agency training materials. UAT materials provided by the Project will include the steps to complete processes in Florida PALM and how to navigate in Florida PALM. The functions performed in Florida PALM are listed in the [Topics and Activities](#) listing. The Project-provided UAT materials are available in the Knowledge Center and related screenshots and demonstration videos and align with the items in the Topics and Activities listing.

### Testing Environment

The Project will provide access to the testing environment for all agencies. Prior to the start of All Agency UAT in February 2026, the Project will load the following into the testing environment:

- agency end users identified to be loaded for the initial portion of UAT and their assigned end user roles, based on the agency's submitted Role Mapping Worksheet;
- configuration data, including statewide and standard configurations and agency-specific configurations as confirmed by agencies; and
- conversion data from Mock 4 conversion testing.

In August 2026, the testing environment will be refreshed. The Project will:

- load all agency end users and their assigned end user roles based on the agency's submitted Role Mapping Worksheet;
- complete a data refresh of the testing environment with Dry Run 2 conversion data; and
- update agency-specific configuration values as provided by agencies, if needed.

**NOTE:** *End user separation of duties (SOD) conflicts will be permitted and all requested roles loaded into the UAT environment for the first portion of UAT. SOD conflict restrictions will be strictly enforced during the second portion of All Agency UAT (i.e., after the data refresh). At that time, all SOD conflicts must be resolved or receive an exception status from DFS A&A prior to being loaded.*



### *Testing Errors and System Enhancements*

A critical component of testing execution and management is the ability to report testing errors and track the resolution of reported errors. The Project will use ServiceNow (SNow) for tracking testing errors or service requests via the Florida PALM Testing Customer Portal. End users with approved Portal access will be able to log tickets to request support or log errors.

Agencies will be provided with two SNow Ticket Reporter licenses. With those licenses, the SNow Ticket Reporters will have visibility into all tickets that have been logged for their agency, including the status of each ticket. Additional licenses for the SNow Ticket Reporter are not available, so agencies must ensure the right resources are selected for this access. The Project will:

- manage reported testing issues and requests by reviewing submitted tickets daily to prioritize and resolve tickets timely;
- escalate major issues during UAT immediately (i.e., real-time) to ensure blockers are removed quickly; and
- communicate ticket resolution to the ticket originator.

### *Agency Responsibilities During Test Execution*

Managing UAT will require a significant commitment from agencies and must be a coordinated effort across a variety of critical agency roles (e.g., UAT Coordinator, SAMs, Triage Team) and the Project. When conducting UAT, agencies are responsible for:

- **Agency Testing Participants** – Identifying and preparing agency testers (those identified for the initial UAT load and all end users for the secondary load)
- **Agency-Led UAT Testing Logistics** – Managing agency testing logistics, such as securing locations, ensuring participant sign up, obtaining computer resources
- **Agency-Specific Testing Materials** – Identifying agency-specific testing scenarios and gathering examples and supporting materials
- **Agency Testing Data** – Validating testing data and tracking data changes
- **Progress Tracking and Reporting** – Tracking and reporting progress of agency testers and testing efforts
- **Testing Errors** – Managing and reporting testing errors
- **Testing Coordination** – Coordinating testing activities, internal and external communication, and changes to agency business systems

### *Agency Testing Participants*

#### *Initial Testers*

Agencies will identify their initial testing participants through Role Mapping. It is an agency decision as to which users will be included in the initial load, but it's recommended that the initial testers should be:

- **Business experts** in your agency's current operational process.
- **Aware** of Florida PALM functionality and the related change impacts for your agency.
- **Involved** in Florida PALM readiness activities (attending workshops, participating in internal agency CCN engagements, assisting with completing RW tasks).
- **Leaders** with the authority to speak for your agency during UAT sessions.
- **Advisors** who are able and have the capacity to lead UAT sessions with agency end users.

Initial agency testers will be the leaders in UAT and should support the facilitation of agency-led UAT testing sessions and the training efforts within their agency. Initial testers should partner with their agency Training Liaison to support the development and delivery of agency-specific training. The [Training Approach](#) provides additional information about Project and agency-specific training.

### Remaining End Users

At some point during the UAT period, agencies should have all end users identified in their Role Mapping worksheet (RW task 573). All end users should participate in UAT, completing user stories to confirm that they can complete their job functions in Florida PALM, including related workflows.

Agency Change Management Liaisons should be working with managers of end users to ensure that end users are aware of UAT and their participation, to discuss process changes that have already been identified, and to confirm understanding of testing materials. Awareness activities targeted at agency end users should already be underway. End users need to be aware of the implementation timeline, changes that are coming in how they perform their functions, their role in the testing, and the expectations your agency has for end users to complete training and practice their functions prior to go live.

UAT and training both provide opportunities for end user learning and building of understanding. Project-provided training will begin in October 2026, as end users are testing activities in the UAT environment. Agencies should be prepared to deliver agency-specific end user training beginning no later than November 2026. End users will continue to have access to the UAT environment, which will be configured for each agency (e.g., roles, data, workflow), to practice job functions and reinforce what has been learned through training.

### Agency-Led UAT Testing Logistics

Agencies must plan for and manage agency-led UAT sessions. It is recommended that initial UAT testers support agency-led UAT sessions with end users. Since Florida PALM is a web-based solution, end users participating in testing will be able to log into the UAT environment from a central location or from their agency workstation.

When planning the logistics for agency-led UAT sessions, agencies should develop a roll-out plan to ensure all end users are included and all business processes are tested and validated, including those with integrated agency business systems. The questions below may assist agencies in developing a logistics plan.

- *Where are all our end users located?*
- *How should testing be facilitated – in person or virtually?*
- *Do we need to identify and reserve physical testing locations?*
- *Which agency business systems should be included, if any?*
- *Should all end users enter UAT at the same time or should there be a focused effort with managers of end users first?*
- *What will the testing schedule be from February 2026 – October 2026?*
- *Are there competing priorities at the same time as UAT? How will those be managed?*
- *How will we ensure that end users have the time and ability to participate in UAT and training during this time?*



The Project will provide overview materials to help end users be successful in UAT, but agencies may require end users to complete pre-requisites before participating in UAT. They may consider requiring review of change impact or updated process documentation, confirmation of understanding of the Florida PALM Chart of Accounts structure, or review of demonstration videos in the Knowledge Center.

### *Agency UAT Communication Strategy*

Many agencies will have a large number of testers engaged in UAT. Agencies should develop a communication strategy to plan for and document UAT communications to ensure participants are well-informed of expectations, activities, schedules, available resources, and testing progress. The UAT Coordinator and Change Management Liaison should work together to develop a communication strategy for the agency.

### *Agency-Specific Testing Materials*

Agencies must create user stories for all business processes they plan to test (RW Task 574). A user story is not a test script, rather it is a description of a single unit of work or activity within a larger business process. It often includes a role, the activity, and the reason for the activity.

Some examples of user stories are:

- As an Accounting Specialist in Disbursements, I want to process a City of Tallahassee utility bill so that we may pay the invoice to meet prompt payment law.
- As an Asset Custodian, I want to update the location of a tagged piece of equipment to reflect the transfer from one assigned user to another.
- As an Accountant III in Revenue, I want to process a transfer of revenues between two of our agency trust funds so the agency can record the receipt of funds into the proper fund.

In addition to developing user stories, agencies may need to create additional agency-specific materials to support end user testing activities, such as crosswalks of new Chart of Account values and agency-specific configurations (e.g., SpeedKeys). As agencies are completing their configuration and conversion RW tasks, they should be thinking about how those changes or resulting data sets should be captured and communicated internally to support end users' UAT experience. Agency example / sample transactions (e.g., invoices, deposits, transfers) should be sourced from actual agency transactions.

### *Agency Testing Data*

Agencies must ensure that testers have access to valid ChartFields to use in transactions and valid combo edits for transactions. Configuration data that has been successfully loaded in the UAT environment for the related conversion or dry run will be made available in the agency's archive workbook in Smartsheet. Testers with the appropriate reporter roles will also have the ability to pull reports from Florida PALM UAT for valid ChartFields and combo edits.

Conversion results will be shared in the agency's secure file share. The results will provide the errors, indicating the records that did not successfully load in the environment, and a report extract of the transactions that did load.

During testing, agencies may identify data issues that require action to be taken for resolution, such as:

- **Configuration updates/changes** – If an agency identifies the need to make a change or provide a new agency-specific configuration value (e.g., Organization ID, OA1, asset location definition), the agency should make the update in the testing environment following the related Florida PALM process and also into their configuration workbook if those changes need to be in Florida PALM after the UAT data refresh or at go-live. Changes not included in the applicable configuration worksheet will not be included in the UAT environment refresh (i.e., Dry Runs) or at Go Live.
- **Conversion issues** – If an agency identifies an issue with data that has been converted, the agency should address the issue in the source system (e.g. FLAIR, MFMP). Agencies should update their Agency Data Readiness Plan to include the found issue, the resolution and plan to maintain data readiness until final conversion just before go-live.
- **End User Role Assignment changes** –
  - If an agency identifies the need to add or remove end users, the agency IdP SME is responsible for making required updates in the agency's active directory.
  - If an agency identifies the need to make role assignment changes, those changes must be performed by the agency SAM.
  - All changes that are tested, verified and determined to be needed at go-live should be documented in the agency's Role Mapping Worksheet to be submitted to the Project for the data refresh and for go-live.

### *Progress Tracking and Reporting*

Agencies will be responsible for tracking and reporting UAT progress via the Monthly Progress Reports. The Monthly Progress Reports will require agencies to track such things as:

- overall testing progress to determine if the agency is on track to complete testing activities on time;
- end user participation;
- progress and validation of agency business processes; and
- testing errors and statuses for Florida PALM and agency business systems.

Agencies will report progress of UAT to the Project across the four critical operational components of readiness: people, processes, technology and data. Examples, include:

- **People** – Participation rate of end users
- **Processes** – Completion rate (percentage complete) of planned user stories
- **Technology** – Testing progress of Agency Business Systems with direct interfaces to Florida PALM
- **Data** – Confirmation of conversion and configuration data

### *Testing Errors*

Agencies are expected to track and report on testing errors to their Testing Error Triage team. The purpose of the team is to review all reported testing errors on a regularly scheduled basis to determine the nature of the issue and next course of action, as some errors can be resolved within the agency while others will need to be reported to the Project through the Florida PALM Testing Customer Portal. All testing errors must be reviewed daily and, if action is required by the Project, the ticket(s) must be logged.

**NOTE:** *Agency SAMs must approve end users' request to establish Testing Customer Portal access. Although all agency-approved Portal users will have the ability to log tickets in*

*SNOW, agencies should require all end users to submit errors to the agency Testing Triage Team prior to logging a ticket.*

Examples of testing errors that will require internal resolution:

- An end user is unable to complete a user story because the end user does not have the correct role assignment.
- A user story failed because the needed agency-specific ChartField value is not available.
- An agency business system is unable to accurately consume a file from Florida PALM.

Examples of testing errors that should be reported by logging a testing error ticket in the Testing Customer Portal includes:

- A report did not provide expected results due to report generation error (e.g., timing out) or missing information.
- A returned error message is unclear, is not adequately explained in the UAT materials, and error resolution steps are indeterminate.
- An Approver is unable to approve a transaction despite having an assigned approver role.

Agencies will be expected to report their progress related to UAT and agency training of end users during their monthly touchpoints with the Project, their monthly progress reports, bimonthly (or other cadence) status reports, and through the readiness certification process. Additional guidance for tracking and reporting testing progress will be provided by the Project before the start of UAT.

### *Testing Coordination*

Agency execution and management of UAT will require significant coordination within the agency, across several critical agency roles, including their UAT Coordinator, SAMs, IdP SMEs, File Managers, Triage Team, and initial testers. Refer to Table 4 Agency Roles and Responsibilities for a description of each role.

These roles will require a significant time commitment across the duration of UAT. The following describes the criticality of each role during UAT.

- **UAT Coordinator** – This role is essential for providing needed direction and alignment within the agency and for representing agency progress to the Project. This role should maintain constant awareness of agency efforts, support resolution of issues internally (remove blockers, connect resources), and be able to work across internal organizational lines for the overall success of the agency testing.
- **Testing Error Triage Team** – The regular and timely review and discussion of testing errors at a cross-team / agency level will help to ensure progress of testing efforts, as well as alignment across the agency for identified and resolved issues.
- **Initial Testers** – Support is essential to the success of the end users within the agency. Their responsiveness and ability to assist in subsequent end user understanding and issue resolution will be pivotal for agency UAT success. Building a network of agency resources that can support one another is a critical strategy for agency success.
- **SAMs** – Support will need to be continual in order to resolve testing issues related to role assignment.

- **IdP SMEs** – Support will need to be timely to ensure end user role access and resolution of any testing issues related to access.
- **File Manager** – Support will be as needed to resolve any interface testing issues, including escalation to the Project Team.

## UAT Scope and Success Criteria

### Testing Scope

Agencies should identify and document the scope of their testing needs based on the changes to their people, processes, technology and data.

- **People** – Who should participate in testing?
- **Processes** – What activities need to be tested and validated?
- **Technology** – What related agency business systems should be included in testing?
- **Data** – What data values need to be validated?

### People

Testing scope includes the identification of all required testing participants. The primary testing participants will be the future Florida PALM end users. Agencies should use their Role Mapping worksheet to continually maintain their end user listing as staffing changes occur, or as role changes occur during testing. Agencies will role map initial testers prior to the start of UAT and the remaining end users will be role mapped for the Project to load during the UAT refresh. Changes during the period in between the Project-loaded users and role assignment will be managed by the agency's SAMs and IdP SMEs.

Some agencies may require additional testing participants beyond the Florida PALM end users, such as users of related agency business systems or related enterprise systems (e.g., People First, MFMP, Works, FACTS). Agencies may also identify the need to include roles outside of systems. Any person or role that is needed to complete an agency business process from end to end should be considered.

### Processes

Before agencies can begin developing user stories, they must first confirm all the processes and subprocesses, or activities, that must be tested during UAT. To confirm all the activities that must be tested, agencies must

1. Understand current business practices, as documented in the Agency Current State Analysis.
  - a. RW Task 324 – Complete FLAIR Data Elements Inventory
  - b. RW Task 325 – Complete Data Security and Access Survey
  - c. RW Task 326 – Update Current State Agency Business System Inventory and Documentation
  - d. RW Task 327 – Complete Reports Inventory
  - e. RW Task 328 – Document Current Agency Business Processes
2. Understand Florida PALM Design, presented to agencies through a series of design workshops and documented in the [Knowledge Center](#).
  - a. Business Processes, subprocesses and activities
  - b. Chart of Account Design
  - c. Configurations
  - d. Conversions

- e. End user roles, access and security
  - f. Interfaces
  - g. Reports
  - h. Workflow
3. Understand the changes to the agency's current state based on Florida PALM design, including changes to people, processes, technology, data.

Agencies should create an inventory of all activities that should be tested in Florida PALM and document changes to people, processes, technology and data using the Change Analysis Tool (RW Task 560). While agencies completed and submitted the Change Analysis Tool prior to the start of UAT, it remains available for agencies to update and maintain throughout UAT. The Change Analysis Tool may also be used to support the agency's tracking and reporting of testing progress.

### *Technology*

Agencies should consider activities outside of the Florida PALM solution that may also need to be incorporated in the scope of UAT, such as activities in related agency business systems. Agencies have had the opportunity to identify agency business system test cases through a series of RW tasks to update Agency Business System Documentation (RW Tasks 504, 516, 528, 544, and 558). Agencies should plan to test Agency Business Systems based on their identified test cases during full integration testing beginning February 2026.

**NOTE:** *Agency business systems will not be authorized to participate in end-to-end interface testing in the UAT environment until they have completed Interface Cycle 2 – Technical Testing of in-bound interfaces.*

### *Data*

Agencies should identify the critical data changes that must be tested and validated. Data considerations include the validation of:

- agency-specific configuration values;
- reporting needs; and
- data access (e.g., end users have access to necessary data).

As part of the UAT data refresh, agencies will be required to reconcile their converted data (e.g., balances) to FLAIR. As such, agencies should also identify their approach to validating Florida PALM data conversions. The validation must include reconciliation of the information converted from FLAIR to the information loaded in into the Florida PALM UAT environment for the UAT refresh. As part of this, agencies should also identify their approach for keeping their data clean, so the cut-over conversions accurately reflect the agencies data.

### *Success Criteria*

Once agencies understand the scope of UAT, they should identify the success criteria for UAT completion. Agencies should identify and prioritize what is critical for successful completion of UAT (must haves vs. nice to haves), which means they are able to certify readiness to go live. Figure 2 shows the relationships between the various agency efforts, which all lead to certification of readiness.

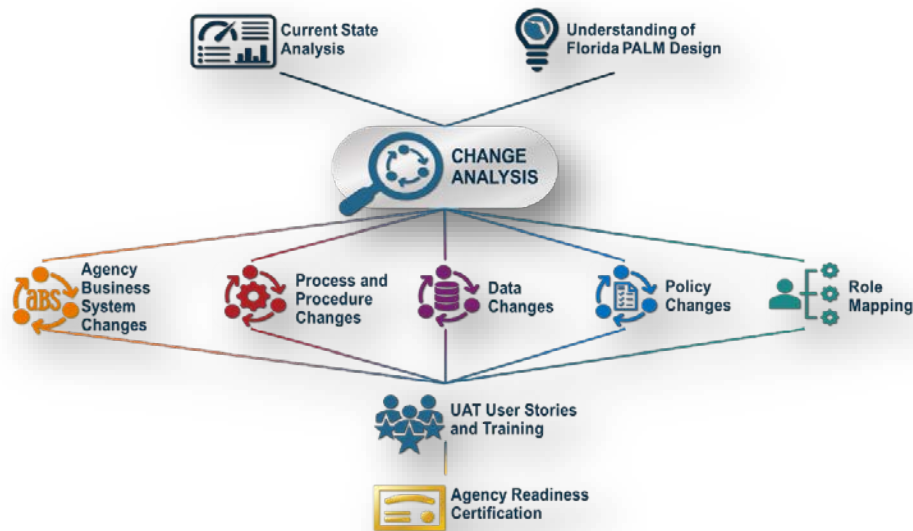


Figure 2: Agency Activities Impact on Readiness Certification

The Project has provided criteria for Agency Readiness Certification. Agencies must certify that they have completed readiness activities across the four critical operational elements: people, processes, technology and data. Agency completed and submitted Readiness Certification will be provided to the Executive Steering Committee for review to consider each agency's readiness as they prepare to vote on Stage Gate 4: Agency Readiness in November 2026.

Final submission of the Agency Readiness Certification will occur in November 2026 (RW Task 628), indicating the culmination of all testing activities and that the agency is ready to go live. The following are UAT-related criteria for the final submission of the Agency Readiness Certification.

### **People**

- End users have practiced or will practice completing job functions in UAT before go-live.
- End users have tested and validated end user roles.

### **Processes**

- All business processes from end-to-end have been tested and validated.

### **Technology**

- All critical interfaces have been tested and validated.
- All critical agency business system remediation has been tested and validated.
- Agency has updated their agency-specific deployment plan based on end-to-end testing.

### **Data**

- All agency-specific configurations have been tested, validated and confirmed (including any final updates provided to the Project).
- All reporting needs and solutions have been tested and validated.
- Converted balances have been reconciled for Dry Run 2.

**NOTE:** At a minimum, agency UAT success criteria should align to the criteria defined in the Agency Readiness Certification.



### ***Mitigating Gaps in UAT Success Criteria***

The achievement of successful completion of UAT is strictly to the benefit of the agency and its stakeholders, ensuring that the agency's people, processes, technology and data are ready for the transition to Florida PALM at go-live. However, it is recognized that some agencies may not fully meet their success criteria for completion of UAT.

Agencies should identify and monitor any risks that may impact the successful completion of UAT. As with any risk, if it materializes and becomes an issue, agencies should act immediately by developing a mitigation plan, following the agency's Risk and Issue Management Plan.

## Agency Roles and Responsibilities

The agency CCN will generally coordinate the UAT efforts within the agency, though there are some specific, time-bound roles that will be assigned to support UAT efforts for the duration of the UAT period. Table 4 lists the roles and describes the various responsibilities of each.

*Table 3: Agency UAT Roles and Responsibilities*

Role	Responsibility
Agency Sponsor	<ul style="list-style-type: none"> <li>• Certify readiness to participate in and continue with UAT.</li> <li>• Regularly monitor agency UAT progress.</li> <li>• Monitor agency risks, issues, and mitigation plans and communicate them to the Project.</li> <li>• Request, provide and assign appropriate resources as needed and remove obstacles to successfully complete UAT activities.</li> </ul>
Agency Liaison	<ul style="list-style-type: none"> <li>• Collaborate closely with UAT Coordinator and provide updates to the Agency Sponsor.</li> <li>• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Business Liaison	<ul style="list-style-type: none"> <li>• Identify and confirm all agency business processes to be tested.</li> <li>• Confirm the creation of User Stories and updated documentation for processes and procedures.</li> <li>• Ensure that end-to-end testing of agency business processes is conducted.</li> <li>• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Technical Liaison	<ul style="list-style-type: none"> <li>• Identify and confirm all agency business systems to be tested.</li> <li>• Confirm agency business systems are ready for full integration testing.</li> <li>• Coordinate agency business system remediation as needed, based on the results of testing.</li> <li>• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Project Management Liaison	<ul style="list-style-type: none"> <li>• Capture and track both Project- and internal agency-driven UAT activities and maintain awareness of progress and due dates.</li> <li>• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Change Management Liaison	<ul style="list-style-type: none"> <li>• Develop and maintain UAT communication plan.</li> <li>• Support the identification and tracking of agency UAT participants.</li> <li>• Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Training Liaison	<ul style="list-style-type: none"> <li>• Identify and track agency UAT participants.</li> <li>• Support agency-hosted UAT sessions with end users.</li> <li>• Track and report UAT participants completion of Project provided pre-requisite trainings.</li> </ul>

Role	Responsibility
	<ul style="list-style-type: none"> <li>Coordinate or lead the agency training material development.</li> <li>Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
UAT Coordinator	<ul style="list-style-type: none"> <li>Track and confirm testing progress.</li> <li>Lead the Testing Error Triage Team.</li> <li>Serve as the primary point of contact with the Florida PALM Project team for reporting progress, discussing testing issues, ensuring coordination of agency efforts with the overall UAT timeline.</li> </ul>
Testing Error Triage Team	<ul style="list-style-type: none"> <li>Meet regularly to review progress and discuss upcoming activities.</li> <li>Review testing errors to determine resolution or need for escalation.</li> </ul>
SNOW Ticket Reporters	<ul style="list-style-type: none"> <li>Review status of agency testing error tickets logged in the Testing Customer Portal.</li> <li>Participate in Testing Error Triage Team.</li> </ul>
Initial Testers	<ul style="list-style-type: none"> <li>Support UAT planning (e.g., user stories/script development, agency-specific materials development).</li> <li>Participate as first end users in UAT.</li> <li>Conduct agency-hosted UAT session with subsequent end users.</li> <li>Serve as primary point of contact for end user business process, data, and technical questions.</li> <li>Support agency training material development.</li> <li>Report testing errors and testing progress to UAT Coordinator.</li> <li>Support subsequent end user understanding during UAT and after go-live.</li> <li>Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Security Access Manager (SAM)	<ul style="list-style-type: none"> <li>Perform and track role assignment changes for end users during UAT.</li> <li>Report agency-specific Florida PALM risks and issues to Agency Sponsor and UAT Coordinator and support mitigation strategies or resolutions.</li> </ul>
Identity Provider (IdP) Subject Matter Expert (SME)	<ul style="list-style-type: none"> <li>Add end users to the active directory (or applicable tool) for access to UAT.</li> <li>Maintain active directory for access throughout UAT (adding new end users or removing end users as needed).</li> </ul>
File Manager	<ul style="list-style-type: none"> <li>Serve as the primary point of contact for interface testing.</li> <li>Access the Florida PALM Managed File Transfer (MFT) site to send and receive files between the agency and Florida PALM.</li> </ul>
Batch Error Contact	<ul style="list-style-type: none"> <li>Serve as the primary point of contact for batch errors or change in batch process timing.</li> </ul>
End Users	<ul style="list-style-type: none"> <li>Practice job-related processes in Florida PALM.</li> <li>Confirm end user role assignment(s).</li> </ul>

Role	Responsibility
	<ul style="list-style-type: none"><li>Report testing errors and testing progress to UAT Coordinator or agency-identified contact, as appropriate.</li></ul>