Task Instructions

Task ID: 593
Task Name: *Update Agency Readiness Certification #1*
Task Start Date: 06/23/2025
Task Due Date: 07/18/2025
Project Impact: Indirect

Task Description

Provide update to Agency Readiness Certification in preparation for go-live.

Task Overview

Florida PALM is a business transformation Project impacting agencies across four critical operational elements: people, processes, technology, and data. Agencies must be ready across all four critical operational elements to successfully transition to Florida PALM at go-live in January 2026. The Project has previously established and shared the Agency Readiness Certification Criteria with all agencies.

An agency's critical operational elements are defined as:

- People – The staff and stakeholders affected by your agency's transition to Florida PALM
- Processes – The sequence of procedures to accomplish a business objective
- Technology – The applications or tools used to process, track, or report on financial operations
- Data – Information used in or processed from an agency's financial business operations

Agency Sponsors must certify that their agency has achieved each readiness criteria, describe mitigation plans for any readiness criteria not achieved, and provide an overall confidence level regarding the agency's readiness across each of the critical operational elements through a series of RW tasks described in Table 1.

Table 1: Readiness Certification RW Tasks

RW Task ID	Task Due Dates	Task Purpose
593	07/18/25	Agency Sponsors will provide the first update to Agency Readiness Certification to indicate the agency is ready to begin participating in UAT and Cycle 2 – Technical Interface Testing.
606	11/14/25	Agency Sponsors will provide the second update to Agency Readiness Certification to indicate the agency is ready to continue UAT and is prepared to soon begin agency-led sessions for agency end users and fully integrated UAT to test end to end processes, including agency business systems and enterprise systems.
619	03/13/26	Agency Sponsors will provide the third update to Agency Readiness Certification providing an update of UAT progress, indicating the agency is ready to provide agency-specific training for their end users and prepare for cutover activities.
628	05/15/26	Agency Sponsors will provide final submission of the Agency Readiness Certification indicating the culmination of all testing activities and that the agency is ready to go-live.

All agency readiness certifications will be published to the Florida PALM website and shared with Project stakeholders, including the Executive Steering Committee (ESC). This first update to the Agency Readiness Certification will be shared with the ESC, along with the Project's status of UAT entry criteria, prior to the July 30th ESC vote for Stage Gate 3 – Ready to Begin UAT. The final submission of Agency Readiness Certification will be provided to the ESC for review and consideration as they prepare to vote on Stage Gate 5 – Agency Readiness, required before Florida PALM can go live.

A new <Agency> Readiness Certification Dashboard (Dashboard) and related worksheets have been created for each agency and added to a new *Agency Readiness Certification* folder within the *Florida PALM Workspace for (Agency) > Agency Readiness* folder. The Dashboard provides a view of the Readiness Certification Criteria and the agency's current status for the related RW tasks. The Dashboard also serves as the tool for the Agency Sponsor to submit the agency's status for each Readiness Certification Criteria, any mitigation plans for any criteria not met, and an indication of the Sponsor's confidence level regarding the agency's readiness across each of the critical operation elements and at an overall level. The [Understanding Your Agency Readiness Certification Dashboard](#) document provides a detailed overview of all components of the Dashboard.

Task Elements

This task contains four parts:

1. Review Agency Readiness Certification Criteria and your Agency's readiness progress
2. Confirm status of Agency Readiness Certification Criteria
3. Provide mitigation plans for any criteria not met
4. Complete and Submit Readiness Certification Dashboard

Review Agency Readiness Certification Criteria and Agency Readiness Progress

The criteria for Agency Readiness Certification #1 and the related RW tasks are provided in Table 2 below. Review the criteria and your agency's readiness progress. You should consider the status of each of the related RW Tasks, as displayed on your Dashboard, as well as any additional information provided by your Agency CCN regarding progress.

Table 2: Readiness Certification #1 Criteria and Related RW Tasks

Critical Operational Element	Readiness Criteria *Update 1: Begin UAT and Interface Testing*	Related RW Tasks or Project Activity
People	1.1 Agency identified SMEs have been assigned end user roles based on job functions. 1.2 UAT Roles and Responsibilities have been identified in agency-specific UAT Plan. 1.3 SMEs have been identified and prepared to participate in UAT.	• Task 536 – Create Agency-Specific User Acceptance Testing Plan • Task 573-A – Complete and Submit End User Role Mapping Worksheet for UAT

Critical Operational Element	Readiness Criteria *Update 1: Begin UAT and Interface Testing*	Related RW Tasks or Project Activity
Processes	2.1 Agency UAT success criteria has been identified. 2.2 Change impacts have been identified for agency processes. 2.3 Creation of at least 75% of the Project-recommended standard UAT scenarios.	• Task 536 – Create Agency-Specific User Acceptance Testing Plan • Task 560 – Submit Change Analysis Tool • Task 574 – Prepare Documentation for User Acceptance Testing
Technology	3.1 Agency interface needs have been confirmed. 3.2 Agency business system remediation for Tier 1 systems is at least 75% complete. 3.3 Agency business system testing environments have been established and are ready to begin technical interface testing with Florida PALM. 3.4 Agency IdP has been confirmed and configuration with the Florida PALM UAT environment is on track to be complete before the start of UAT. 3.5 Agency SME end users have been added to the agency's IdP for the Florida PALM UAT environment.	• Task 557 – Confirm Interface Inventory for Cycle 2 Interface Testing • Task 576 – Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing • Task 578 – Confirm Identity Provider for Florida PALM • Task 591 – Confirm IdP Configuration for Florida PALM
Data	4.1 Agency has documented reporting needs. 4.2 Agency specific test data has been identified and documented, including source documents required for UAT scenarios. 4.3 Agency specific configurations have been confirmed. 4.4 Agency data is cleansed based on Mock Conversion 2 results. 4.5 Agency has provided updated data mapping to support Mock Conversion 3.	• Task 560 – Submit Change Analysis Tool • Task 574 – Prepare Documentation for User Acceptance Testing • Task 657 – Submit Updated Configuration Workbooks • Task 659 – Update Conversion Field Mapping • Task 571 – Complete Data Cleansing Based on Mock Conversion 2

Confirm Status of Agency Readiness Certification Criteria

A new worksheet titled <Agency> Readiness Certification has been added to your new *Agency Readiness Certification* folder within your *Florida PALM Workspace for (Agency) > Agency Readiness* folder. Use this worksheet to provide confirmation of whether each criteria has been met (Yes), not met (No), or is not applicable (N/A) to your agency. You will also be required to rate your confidence level for your agency's readiness for each of the four critical operational elements and your overall confidence level for entering UAT and beginning interface testing. The information you provide in the worksheet is displayed on your Dashboard, as described in the Understanding Your Agency Readiness Certification Dashboard document.

Figure 1: DEMO Readiness Certification Worksheet

The worksheet contains the following columns used to display the criteria for this Readiness Certification update. These columns are locked from editing.

- Critical Operational Element
- Criteria ID
- Criteria

You must complete the following columns within the worksheet.

- Criteria Met – Use this field to indicate if the criteria has been met, not met or not applicable to your agency.
    - Required for all readiness criteria, as indicated by yellow highlighting within the blank cell
    - Drop-down options include Yes, No, or N/A
        - If 'No' is selected, the cell will highlight red, and you will be required to provide a mitigation plan for that criteria.
        - 'N/A' should only be selected if the criteria applicable to your agency. For example, an interface-related criteria is not applicable to an agency that is not planning for any agency business systems to interface with Florida PALM and, therefore, not participating in interface testing.
        - If 'N/A' is selected, you must provide an explanation in the comments field.

- Confidence Level – Use this field to indicate your level of confidence of your agency's readiness overall and across the four critical operational elements.
  - Required for the following rows within the Criteria column, as indicated by yellow highlighting within the blank cell:
    - Overall Readiness
    - Overall People Readiness
    - Overall Processes Readiness
    - Overall Technology Readiness
    - Overall Data Readiness
  - Drop-down options include:
    - Extremely Confident
    - Very Confident
    - Moderately Confident
    - Becoming Confident
    - Somewhat Concerned
    - Highly Concerned
- Comments – Use this field to provide comments related to any of the criteria.
  - Required for any criteria where 'N/A' was selected, as indicated by yellow highlighting within the cell
    - You must describe why the criteria is not applicable for your agency

Provide Mitigation Plans for Any Criteria Not Met

A mitigation plan is required for any readiness criteria that has not been met. A new worksheet titled *<Agency> Readiness Mitigation* worksheet has been added to your new *Agency Readiness Certification* within your *Florida PALM Workspace for (Agency) > Agency Readiness* folder. Use this worksheet to provide your mitigation plans, as necessary.

Within this worksheet you will see all Readiness Certification Criteria listed. However, you are only required to provide mitigation plans for those criteria that you indicated have not been met in the <Agency> Readiness Certification worksheet. All required fields are highlighted yellow. The information you provide in the worksheet is displayed on your Dashboard, as described in the Understanding Your Agency Readiness Certification Dashboard document.

Critical Operational Element	Criteria ID	Criteria	Why has the criteria not been met?	What mitigating actions are being taken?	Who is responsible for supporting the mitigation?	Impact/workaround if mitigation is not completed?	Planned completion date of the mitigation steps?
People	1.1	Agency identified SMEs have been assigned end user roles based on job function.					
People	1.2	UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.					
People	1.3	SMEs have been identified and prepared to participate in UAT.					
Processes	2.1	Agency UAT success criteria has been identified.					
Processes	2.2	Change impacts have been identified for agency processes.					
Processes	2.3	Creation of at least 75% of the Project-recommended standard UAT scenarios.					
Technology	3.1	Agency interface needs have been confirmed.					
Technology	3.2	Agency business system remediation for Tier 1 systems is at least 75% complete.					

Figure 2: DEMO Readiness Mitigation Worksheet

The worksheet contains the following columns used to display the criteria for this Readiness Certification update. These columns are locked from editing.

- Critical Operational Element
- Criteria ID
- Criteria

You must complete the following columns within the worksheet for all criteria that have not been met, as indicated by yellow highlighting:

- ***Why has the criteria not been met?*** – Use this column to describe your agency's challenges or blockers that have prevented the achievement of the criteria.
- ***What mitigating actions are being taken?*** – Use this column to describe the action items that your agency has or will employ to achieve the criteria.
- ***Who is responsible for supporting the mitigation?*** – Use this column to indicate the person or people within your agency that is responsible for ensuring the mitigation plan will be completed.
- ***Impact/workaround if mitigation is not completed?*** – Use this column to describe the impact to your agency if the mitigation is not completed and any workaround solutions you may need to be prepared to employ.
- ***Planned completion date of the mitigation steps?*** – Use this column to provide the expected completion date for the mitigation plan.

Responses must be provided for all required fields. N/A is not a valid response.

Primary Agency Sponsor Submits the Readiness Certification Dashboard

After both worksheets have been completed, you should view all the data presented on your Dashboard. Ensure your information is displaying accurately and make any necessary updates to the source worksheets, as needed. Your Primary Agency Sponsor must confirm the data presented on the Dashboard accurately represents your agency's readiness status. Upon confirmation, your Primary Agency Sponsor must submit the Dashboard by completing the Agency Sponsor Confirmation located at the bottom of the Dashboard. The Agency Sponsor Confirmation requires the Primary Agency Sponsor to provide their name, add a check in the checkbox to "Confirm" the Dashboard, and click the Submit button for submission, as shown below in figure 3.

Figure 3: Agency Sponsor Confirmation Submission Form located on the Dashboard

Upon submission, the Readiness Certification #1 Confirmation box at the top of the Dashboard will populate with the confirmation date, as described in the Understanding Your Agency Readiness Certification Dashboard document.

How will agencies use this information?

Agencies must ready their people, processes, technology and data for a successful transition to Florida PALM. The Agency Readiness Certification provides an opportunity for agencies to evaluate current readiness progress and establish or refine mitigation efforts as needed before moving into the next phase of the Project (e.g., UAT Online and Cycle 2 Technical Interface Testing).

The Dashboard can be used as a reporting or communication tool to share your agency's readiness progress internally with your agency leadership and stakeholders.

What will the Florida PALM Team do with this information?

Your Dashboard will be published to the Florida PALM website and shared with stakeholders including the ESC. This first update to the Agency Readiness Certification will be shared with the ESC, along with the Project's status of UAT entry criteria, prior to the July 30th ESC vote for Stage Gate 3 – Ready to Begin UAT.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 3: Task Completion Rubric

Task Completion Rubric
A response has been provided in the *Criteria Met* or *Confidence Level* columns for all criteria in the *<Agency> Readiness Certification* worksheet.
A comment has been provided for any criteria the agency has indicated 'N/A' in the *Criteria Met* column in the *<Agency> Readiness Certification* worksheet. The comment must describe why the criteria is not applicable to the agency.
All required fields are complete in the *<Agency> Readiness Mitigation* worksheet, for all readiness criteria not met. N/A is not a valid response for any fields in this worksheet.
Primary Agency Sponsor has confirmed and submitted the Dashboard.
The RW Task Tracker, Agency Reported Task Progress column, has been updated to 100% - Submitted.

Task Instructions

Your Primary Agency Sponsor should work with the CCNs to evaluate your agency's current readiness status and determine a status for each Readiness Certification Criteria. The Agency Primary Sponsor must determine the overall confidence level that the agency is ready to begin UAT and Cycle 2 Technical Interface Testing, as well as confidence level across each of the critical operational elements.

Update the components of your Dashboard by completing the *<Agency> Readiness Certification* and *<Agency> Readiness Mitigation* worksheets. Your Primary Agency Sponsor must certify your agency's readiness status by submitting your agency's Dashboard.

Smartsheet Navigation:

> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Readiness Certification*

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 3 above.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps
1) **With your Primary Agency Sponsor, review the Agency Readiness Certification Criteria and evaluate your agency's current readiness status.**
2) *Provide the status for each readiness criteria in the <Agency> Readiness Certification worksheet.*
3) *Describe mitigation plans for any readiness criteria that have not been met, if any, in the <Agency> Readiness Mitigation worksheet.*
4) *The Primary Agency Sponsor must review, confirm, and submit the Dashboard.*
5) *Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.*
6) *Complete task by **July 18, 2025.***
7) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
8) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- [Understanding Your Agency Readiness Certification Dashboard](#)
- [Agency Readiness Certification Criteria](#)