

## Task Instructions

**Task ID:** 592

**Task Name:** Agency IdP SMEs Add End Users to Agency's Identity Provider

**Task Start Date:** December 8, 2025

**Task Due Date:** January 9, 2026

**Project Impact:** Direct

## Task Description

Agency IdP SMEs add the end users identified to participate in the initial portion of User Acceptance Testing to agency's identity provider.

## Task Overview

As described in the [Identity Access Management \(IAM\) article](#), agencies are responsible for identity management and authentication controls (e.g., password policies) for their Florida PALM end users, as well as for configuring and maintaining their agency's Identity Provider (IdP) connection with the Florida PALM IAM tool. Agencies use their IdP as an Agency User Directory or Active Directory that contains user credentials. The configuration of the agency IdP with the Florida PALM IAM tool allows for end user single sign-on to Florida PALM.

In previous RW Task 591, agencies added UAT SMEs to their agency's active directory Florida PALM security group, confirmed that Security Access Managers (SAMs) could access the Florida PALM UAT Access Management tool, and established new IdP connections, as needed.

In this task, agency IdP SMEs will need to add end users identified to participate in the initial portion of UAT to their agency's active directory and confirm that their IdP connection is still current in preparation for the start of All Agency UAT in February 2026.

## Task Elements

This task contains two parts:

1. Confirm that UAT participants have been added to your agency's active directory
2. Confirm IdP configurations needed for UAT

### Confirm UAT Participants are Added to Agency's Identity Provider

Your IdP SMEs are the primary contacts that manage the IdP and active directory at your agency. This task requires IdP SMEs to add the end users identified to participate in the initial portion of UAT to agency's active directory within the IdP, so that those specified end users can access the UAT environment.

You are currently identifying end users to be loaded to the UAT environment for the start of UAT in your *<Agency> Role Mapping* worksheet (RW Task 573-B). IdP SMEs must have access to the list of end users identified for the initial UAT load in your *<Agency> Role Mapping* worksheet. Using this list, your IdP SME must add end users to the appropriate security group within your active directory to access the UAT environment.

**NOTE:** UAT participants who are not in the appropriate security group in your active directory will not be able to access the UAT environment.

Once your IdP SME confirms that all initial UAT participants have been added to the appropriate security group for Florida PALM UAT within your agency's active directory, you must indicate completion in your *<Agency> UAT IdP* worksheet in Smartsheet. This worksheet has been updated to include new columns for this task, as shown below in Figure 1. Use the *UAT Participants Added to Active Directory* column to confirm this first element of this task has been completed.

UAT Participants Added to Active Directory	IdP Configuration Confirmation	Email Domain	Authentication Protocol	Identity Provider (IdP)	Project Comments	Comments
Not Started	@PALM.myflorida.com	Authentication Protocol	IdP Listed			

Figure 1: UAT Participants Column in the Demo UAT IdP Worksheet

## Confirm IdP Configurations Needed for UAT

Your agency's current IdP configuration(s) confirmed in previous RW Task 591 will be used for the UAT environment, unless your agency has had recent IdP changes that impacts end user access to the UAT environment. Your *<Agency> UAT IdP* worksheet currently lists all IdP configurations previously confirmed for UAT. Review the listed IdP configurations and determine if updates need to be made. Updates may include a new IdP connection or removal of an IdP connection. If your agency has had recent IdP changes since last confirmed in July 2025, your agency may require updated IdP configurations for UAT.

A new “IdP Connection Confirmation” column has been added to your *<Agency> UAT IdP* worksheet. Confirm if the listed IdP connections are correct or if any updates are needed. If an update is needed, select “Updates are Needed”, and upon saving, a workflow will be triggered to have a member of the Florida PALM team to contact your agency to gather the required information and schedule a meeting with your IdP SME to test any new configurations needed.

UAT Participants Added to Active Directory	IdP Configuration Confirmation	Email Domain	Authentication Protocol	Identity Provider (IdP)	Project Comments	Comments
Complete	Information is Correct Updates are Needed	@PALM.myflorida.com	Authentication Protocol	IdP Listed		

Figure 2: IdP Connection Confirmation in the Demo UAT IdP Worksheet

## How will agencies use this information?

Completion of this task supports your agency preparations for UAT, ensuring all identified end users participating in the initial portion of UAT will be able to access the UAT environment. This task is directly associated with the following Agency Readiness Certification #2 (RW Task 606) Criteria:

- Agency end users identified for the first portion of UAT have been added to the agency's IdP for the Florida PALM UAT environment.

## What will the Florida PALM team do with this information?

The Project team will monitor your progress throughout the duration of the task and provide technical support to update IdP configurations as needed.

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

Table 2: Task Completion Rubric

Task Completion Rubric	
“Complete” is selected in the <i>UAT Participants Added to Active Directory</i> column of the <i>&lt;Agency&gt; UAT IdP</i> worksheet.	
<i>IdP Connection Confirmation</i> column has a selection.	
If IdP updates are needed, the agency is required to provide the necessary information to the Project to establish the appropriate configurations and provide a positive test result of any new configurations established.	
The Task Tracker has been marked as 100% complete for this Task.	

## Task Instructions

Your IdP SME must update your agency active directory within the IdP to ensure end users identified to participate in the initial portion of UAT are included in the Florida PALM security group for UAT. Indicate completion in the *<Agency> UAT IdP* worksheet. Confirm the current IdP connection is correct or if updates are needed. If IdP configuration updates are needed, work with the Project team to complete and test the updates.

### Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Testing > (Agency) UAT IdP

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 2.

Table 3: Summary of Task Completion Steps

Summary of Task Completion Steps	
1)	<i>IdP SMEs add end users who will be participating in the initial portion of UAT to the Florida PALM security group for UAT within your agency IdP. Provide confirmation of completion in the &lt;Agency&gt; UAT IdP worksheet.</i>
2)	<i>IdP SMEs confirm that the IdP connection(s) listed are correct or if updates need to be made. If updates are needed, work with the Project team to establish and test any new configurations.</i>
3)	<i>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.</i>
4)	<i>Complete task by January 9, 2026.</i>
5)	<i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
6)	<i>If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.</i>

Supporting Materials & Resources:

- [Identity Access Management \(IAM\) article](#)