Task Instructions

Task ID: 606
Task Name: *Update Agency Readiness Certification #2*
Task Start Date: *December 15, 2025*
Task Due Date: *January 9, 2026*
Project Impact: Indirect

Task Instruction Updated: 1/05/2026

Summary of Change: Published the *<Agency> Mitigation for Incomplete Cycle 2 Testing* worksheets in Smartsheet and updated the *Mitigation for Criteria 3.1 – Technical Interface Testing* section.

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 2027. The Project has previously established and shared the [Agency Readiness Certification Criteria](#) for this second certification 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: Current and Remaining Readiness Certification RW Tasks

RW Task ID	Task Due Dates	Task Purpose
606	01/09/26	Agency Sponsors will provide the second update to Agency Readiness Certification to indicate the agency is ready to begin All Agency UAT to test end to end processes, including agency business systems and enterprise systems.
619	06/26/26	Agency Sponsors will provide the third update to Agency Readiness Certification providing an update of UAT progress.
628	11/06/26	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 second 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 January 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 4 – 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 #2 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 #2 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 operational 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 #2 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 and related activities as displayed on your Dashboard, as well as any additional information provided by your Agency CCN regarding progress.

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

Critical Operational Element	Readiness Criteria *Update 2: Begin All Agency UAT*	Related RW Tasks or Project Activity
People	• Agency testers have been identified and prepared for the first portion of all agency UAT. • Identified testers have been assigned end user roles based on job functions. • UAT Roles and Responsibilities have been updated in agency-specific UAT Plan.	• Task 573-B – Complete and Submit End User Role Mapping Worksheet • Task 688 – Update UAT Plan
Processes	• UAT user stories have been created for all Project-	• Task 574 – Prepare Documentation for User Acceptance Testing

Critical Operational Element	Readiness Criteria *Update 2: Begin All Agency UAT*	Related RW Tasks or Project Activity
	• recommended standard scenarios. • Agency UAT Plan has been updated to align the Project's revised UAT Approach.	• Task 688 – Update UAT Plan
Technology	• Technical interface testing has been successfully completed. • Agency business system documentation has been updated based on technical interface testing results. • Agency business system testing environments are ready for end-to-end integration testing. • Test scenarios for end-to-end integration testing have been developed. • Agency end users identified for the first portion of UAT have been added to the agency's IdP for the Florida PALM UAT environment.	• Task 592 – Agency IdP SMEs Add End Users to Agency's Identity Provider • Submit Monthly Progress Reports - Testing
Data	• Agency specific test data has been identified and documented, including source documents required for UAT scenarios. • Changes to agency specific configurations have been documented and provided to the Project, if applicable. • Agency data is cleansed based on Mock Conversion 3. • Agency has provided updated data mapping to support Mock Conversion 4.	• Task 574 – Prepare Documentation for User Acceptance Testing • Task 587-A – Complete Data Cleansing Based on Conversion 3 • Task 587-B - Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers • Task 587-C - Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects • Task 662 - Submit Updated Configuration Workbooks • Task 662-A – Submit Updated Configuration Workbooks – State Program Selection for Budget Allotments • Task 661 – Update Conversion Field Mapping

Confirm Status of Agency Readiness Certification Criteria

A new worksheet titled <Agency> Readiness Certification #2 has been added to your *Agency Readiness Certification* folder within your *Florida PALM Workspace for (Agency) > Agency Readiness* folder. Use this worksheet to provide confirmation of whether each criterion 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. 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 #2 Worksheet

The worksheet contains the following columns used to display the criteria for this Readiness Certification update. Additionally, the % column provides real-time data related to you Interface Cycle 2 – Technical Testing progress. 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 criterion has been met, not met or not applicable to your agency.
  - o Required for all readiness criteria, as indicated by yellow highlighting within the blank cell
  - o 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 is 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.

NOTE: Due to the collaborative nature of Interface Cycle 2 – Technical Interface Testing between agencies and the Project, responding to Criteria 3.1 is managed differently, as described further below.

- Confidence Level – Use this field to indicate your level of confidence of your agency's readiness overall and across the four critical operational elements.
  - o 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
  - o 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.
  - o Required for any criteria where 'N/A' was selected, as indicated by yellow highlighting within the cell
  - o You must describe why the criteria is not applicable for your agency

Criteria 3.1 – Technical Interface Testing

The Project recognizes that Cycle 2 testing continues to be in progress throughout the duration of this Task and beyond. Therefore, your Technical Interface Testing status may change during this Task. Based on the current state of Technical Interface Testing, the reporting on this criterion is being managed differently. There are two sub-criteria rows directly below Criteria *3.1 – Technical interface testing has been successfully completed.* All three rows are locked from editing.

- Sub-criteria 3.1a – Status of Inbound Interface Cycle 2 Technical Testing
- Sub-criteria 3.1b – Status of Outbound Interface Cycle 2 Technical Testing

The current status of Inbound and Outbound Interface Cycle 2 Technical Testing is auto populated in the % column. The data displayed is updated nightly based on your *<Agency> Cycle 2 Technical Interface Testing* worksheet in Smartsheet that you are currently maintaining.

- If the status is 100%, the cell will be green.
- If the status is greater than 75% but less than 100%, the cell will be yellow.
- If the status is less than 75%, the cell will be red.
- The status will be 'N/A' if your agency is not participating in interface testing.

Because these rows are locked from editing, you will not be able to insert a comment on this worksheet for these specific criteria. You may request your Readiness Coordinator add language in the Comment field on your behalf, or you may also choose to provide a comment directly in this worksheet in the *Overall Technology Readiness* row.

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 #2* has been added to your *Agency Readiness Certification* within your *Florida PALM Workspace for (Agency) > Agency Readiness* folder. Use this worksheet to provide your mitigation plans, as necessary.

NOTE: *Mitigation plans for Criteria 3.1 – Technical Interface Testing will be completed on a separate worksheet, as described further below.*

Within this worksheet you will see all Readiness Certification #2 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 #2* 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.

Figure 2: DEMO Readiness Mitigation #2 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
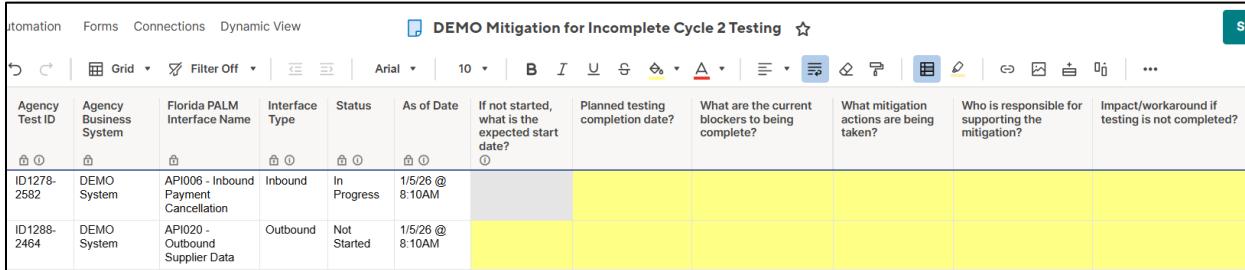
- Criteria ID
- Criteria

You must complete the following columns within the worksheet for all criteria that have not been met, as indicated by yellow highlighting:
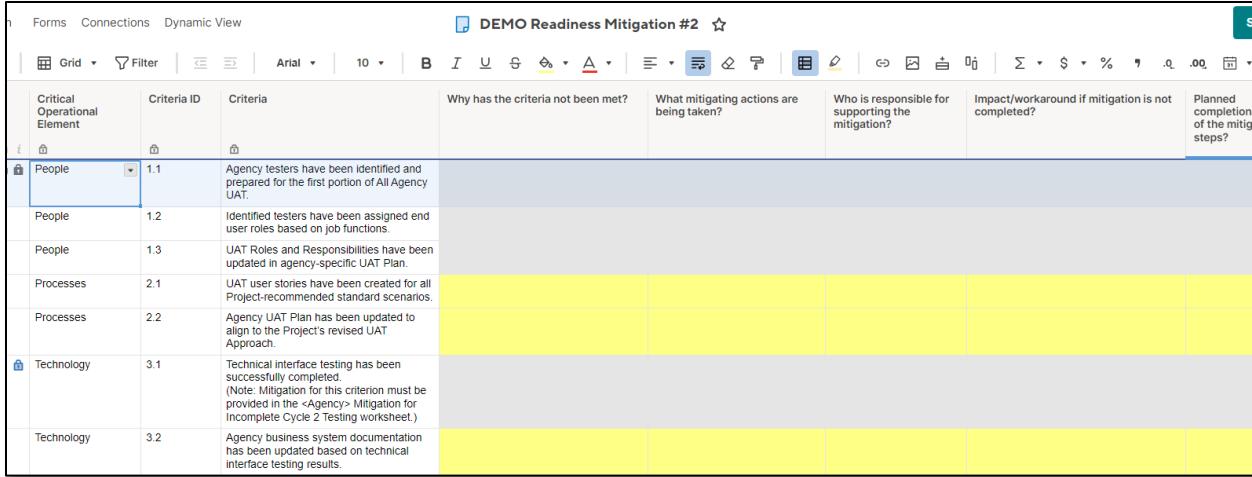
- *Why has the criteria not been met?* – Use this column to describe your agency's challenges or blockers that have prevented the achievement of the criteria.
- *What mitigating actions are being taken?* – Use this column to describe the action items that your agency has or will employ to achieve the 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.

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

Mitigation for Criteria 3.1 – Technical Interface Testing

Because Cycle 2 testing continues to be in progress throughout the duration of this Task, your status and percentage complete will likely change during the Task timeframe. It is also recognized that the mitigation plan may be different for each interface that has not successfully completed Interface Cycle 2 – Technical Testing. Therefore, a new worksheet, *<Agency> Mitigation for Incomplete Cycle 2 Testing* has been published as of <u>January 5, 2026</u>. The worksheet provides the opportunity for you to describe the mitigation for each interface where testing has not started or is still in progress, as necessary.

Figure 3: DEMO Mitigation for Incomplete Cycle 2 Testing worksheet

The worksheet is populated with data from your *<Agency> Cycle 2 Technical Interface Testing* worksheet in Smartsheet that you are currently maintaining and will only display interfaces that are not in a complete status for Cycle 2 testing. The worksheet will be updated twice daily (afternoon and nightly), at a minimum, throughout the duration of this task. If an interface that is in progress becomes complete before the close of this task, the interface will be removed.

The worksheet contains the following columns used to display any interfaces that are not in a complete status for Interface Cycle 2 – Technical Testing. These columns are locked from editing:

- Agency Test ID – Unique identifier for the interface test
- Agency Business System – Agency Business System for the interface
- Florida PALM Interface Name – Interface name
- Interface Type – Inbound or Outbound
- Status – In Progress or Not Started
- As of Date – Date and time that worksheet was last updated.

You must complete the following columns within the worksheet for all interfaces listed in your worksheet:

- ***If not started, what is the expected start date?*** (required only if the status is 'Not Started') – Use this column to indicate the planned testing start date.
- ***Planned testing completion date?*** – Use this column to provide the expected testing completion date.
- ***What are the current blockers to being complete?*** – Use this column to describe your agency's challenges or blockers that have prevented testing completion.
- ***What mitigating actions are being taken?*** – Use this column to describe the action items that your agency has or will employ to complete testing.
- ***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 testing is not completed?*** – Use this column to describe the impact to your agency if the testing is not completed and any workaround solutions you may need to be prepared to employ.

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 Agency Sponsor must confirm the data presented on the Dashboard accurately represents your agency's readiness status. Upon confirmation, your Agency Sponsor must submit the Dashboard by completing the Agency Sponsor Confirmation located at the bottom of the Dashboard, requiring your 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 4.
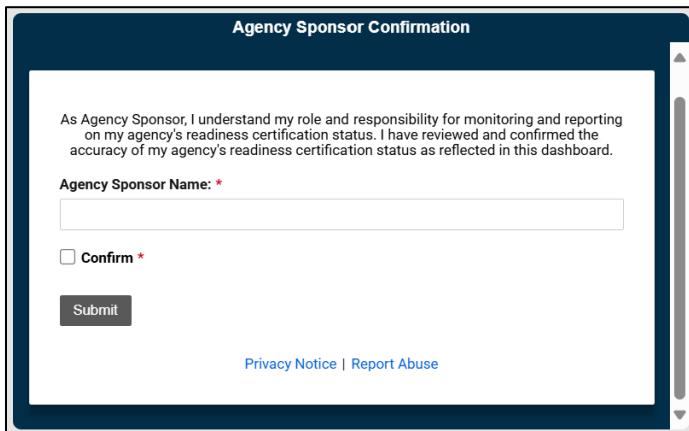
Figure 4: Agency Sponsor Confirmation Submission Form located on the Dashboard

Upon submission, the Readiness Certification 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 when moving into the next phase of the Project.

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 second 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 January 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 (except Criteria 3.1) in the *<Agency> Readiness Certification* #2 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* #2 worksheet. The comment must describe why the criteria is not applicable to the agency.
All required fields are complete in the *<Agency> Readiness Mitigation* #2 worksheet for all readiness criteria not met (except Criteria 3.1). N/A is not a valid response for any fields in this worksheet.
All required fields are complete in the *<Agency> Mitigation for Incomplete Cycle 2 Testing* worksheet for any interfaces where testing has not started or is in progress.
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 Agency Sponsor should work with the CCN to evaluate your agency's current readiness status and determine a status for each Readiness Certification Criteria. The Agency Sponsor must determine the overall confidence level that the agency is ready to begin All Agency UAT, as well as confidence level across each of the critical operational elements.

Update the components of your Dashboard by completing the *<Agency> Readiness Certification #2* and *<Agency> Readiness Mitigation #2* worksheets. Beginning January 5, update the *<Agency> Mitigation for Incomplete Cycle 2 Testing* worksheet for any interfaces where testing has not started or is in progress.

Your 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 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 #2 worksheet.*
3) *Describe mitigation plans for any readiness criteria that have not been met, if any, in the <Agency> Readiness Mitigation #2 worksheet.*
4) *Describe mitigation plans for any interfaces where the status is not 100% complete, if any, in the <Agency>* **Mitigation for Incomplete Cycle 2 Testing** *worksheet.*
5) *The Agency Sponsor must review, confirm, and submit the Dashboard.*
6) *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.*
7) *Complete task by* **January 9, 2026.**
8) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
9) *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