Task Instructions

Task ID: 669
Task Name: *Submit Monthly Progress Report - Testing*
Task Start Date: January *05, 2026*
Task Due Date: *January 30, 2026*
Project Impact: Indirect

Task Description

Provide progress update for agency interface testing and data readiness.

Task Overview

The *Monthly Progress Report* dashboard provides a high-level view of the agency's reported testing activity progress and serves as the tool for the Agency Sponsor to confirm and submit testing progress each month. Agency reported testing progress will be shared with Project stakeholders, including the Executive Steering Committee (ESC). The Understanding Your Monthly Progress Report Dashboard document provides a detailed overview of all components of the dashboard.

The *Monthly Progress Report* dashboard is designed to allow agencies to confirm progress of interface testing and UAT preparation activities. The dashboard is expected to evolve over time to display relevant data and metrics for activities including participation in UAT, full integration testing, training, and cutover.

Task Elements

This task contains two parts:

1. Review Interface Testing and UAT preparation progress and update as needed
2. Agency Sponsor submits the Monthly Progress Report

Review Interface Testing and UAT Preparation Progress and Update as Needed

As described in the Understanding Your Monthly Progress Report Dashboard document, your *<Agency> Monthly Progress Report* has been populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- *<Agency> Cycle 2 Technical Interface Testing*
- *<Agency> Interface Test Planning*
- *<Agency> Prerequisite Tracking*
- *<Agency> Role Mapping Worksheet*
- *<Agency> Project Recommended Standard Activities*

These worksheets should be regularly maintained to reflect accurate statuses and progress throughout the month. Review your worksheets to ensure the data reported is accurate and make any necessary updates.

Agency Sponsor Submits the Monthly Progress Report

After reviewing your *<Agency> Monthly Progress Report* dashboard to ensure the data is representative of your current status, your Primary or Backup Agency Sponsor must confirm and

submit the report using the Agency Sponsor Confirmation form at the bottom of the dashboard. The confirmation requires the Agency Sponsor to provide their name, add a check in the checkbox to "Confirm" the Dashboard, and click the Submit button for submission.

This report is intended to provide an accurate representation of the testing progress for the current month; therefore, the Agency Sponsor Confirmation form will be disabled for the majority of the month during the task duration. **Five (5) business days before the task is due, the confirmation form will be enabled to allow submission and will close promptly the business day after the task is due.**

How will agencies use this information?

The Monthly Progress Report provides an opportunity for agencies to evaluate and confirm interface testing and UAT preparation progress and status. Reviewing your progress on a monthly basis allows you the opportunity to determine if your agency is on track to meet testing-related deadlines and establish or refine any mitigation efforts if needed.

The Monthly Progress Report can also be used as a communication tool to share your agency's progress internally with your agency leadership and stakeholders.

What will the Florida PALM Team do with this information?

Your Monthly Progress Report will be shared with Project stakeholders, including the ESC. The Project team will also review your task submission based on the following criteria to confirm completion:

Table 1: Task Completion Rubric

Task Completion Rubric
Agency Sponsor has confirmed and submitted the Monthly Progress Report.
The RW Task Tracker, Agency Reported Task Progress column, has been updated to 100% - Submitted.

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Maintain your Interface Testing progress in the following worksheets.
- *<Agency> Cycle 2 Technical Interface Testing*
- *<Agency> Interface Test Planning*

Maintain your UAT preparation progress in the following worksheet.
- *<Agency> Prerequisite Tracking*
- *<Agency> Role Mapping Worksheet*
- *<Agency> Project Recommended Standard Activities*

Your Agency Sponsor should work with the CCN to review and confirm your agency's current testing progress for the month. During the last five business days of the task duration, your Agency Sponsor must confirm your agency testing progress by submitting your *<Agency> Monthly Progress Report.*

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Monthly Progress Reporting

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 1 above.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Throughout the month, maintain your Interface Testing status and UAT preparation status within the related worksheets in Smartsheet.*
2) *Review your agency progress displayed on your agency's Monthly Progress Report to ensure accuracy and update the related worksheets, as necessary.*
3) ***Agency Sponsor** must review, confirm, and submit the Monthly Progress Report **by the task end date**.*
4) *Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.*
5) *Complete task by **January 30, 2026.***
6) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
7) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- Understanding Your Monthly Progress Report Dashboard
- Interface Testing Worksheet Supplemental
- UAT Online Prerequisite Training Tracker Supplemental
- 573-B - Complete and Submit End User Role Mapping Worksheet
- 574 - Prepare Documentation for User Acceptance Testing