

Date	06/24/2026	Time	1:30 – 4:30 p.m.
Location	First District Court of Appeal		
Objective	Executive Steering Committee Meeting Minutes		
Committee Members	Jason Adank (FDOT); Richard Evans (EOG); Rebecca Evers (DOR); Steven Fielder, Chair (DFS); Theresa Gagnon (EOG); Dennis Hollingsworth (DEP); Sally Huggins (DBPR); Charlotte Jerrett (FWC); Jesse Johnston (DMS); Matt Kirkland (DOE); Jon Manalo (AHCA) ; Jesse Marks (DMS); Angie Martin (DFS); Mark Merry (DFS); Jennifer Pelham (DFS); Warren Sponholtz (FLIDS) ; Scott Stewart (DFS)		
Speakers	Jimmy Cox (DFS); Sarah Crouch (PCG); Steven Fielder (DFS); Julian Gotreaux (DFS); Angie Robertson (DFS) <i>Roundtable Participants: Renee Hermeling (DFS); Stacey Terry (Accenture)</i>		
Materials	Meeting Presentation		

Meeting Recording

An audio recording is located on the [Florida PALM website](#).

Opening Remarks and Roll Call

Steven Fielder, Chair

Mr. Steven Fielder called the meeting to order at 1:30 p.m. with a roll call of the Executive Steering Committee (Committee) members. Thirteen members were present for the meeting. *(Names of members not in attendance appear with strikethroughs in the above table.)*

Presentation

Administrative; Julian Gotreaux

Mr. Julian Gotreaux gave an update on the Florida PALM Spend Plan for fiscal year (FY) 25-26 with a detailed breakdown of expense categories.

Mr. Gotreaux provided an update on Project Risks and Issues. A new Issue (39) has been drafted and is being finalized. Issue 39 reflects the performance of processing the FRS Retiree Payroll file. The processing time for the 500,000 transactions is currently longer than desired; the Project is actively working to reduce the run time. The Committee asked for a comparison to the run time in the current system for the FRS Retiree Payroll file. Mr. Cox said the current process takes significantly less time; however, the process in Florida PALM is not the same, so it's not expected that the processing time be the same in Florida PALM. There are several days between when the file is provided and when payment needs to be produced.

The Committee asked if the FRS Retiree Payroll file run time would impact other same-day processing transactions. Ms. Stacey Terry said all transactions will process as normal, and the Project will be monitoring the batch run times for downstream process impacts and to see if off-cycle times need to be added or adjusted. Mr. Cox explained the Project is still conducting performance testing on the volume of transactions for continued fine-tuning. He made the Committee aware that since Florida PALM is cloud-based, transactions are processed at different speeds compared to current-day systems and go through significantly more validations.

Mr. Gotreaux shared Risk 1 related to Project staffing received an update to its title, background, mitigation plan, impact if unmanaged, and changed from stable to increasing. A new Risk (14) was created from the FY 26-27 Proviso requirements. The Florida PALM [Open Issues Log](#) and [Open Risk Log](#) details the above-mentioned Risks and Issues.

The Project remains on schedule to be implemented in January of 2027. The Schedule Performance Index remains unchanged at .98.

The Committee asked for an update on the delayed Training Build task. Ms. Angie Robertson said the training build activities are in progress; this Schedule task trending behind schedule represents the Plan document only, and is not representative of the activities in progress.

Independent Verification and Validation; Sarah Crouch

Ms. Sarah Crouch shared their monthly IV&V assessment, beginning with the May Risk Rating for the Project, which is a High-risk score based on Findings.

Reporting on Testing, Ms. Crouch noted only 40 percent of User Story activities have been tested by agencies. IV&V would like to see the testing metric closer to 66 percent before the UAT Refresh in August. Agency Certification #3 recommends agencies test all Florida PALM's recommended topics and activities at least once. The overall time spent in the system testing decreased in May. Fifty-four percent of the identified total end users have been in the system. The Committee asked how the Project tracked the expected number of end users. Ms. Crouch replied they used the agency workbooks where agencies report expected end users.

The Committee referenced the presentation appendix and asked for clarification on the reported 1,635 UAT tickets opened by agencies, asking if the ticket number represented the reporting period or total UAT. Ms. Terry replied the number represents all UAT tickets opened by agencies to date. The Committee followed up by asking how the reduced testing metrics shared by IV&V earlier in the presentation aligned with the reported ticket numbers, and how the aging tickets played a role in agency testing progression. Ms. Crouch said the numbers IV&V reported represent the amount of time end users are testing in the system based on the time users are logged in to the system. Agencies are also testing interfaces so the volume of tickets will include that testing as well. Ms. Terry followed up and explained the metrics on slide 47 show 530 currently open tickets which include all testing services, and, of the 1,635 tickets specifically opened for UAT shown on slide 48, 151 remain open. Open ticket numbers are decreasing. The aging tickets are issues that are not critical to go-live. The criticality of tickets are prioritized, and the less critical tickets may 'sit' before being resolved. Ms. Crouch agreed that high impact tickets have decreased during May. The Committee asked if some of the tickets were still duplicative in nature, to which Mr. Cox said, yes, they were.

Reporting on interface testing, Ms. Crouch said there are seven inbound interfaces that remain in Cycle 2 testing. The Project has given an extension to those agencies to complete Cycle 2 testing. There are 15 outbound interfaces that also remain in Cycle 2 testing. Their completion deadline is July 31. Eighty-three percent of Cycle 3 interfaces have been tested at least once by agencies. IV&V recommends the Project team conduct a root cause analysis for the agencies reporting inadequate testing results.

Legislative Updates; Steven Fielder

Mr. Steven Fielder shared a few legislative updates. Statewide funding for FY 26-27 reached \$97.5 million, adding prior year appropriations push the total to available funding well over \$100 million. Proviso and Implementing Bill have a few new requirements: agencies will provide a UAT engagement plan for their agency to the House, Senate, and Project by July 31; agencies will now report their readiness status on a monthly cadence rather than bimonthly; Prompt Payment will allow an additional 10 days during January 2027 to supplement the cutover system downtime; DOR will be given additional days to process revenue distributions due to cutover system downtime. Mr. Fielder also mentioned a separate bill will remove the word FLAIR from statute and only generically refer to the state financial system, having no impact on agencies or the Project. Mr. Fielder shared his appreciation for the legislative staff he and the Project leadership have been working with to implement Florida PALM. They have listened, been accommodating, and have helped to resolve issues. He stated they do have expectations that Florida PALM will be implemented on time. Proviso, Readiness Certifications, and Stage Gate Decisions support the Project, agencies, and enterprise partners on implementing on time.

Agency Certification #3: Angie Robertson

Agency Readiness Certification #3 is due July 10. This date aligns with final submission of Bimonthly Agency Status Report. Ms. Robertson said the Project will summarize and report the agency submission during the July ESC meeting. The Committee can expect to see agency-reported confidence levels across People, Process, Technology, and Data via Smartsheet dashboard snapshots, comparisons, mitigation plans, and a Project team analysis. The Committee asked for clarification on the confidence levels the agencies will be using to rate their readiness. Ms. Robertson said the goal was to give consideration for a wide range of readiness levels; many agencies are still working towards goals which will impact how they feel about their readiness. The comments section will better help the Project and ESC understand their rating. Ms. Robertson displayed a visual of the completed, near completed, and outstanding tasks agencies will reflect upon when rating their readiness levels.

UAT Refresh and Agency Impacts: Jimmy Cox

Dry Run 2 feeds the data used for the UAT Refresh and will be the starting point for when the UAT environment reopens. Data from Payroll (PYRL, People First) was captured on June 22 and will be used for Dry Run 2, the last monthly parallel test and UAT refresh. This is the “employee, position, job relationship information”. This data has no impact on Financials transactions or balances.

Data from Financials (Central FLAIR, Departmental FLAIR, Florida PALM Cash Management) will be captured on July 2, as of close of FY 25-26 and before opening FY 26-27. Agency configurations are based on workbooks that closed on June 17. The Project and MFMP are having conversations about timing for the MFMP data snapshot for their refresh as well. Only FY 25-26 data will be included in the UAT Refresh from Dry Run 2, the FY 26-27 files will then be loaded in UAT as part of the refresh to establish the new year appropriations and available budget. This is intentional and will help with the quality of testing (e.g., such as testing dual year). Dry Run 2 preparation and early runs are in progress.

Dry Run 2 ‘cutover’ activities begin on July 2 and run through July 31. The UAT Refresh is planned to begin close of business August 7, and the environment will be available for agencies August 24.

The refresh will wipe all transactions conducted by agencies prior to the refresh. The UAT environment will be loaded (refreshed) with Dry Run 2 results. Agency-scheduled reports and queries (in Florida PALM, see below for the Florida PALM Data Warehouse) will have to be re-established. Agency-created Data Warehouse queries and dashboards identified by agencies as built and confirmed by the agency will be retained, but all others will be wiped. **Update since ESC Meeting:** For the UAT refresh, the agency queries and dashboards will be retained, regardless of status. Agencies will then be provided the ability to delete queries that are not needed. Interface Cycle 3 Testing will not occur during the refresh. It will pause after nightly processing on August 7. Cycle 3 Testing will resume on August 24. Interface Cycle 2 Testing will be considered complete at the point of UAT Refresh. Most Cycle 2 interfaces have completed. Any agency that did not complete Cycle 2 Testing before the refresh will be removed from go-live consideration and testing will cease on those interface files until at least six months after go-live. When UAT reopens, new seed files will be provided to agencies (where the files were selected by the agencies) and enterprise partners, to seed their test environments for use in continued Cycle 3 testing. All Cycle 3 testing data will be new or based on the Dry Run 2 converted data; prior Cycle 3 testing data will no longer be valid.

Reviewing what will be included in the UAT environment after the refresh: Updated to the latest PeopleTools technical platform; Dry Run 2 conversion data, appropriations and release files for FY 26-27, new year budget COA values, agency configuration values as submitted and confirmed for Dry Run 2 and agency role mapping (without SOD conflicts) submissions. Following the refresh, the UAT environment will support year-end testing for FY 25-26 and new year testing for FY 26-27. FLAIR General Ledger balances will need to be reconciled and in balance with Departmental data as of June 30, 2026.

At the restart of UAT, agencies should be mindful of budgetary allotments. Agencies that selected 'Track with Budget' allotments will need to have their FY 25-26 and 26-27 allotments posted before they can transact after the UAT refresh. The Project is planning to collect that information from the 'Track with Budget' agencies to include in the refresh so when UAT restarts, year-end testing can begin. Additionally, all agencies should load allotments so they can confirm their allotment balances are correct. FY 26-27 Proviso has requirements about agencies confirming their allotment balances. New agency unique values identified after the workbooks closed will need to be created by the agency directly in the UAT environment. Agencies are encouraged to increase their testing time after the refresh. Mr. Cox shared concerns over the ripple effect of what is discovered during testing. He emphasized it's better to work through issues now than after go-live.

Mr. Fielder shared the Project held an Agency Sponsor meeting that was well attended, and he will be personally reaching out for one-on-one conversations as a follow-up with all Agency Sponsors to continue bringing key activities or areas of concern into awareness. This is in effort to increase the Committee's confidence level when assessing the agency readiness for go-live.

The Committee asked about the level of awareness by agency executive leadership in regard to their agency's transition to Florida PALM. Mr. Fielder replied that most agencies are represented on the Advisory Council or Executive Steering Committee and get first-hand information from the Project's executive leadership. In addition, the Project meets monthly in one-on-one touchpoints with agency Change Champion Network (various levels of agency positions attend) and it's their mission to be a liaison between the Project and their executive leadership. Further, Agency Sponsors sign their agency's monthly Progress Report, reporting their progress in areas of testing, training, conversion, and data. Mr. Fielder also plans to personally reach out to each Agency Sponsor.

Mr. Cox continued, Cycle 3 Testing will conclude by October 2 and UAT for agencies will conclude November 6. Agencies will provide their final Agency Certification in November. Agencies with a business system(s) that are not ready to go live in January 2027 will create a plan detailing their approach for addressing (i.e., processing transactions in Florida PALM) while their system remediation continues. Mr. Fielder asked the Committee if they would like agencies to present their mitigation/workaround plans if they certify they are 'not ready' in their Readiness Certification #4 in November. The Committee showed interest in hearing from agencies in person.

Mr. Cox shared Proviso language for the Project in FY 26-27 relating to UAT. He highlighted the statement that agencies are able to produce a General Ledger (GL) Trial Balance in Florida PALM that reconciles to the converted balance from FLAIR for each fund within the agency that was in balance in Departmental FLAIR at the point of conversion. An additional five requirements relate to agencies and an additional eight relate to enterprise partners'. Overall the Project is in a good place with all requirements. However, as the proviso bullets are wide-reaching and the majority are outside of the Project's control, the Project has opened a high risk associated with this language.

The Project will host in-person sessions for Year End testing after the UAT refresh. As the Project solidifies plans, details will be shared with agencies.

Cutover Activities; Jimmy Cox

A new section was added in the Knowledge Center specifically for Cutover and Deployment information. The section will be enhanced over time to include additional content as the Project moves towards go-live. An article detailing Deployment Planning shares draft deployment activities and a timeline. The draft deployment timeline listed agency and Project activities with planned dates during Pre-Cutover and Cutover. Details of the cutover timeline were previously discussed in the May Meeting. Ms. Robertson said agencies will receive a Readiness Workplan task next week with guidance for developing a deployment plan and cutover checklist.

Enterprise Partner Updates; Renee Hermeling, Jesse Johnston, Jesse Marks, Mark Merry

Mr. Jesse Johnston shared an update on People First testing: the enterprise partner is progressing as planned with their internal testing and in Cycle 3 testing. They are working with agencies to test integrations, reporting, and agency business processes. They've been holding office hours to answer agency questions. After the refresh, they will test a full end-to-end for payroll. Florida PALM and the People First team are holding planning meetings to determine when People First will be down during cutover. The Committee asked if People First agency testing has seen a decline as reported in the overall UAT earlier in the presentation. Mr. Johnston said they had a generally good testing engagement with a few agencies not as engaged.

Ms. Jesse Marks shared an update on MFMP testing: the enterprise partner completed three test activities, conversion testing, regression testing, and assigned test scripts during UAT. As of June 15, MFMP had a pass rate of 90.83 percent. To date, they've logged 31 tickets, 22 have been resolved, and nine are open; none of which are high impact or critical. MFMP began testing with agencies in June and will be available through October. Sharing an update on STMS testing: the enterprise partner began testing in UAT in February where test scripts were provided to testers. There are two known issues that have been triaged for resolution. STMS will not convert existing trips from FLAIR to Florida PALM fields and agencies are encouraged to review trips which must be paid and converted before cutover.

Ms. Theresa Gagnon shared an update for LAS/PBS and Transparency Florida testing: the enterprise partner said they are testing 24 interfaces. LAS/PBS files are being reviewed daily after a nightly refresh to see how OPB responds. There have been a few errors which have been resolved. The Project's State development team is working to build queries for Transparency Florida to further support these integrations into Florida PALM.

Mr. Mark Merry shared an update on FACTS testing: the enterprise partner testing has been good with only a six percent failure rate. Remediation and integration are good. FACTS will not allow agency testing during August 8 – 23, during the UAT refresh, but is planning for UAT with all agencies for August 24 – October 2. Then sharing an update on PCard Works: due to working with a third party, testing began late, but enterprise testing is going well. Errors are being resolved. UAT with agencies will begin in September and run through October but will be limited in functionality and number of users due to limitations in the testing environment for the third party.

Ms. Renee Hermeling shared an update on FLIPS: the enterprise partner is a brand-new system to Florida. They are testing in Cycle 3 environment, resolving errors in the system and in Florida PALM. Significant progress has been made as their major functionality has been tested. FLIPS will also test with MFMP and STMS.

Roundtable Discussion; Facilitated by Jimmy Cox, Steven Fielder, Angie Robertson

Mr. Cox and Ms. Robertson led an open discussion asking for feedback on User Acceptance Testing, Interface Testing, Configuration and Conversions, Training, and Cutover Planning. The Committee asked if the enterprise systems would be down during the time FLAIR is down during cutover, to which Mr. Cox said, yes.

The Committee has concerns that agencies are not making preparations for business process change, organizational structure change, policy change, etc., in order to use Florida PALM functionality as intended. The Committee agreed they are also concerned and have seen a lack of internal change in preparation for Florida PALM.

The Committee expressed appreciation if the Project could resolve or respond to tickets quicker, as it often halts testing. Ms. Robertson agreed and also made a suggestion for speeding up ticket response, in that agencies should triage their tickets before submission to ensure true errors are being submitted and not questions that can be resolved internally.

Appendix

The ESC Presentation Appendix includes detailed information on the standard Testing, Training, and Readiness updates.

Next Meeting and Adjournment

Steven Fielder, Chair

The meeting was adjourned at 4:00 p.m. The next meeting is scheduled for July 22, 2026, at the First District Court of Appeal.