Florida Department of Financial Services

Planning, Accounting, and Ledger Management Project

Independent Verification & Validation

Monthly Assessment Report

March 2025

April 11, 2025

Contract: 80101507-21-STC

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**PUBLIC** CONSULTING GROUP

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# Executive Summary

The following list summarizes the key items of the Florida PALM IV&V Team details in the Monthly Assessment Report for March 2025:

- The overall Florida PALM Project Risk Rating has decreased (improved) from a High Risk to a Medium Risk due to the decreased Risk Rating for the Florida PALM Project Development Focus Area and the closure of Findings 14 and 18.
- Finding 14 related to Development delays impacting the completion of System Testing and the start of User Acceptance Testing (UAT) has been closed since all Segment III Application Development (AD) documents have been approved. The drafting and approval of Segment IV AD documents are progressing ahead of the revised target date based on Amendment 12.
- Finding 18 related to potential delays in System Testing completion and an increased overlap with UAT has been closed since the System Testing completion date has been extended by two months, and the overlap between System Testing and UAT has been eliminated in the revised timeline in Amendment 12.
- The Risk Rating for the Florida PALM Project Development Focus Area has decreased (improved) from a High Risk to a Medium Risk due to the completion of Build Segment III, the drafting of all 112 AD documents for Build Segment IV, and approval of 66 AD documents for Build Segment IV. This is ahead of schedule according to the targeted dates in the Design Work Unit Tracker (DWUT) and the revised completion date for Development in Amendment 12.

# Focus Area Updates

The Table below summarizes the Florida PALM IV&V Team's updates for the various Focus Areas since the last Monthly Assessment Report. Detailed updates regarding these Focus Areas are provided in this document's Focus Area Updates section. Some Focus Areas may be marked as Not Applicable (NA) as they have not started or if there is no activity during this reporting period. Descriptions for each Focus Area will be incorporated into each Monthly Assessment Report.

**Florida PALM Project Focus Areas:**

**Table 1: Florida PALM Project Focus Areas**

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| Overall Project Indicator | High | Medium | Improving | The overall Florida PALM Project Risk Rating has decreased (improved) from a High Risk to a Medium Risk. This is due to the decreased Risk Rating for the Florida PALM Project Development Focus Area, and the closure of Finding 14 related to delays in Development and Finding 18 related to projected delays to the completion of System Testing against the baselined Florida PALM Project Schedule.<br><br>Amendment 12, which extends the Development and System Testing completion dates, delays the start of Interface Testing and UAT, removes the overlap between System Testing and UAT, aligns Data Warehouse (DW)/Business Intelligence (BI) with System Testing and UAT, and shifts Go-Live to July 2026, was executed on 3/3/25. The Florida PALM Project Team is updating the Florida PALM Project Schedule to align with these changes. The Florida PALM IV&V Team will review the Schedule and provide feedback as updates progress. |
| Florida PALM Project Management | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk.<br><br>The Florida PALM Project Schedule is being updated to align with the extended timeline in Amendment 12. The Florida PALM IV&V Team will not provide metrics in this report due to a variety of variables in flux, which can make the metrics inaccurate gauges of the overall Florida PALM Project status and health.<br><br>The Florida PALM IV&V Team has provided recommendations for implementing more stringent Schedule control and mitigation thresholds once the Florida PALM Project Schedule is updated. The goal is to keep the Florida PALM Project on track to meet the newly approved timeline. |

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| Florida PALM Organizational Change Management | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk.<br><br>The Florida PALM Project Team encouraged cross-Agency collaboration during Touchpoints, including Readiness Coordinators (RCs) asking Agencies to share data with other Agencies. This collaboration, along with continued Agency-led workgroups, helps break down information silos and can better equip Agencies for UAT and training.<br><br>The Florida PALM IV&V Team interviewed the Florida PALM Project Team about Agency dashboards, specifically the calculation and intent of the Readiness dials. The Florida PALM IV&V Team will continue monitoring Dashboard use and recommend ways to assess the effectiveness of the Change Champion Network (CCN).<br><br>A special Task Talk was held on 3/25/25 for select Agencies to address SpeedKey selection errors and highlight their impact on downstream Tasks. The Florida PALM IV&V Team recommends ongoing identification of trends for targeted sessions. |
| Florida PALM Requirements and Design | Low | Low | No Change | The Risk Rating for this Focus Area remains a Low Risk.<br><br>The Florida PALM Project Team is progressing through pre-Build and Build reviews for several Reports, Interfaces, Conversions, Extensions, Forms, and Workflows (RICEFW) Items, with no issues or roadblocks identified. |
| Florida PALM Development | High | Medium | Improving | The Risk Rating for this Focus Area has decreased (improved) to a Medium Risk.<br><br>The final AD document for Build Segment III was approved on 3/7/25.<br><br>Per the DWUT, all Segment IV AD documents are targeted for approval by 5/9/25. As of 3/31/25, all 112 Segment IV AD documents have been drafted, and 66 have been approved, surpassing revised targets. Based on historical |

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| | | | | review and approval timelines, the Florida PALM IV&V Team estimates Build may be completed by 5/5/25. |
| | | | | Five major extensions related to Employee Self Service (ESS) are targeted for AD approval by 7/23/25. Additionally, 13 RICEFW Items were introduced due to Project Change Requests (PCRs) after the completion of Design and based on the extended timeline in Amendment 12. |
| Florida PALM Testing | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk.

Finding 18, which projected System Testing execution would exceed the 4/30/25 end date in the baselined Florida PALM Project Schedule, has been closed following the two-month extension in Amendment 12.

System Testing for Segment III began on 3/17/25. The SSI Vendor's initial test execution pace is behind their planned pace.

Regression Testing for Event 1, following the completion of System Testing Segment I and II, began early on 3/24/25 and is ahead of schedule. |
| Florida PALM Data, Conversion, and Interfaces | High | High | No Change | The Risk Rating for this Focus Area remains a High Risk.

Finding 16, which tracks delays to Mock Conversion 1, remains an Issue. Five Medium-priority System Investigation Requests (SIRs) are still unresolved, and while Mock Conversion 2A began on 3/19/25, ongoing delays to the completion of Mock Conversion 1 may impact Interface Testing Cycle 2, Mock Conversion 3, and UAT. |
| Florida PALM Implementation Readiness | NA | NA | NA | The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin. |

**Florida PALM Agency Focus Areas**

**Table 2: Florida PALM Agency Focus Areas**

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| Agency Project Management | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk.<br><br>The Florida PALM IV&V Team observed a 6% improvement in Readiness Workplan (RW) Direct Tasks Verified as Complete by the Florida PALM Project Team (starting with RW Task 512). Among the 83 RW Tasks due before 3/31/25, Indirect Tasks marked as 100% Submitted by the Agencies and Verified as Complete increased by 18%. Most incomplete RW Tasks fall under the Technology category.<br><br>The Florida PALM IV&V Team met with the Florida PALM Project Readiness Team to clarify the intent of the Agency Dashboards and will continue to review their accuracy and relevance to verify Agencies have reliable data for decision-making.<br><br>Analysis of Agency Risks and Issues shows no change in open Issues and a decrease in open Risks, with most falling under Technology, Staffing, Data, and Business Processes. Agencies participating in the Multi-Agency Project Management Liaison-Change Management Liaison (PML-CML) Meeting reviewed the Florida PALM IV&V Team's recommendations from the February Monthly Assessment Report and the Executive Steering Committee (ESC) presentation and plan to collaborate on improvements. |
| Florida PALM Agency Readiness | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk.<br><br>The Florida PALM IV&V Team observed Agencies maintaining momentum in completing RW Tasks. Agencies interviewed by the Florida PALM IV&V Team shared positive feedback regarding the extended |

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| | | | | schedule and improved Florida PALM Knowledge Center communications. |
| | | | | The Multi-Agency PML-CML Meeting continues to provide valuable collaborative support, particularly around shared initiatives like Readiness checklists, UAT, and Training preparation. |
| | | | | The Florida PALM IV&V Team observed inconsistencies between the Agency Readiness Workplan and Dashboard data. The Dashboard data reflected minor mathematical errors in some instances and Agencies are utilizing varied approaches to tracking Task progress. Since Dashboard data is certified for bi-monthly reporting, inconsistencies may present potentially unreliable information to the ESC and stakeholders. |
| Agency Requirements and Design | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk. Fifteen Florida PALM Design updates were documented in the Florida PALM Knowledge Center, eight of which affected the Report Catalog. The Florida PALM IV&V Team observed consistent weekly email notifications from the Florida PALM Project Team. Agencies are encouraged to establish a routine for reviewing Florida PALM Knowledge Center updates and to collaborate with their RCs to ensure timely understanding and response. |
| Agency Testing | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk. During interviews held by the Florida PALM IV&V Team, Agencies expressed confidence in their ability to begin Interface Testing and remediating their business systems before the start of UAT. Agencies are actively working on UAT planning, third-party and inter-Agency business system remediation, and |

| Focus Area | Last Month Indicator | Current Month Indicator | Trend | Update Summary |
|---|---|---|---|---|
| | | | | internal system and process verification. |
| Agency Data, Conversion, and Interfaces | Medium | Medium | No Change | The Risk Rating for this Focus Area remains a Medium Risk. The Agency Dashboard metrics showed fluctuations in business system and Interface counts across nine Agencies, indicating potential uncertainty in Agency selections. The Florida PALM IV&V Team recommends that Agencies consider logging Risks that clearly outline any delays or uncertainties related to Data, Conversion, or Interfaces. |
| Agency Implementation Readiness | NA | NA | NA | The Florida PALM IV&V Team will begin reporting progress once Agency Implementation efforts begin. |

# New Findings

No new Findings were opened in this reporting period.

# Open Findings

**Finding Number and Title: Finding 15** – Risk that high failure rate for RICEFW-related Test Scripts may impact Stage Gate 3.

| | | |
|---|---|---|
| **Date Opened:** 10/31/24 | | |
| **Finding Description:** Although System Testing execution is progressing, the Florida PALM IV&V Team has identified an initial failure rate of approximately 76% for Test Scripts associated with the RICEFW Items. As of 10/31/24, the failure rate for the second and third runs for RICEFW Items that failed initial execution is also high, with 30% failing during the second run and 38% failing on the third run. Compared to other types of Test Scripts, the failure rate of RICEFW-related Test Scripts for first, second, and third runs is substantially higher. | | |
| **Current Impact:** Moderate | **Previous Impact:** Significant | **Trend:** Improving |
| **Current Probability:** Unlikely | **Previous Probability:** Likely | **Trend:** Improving |
| **Current Priority:** Low | **Previous Priority:** High | **Trend:** Improving |

**Status Update:** While this Finding remains a Risk, the Florida PALM IV&V Team has seen an improvement in the initial failure rate of RICEFW-related Test Scripts since December 2024. Initial failure rates went from an average of 68% in October through November to an average of 39% from December through March. Based on the Test Script Work Unit Tracker (TSWUT), there are 715 RICEFW-related Test Scripts that are part of System Testing Segment III, which started on 3/17/25. This represents about 37% of all the RICEFW-related Test Scripts. Even though there has been continued improvement in the initial RICEFW failure rate, the Florida PALM IV&V Team still considers this to be a Risk based on the amount of RICEFW Items that remain for System Testing.

**Recommendation #1:** The SSI Vendor should assign SIRs back to the original Developer that built the failed RICEFW Item.

**Status:** In Process

**Update:** Based on a review of Developers assigned to resolve SIRs, it does appear that most are being assigned back to the original Developer.

**Recommendation #2:** The SSI Vendor should add additional Development staff to focus on the remaining items for Build Segment IV.

**Status:** In Process

**Update:** Additional Development staff have been added to the Florida PALM Project starting in June 2024 and additional staffing is expected through June 2025 to correspond to the new timeline for the completion of System Testing.

**Recommendation #3:** The SSI Vendor should prioritize Test Scripts to facilitate early testing of the most critical business functionality.

**Status:** In Process

**Update:** Test Scripts are being prioritized and coordinated with the Development Team based on what is available. The Florida PALM IV&V Team has not observed System Testing resources trying to test functionality that is still in Build. A total of 400 Test Scripts from System Testing Segment II have been deferred to Segment III, with most of these deferred due to delays in Build Segment IV.

**Recommendation #4:** The SSI Vendor should document and standardize approaches to maintain consistency in configuration, application security roles, and settings across different environments.

**Status:** In Process

**Update:** The percentage of SIRs with a defect type of "configuration," "application security," "migration," or "not a defect" has been reduced. These defect types accounted for 38.5% of SIRs in December, 24.5% in January, 15.13% in February, and 15.82% in March. The percentage of these defect types seen in February and March does appear consistent with other similar testing efforts. Overall, process improvements have increased consistency and reduced unnecessary SIRs.

**Recommendation #5:** The SSI Vendor should enhance smoke testing performed on Builds migrated to the System Testing environments using automated Test Scripts. Smoke testing is intended to assess the stability and functionality of new code when it is released in a new environment.

**Status:** No Change

**Update:** Although some smoke testing is performed, the Florida PALM IV&V Team is not aware of any increase in the smoke tests being performed or that any of the tests are being automated. The Florida PALM IV&V Team continues to recommend that additional automated smoke testing scripts be developed and utilized.

**Recommendation #6:** The SSI Vendor should continue existing meetings and processes between the Development and Testing Teams to coordinate the availability of RICEFW Items for System Testing and identify any dependencies among RICEFW Items.

**Status:** In Process

**Update:** The SSI Vendor Development and Testing teams are in frequent contact to coordinate the testing of RICEFW Items based on availability. The Florida PALM IV&V Team has not observed any instances where testing was attempted on a RICEFW Item that had not been completed.

**Recommendation #7:** The SSI Vendor should continuously log and review the root causes of SIRs with testers to minimize future identification of SIRs that are not valid defects.

**Status:** In Process

**Update:** Root causes are now consistently being added to SIRs. Approximately 98% of the closed or canceled SIRs have a root cause entered.

**Recommendation #8:** The SSI Vendor should develop a burn-up chart based on the Stage Gate 3 Entry Criteria and track performance against it.

**Status:** No Change

**Update:** The Florida PALM IV&V Team has not observed the creation of a burn-up chart for System Testing based on the Stage Gate 3 criteria that can be used to determine whether the trajectory of progress is sufficient to meet the criteria. The Florida PALM IV&V Team continues to recommend that this type of burn-up chart be created.

**Finding Number and Title: Finding 16** – Compounding delays in Mock Conversion 0 and 1 have led to a compressed timeline for Mock Conversion 2 and have the potential to impact multiple downstream activities, such as Interface Testing, future Mock Conversions, and UAT.

| Date Opened: 11/29/24 | | |
|---|---|---|
| **Finding Description:** Mock Conversion 0B has been delayed due to delays with the development of critical Payroll Conversion interfaces, pushing the anticipated completion date of Mock Conversion 0B beyond November. As of 11/30/24, the Florida PALM Project Team completed Conversion activities for 10 out of the 14 interfaces for Mock Conversion 0B. Three of the remaining Conversion interfaces are 50% complete, and one is 25% complete. Additionally, there are two open High-priority SIRs, with one remaining unresolved since October, and 10 Medium-priority SIRs. These delays have pushed the completion of Mock Conversion 1B to early December, but Mock Conversion 1B cannot be finalized until Mock Conversion 0B is complete. Mock Conversion 1A has been reopened and new SIRs have been logged as a result. | | |
| **Current Impact**: High | **Previous Impact:** Critical | **Trend:** Improving |
| **Current Probability:** Likely | **Previous Probability:** Probable | **Trend:** Improving |
| **Current Priority:** High | **Previous Priority:** High | **Trend:** No Change |

**Status Update:** Mock Conversion 1, originally scheduled to take place from early September through November 2024, remains incomplete as of 3/31/25, placing it approximately 16 weeks behind the targeted completion date in the baselined Florida PALM Project Schedule. While seven SIRs (five Medium-priority and two Low-priority) from Mock Conversion 1 remain unresolved, Mock Conversion 2A kicked off on 3/19/25. According to the baselined Florida PALM Project Schedule, Mock Conversion 2 was initially planned for completion in late December 2024.

Given the duration required to complete prior Mock Conversions, the current four-week timeline for Mock Conversion 2 (reduced from the originally planned six weeks) may be insufficient to fully execute Conversion scripts and address any new High-priority defects that emerge. The delay in Mock Conversion 2 has had a cascading impact on subsequent Mock Conversions and the Interface Testing schedule.

To help mitigate these impacts, the extended timeline will shift the start date of Interface Testing Cycle 2 to 6/2/25, allowing additional time for the completion of Mock Conversion 2 activities. This Finding remains categorized as an Issue due to its continued impact on the baselined Florida PALM Project Schedule.

**Recommendation #1:** Prioritize the resolution of SIRs from Mock Conversions 0B and 1B and finalize Mock Conversion 0B activities to prevent further delays to Mock Conversion 1B. The Florida PALM Project Team should review completion dates for the remaining Mock Conversions and consider mitigation strategies such as allocating additional resources or extending work hours to realign the Mock Conversion timeline and promptly address new SIRs

**Status:** In Process

**Update:** The Florida PALM IV&V Team has observed that the Florida PALM Project Team continues to prioritize the resolution of SIRs from prior Mock Conversions while also moving

forward with Mock Conversion 2A on 3/19/25. As of now, five Medium-priority and two Low-priority SIRs from Mock Conversion 1 remain unresolved.

To support progress, the Florida PALM IV&V Team continues to recommend that the Florida PALM Project Team collaborate with the SSI Vendor to establish clear deadlines for resolving these SIRs, complete the execution of remaining scripts, and finalize State Validation for prior Mock Conversions. Implementing a structured timeline for these activities will help ensure outstanding tasks are addressed efficiently and minimize further schedule impacts.

**Finding Number and Title: Finding 17** – The overlapping timing of UAT, Training activities, and Year-End Closing (YEC) tasks can create resource constraints, potentially reducing the effectiveness of Training delivery.

| | | |
|---|---|---|
| **Date Opened:** 11/29/24 | | |
| **Finding Description:** Agency Subject Matter Experts (SMEs) and end users will depend on UAT and Training to gain the familiarity needed to perform their job functions in Florida PALM. The concurrent timelines for UAT, Training, and YEC activities may strain Agency resources and divide their focus across these overlapping efforts. | | |
| **Current Impact**: Significant | **Previous Impact:** Significant | **Trend:** No Change |
| **Current Probability:** Likely | **Previous Probability:** Likely | **Trend:** No Change |
| **Current Priority:** High | **Previous Priority:** High | **Trend:** No Change |

**Status Update:** Amendment 12 has shifted the timeline for the Florida PALM Project, including UAT and Training activities. UAT begins in August 2025 and extends for an additional two months compared to the baselined Florida PALM Project Schedule, while the start date for Training has been pushed to March 2026. Although the updated timeline appears to reduce overlap with YEC activities and may lessen some Agency workload, the Finding remains open as a Risk with no change.

**Recommendation #1:** Agencies should plan to increase resources – potentially through staff augmentation – to better support their staff during these parallel activities before beginning UAT. The Florida PALM IV&V Team also recommends that the Florida PALM Project Team track Training readiness through defined Key Performance Indicators (KPIs), surveys, and other metrics (i.e., SME and end-user participation in UAT, UAT progress, Training participation, completion rates, and knowledge transfer evaluations).

**Status:** In Process

**Update:** The Florida PALM IV&V Team observed that Agencies continue their staff augmentation efforts to improve their ability to prepare for and implement Florida PALM. Some Agencies are actively hiring for positions, and many are including staff augmentation funding in their Legislative Budget Requests to support readiness efforts.

The Florida PALM Project Team has planned changes to the reporting metrics for the CCN composition, which the Florida PALM IV&V Team will review. Metrics for tracking Training effectiveness are still being developed.

**Recommendation #2:** Consider additional support mechanisms during this period, such as setting up support labs, offering office hours, and hosting targeted workshops to address learning gaps and technical issues during UAT and Training. While the Florida PALM Project Team is already considering some of these measures, they could be especially effective through early engagement to identify specific Training needs and gaps, which can then be incorporated into the Training materials.

**Status:** In Process

**Update:** The Florida PALM Project Team has planned several workshops to give Agencies additional guidance on developing UAT and Training plans.

**Finding Number and Title: Finding 19** – The Florida PALM Project could benefit from increased adherence and updates to the Risk and Issue Management process, promoting additional clarity and transparency regarding open Risks and Issues.

| Date Opened: 1/31/25 | | |
|---|---|---|
| **Finding Description:** The Florida PALM IV&V Team has observed that Florida PALM Project Risk statuses and mitigation strategies have not been updated or escalated in a timely manner per the Changes, Risks, Action Items, Decisions, and Lessons Learned (CRAIDL) management process outlined in the Florida PALM Project Management Plan (PMP). The Florida PALM IV&V Team began reporting on the CRAIDL process in the November and December 2024 Florida PALM IV&V Monthly Assessment Reports, emphasizing the need for a more proactive approach to Risk and Issue management for a project of this scale. | | |
| **Current Impact**: Significant | **Previous Impact:** Significant | **Trend:** No Change |
| **Current Probability:** Probable | **Previous Probability:** Probable | **Trend:** No Change |
| **Current Priority:** High | **Previous Priority:** High | **Trend:** No Change |

**Status Update:** The Florida PALM IV&V Team has not yet observed increased adherence or updates to the Risk and Issues Management process.

**Recommendation #1:** Update the CRAIDL management process in the PMP to include a provision allowing exceptions in cases where extenuating circumstances prevent the Florida PALM Project Team from following the standard process for escalating Risks and documenting mitigation strategies that involve changes to scope, cost, and/or schedule.

**Status:** No Change

**Update:** The Florida PALM IV&V Team reviewed the PMP, including drafts, and the language has not yet been updated.

**Recommendation #2:** Where possible, create distinct entries for individual Risks in the CRAIDL log and develop detailed mitigation plans specific to each Risk, rather than using broad, high-level descriptions to cover multiple Risks. For example, Risk #8, which was originally opened to track the overlap between System Testing and UAT, also includes scope expansion due to additional work related to the DW/BI and delays in the Financials and Payroll Build Segment IV. Separating these into individual Risks would provide greater clarity and more targeted mitigation strategies.

**Status:** No Change

**Update:** The Florida PALM IV&V Team has not yet observed changes in the Risk documentation to create distinct entries or changes to the mitigation plans to provide more targeted strategies.

**Recommendation #3:** Refine the process for reviewing and tracking Risk status updates to include:

- Action items
- Assigned resource for Action Item
- Expected Time of Completion (ETC) for each Action Item
- Chronological status history
- Current status of Action items providing visibility into mitigation efforts

**Status:** No Change

**Update:** The Florida PALM IV&V Team has not yet observed any significant changes to the process.

**Recommendation #4:** Specify whether a Risk is being Mitigated, Accepted, or Avoided in the mitigation plan.

**Status:** In Process

**Update:** The Florida PALM IV&V Team has observed updated language, including "Mitigate" or "Monitor Plan." The Florida PALM Project Team could also consider including language outlining whether the risk will be Accepted or Avoided.

**Recommendation #5:** Include standardized reporting practices in the PMP to provide greater clarity regarding Florida PALM Project Risks and Issues in the Monthly Status Report and ESC Meetings.

**Status:** No Change

**Update:** The Florida PALM IV&V Team reviewed the PMP, including drafts, and the language has not yet been updated.

# Closed Findings

**Finding Number and Title: Finding 14 –** Issue that delays in application Build are impacting the completion of System Testing and the start of UAT.

**Date Opened:** 3/29/24

**Date Closed:** 3/31/25

**Finding Description:** When Finding 14 was opened, Build Segment I activities were seven weeks behind schedule, and Build Segment II was approximately three weeks behind schedule. There was a risk identified by both the Florida PALM IV&V Team (Finding 14) and the Florida PALM Project Team (Risk #8) that if these delays continued into subsequent Build Segments, the completion of System Testing or Stage Gate 3 – Ready to Begin UAT could be affected. Since Build Segments III and IV involve more Development activities than Segments I or II, ongoing delays could have a much larger and cumulative impact on the subsequent Build Segments.

**Rationale for Closing:** All Segment III AD documents have been approved. The drafting and approval of Segment IV AD documents are progressing ahead of the revised target dates based on the DWUT. The Florida PALM IV&V Team's projected estimate for the completion of Segment IV also aligns with the extended timeline in Amendment 12. Additionally, the updated timeline extends System Testing, providing sufficient time to thoroughly test the remaining Development items from Build Segments III and IV.

**Finding Number and Title: Finding 18 –** The current pace of System Test execution by the SSI Vendor and the addition of Test Scripts as Build Segments are completed could delay the completion of System Testing and increase the overlap with UAT.

**Date Opened:** 12/29/24

**Date Closed:** 3/31/25

**Finding Description:** As of 12/31/24, 1,507 Test Scripts need to be executed in the 17 weeks remaining for System Testing. At the current average execution rate of 56 Test Scripts per week, the Florida PALM IV&V Team projects that System Testing may not be completed until the beginning of July 2025, which represents an approximately nine-week delay.

**Rationale for Closing:** Based on the updated timeline in Amendment 12, the System Testing completion date has been extended by two months – from 4/30/25 to 6/30/25. As a result, the completion date previously used as the basis for opening the Finding is no longer applicable. Additionally, the UAT start date has shifted from 4/1/25 to 8/11/25, eliminating the risk of overlap between System Testing and UAT. These changes remove the associated risks previously identified with concurrent Testing efforts.

# Metrics Related to Findings

The Figure below shows the open, closed, and new Findings the Florida PALM IV&V Team identified. No new Findings were opened this month. There are four open Findings and four closed Findings.
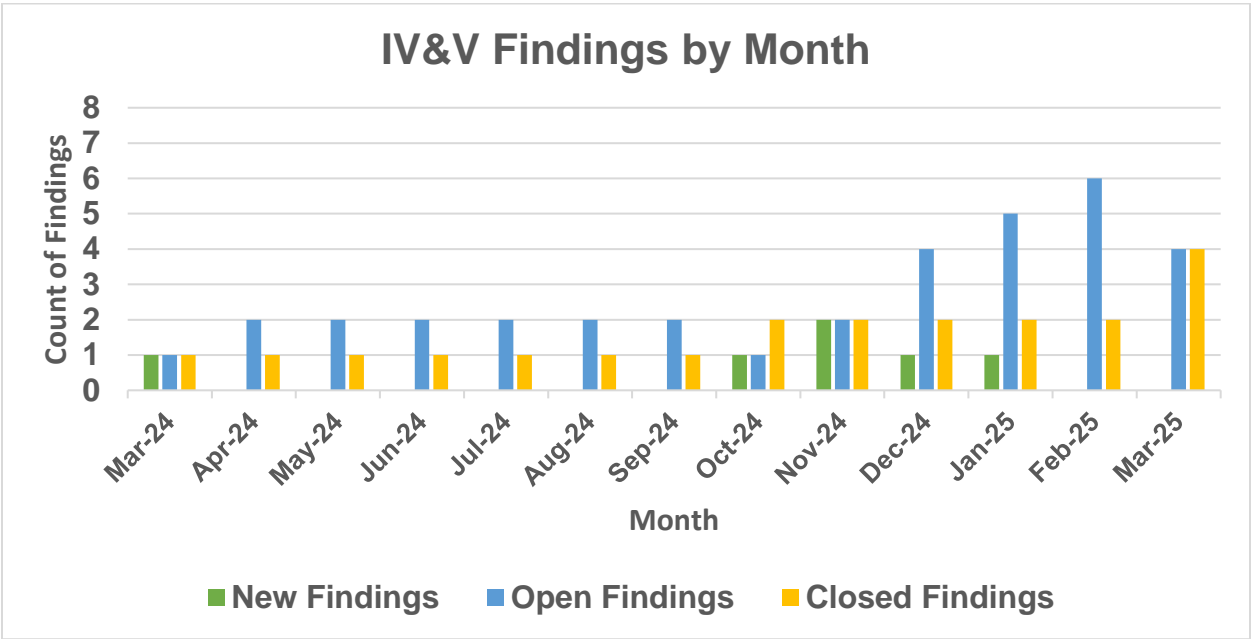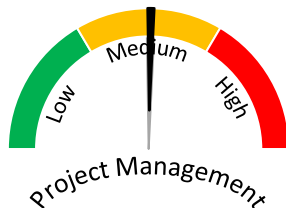


**Figure 1: Florida PALM IV&V Findings by Month**

# Florida PALM Project Focus Area Updates

## Florida PALM Project Management

**Focus Area Indicator[1]**



Trend: No Change

**Florida PALM Project Management Updates**

The Florida PALM Project Schedule is being updated to align with Amendment 12 changes. The Florida PALM IV&V Team will not be providing metrics in this report due to a variety of variables that are currently shifting, which can cause the metrics to be inaccurate gauges of the overall Florida PALM Project status and health.

The Florida PALM IV&V Team recognizes the complexity involved in updating the Florida PALM Project Schedule, as well as the impacts on both the Florida PALM Project Team and the Agencies. Once the revised Schedule is approved and baselined, the Florida PALM IV&V Team recommends that the Florida PALM Project Team implement stricter Schedule control and mitigation thresholds to prevent slippage on the new timeline. The following guidelines could support this effort:

- Incorporating estimated Start and Finish dates helps establish Schedule control thresholds and define acceptable variance limits before corrective action is needed. This approach enables the Florida PALM Project Team to proactively identify and address delays, especially for Critical Path activities or tasks that, while not on the Critical Path, impact the overall Florida PALM Project timeline.
- Once Schedule control thresholds are set, action triggers, alerts, and action items can be established. These parameters will help guide the next steps to mitigate delays once the threshold is exceeded. For example, the Florida PALM Project Scheduler may hold weekly meetings with Task Coordinators to discuss the cause of delays and expected resolutions. If delays cannot be mitigated, they should be escalated to Florida PALM Project leadership for awareness and support.

While the Florida PALM Project Schedule is being updated, the Florida PALM Project Team should consider potential challenges that may arise from relying on various work trackers in the

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[1] Indicator would include this month's indicator as well as a shadow that shows what the previous indicator rating was similar to what is provided in the current Monthly Assessment Report template.

interim. If the updates take longer than anticipated, misalignment between ongoing efforts and the revised Florida PALM Project Schedule may occur, making it more difficult to identify the downstream impacts if tasks are delayed.

- Resource allocation based on outdated priorities may lead to conflicts or bottlenecks as the new Florida PALM Project Schedule is implemented, potentially causing inefficiencies and increased costs.
- Assumptions based on the baselined Florida PALM Project Schedule may impact efforts for future tasks like UAT, Interface Testing, and data validation, potentially affecting Florida PALM Readiness and the effectiveness of issue resolution.
- Conflicting timelines across teams may lead to confusion or miscommunication, making it harder for Florida PALM Project leadership to enforce alignment, which could lead to inconsistent execution.
- Delays in decision-making could arise as Florida PALM Project leadership may lack an updated view of ongoing activities, potentially impacting milestone achievements and the Florida PALM Project timelines.

The Florida PALM IV&V Team recommends the following to minimize schedule slippage and maintain momentum while awaiting the new timeline:

- Conduct weekly meetings with the Task Coordinators to ensure teams are aligned, review progress, adjust workstreams as needed, and offer guidance on interim efforts to avoid duplication of efforts.
- Conduct a dependency review to validate Critical Path items and verify ongoing work aligns with the updated Florida PALM Project Schedule, minimizing new risks.
- Ensure the Risks log is updated to identify Risks associated with Florida PALM Project Schedule uncertainty, develop a mitigation plan for any anticipated delays, and escalate high-impact Risks to Florida PALM Project leadership.

These steps could help the Florida PALM Project Team detect risks early, assist in mitigation planning, and keep the Florida PALM Project on track with budget, schedule, quality, and scope.

*Florida PALM Project Decisions*

The Figure below shows the trend of Decisions over the last four months.

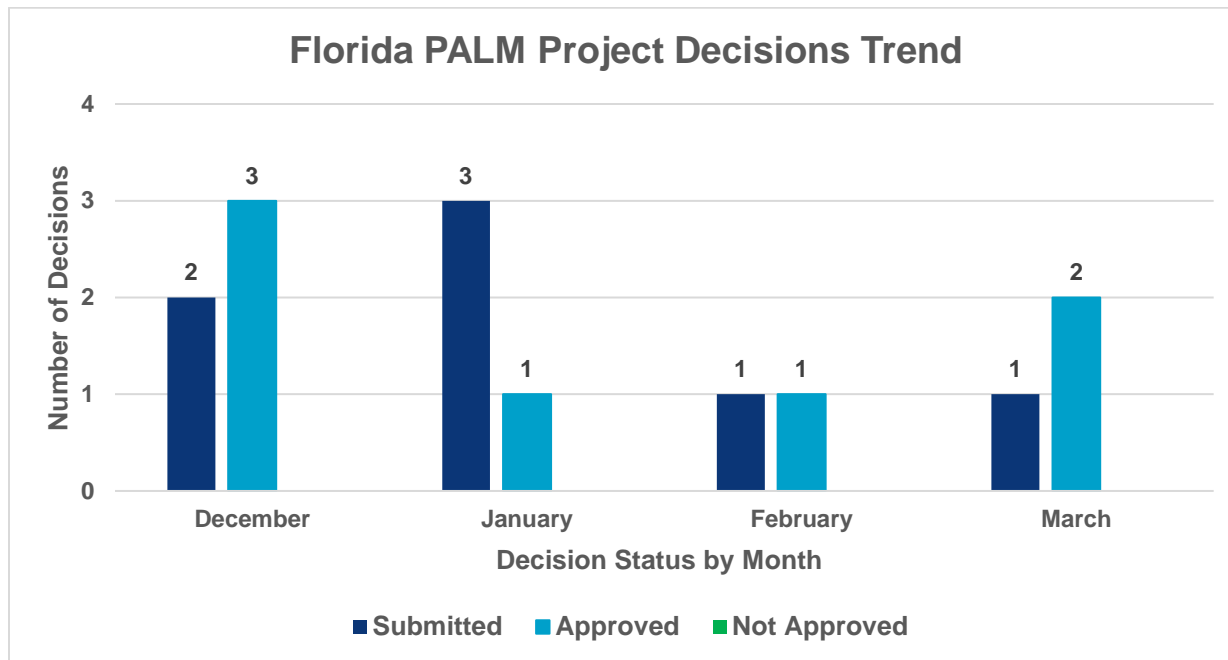**Florida PALM Project Decisions Trend**



**Figure 2: Florida PALM Project Decisions Trend**

One Decision was submitted, and the following two Decisions were approved by Florida PALM Project leadership:

- DE360 – Removal of Test Scripts from D656 Completion of System Testing Segment II, removed Test Scripts that had been canceled or deferred to Segment III.
- DE361 – D668 DW/BI Solution Design Changes updated the Report title and descriptions in approximately three AD documents that were part of D668 – Completion of Build Segment III DW/BI. This approval ensures that naming conventions or designs align with the respective report purpose.

The Risk Rating for this Focus Area remains a Medium Risk.

## Florida PALM Organizational Change Management

**Focus Area Indicator**
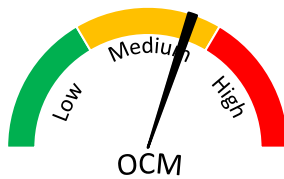


Trend: No Change

**Florida PALM Organizational Change Management Updates**

The Florida PALM IV&V Team observed RC engagement with the Agencies' CCNs and the promotion of cross-collaboration between Agencies during Agency Touchpoints. Encouraging collaboration helps break down information silos, particularly for activities like UAT, Training, and Testing. RCs also facilitated the sharing of Interface Selection data, UAT, and Training Plans on the Agency Exchange Library (located on the Agency Readiness webpage), allowing Agencies to share resources beyond Florida PALM Project materials. Continuing this effort will foster relationships that support Florida PALM Project Readiness, particularly for UAT preparation, execution, and SME and end-user Training leading up to go-live.

Conversations during monthly Touchpoints focused on the following Agency Readiness topics:

- RW Tasks like those for Interface selections, configuration workbooks, and the Change Impact Analysis.
- Agency updates like budgeting and CCN composition.
- Amendment 12 updates to the Florida PALM Project Schedule and RW.
- UAT and Training planning.
- Other information, such as upcoming Training workshops and Agency-led subgroups focusing on UAT, Training, and Testing.

The Florida PALM IV&V Team continues to acknowledge the benefit of the following Florida PALM Project Team assistance offered to Agency-led workgroups:

- Assisting with kickoff meetings to help align objectives and expectations.
- Providing support to help Agencies implement a structured approach for meetings and discussions, incorporating methodologies such as the Project Management Book of Knowledge (PMBOK) and Prosci®. This includes documenting meeting agendas, action items, lessons learned, and other best practices.
- Providing guidance in developing a structured learning path for Agencies to leverage that aligns with the Florida PALM Project Team's Training development phases.

The Florida PALM IV&V Team interviewed members of the Florida PALM Readiness Team on 3/28/25 to discuss Agency Dashboards, focusing on the CCN and Task Dials, their calculations, intended purpose, and past, present, and future changes. The meeting provided valuable insight into the Agency Dashboards. The Florida PALM IV&V Team will continue to analyze the

Dashboards, Agency responses in the Florida PALM IV&V Team Monthly Interviews, and RC Readiness Touchpoints to offer recommendations on measuring the effectiveness of the CCN, including monitoring factors like change fatigue, burnout, bandwidth, and communications.

The Florida PALM Project Team hosted a special Task Talk for select Agencies on 3/25/25 to discuss errors in the Agency SpeedKey selections. Technical RCs were present at the meeting and walked through examples in Smartsheet to illustrate how Agencies should correct the SpeedKey errors. In addition to reinforcing the importance of the downstream impacts of SpeedKeys on areas like Conversion, the Florida PALM Project Team also noted that they would continue to follow up with Agencies to ensure the errors were corrected. Performing these targeted sessions, both in scope and audience, is crucial for saving time and rework by Agency staff and allows the conveyance of a single consistent message rather than addressing issues across individual Agency touchpoints. The Florida PALM IV&V Team encourages the Florida PALM Project Team to continue identifying trends in problems and tasks that can be solved with targeted sessions. Addressing these specific concerns will also help Agency staff build a deeper understanding of Florida PALM to help their Readiness efforts.

With competing Florida PALM Project Readiness activities focused on technical and functional aspects, the Florida PALM IV&V Team recommends that RCs incorporate some Organizational Change Management (OCM) activities during routine Agency Readiness Touchpoints, particularly as shifting timelines and changes in the RW arise from Amendment 12. These may include the following, based on Agency size and CCN composition:

- Encouraging all CCN members to participate in routine Agency Readiness Touchpoints.
- Asking how the CCN members are doing with the Florida PALM Project and where they may need support.
- Gauging how the messages in the communications from the Florida PALM Project Team are being received.
- Asking if their Agency end-users are aware of the Florida PALM Project and changes associated with it.
- Asking how their OCM is going internally and how they plan to prepare people for change.

The Risk Rating for this Focus Area remains a Medium Risk.

## Florida PALM Requirements and Design

**Focus Area Indicator**
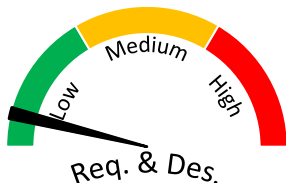


Trend: No Change

### Florida PALM Requirements and Design Updates

The Florida PALM IV&V Team continues to participate in Pre-Build and Build review meetings for several RICEFW Items, including Inter-unit Accounting and Payroll and Financial Reporting. No issues or roadblocks have been observed so far, and the Florida PALM IV&V Team will continue to monitor these discussions.

The Risk Rating for this Focus Area remains a Low Risk.

## Florida PALM Development

**Focus Area Indicator**
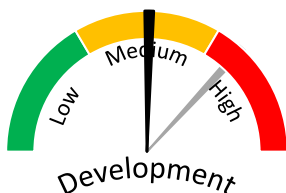


Trend: Improving

### Florida PALM Development Updates

*Build Segments III and IV*

The last AD document for Segment III was approved on 3/7/25. This represents a five-and-a-half-month delay from the baselined approval target date of 9/27/24. The Florida PALM IV&V Team has observed several root causes that have contributed to the delays in Build Segment III, including:

- Development staff misunderstanding content in the Functional Designs (FDs), leading to rework.

- Development staff need to make multiple rounds of updates to AD documents based on feedback and clarifications from the Florida PALM Project Team.
- Onboarding newly added Development staff that do not have background knowledge of the Florida PALM Project.
- Initial underestimation of the scope and complexity of Build Segment III.

Per the DWUT, the revised target for approval of all Segment IV AD documents is 5/9/25. As of 3/31/25, all 112 AD documents have been drafted, and 66 have been approved, exceeding the revised milestone of 49 approvals.

To mitigate delays in drafting the AD documents for both Build Segments III and IV, the SSI Vendor has consistently added Development staff starting in July 2024. The changes to Development staffing levels are shown in the Figure below.
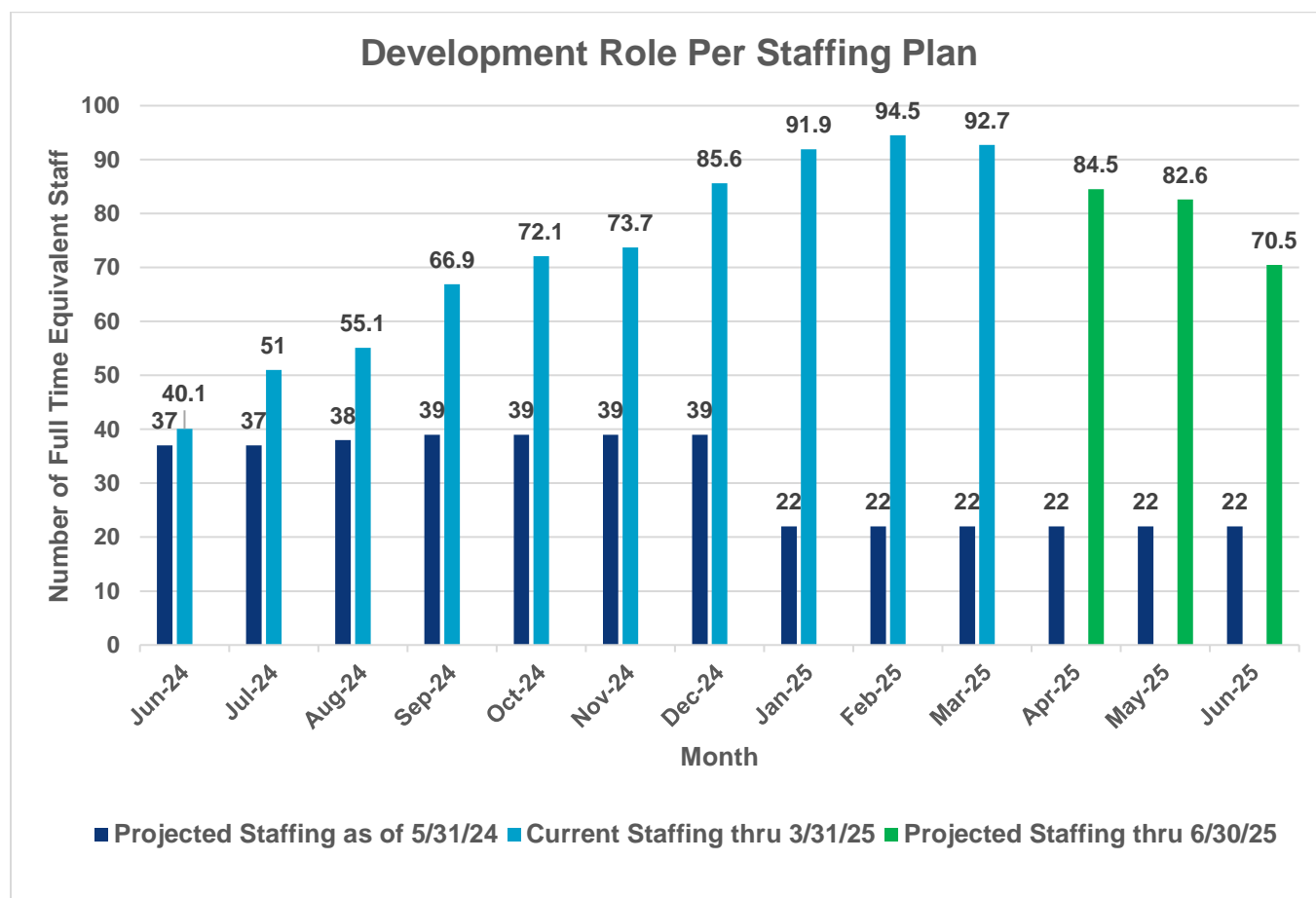


**Figure 3: Changes in Development Staffing**

Per the Staffing Plan as of 3/31/25, the current level of Development staffing is expected to be reduced starting in April and continuing through June 2025. As all the Segment IV AD documents have now been drafted and are in some stage of review and approval, the Development staff reductions are not expected to impact the approval of the remaining AD documents.

For Build Segment IV, the main workload will be on the Florida PALM Project Team to review and approve the drafted AD documents. The review and approval process is thorough and includes independent unit testing, a collaborative review, a Team Manager review, a Project Architect review, and a Project Director review. On average, the process takes about 32 business days from the time the draft AD document is submitted until approval. See the Table below for specific average review times per Build Segment.

**Table 3: Average Business Days for Build Segments**

| Build Segment | Average Business Days (AD Drafted to Approval) |
|---|---|
| I | 36.7 |
| II | 21.4 |
| III | 39.8 |
| IV | 31.0 |
| DW / BI - I | 23.2 |
| DW / BI - II | 19.7 |
| DW / BI - III | 31.0 |
| **Overall Average** | **32.0** |

The Florida PALM Project Team approved 47 Segment IV AD documents in March. To stay on target for both Build Segment IV and DW/BI Build Segment III, a similar number (45) will need to be approved in April. The Figure below provides the actual number of approved AD documents by month through March 2025 and projected AD approvals required in the coming months.
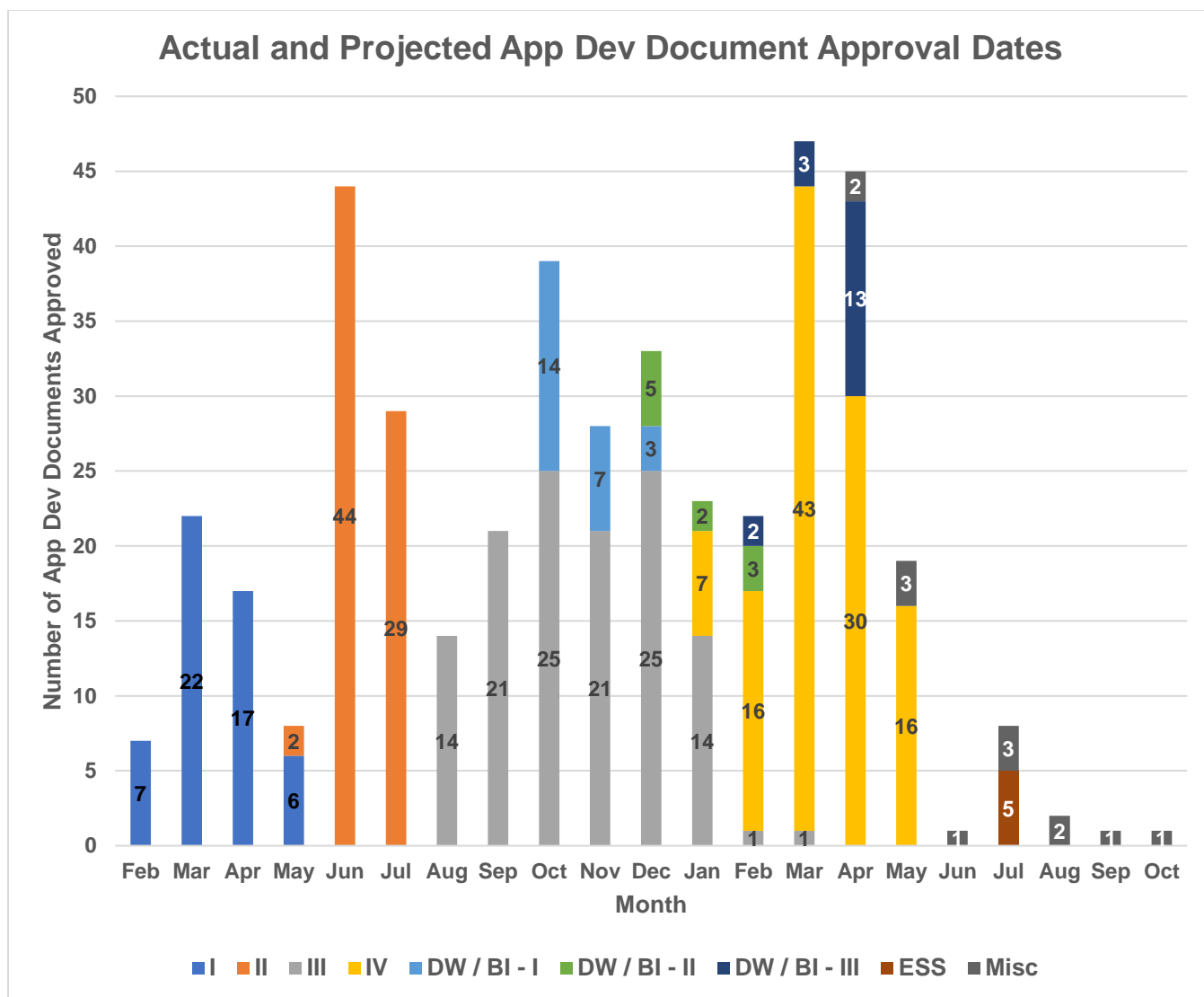
**Figure 4: Actual and Projected AD Approvals per Month**

Based on the historical pace for reviewing and approving AD documents and the number that the Florida PALM Project Team was able to review and approve in March, the Florida PALM IV&V Team estimates that all AD documents may be completed by 5/5/25. This is ahead of the updated target date of 5/9/25 and about four weeks ahead of the contractual date for completing Development by 5/30/25. This should also allow sufficient time for System Testing of the remaining AD documents that are currently going through the review and approval process.

It should be noted that there are some RICEFW Items that are excluded from the contractual Development completion date outlined in Amendment 12. This includes ESS functionality as well as 13 RICEFW Items that have been identified both because of PCRs approved after all Design Segments were complete and as a result of the new timeline defined in Amendment 12. These Items will need to be designed and developed separately from Build Segment IV. The ESS extensions are targeted for completion by 7/23/25. Of the 13 other RICEFW Items, five are

planned for approval prior to final Build Segment IV approval, but the rest are targeted for approval after Build Segment IV is completed. One RICEFW Item will be completed just prior to the end of System Testing, three will be approved between the end of System Testing and the beginning of UAT, and four will not be approved until after the start of UAT. System Testing for these items is not expected to be significant and there is not expected to be an impact on UAT.

## *SIR Resolution*

The SSI Development Team is involved in resolving SIRs generated by testing. The Figure below shows the count of active SIRs over time, categorized by their assigned priority in Jira (None to Highest).
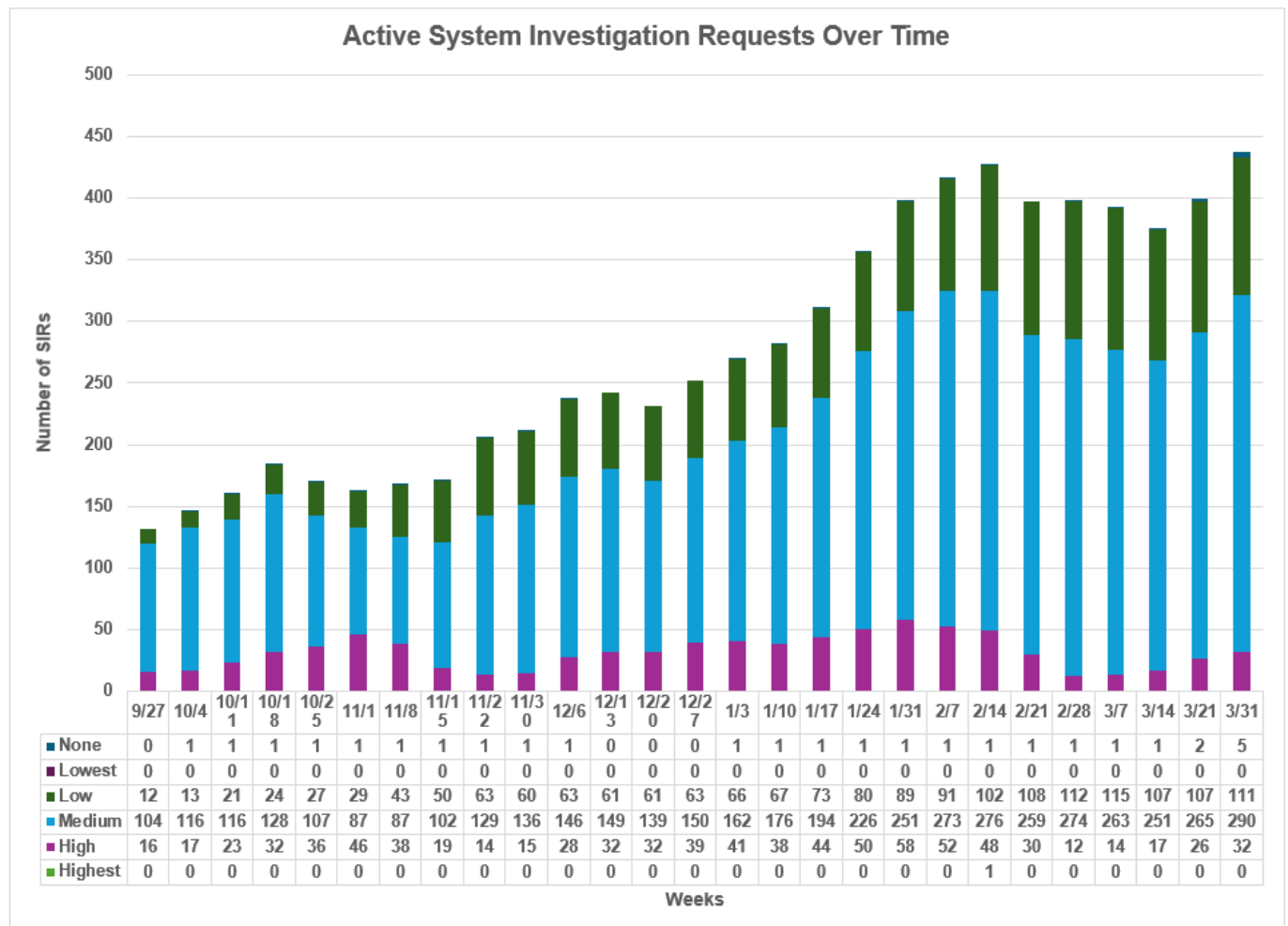


| | 9/27 | 10/4 | 10/11 | 10/18 | 10/25 | 11/1 | 11/8 | 11/15 | 11/22 | 11/30 | 12/6 | 12/13 | 12/20 | 12/27 | 1/3 | 1/10 | 1/17 | 1/24 | 1/31 | 2/7 | 2/14 | 2/21 | 2/28 | 3/7 | 3/14 | 3/21 | 3/31 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ■ None | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 5 |
| ■ Lowest | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| ■ Low | 12 | 13 | 21 | 24 | 27 | 29 | 43 | 50 | 63 | 60 | 63 | 61 | 61 | 63 | 66 | 67 | 73 | 80 | 89 | 91 | 102 | 108 | 112 | 115 | 107 | 107 | 111 |
| ■ Medium | 104 | 116 | 116 | 128 | 107 | 87 | 87 | 102 | 129 | 136 | 146 | 149 | 139 | 150 | 162 | 176 | 194 | 226 | 251 | 273 | 276 | 259 | 274 | 263 | 251 | 265 | 290 |
| ■ High | 16 | 17 | 23 | 32 | 36 | 46 | 38 | 19 | 14 | 15 | 28 | 32 | 32 | 39 | 41 | 38 | 44 | 50 | 58 | 52 | 48 | 30 | 12 | 14 | 17 | 26 | 32 |
| ■ Highest | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |

**Figure 5: Active SIRs over Time**

While the number of active SIRs declined from mid-February through mid-March, which corresponds with the close of System Testing Segment II, the count began rising again with the start of Segment III in mid-March. Notably, new SIRs continued to be identified weekly even after Segment II concluded. The Figure below illustrates the number of new and closed SIRs per week.
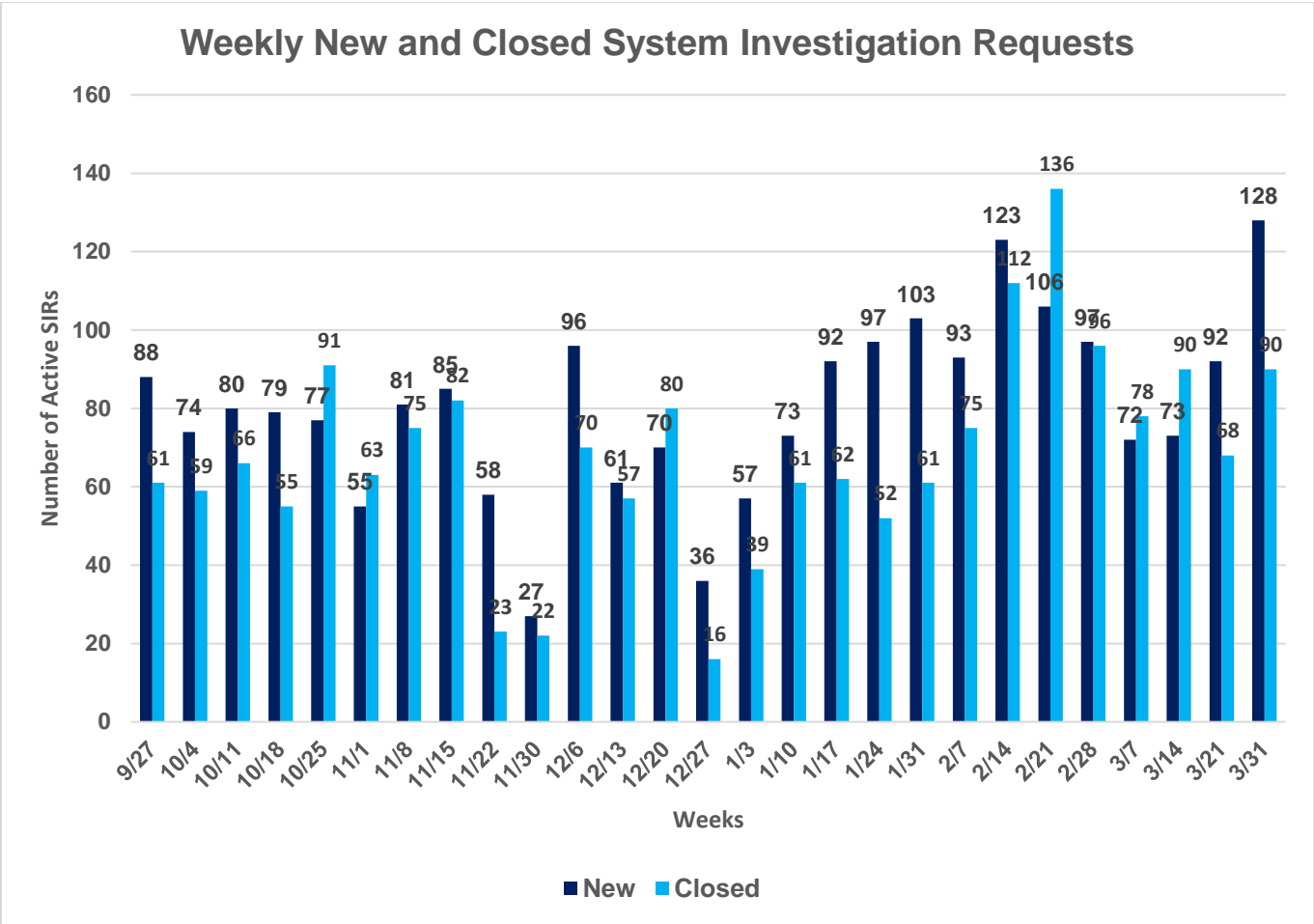
**Figure 6: New and Closed SIRs over Time**

The Florida PALM IV&V Team also observed that the initial failure rate for RICEFW-related Test Scripts from December 2024 through February 2025 has continued to show improvement when compared to October and November 2024. Since there was little System Testing during the month of March, there is insufficient data to determine an initial failure rate for March. As System Testing for Segment III progresses, the Florida PALM IV&V Team will continue to assess the initial failure rate moving forward. The trend between September 2024 and February 2025 is visible in the Figure below:

**RICEFW Test Cases Initial Failure Rate**
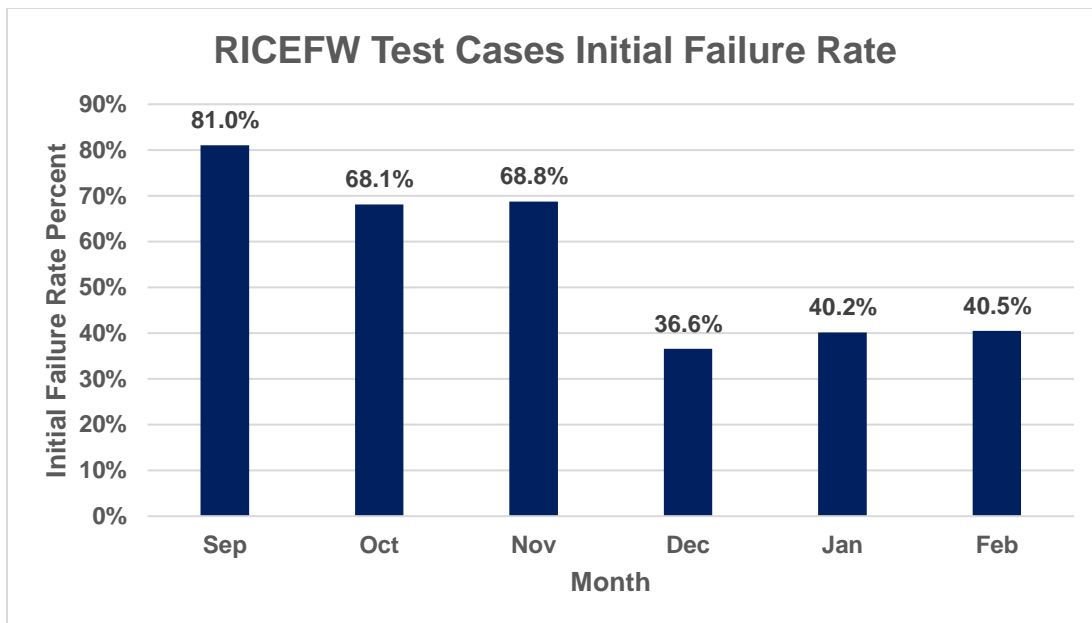


**Figure 7: Monthly Initial Failure Rate for RICEFW-related Test Scripts**

It appears that initiatives put in place by the SSI Vendor and the Florida PALM Project Team are improving the initial failure rate, resulting in fewer SIRs being identified for RICEFW Items.

It is important to note that a substantial number of RICEFW-related Test Scripts are still part of System Testing Segment III. According to the TSWUT, 715 RICEFW-related Test Scripts are included in this Segment, which began on 3/17/25, representing approximately 37% of all RICEFW-related Test Scripts. Due to the number of RICEFW-related Test Scripts that still need to be tested, the Florida PALM IV&V Team will continue to evaluate the initial failure rate and any impact on passing the remaining Test Scripts. Overall, the risk that the initial failure rate will impact the System Testing timeframe is lower both due to improvements in the failure rate and the revised timeline for System Testing as part of Amendment 12.

Since Development is currently ahead of the revised target dates, Finding 14, which addressed the impact of Development delays on System Testing, has been closed. As a result, the Risk Rating for this Focus Area has decreased (improved) to a Medium Risk.

## Florida PALM Testing

### Focus Area Indicator
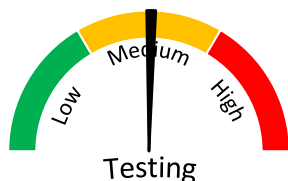


Trend: No Change

### Florida PALM Testing Updates

#### Completion of System Testing Segment II

After the completion of System Testing Segment II, the Florida PALM IV&V Team reviewed D656 – Completion of System Test Segment II and Work Product (WP) 402 – Requirements Traceability Matrix (RTM) System Test Segment II Updates. The Florida PALM IV&V Team will provide an assessment of these documents in a future report.

The Florida PALM IV&V Team observed in WP402 that of the 2,424 requirements to be met, 952 (39%) requirements have been identified as met either partially or fully through System Testing Segments I and II. The remaining 1,472 requirements that are yet to be met fall under various types of Design Segments, such as DW/BI, Segment III, or Multiple Test Segments, as noted in the "Segment" column of the RTM. Requirements marked as "Future Segment" represent 287 or 19% of untested requirements.

The Florida PALM IV&V Team received clarification from the Florida PALM Project Team on 47 SIRs logged between the completion of System Testing Segment II on 2/28/25 and the start of Segment III on 3/17/25. While some were linked to Test Scripts in the Test Execution Tracker (TEXT), the majority (33 out of 47) of the SIRs were not tied to any Test Scripts and resulted from exploratory testing conducted by the SSI Vendor.

#### System Testing Segment III

The SSI Vendor began execution for System Testing Segment III on 3/17/25. Thirty-nine of the 706 Test Scripts from the Initial List of Test Scripts submitted with the Deliverable Expectation Document (DED) for D696 – Completion of System Test Segment III have been marked as Canceled. According to the DED for D696, additional Test Scripts can be added to the Segment without requiring a PCR or Decision, but the removal of Test Scripts from the initial list will require the submission and approval of a Decision prior to the submission of D696. The SSI Vendor also added 167 Test Scripts bringing the current total volume of Test Scripts in Segment III to 833 as of 3/31/25.

According to the TEXT, 50 test scripts were planned for execution by the SSI Vendor between the start of Segment III on 3/17/25 and 3/31/25, but 28 test scripts were executed. The Florida

PALM IV&V Team sought clarification from the Florida PALM Project Team regarding the slower pace of execution. The Florida PALM Project Team cited the resolution of outstanding SIRs, dependencies on existing SIRs, and the timing of moving the completed Build to the System Testing environments as the reasons for the delay. The Florida PALM IV&V Team expects the pace of execution for System Testing Segment III to increase in the coming weeks, and any emerging concerns will be communicated to the Florida PALM Project Team.

### Regression Testing

The SSI Vendor held a Regression Testing Overview Meeting on 3/11/25. The Florida PALM IV&V Team observed that Event 1 of Regression Testing began on 3/24/25 ahead of the scheduled start date in April per the baselined Florida PALM Project Schedule. Event 1 is the first of four Regression Testing Events planned for the Florida PALM Project. Event 1 is a Full Regression Test scheduled to occur after the completion of System Testing Segments I and II per WP409 – Regression Test Plan. Approximately 520 Test Scripts from the CMS Wave and Segments I and II are planned to be executed during Event 1 of Regression Testing, as seen in the Regression Script Work Unit Tracker (RSWUT).

Approximately 65% of the Regression Test Scripts have been identified for Automation Testing in the RSWUT. As documented in WP409, Katalon will be the tool used to perform Automated Testing on the Florida PALM Project. The SSI Vendor has executed 92 Test Scripts, of which 80 Passed and 12 Failed, as observed in the Regression Test Execution Tracker (ReTEXT). Five SIRs were categorized as "Regression SIR" (new SIR detected), and six were categorized as "System Testing" (SIR closed during System Testing that was re-opened during regression).

### DW/BI System Testing

Preparation activities for System Testing for DW/BI were scheduled to begin in mid-March, as per the timeline in Amendment 12. The Florida PALM IV&V Team followed up with the Florida PALM Project Team to clarify the timing of the kickoff meeting and the update of the TEXT with DW/BI Test Scripts. The Florida PALM Project Team responded that the Testing schedule in WP429 – Updated System Testing Plan (DW-BI) is being revised to incorporate changes from Amendment 12, with System Testing execution for DW/BI scheduled to start on 5/12/25 and continue through 7/28/25.

### Unresolved System Testing SIRs

The total number of unresolved (excludes canceled, rejected, or duplicate) System Testing SIRs logged by the SSI Vendor decreased from 331 at the end of February to 99 at the end of March.
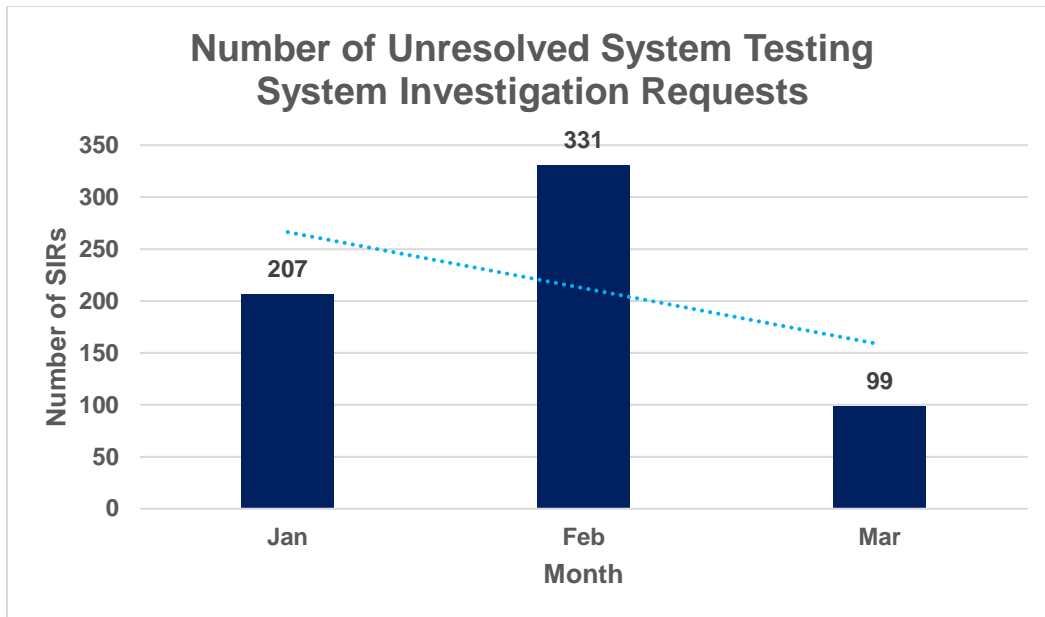
**Figure 8: Number of Unresolved SIRs**

Per the SIR Management process defined in D643 – Updated System Testing Plan, SIRs have both a Business Criticality and Priority assigned to them in Jira. Business Criticality represents an unresolved SIR's potential impact on business operations or end users if deployed to the Production environment. Per D643, Critical or High criticality SIRs must be resolved or have an agreed-upon disposition to exit System Testing and proceed to UAT. While two Critical priority SIRs were logged on 3/31/25, the number of unresolved System Testing SIRs with High, Medium, and Low criticality decreased from February, as depicted in the Figure below.
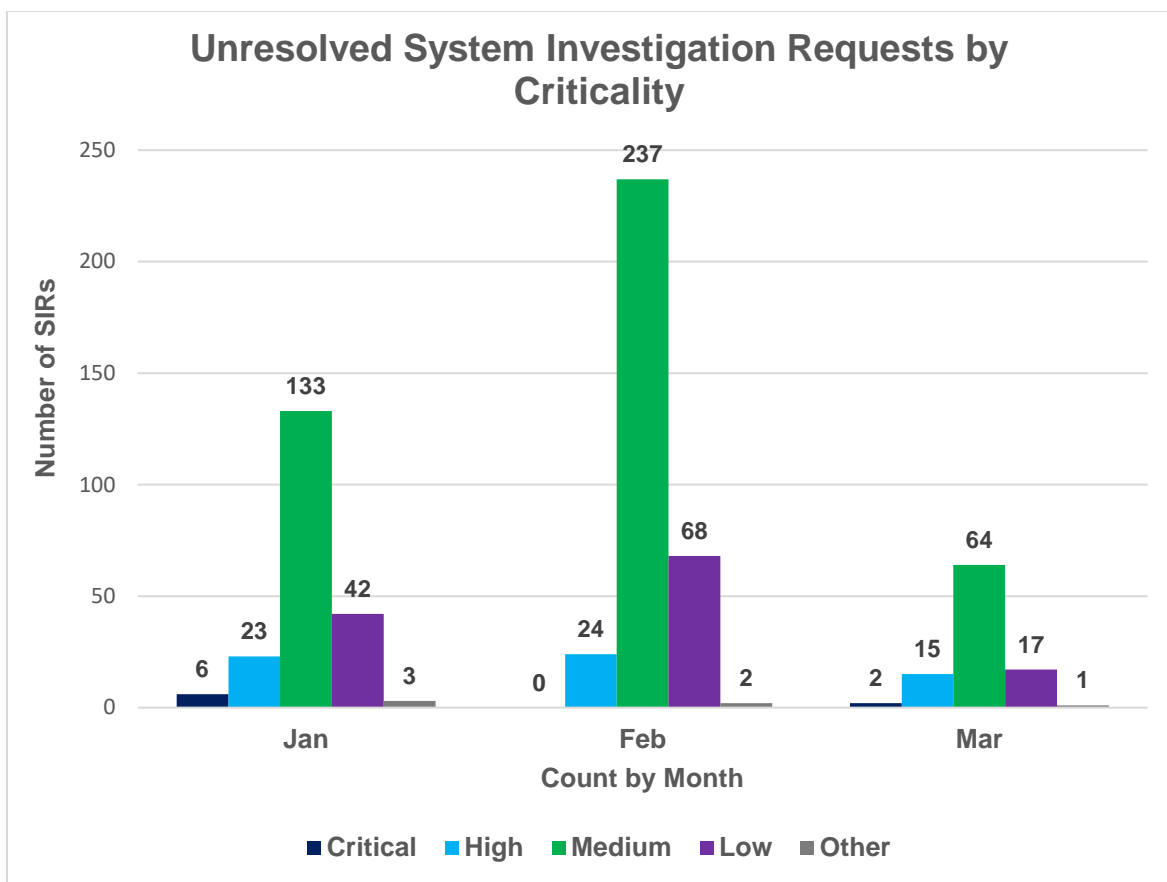
**Figure 9: Number of Unresolved SIRs by Criticality**

Priority reflects a SIR's impact on Testing progress and the urgency of fixing it. Per D643, "there will be agreement on the assigned Priority for outstanding Medium and Low-priority SIRs" prior to exiting System Testing and proceeding to UAT. The number of unresolved High-priority SIRs increased from three to 11, the number of unresolved Medium-priority SIRs decreased from 244 to 62, and the number of unresolved Low-priority SIRs decreased from 81 to 24. The Florida PALM IV&V Team will continue to monitor the potential impact a high number of unresolved Medium and Low-priority SIRs could have on the overall quality of the application delivered to UAT and the end-user Testing experience.
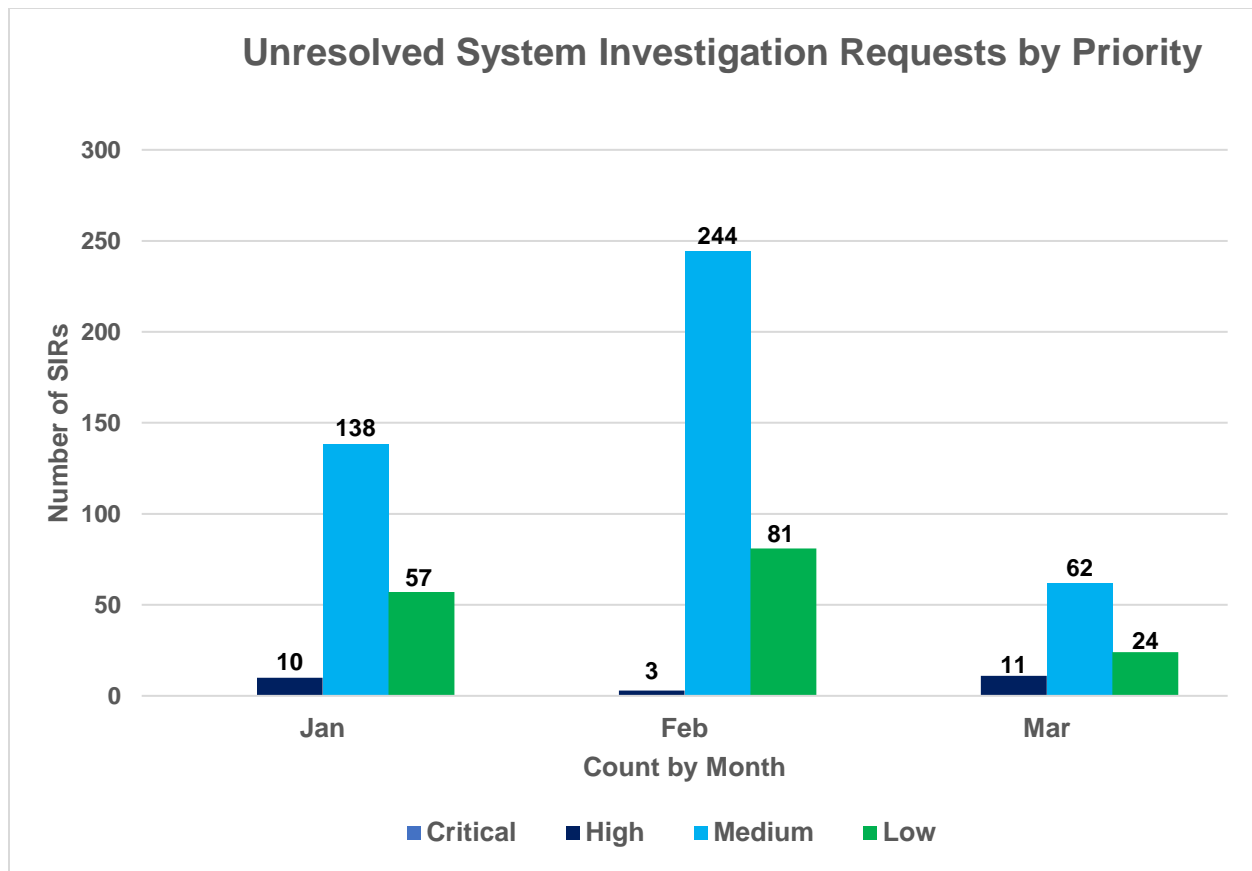
**Figure 10: Number of Active SIRs by Priority**

Aging is the period between the time a SIR is logged and the time it is resolved. The Florida PALM IV&V Team uses aging data as a method to assess the Florida PALM Project Team's ability to meet System Testing exit criteria. The Florida PALM IV&V Team observed that the average number of days required to resolve a High-priority SIR increased slightly from 9.4 days to 9.7 days, Medium-priority SIR resolution time increased from 12.5 days to 13 days, and Low-priority SIR resolution time increased from 11.4 to 15.8 days as seen in the Figure below.
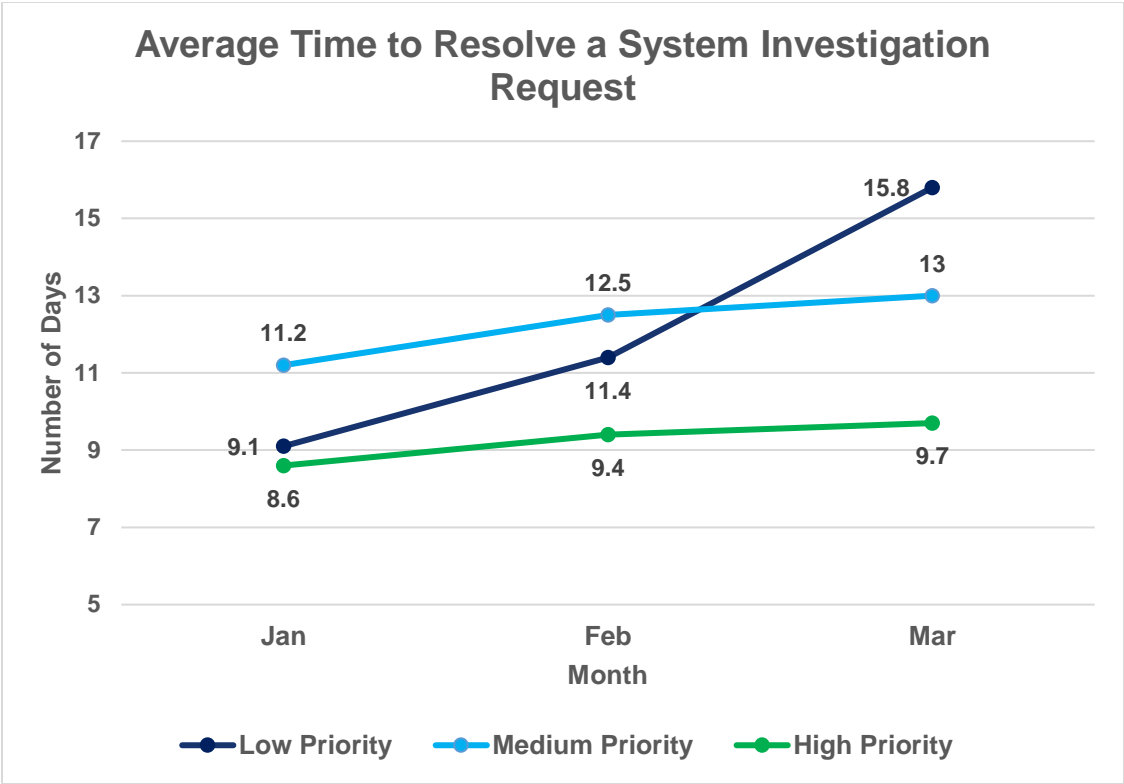
**Figure 11: Average SIR Resolution Time by Priority**

The Table below provides a snapshot of the execution status for System Testing Segment III.

**Table 4: Test Execution Status for System Testing Segment III**

| Test Execution Status for Segment III (As of 3/31/25) | | | | | | | |
|---|---|---|---|---|---|---|---|
| Cycle | Total No. of Test Cases | No. of Test Cases Canceled | No. of Test Cases Deferred | Actual No. of Test Cases Execution Complete | Pass | Fail | Pass % (based on executed) | Fail % (based on executed) |
| Cycle 0 | 3 | 0 | 0 | 1 | 1 | 0 | 100% | 0% |
| Cycle 1 | 16 | 1 | 0 | 0 | 0 | 0 | NA | NA |
| Cycle 2 | 440 | 18 | 0 | 9 | 7 | 2 | 78% | 22% |
| Cycle 3 | 192 | 0 | 0 | 7 | 5 | 2 | 71% | 29% |
| Cycle 4 | 43 | 16 | 0 | 0 | 0 | 0 | NA | NA |
| Cycle 5 | 3 | 0 | 0 | 0 | 0 | 0 | NA | NA |
| Cycle 6 | 103 | 0 | 0 | 1 | 1 | 0 | NA | NA |
| Cycle 7 | 23 | 0 | 0 | 3 | 1 | 2 | 33% | 67% |
| Cycle 8 | 12 | 5 | 0 | 5 | 5 | 0 | 100% | 0% |
| Cycle 9 | 38 | 0 | 0 | 3 | 2 | 1 | 67% | 33% |
| Grand Total | 873 | 40 | 0 | 29 | 22 | 7 | 76% | 24% |

*State Quality Assurance (QA) Team Test Activities*

The State QA Team supports ongoing testing efforts on the Florida PALM Project through various activities, including reviewing Test Scripts, test execution results, and executing both SSI Vendor and State-developed Test Scripts. The additional Test Scenarios and Test Scripts are created based on gaps identified during the review of FD documents and SSI Vendor Test Scripts. The State QA Team uses Azure DevOps for test execution management, logs SIRs in Jira, and stores reports on the Florida PALM SharePoint.

As of 3/31/25, the State QA Team has reviewed 1,826 of the 2,044 Test Scripts marked for "In State Review" in the TSWUT. For test execution, the State QA Team has executed 1,480 out of 1,856 selected Test Scripts that were marked as "Execution Complete - Passed" in the TEXT.

In reviewing the FDs, the State QA Team has identified approximately 1,600 Test Scenarios, with corresponding Test Scripts developed for about 1,050 of them, as documented in the "State

Finding Scenarios" tab of the Review State QA Test Scripts workbook on the Florida PALM SharePoint.

Based on data from Jira, the State QA Team has logged 735 SIRs. Of these, 258 (35%) are related to application issues such as coding defects, design defects, or application security. Approximately 19% are marked by the SSI Vendor as "not a defect," and 46% are attributed to "Other" non-application causes, such as network connectivity, configuration, or data issues. The Figure below outlines the various root causes of the SIRs logged by the State QA Team.



**State Quality Assurance System Investigation Requests by Root Cause**

Other
338
46%

Coding Defect
258
35%

Not a Defect
139
19%
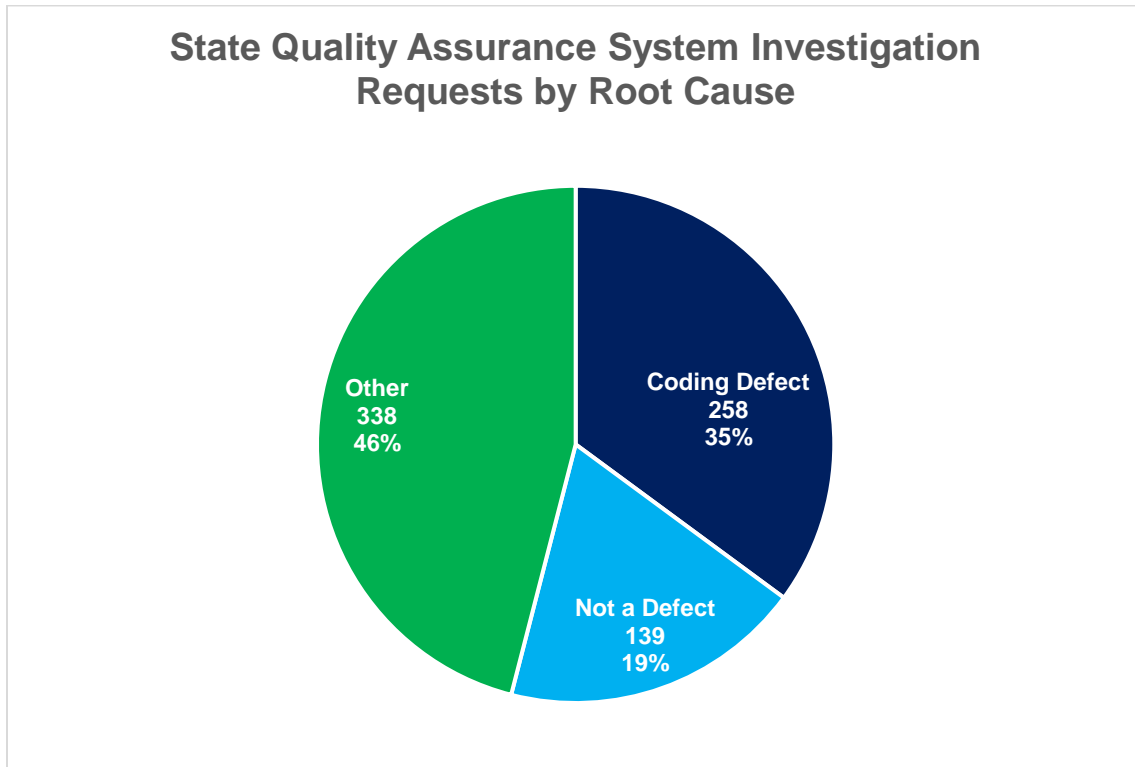
**Figure 12: State QA SIRs by Root Cause**

Of the SIRs opened by the State QA Team, 70% are assigned Medium Priority and Criticality, 21% are assigned Low Priority, and 9% are assigned Low Criticality. The remaining 9% assigned

High Priority and 21% assigned High Criticality, are either in "Resolve" or "Re-test" statuses, indicating they are actively being addressed and retested.
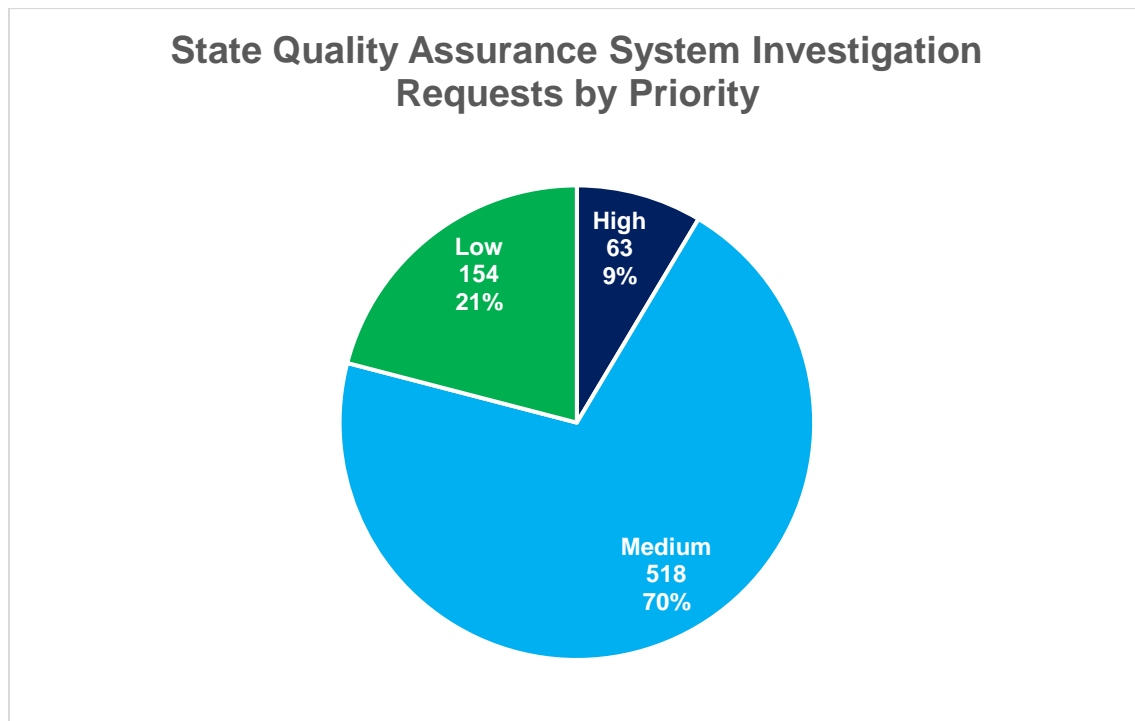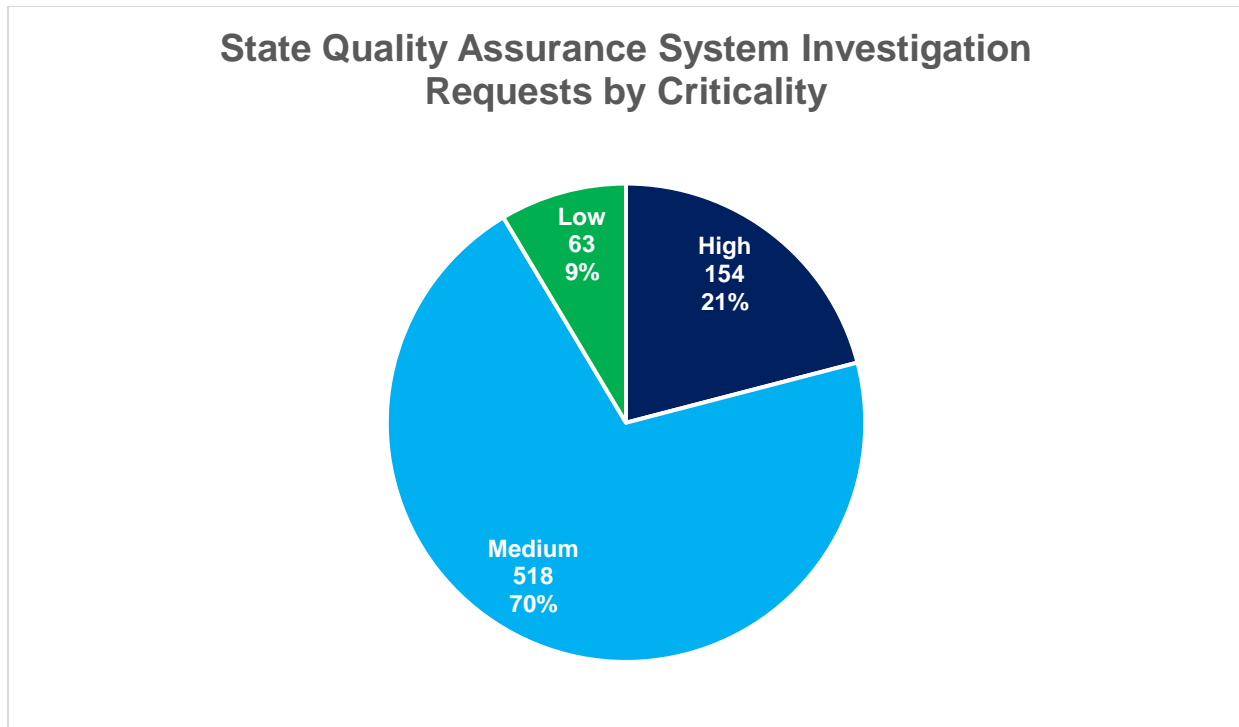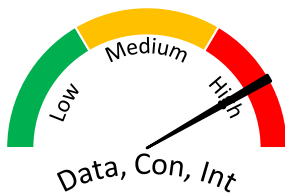


**Figure 13: State QA SIRs by Priority**

## State Quality Assurance System Investigation Requests by Criticality



**Figure 14: State QA SIRs by Criticality**

The Risk Rating for this Focus Area Remains a Medium Risk.

## Florida PALM Data, Conversion, and Interfaces

**Focus Area Indicator**



Trend: No Change

**Florida PALM Data, Conversion, and Interface Updates**

*Conversions*

While three new SIRs for Mock Conversion 1A were opened in March, both the new and outstanding SIRs from previous months were closed by the SSI Vendor as of 3/31/25.

**Table 5: Status of SIRs for Mock Conversion 1A**

| Priority | Jira Status | | |
| --- | --- | --- | --- |
| | Resolve | Re-test | Closed |
| High | 0 | 0 | 2 |
| Medium | 0 | 0 | 3 |
| Low | 0 | 0 | 0 |
| **Total** | **0** | **0** | **5** |

Note: A Jira status of Resolve indicates the SIR has been assigned to the appropriate Development staff and a fix is being worked on. A Jira status of Re-test indicates a resolution for the SIR that has been loaded into the Testing environments and is ready for re-test. A Jira status of Closed indicates that the SIR resolution has passed a re-test and has been closed.

Four new SIRs for Mock Conversion 1B were also opened in March. The SSI Vendor closed nine SIRs, leaving no High-priority SIRs unresolved as of 3/31/25.

**Table 6: Status of SIRs for Mock Conversion 1B**

| Priority | Jira Status | | |
| --- | --- | --- | --- |
| | Resolve | Re-test | Closed |
| High | 0 | 0 | 4 |
| Medium | 4 | 1 | 5 |
| Low | 2 | 0 | 0 |
| **Total** | **6** | **1** | **9** |

While five Medium-priority and two Low-priority SIRs remain open for Mock 1B, the SSI vendor initiated Mock 2A on 03/19/25.

Eight new SIRs for Mock Conversion 2A were opened in March. The SSI Vendor closed five SIRs, with one High-priority SIR unresolved as of 3/31/25.

**Table 7: Status of SIRs for Mock Conversion 2A**

| Priority | Jira Status | | |
| --- | --- | --- | --- |
| | Resolve | Re-test | Closed |
| High | 1 | 0 | 4 |
| Medium | 2 | 0 | 1 |
| Low | 0 | 0 | 0 |
| **Total** | **3** | **0** | **5** |

*Interfaces*

The Florida PALM Project Team continues to work on resolving connectivity issues for one Enterprise Partner's web service. Interface Testing Cycle 1 – Connectivity Testing is complete for all Agencies and other Enterprise Partners. While Interface Connectivity Testing Cycle 1 has experienced some delays, they are not expected to have an impact on Interface Testing Cycle 2.

Delays to Mock Conversion 2 have affected the start of Interface Testing Cycle 2, which was scheduled to begin on 2/1/25 in the baselined Florida PALM Project Schedule, as it relies on data from Mock Conversion 2. Amendment 12 will adjust the timeline for the remaining Mock Conversions and Interface Testing Cycles. Mock Conversion 2 began on 3/19/25, and preparations are underway for Interface Testing Cycle 2, which is now targeted to begin in June 2025.

The Florida PALM Project Team continued to review Interface inventories submitted by Agencies and provide feedback to address incomplete or inaccurate information. Once the Interface list is finalized, the Florida PALM Project Team will evaluate the need for additional Connectivity testing.

*Data Warehouse/Business Intelligence*

DW/BI Build Segment III includes 18 reports at various stages of completion. Five reports have been finalized, and the remaining reports are either in draft or under collaborative review. Per Decision DE361, two reports – GLR164 Equity Comparison by Fund and GLR172 Cash Balances Reconciliation Report – were retitled, and PCR008 Project Expenditures Report received updates to both its title and description.

All 18 reports are scheduled for completion by 5/19/25. Given the current progress, the Florida PALM IV&V Team does not anticipate any impact on the revised timeline outlined in Amendment 12. In parallel, the DW/BI Production and Disaster Recovery (DR) environments are also being configured.
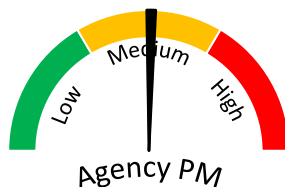
## Florida PALM Implementation Readiness Updates

The Florida PALM IV&V Team will begin reporting progress once Implementation Readiness efforts begin.

# Florida PALM Agency Focus Area Updates

## Agency Project Management

**Focus Area Indicator**



Trend: No Change

**Agency Project Management Updates**

The Florida PALM IV&V Team attends various meetings throughout the month, including Agency Monthly Readiness Touchpoints, RDNS/RW meetings, Readiness Team meetings, and Thursday Task Talks, to assess each Agency's Readiness progress. This includes, at a minimum, reviewing the Agency Dashboards, their CCN Composition, Agency engagement in monthly Readiness meetings, and overall Readiness Task completion.

### *Overall Task Completion*

The Florida PALM IV&V Team analyzed the RW to assess Agency performance across all Tasks. Data was compiled for RW Tasks starting with Task 512, with deadlines before 3/31/25. A total of 83 Tasks were included in this analysis.

**Table 8: Submission Totals by Florida PALM Project Impact**

| Task Status | Project Impact Totals | | | |
|---|---|---|---|---|
| | **Direct** | **Indirect** | **N/A** | **Total** |
| **Verified as Complete** | 24 | 7 | 12 | 43 |
| **Submission Incomplete** | 12 | 2 | 17 | 31 |
| **N/A (No Task Rubric for Verification)** | 1 | 0 | 8 | 9 |
| **Total** | **37** | **9** | **37** | **83** |

Of the seven Tasks due in March, five were Direct Impact Tasks, and one was marked as 100% Submitted by all Agencies and Verified as Complete on time.

The overall percentage of Direct Impact Tasks completed and verified increased from 59% in February to 65% in March. Similarly, the completion rate for Indirect Tasks rose from 56% to 78%. While some Tasks remain outstanding, this upward trend reflects positive momentum in RW Task completion across Agencies.

The Florida PALM IV&V Team observed during Agency Touchpoints that RCs have provided varying guidance on how Agencies should report Tasks they are unable to start or complete for valid reasons. In some instances, Agencies were instructed to mark the Task as complete, while

others were advised to assign partial completion percentages and include comments explaining why the Task couldn't be started or when the Task would be completed. To ensure the reliability and accuracy of metrics and Agency Dashboards, it is important that consistent guidance is provided across all Agencies.

*Tasks Verified as Complete*

The Figure below shows seven RW Tasks due before 3/31/25 and the percentage of Agencies that have been Verified as Complete by the Florida PALM Project Team. Verified as Complete indicates that Agencies have submitted 100% of the required information or data, and the submissions have been reviewed and validated by the Florida PALM Project Team against the Task Rubric. The Florida PALM Project Team does not review Agency submissions to validate the accuracy of data or information against current Agency business processes and systems. Submissions deemed insufficient or incomplete, requiring resubmission by the Agencies, are excluded. This distinction underscores the importance of achieving "Verified as Complete" to ensure readiness and alignment with Florida PALM Project objectives.
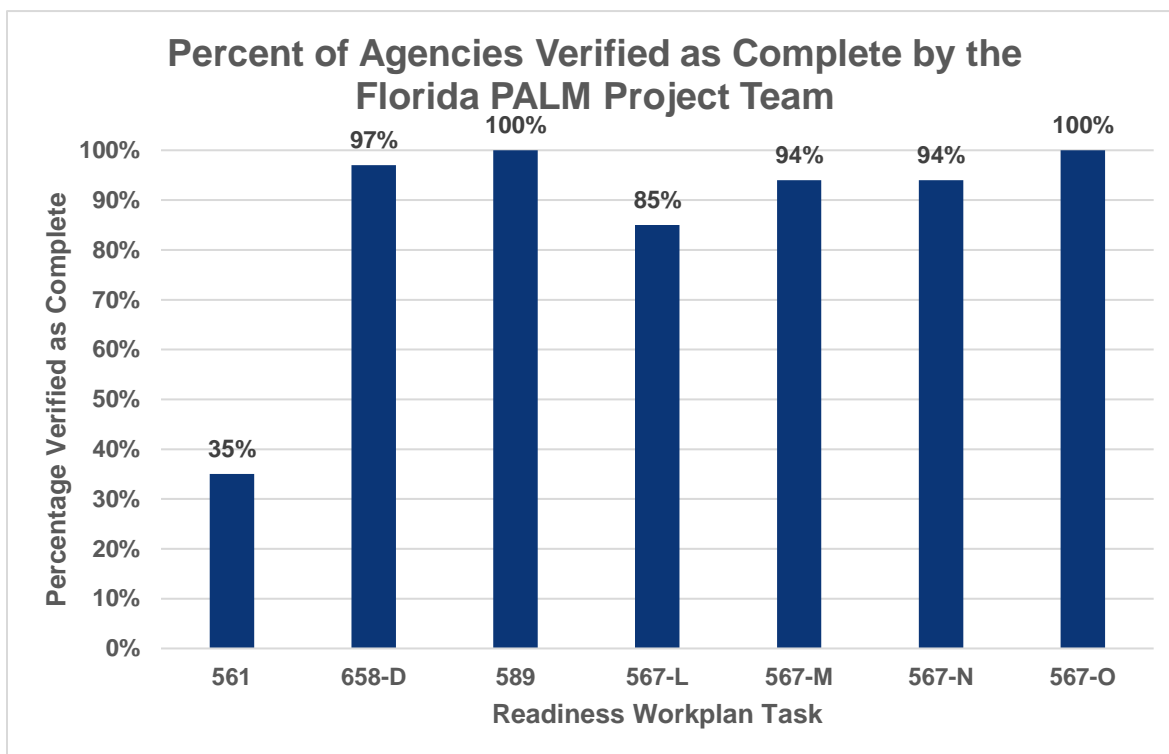


**Percent of Agencies Verified as Complete by the Florida PALM Project Team**

**Figure 15: Tasks Verified as Complete by the Florida PALM Project Team**

Of the seven Tasks, there are five with a Direct Impact on the Florida PALM Project:

- 567L-O – Share, Review, and Update Configuration Workbooks ensures that Agency-specific configuration values are loaded correctly for Testing rather than generic Florida PALM configuration data. Additionally, the data from this Task will support the completion of Tasks 657 – Submit Updated Configuration Workbooks and 622 – Review and Confirm Updated Configuration Workbooks.

- 658D – Submit Data Field Mapping ensures accurate Conversion results for each Agency based on mapping of FLAIR Organization Codes to Florida PALM Organization IDs for Location Codes.

The Florida PALM IV&V Team also reviewed the categories and aging of Tasks not yet Verified as Complete across the following critical operational areas:

- Data – Information used in or produced from an Agency's financial operations. This includes data supporting People, Processes, and Technology, and it must be evaluated against those specific purposes.
- People – Staff and stakeholders impacted by the Agency's transition to Florida PALM (e.g., leadership, technical and functional owners, SMEs, and end users). This category focuses on staffing levels, skill gaps, knowledge, awareness, and buy-in, which are key to successful transformation.
- Process – The sequences of activities used to accomplish business objectives. As business processes evolve at the State and Agency levels, this area emphasizes the need for resources to learn, adopt, and adapt to future-state workflows.
- Technology – The systems, tools, or applications used to process, track, or report on financial operations.
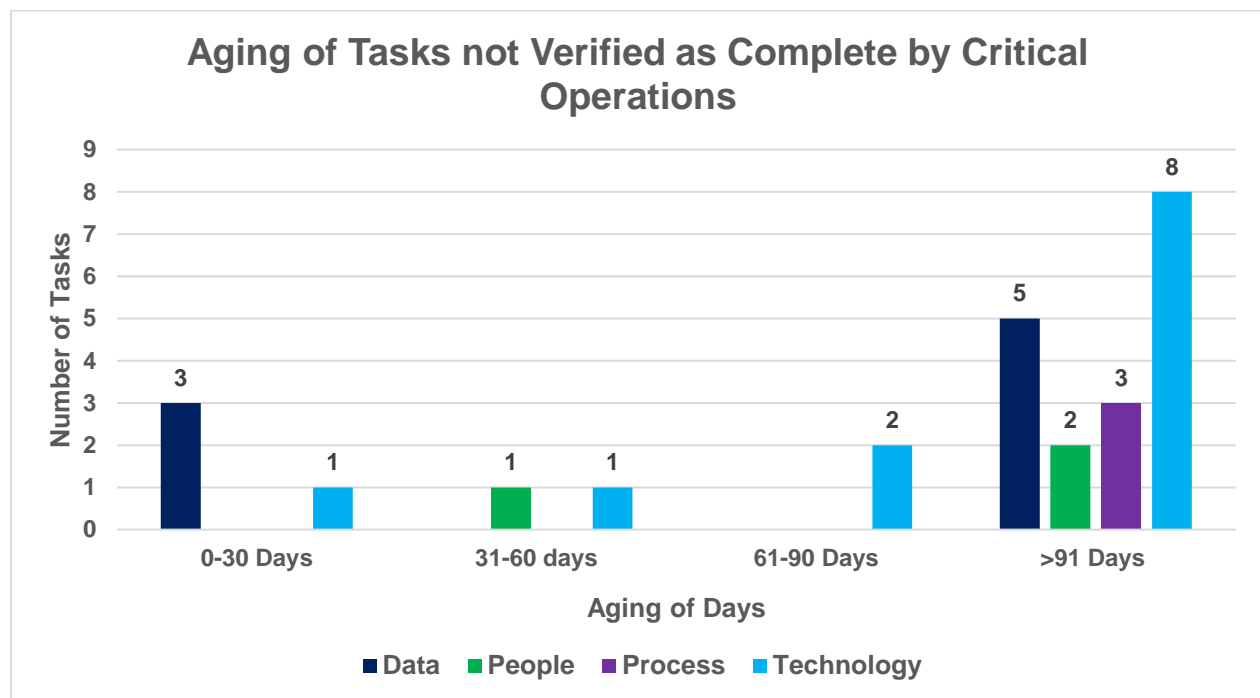


**Figure 16: Aging of Tasks not Verified as Complete by Critical Operations**

The data indicates that some Tasks have remained outstanding by the Agencies and unverified by the Florida PALM Project Team for over 90 days. This indicates that several Agencies are falling behind or struggling to complete Tasks, which may impact their overall Readiness. The Technology Critical Operation category has the highest number of outstanding Tasks, which correlates with the percentage of Agency Risks (17%) and Issues (26%) related to Technology. The Agency Risk and Issue analysis also indicates that 19% of the Risks and 36% of the Issues

are related to Staffing. This could indicate a shortage of knowledgeable staff to complete these Tasks or the presence of barriers that may require additional support from the Florida PALM Project Readiness Team.

The Florida PALM IV&V Team continues to recommend the following for the Agencies:

- Actively engage with RCs before meetings to update discussion topics, ensuring timely resolution of questions and guiding future discussions to assess whether meeting frequency should be adjusted. This also helps ensure meaningful discussions on necessary topics. If Agencies do not provide input when RCs reach out, the agenda template defaults to the standard version, which may not effectively address key discussion points, potentially leading to ineffective communication.
- Continue to evaluate available resources and redistribute Tasks to ensure a balanced workload and that the proper training and tools are available to complete the Tasks.
- Continue to engage with the RCs as soon as it is realized that the due date for a particular Task will not be met. A mitigation strategy should also be created to resolve the potential delay and immediately notify the Florida PALM Project Team if the resolution is outside of the Agency's control.
- Continue to seek collaboration with other Agencies. This can leverage different skills and perspectives, improve efficiency, and provide support and motivation.

### Agency Status Report Dashboards

The Florida PALM IV&V Team interviewed members of the Florida PALM Readiness Team on 3/28/25 to discuss the Florida PALM Agency Dashboards. The interview provided insight regarding their intended purpose, the historical data, and future plans. The Dashboard statistics are intended to provide the Sponsors and their Agencies with data to help manage their Risks, Issues, and overall Florida PALM Project decisions. They are also the source of data represented in the Agencies' bi-monthly reports. The Florida PALM IV&V Team will review and monitor the Dashboards for data that is accurate and relevant to support Agency needs and will provide future recommendations as appropriate to ensure this goal is achieved.

### Agency Readiness Workplan Updates

Amendment 12 extends the Florida PALM Project timeline and helps mitigate the impact of previous delays. This extension provides additional time for both the Florida PALM Project Team and the Agencies to support planning and execution activities. The Florida PALM Project Team is implementing the following measures to mitigate potential impacts while the Florida PALM Project Schedule is being updated:

- Providing high-level milestone estimates where feasible to support planning efforts.
- Offering guidance on priority Tasks that should proceed before the Schedule updates are finalized.
- Maintaining open communication channels to address Agency concerns and provide timely updates.

To help mitigate potential risks, the Florida PALM IV&V Team recommends that the Florida PALM Project Team work toward finalizing updates to the RW as the Florida PALM Project Schedule is updated. Prolonged updates may create the following challenges for Agencies and stakeholders:

- Uncertainty in resource allocation.
  - Agencies are aware of the extension but may lack clarity on specific Task due dates.
  - Agencies may have difficulty managing resource availability, particularly for accounting and financial SMEs, as fiscal year-end activities approach.
- Impact on business system remediation and integration efforts.
  - Agencies may struggle to align their business system remediation efforts with the revised timeline without clear milestones.
  - Dependencies on third-party vendors or inter-Agency system integrations may be impacted due to uncertainty in scheduling.
- Operational and budget planning challenges.
  - Agencies may find it difficult to assess the budget implications of the extended timeline.
- Communication and stakeholder alignment.
  - Without a clearly defined RW schedule, there may be misalignment between Agencies, Florida PALM Project teams, and external vendors.

*Agency Risk and Issue Analysis*

The Florida PALM IV&V Team observed that the number of open Agency Issues has remained steady, while the number of open Agency Risks has decreased since February. The Agencies self-report and self-assess Issues and Risks. The Table below shows the running total of open Risks and Issues reported by the Agencies each month.

**Table 9: Agency Risks and Issues**

| Issues | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 |
|---|---|---|---|---|---|
| Open Issues | 94 | 76 | 78 | 83 | 83 |
| Critical or High | 68 | 61 | 64 | 66 | 66 |

| Risks | Nov-24 | Dec-24 | Jan-25 | Feb-25 | Mar-25 |
|---|---|---|---|---|---|
| Open Risks | 331 | 325 | 327 | 324 | 312 |
| Risks Score 6+ | 162 | 170 | 167 | 155 | 147 |

The Florida PALM IV&V Team has grouped the open Risks scored 6 or higher and the open Critical or High Issues in the following categories:
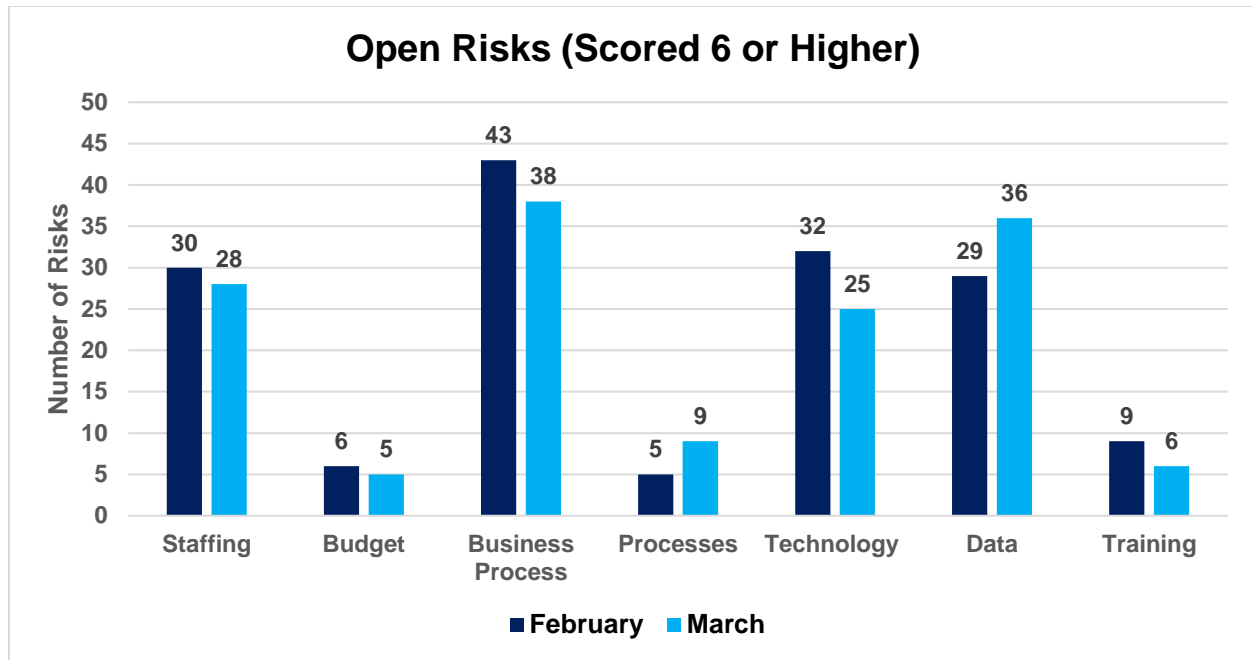
**Open Risks (Scored 6 or Higher)**



**Figure 17: Open Agency Risks Trend**
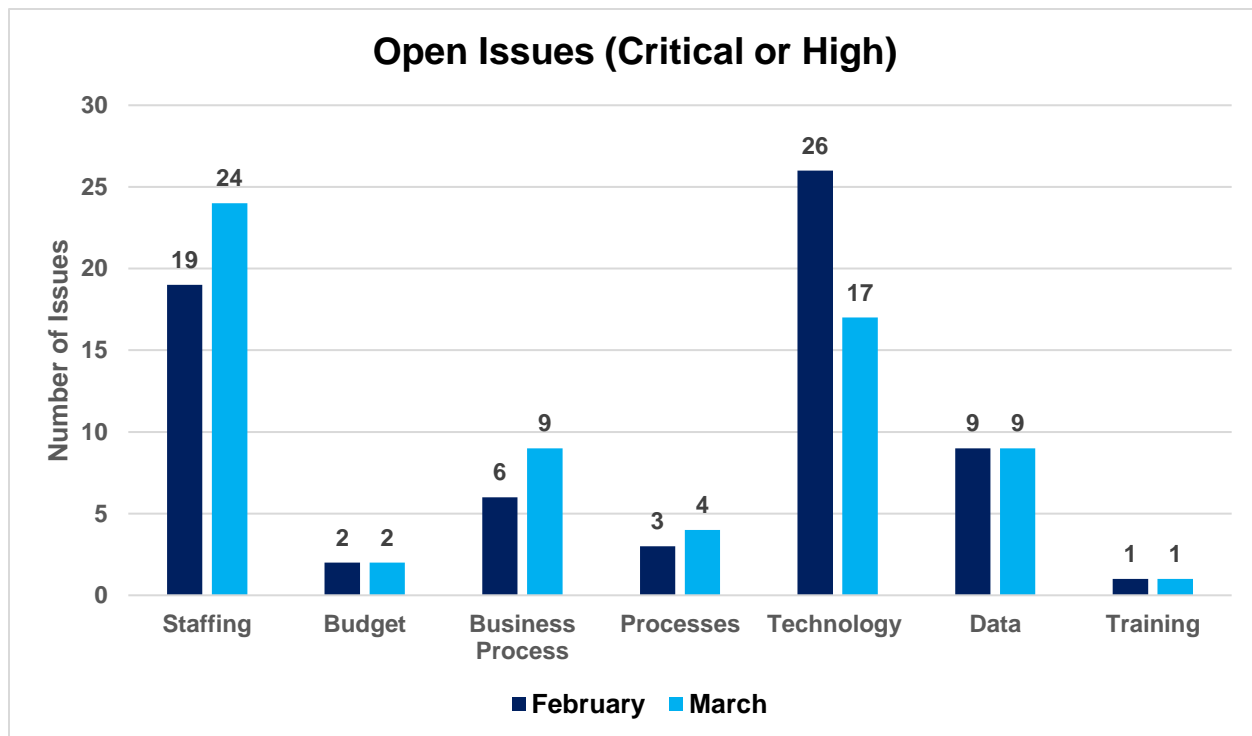
**Open Issues (Critical or High)**



**Figure 18: Open Agency Issues Trend**

A business process consists of activities or tasks related to an Agency's transactional processes or business systems, such as financial reporting, budget management, payroll processing, and procurement. For example, Agencies need to determine how the Trial Balance, Schedule of

Allotment Balances, YEC processes, and Schedule processes will be completed using the Account field, which combines the current FLAIR General Ledger Code and Object Code.

Processes refer to general Florida PALM Project-related activities such as communication, Task instructions, and clarifications. For example, changes to Florida PALM scope (such as shifting certain features to post-implementation after go-live) may reduce core processing functions needed for operational efficiency.

The Florida PALM IV&V Team observed the following trends in the highest percentage of Agency reported Risks and Issues:

- Staffing – Agencies continue to report constraints, with vacancies and SME availability impacting their ability to complete Tasks on time.
- Technology – Agencies reported Technology Risks and Issues related to technical dependencies for business system remediation, changing Interface specifications, and a lack of automation for some Agency business processes, such as consolidating spreadsheets and loading data.
- Business Process – Agencies documented Risks associated with gaining clarity on certain transactional and business processes as they transition from FLAIR to Florida PALM.
- Data – Agencies have identified challenges related to data dependencies, data mapping considerations with Florida PALM, and the need for further clarity on the availability of specific data fields within Florida PALM.

The Agency Risk and Issue documentation continues to lack sufficient detail. The impact and mitigation plans need to be reviewed and reassessed. The Florida PALM IV&V Team acknowledges the effort proposed in the Multi-Agency PML-CML Meeting where the attending Agencies agreed to work collaboratively to improve Risk and Issue management.

The Florida PALM IV&V Team encourages Agencies to take a more proactive and collaborative approach to managing Risks and Issues in coordination with the Florida PALM Project Team. One potential strategy is to leverage the monthly Readiness Touchpoint meetings as a platform for reviewing and discussing open Risks and Issues, fostering a more structured and solution-focused dialogue.

The Risk Rating for this Focus Area remains a Medium Risk.

## Florida PALM Agency Readiness

**Focus Area Indicator**
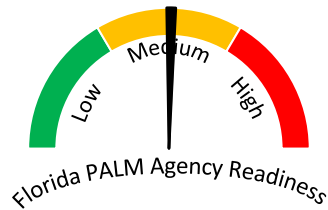


Trend: No Change

**Florida PALM Agency Readiness Updates**

Agencies continued to make progress on existing RW Tasks, including those with extended due dates, with encouragement from their respective RCs to maintain momentum.

*Communication*

The Florida PALM IV&V Team attended the Multi-Agency PML-CML Standup Meetings in March, facilitated by Agency PMLs and CMLs. This inter-Agency workgroup is a structured approach guided by the PML-CML Charter and continues to encourage Agency participation via the Teams Channel for ongoing engagement. Key updates from the Multi-Agency PML-CML Standup March Meetings include:

- In-Person Agency Meetings – Agencies met to refine the collectively developed Training plan and divided into smaller teams for execution. A virtual meeting link was provided to ensure accessibility for all Agencies.
- Agency Participation and Training Development – 11 Agencies participated in the meeting, with 2–3 representatives present for each. Many Agencies are using similar Training software, which supports collaborative development of Training materials.
- Go-Live Readiness Template – A sub-group was formed to develop a template to help Agencies identify critical Readiness topics required for a go-live decision. This template will also align with the Agency Certification buckets and will be presented to the Advisory Council.
- Florida PALM IV&V Feedback regarding Agency Risk Management – The Agencies plan to utilize the Florida PALM IV&V Team's feedback to improve efforts to address Risks that have become stale and may no longer be relevant. During the Multi-Agency PML-CML Meeting, the group agreed that Agencies should take an active role in refining the Risk and Issue Management process to improve the quality and relevance of reporting. A collaborative effort was highlighted during the meeting, where Agencies shared best practices, including insights from one Agency that has developed a structured Risk Management team.
- Cross-Agency Risk Identification – One cross-Agency Risk was identified regarding the number of delayed Tasks on the Florida PALM website. Of the 93 delayed Tasks, 68 are related to Technology, raising concerns about the accuracy of reported data and the broader impact on Agency Readiness. Agencies expressed the need for a standardized approach to managing these Risks and suggested they seek potential support from the Florida PALM

Project Team, particularly in addressing Technology-related delays. The meeting reinforced the importance of proactive Risk Management, consistent communication, and cross-Agency collaboration to mitigate Agencies' challenges effectively.

This structured collaboration and enhanced communication efforts between Agencies and the Florida PALM Team will strengthen alignment, reduce confusion, and improve Readiness. By prioritizing proactive engagement, standardized communication methods, and cross-Agency collaboration, Agencies can work towards smoother implementation and a successful transition to Florida PALM. The Florida PALM IV&V Team recommends the following for the Agencies:

- Enhance communication via the Questions Log.
  - If multiple Agencies have a similar question, each Agency should submit the question to their RC to ensure that all Agency concerns are tracked and addressed appropriately. What may appear to be a similar concern may have Agency-specific variables that need additional information to resolve.
- Continue participation in cross-Agency collaboration.
  - Agencies should engage in inter-Agency collaboration meetings to strengthen communication and problem-solving efforts across the participating Agencies.
  - Proactive participation fosters quicker issue resolution, knowledge sharing, and a unified understanding of the Florida PALM objective and challenges.
  - A collaborative approach will improve Readiness and minimize risks as Agencies move toward implementation.

### *Agency Readiness Reporting*

The Florida PALM IV&V Team has identified mathematical inconsistencies across several Agency Readiness Dashboards, such as discrepancies in Interface counts. For example, one Agency's Dashboard shows thirteen Interfaces selected, while the combined inbound and outbound Interfaces total twelve. Additionally, Agencies have taken varying approaches to reporting the status of Task completion. An example is the completion status of Business System Remediation (Tasks 519, 531, 547, and 561).

- Some Agencies marked these Tasks complete while noting in the comments that they will be addressed in the future.
- Some marked them In Progress with comments that they cannot start them yet for various reasons.
- Others reported them accurately, with progress percentages reflecting ongoing remediation efforts.

These inconsistencies present a challenge because, while the Florida PALM Project does not rely on Agency Readiness Dashboards for decision-making, the Agency Sponsor certifies the accuracy of the Dashboard data for the Bi-monthly Report. Inaccurate data could lead to misinterpretations by the ESC, Agency Sponsors, or the Florida PALM IV&V Team, potentially impacting key observations and strategic planning. Ensuring accurate and consistent reporting is critical to maintaining data integrity and supporting informed decision-making across the Agencies and Florida PALM Project.

The Risk Rating for this Focus Area remains a Medium Risk.

## Agency Requirements and Design

**Focus Area Indicator**



Trend: No Change
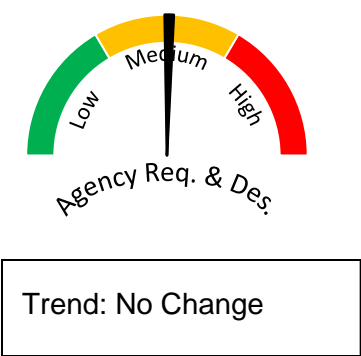
**Agency Requirements and Design Updates**

The Florida PALM IV&V Team observed 15 updates documented in the Florida PALM Knowledge Center, as shown in the Figure below.
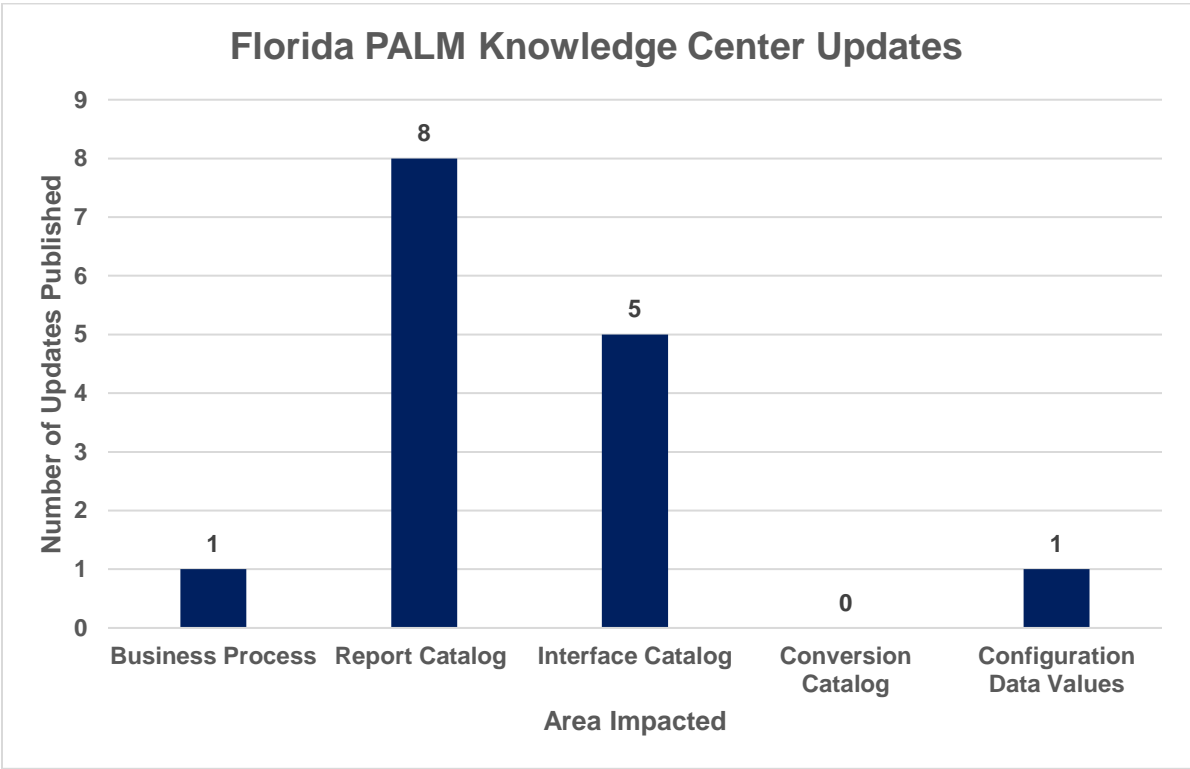


**Figure 19: System Design Updates Published to the Knowledge Center in March**

The Florida PALM IV&V Team observed consistent and timely communication within five business days regarding Interface design updates published to the Florida PALM Knowledge Center. Timely communication about Interface changes is critical to minimizing disruptions, ensuring compatibility, and supporting user adaptation. It helps stakeholders prepare, reduces integration

issues, and prevents rework. Proactive updates also support compliance, enhance security and trust, and promote smoother change management, contributing to a more reliable and efficient transition to Florida PALM. The Florida PALM IV&V Team recommends the following:

- RCs notify their assigned Agencies of critical and/or essential updates in real-time rather than solely relying on formal email communications and monthly Touchpoints.
- Since formal emails are sent on Mondays, Agencies should establish a mid-week cadence to check the Florida PALM Knowledge Center to stay informed about Interface design changes.

The Risk Rating for this Focus Area remains a Medium Risk.

## Agency Testing

**Focus Area Indicator**
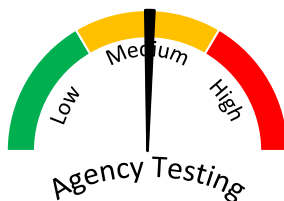


Trend: No Change

**Agency Testing Updates**

Agencies remain engaged in preparing for Interface Testing and UAT planning. Their progress is evident through key Tasks, including RW Task 576 – Internal Agency Business System Testing, RW Task 536-C – Developing UAT Plans, and other RW Tasks focused on remediating Agency business systems to align with Florida PALM.

During Florida PALM IV&V Team interviews held in March, Agencies expressed confidence in their Readiness for Interface Testing and business system remediation. This optimism is, in part, attributed to the execution of Amendment 12, which will extend the Florida PALM Project timeline, allowing for additional preparation. During the PML-CML Meeting, the Florida PALM IV&V Team observed Agencies discussing the ESC presentation, which included the Florida PALM IV&V Team's Risk Management observations, as well as the newly introduced Florida PALM IV&V Team Monthly Touchpoints. The discussion emphasized the value of the Florida PALM IV&V Team's recommendations in supporting Agency efforts, and Agencies were encouraged to actively engage in the Florida PALM IV&V Team Monthly Touchpoints.

RCs, in coordination with Technical SMEs, continue to support Agencies by discussing Task progress, helping identify Risks and Issues, and addressing outstanding questions related to Interface integration and technical requirements. Agencies are actively working on:

- UAT planning by engaging SMEs and end-users.
- Third-party and inter-Agency business system remediation to ensure alignment with Florida PALM.
- Internal system verification to confirm Readiness for seamless integration with Florida PALM.

Agencies are progressing at varying paces. Some are encountering challenges in completing required Taks due to resource limitations, competing priorities, or unresolved dependencies on other business systems.

The Risk Rating for this Focus Area remains a Medium Risk.

## Agency Data, Conversion, and Interfaces

**Focus Area Indicator**
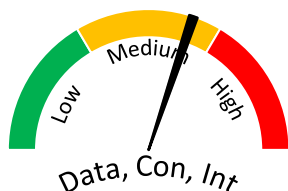


Trend: No Change

**Agency Data, Conversion, and Interfaces Updates**

The Florida PALM IV&V Team established a monthly cadence for Agency interviews to assess the impact and potential remediation strategies for Data, Conversion, and Interface readiness. During this time, the Florida PALM IV&V Team observed continued fluctuations in the counts for business systems and Interfaces across nine Agencies per their Agency Dashboard data. The Florida PALM IV&V Team attended Florida PALM Interface Touchpoints and observed continued review of baseline volume for selected Interfaces and that some Agencies' interface selections were evaluated for potential deselection if their data volume for the Interfaces wasn't large enough. All Agencies that were interviewed in March stated they are managing the challenges internally and working with the Florida PALM Project Team where it is possible to be prepared to start Interface Testing on time.

The Risk Rating for this Focus Area remains a Medium Risk.

## Agency Implementation Readiness

**Agency Implementation Readiness Updates**

The Florida PALM IV&V Team will report progress in this Focus Area once Agency Implementation efforts begin.

# Key Metrics or Analysis

This section provides metrics the Florida PALM IV&V Team uses to assess processes or activities.

## Development Metrics

### Build Segment III Final Approval

The Figure below shows the targeted number of AD documents for final approval versus the actual approved count for Build Segment III. As of 3/7/25, the Florida PALM Project Team has approved all 122 AD documents.
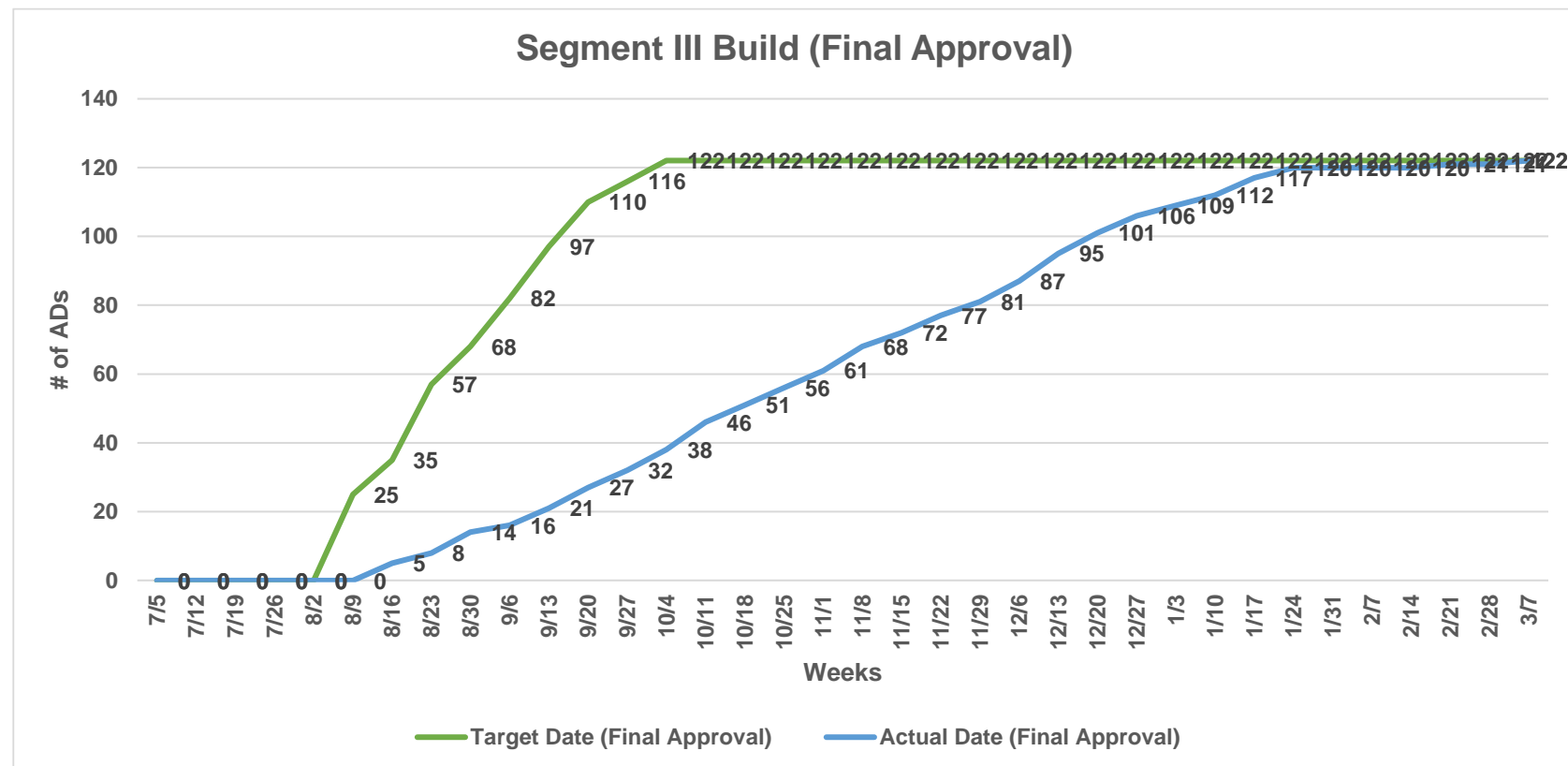


**Figure 20: Segment III AD Documents – Final Approval**

*Build Segment IV Draft*

The Figure below shows the targeted number of AD documents to be drafted versus the actual count for Build Segment IV. As of 3/31/25, All 112 AD documents have been drafted.
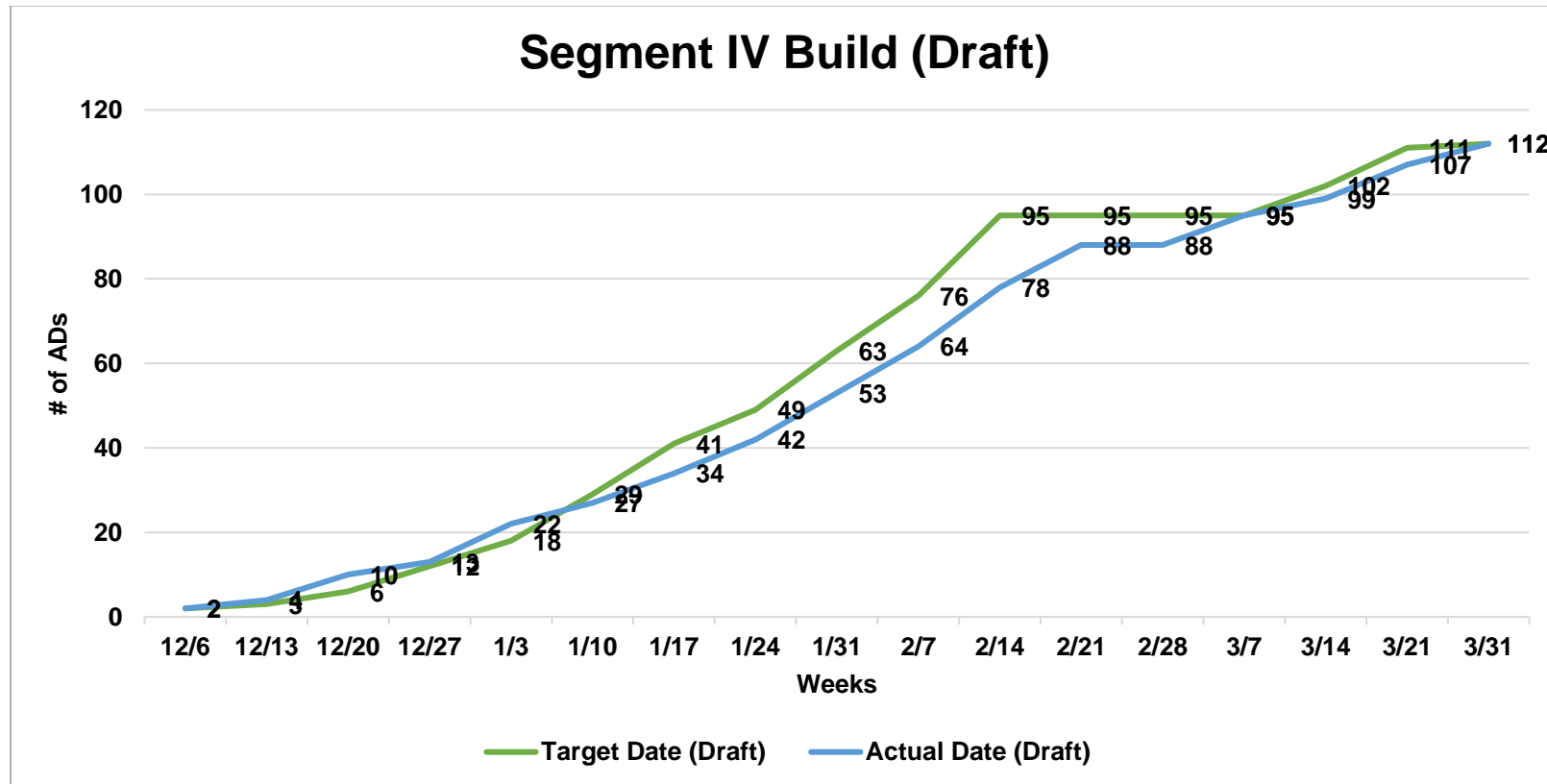


**Figure 21: Segment IV AD Documents – Draft**

## Build Segment IV Final Approval

The Figure below shows the targeted number of AD documents that were expected to be approved versus the actual count approved. As of 3/31/25, 66 of the 112 AD documents have been approved. All 112 Segment IV AD documents were targeted for approval by 5/9/24 in the DWUT.
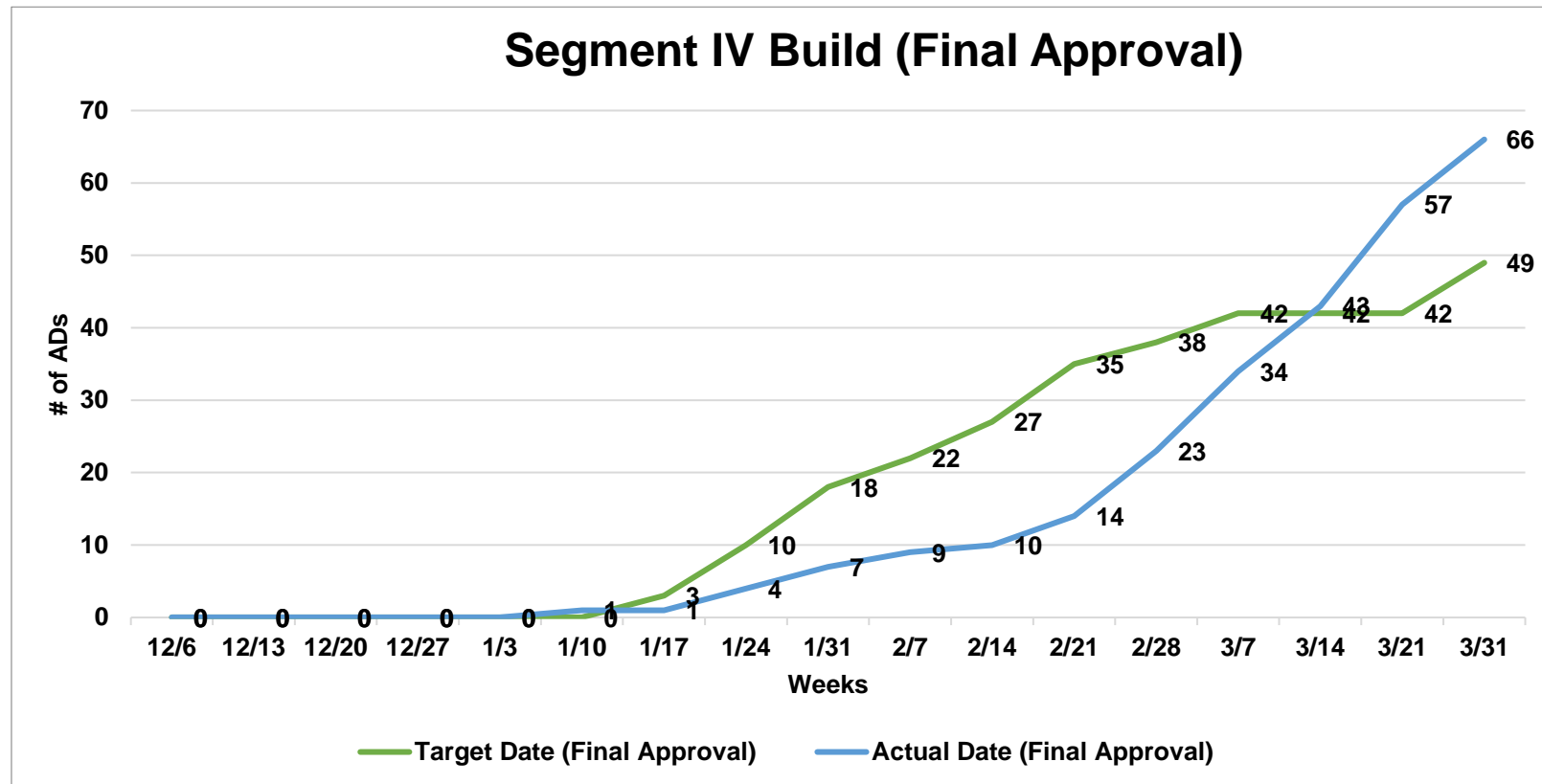


**Figure 22: Segment IV AD Documents – Final Approval**

*DW/BI Build Segment III Draft*

The Figure below shows the targeted number of AD documents that were expected to be drafted versus the actual. As of 3/31/25, 18 AD documents were expected to be drafted, but 14 have been drafted as observed in the DWUT. There are a total of 18 AD documents for DW/BI Build Segment III.
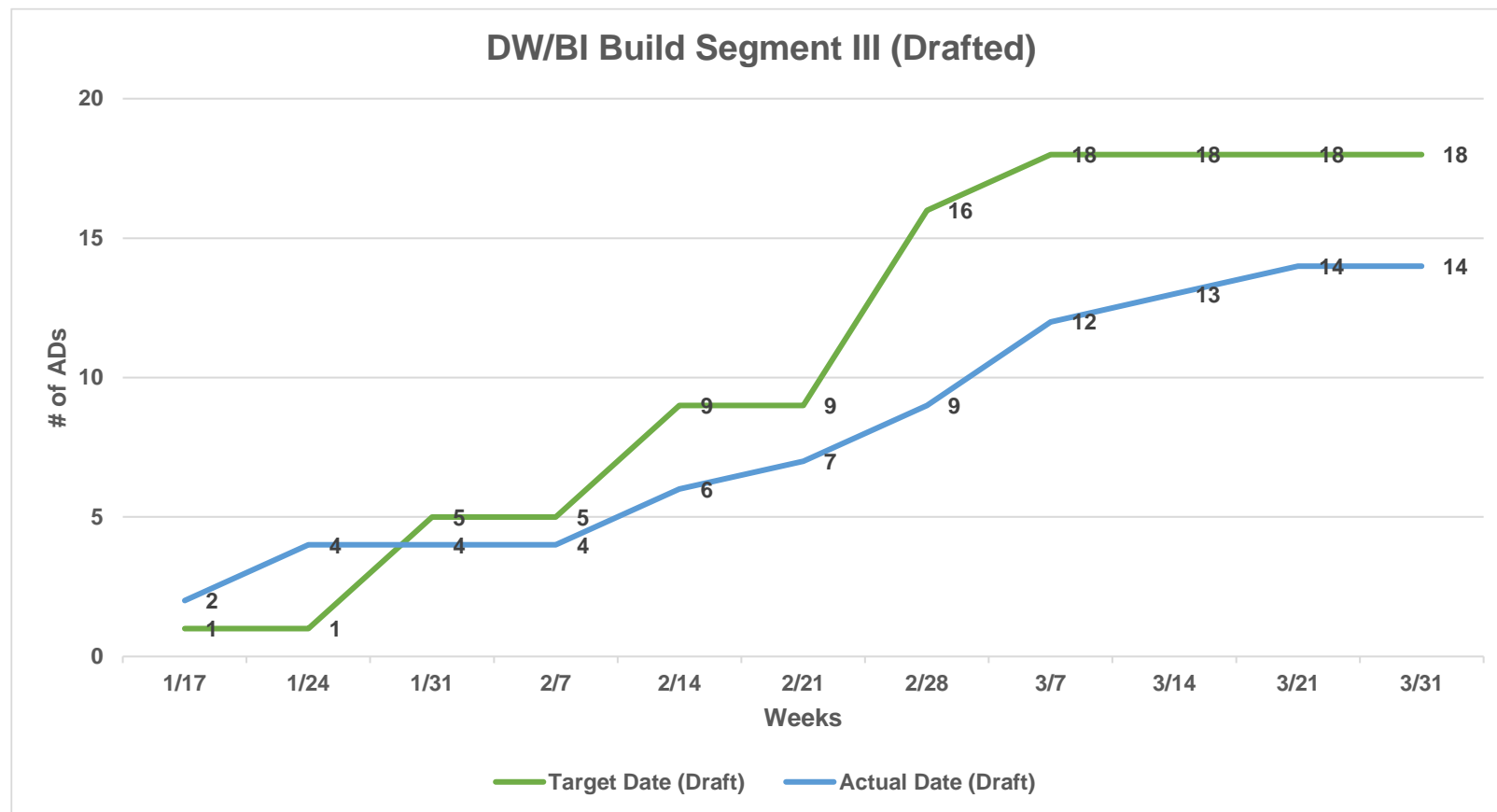


**Figure 23: DW/BI Build Segment III –** Drafted

## Testing Metrics

### Test Scripts Drafted Planned versus Actual for All Cycles

The Figure below shows the number of planned versus actual Test Scripts drafted by the SSI Vendor for all System Testing Cycles as of 3/31/25.
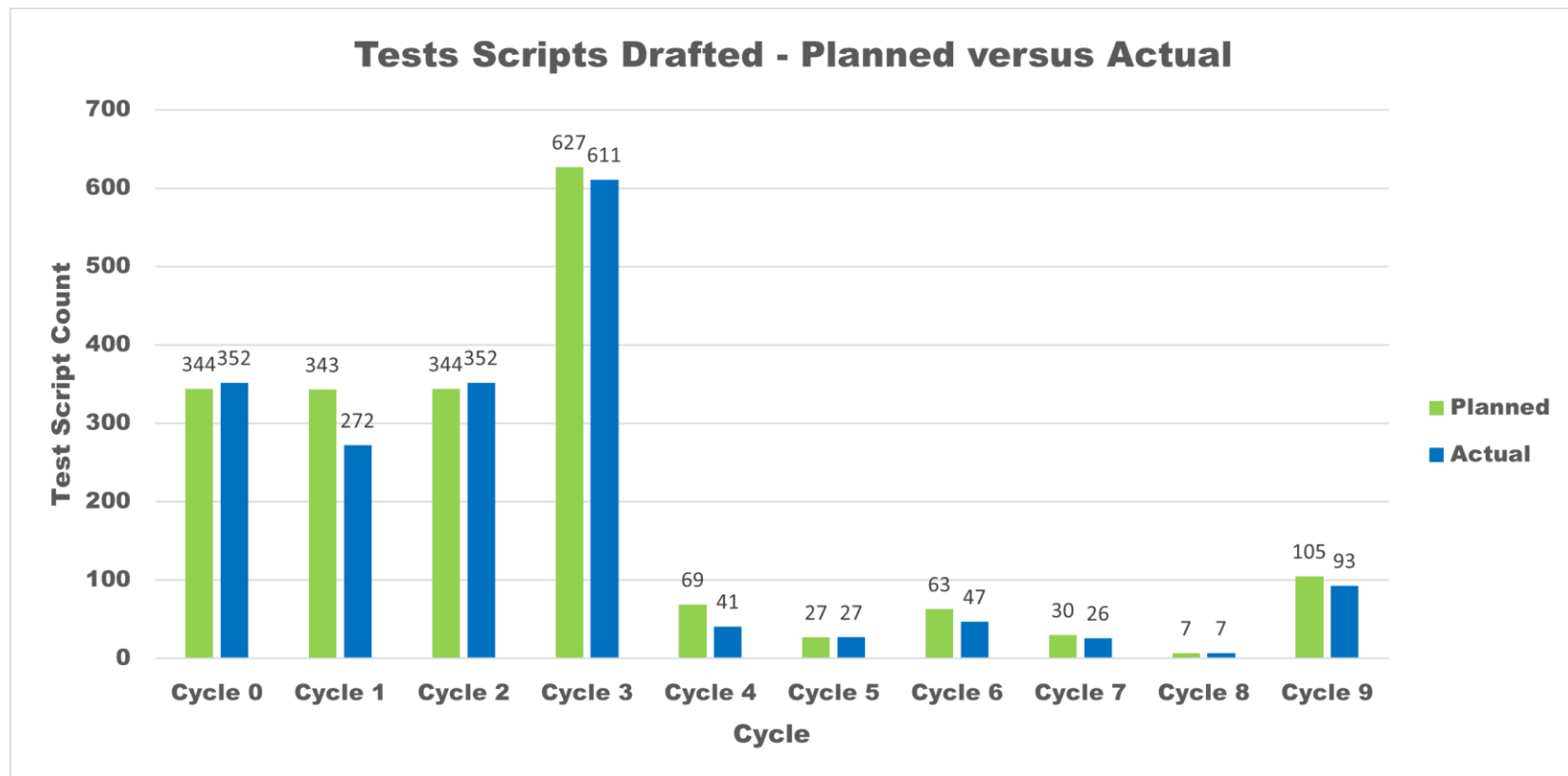


**Figure 24: Planned and Actual Test Scripts Drafted**

*Test Scripts Peer Reviewed Planned versus Actual for All Cycles*

The Figure below shows the number of planned versus actual Test Scripts Peer Reviewed for all Cycles as of 3/31/25.
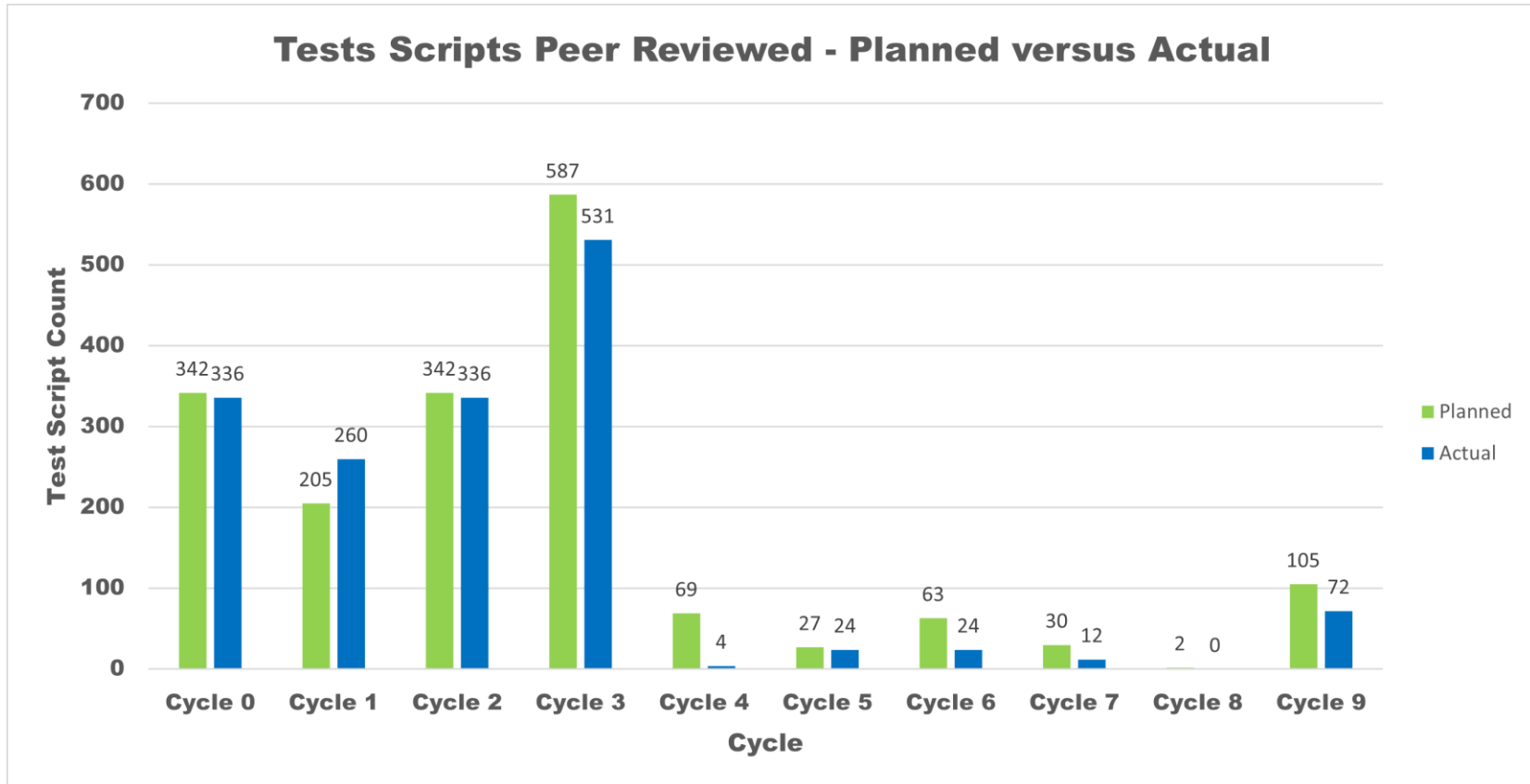


**Figure 25: Planned and Actual Test Scripts Peer Reviewed**

*Test Scripts Executed Planned versus Actual for All Cycles*

The Figure below shows the number of planned versus actual Test Scripts executed by the SSI Vendor for all Cycles as of 3/31/25.
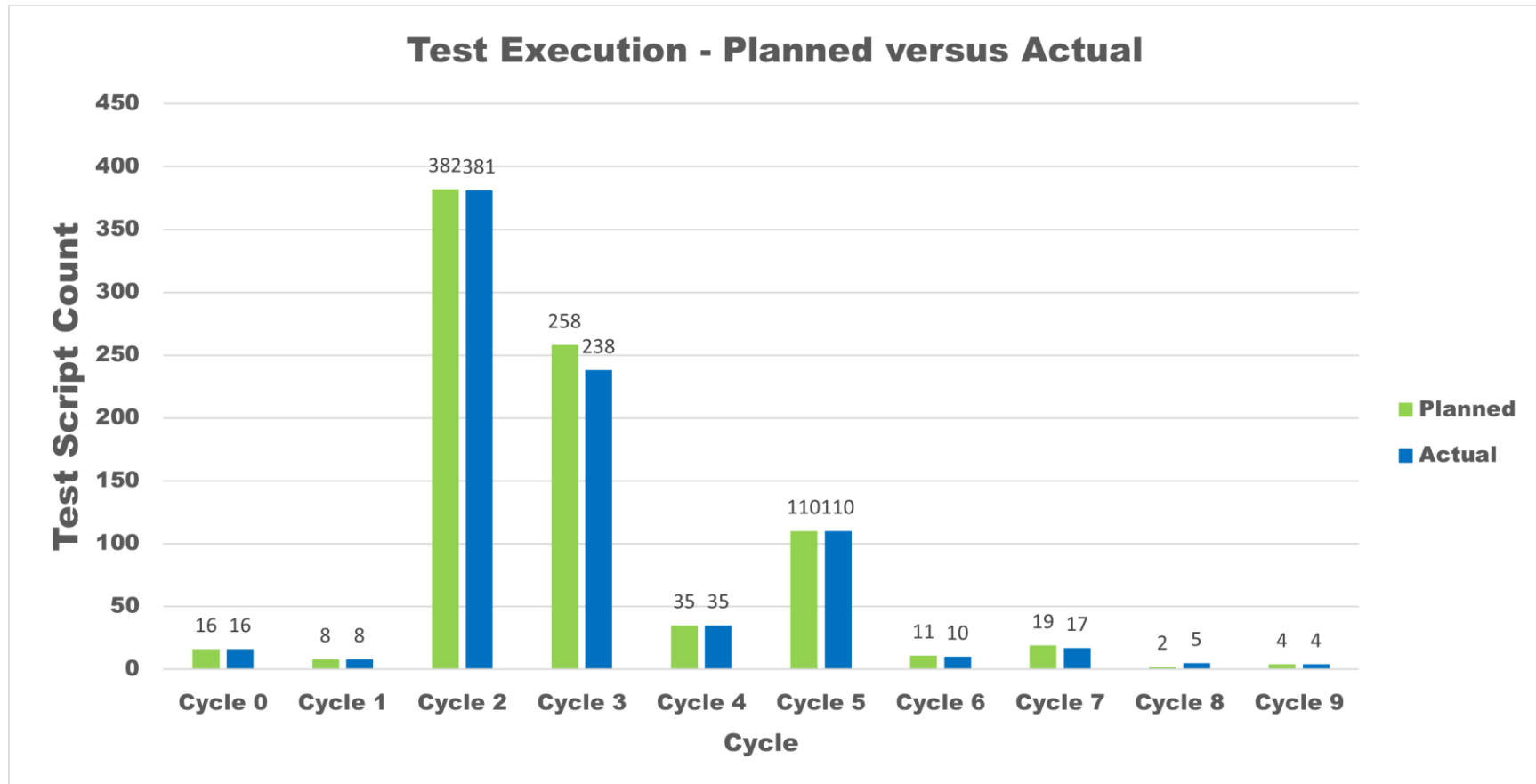


**Figure 26: Planned and Actual Test Scripts Executed**

# IV&V Information Requests

The Table below includes the outstanding Florida PALM IV&V Team information requests from the Florida PALM Project Team.

**Table 10: IV&V Information Requests**

| Information Request | Date of Request | Status |
|---|---|---|
| None | NA | NA |

# Appendix A – Risk Priority Matrix

The Florida PALM IV&V Analysts will use the following Table to assign a Risk probability rating to each identified Risk.

**Table 11: Risk Probability Rating**

| Risk Probability Rating | Probability of Occurrence | Probability Description |
|---|---|---|
| 1 | Improbable | Risk has between a 1%-19% likelihood of occurring. |
| 2 | Unlikely | Risk has between a 20%-39% likelihood of occurring. |
| 3 | Possible | Risk has between a 40%-59% likelihood of occurring. |
| 4 | Likely | Risk has between a 60%-79% likelihood of occurring. |
| 5 | Probable | Risk has between an 80%-99% likelihood of occurring. |

The Risk Impact Criteria the Florida PALM IV&V Analysts will use to assign a Risk impact rating to each identified Risk are described in the Table below.

**Table 12: Risk Impact Criteria**

| Risk Impact Rating | Magnitude of Impact | Impact Description |
|---|---|---|
| 1 | Negligible | Risk will have an impact so small that it can be ignored when studying the larger effect. |
| 2 | Minor | Risk will have a small impact on the Project that should not be ignored when studying the larger effect. |
| 3 | Moderate | Risk will have a noticeable impact on the Project. |
| 4 | Significant | Risk will have a significant impact on the Project |
| 5 | Critical | Risk will have a significant impact and may jeopardize the success of the Project. |

The Table below outlines the Risk Priority Ratings for a Finding based on a combination of impact and probability of occurrence.

**Table 13: Risk Priority Ratings**

| Probability of Occurrence | Magnitude of Impact | | | | |
|---|---|---|---|---|---|
| | Negligible 1 | Minor 2 | Moderate 3 | Significant 4 | Critical 5 |
| Probable 5 | Low | Medium | High | High | High |
| Likely 4 | Low | Medium | Medium | High | High |
| Possible 3 | Low | Medium | Medium | Medium | High |
| Unlikely 2 | Low | Low | Low | Medium | Medium |
| Improbable 1 | Low | Low | Low | Low | Medium |

The Table below defines the levels of the Risk Priority Ratings.

**Table 14: Risk Priority Definitions**

| Rating | Definition |
|---|---|
| High | The possibility of substantial impact on product quality manageability cost or schedule. Major disruption is likely, and the consequences would be unacceptable. A different approach is required. Mitigation strategies should be evaluated and acted upon immediately. |
| Medium | The possibility of moderate impact to product quality manageability cost or schedule. Some disruption is likely, and a different approach may be required. Mitigation strategies should be evaluated and implemented as soon as feasible. |
| Low | The possibility of a slight impact to product quality manageability cost or schedule. Minimal disruption is likely, and some oversight is needed to ensure that it remains low. Mitigation strategies should be evaluated and considered for implementation when possible. |