

FloridaP^{ALM}

Planning, Accounting, and Ledger Management

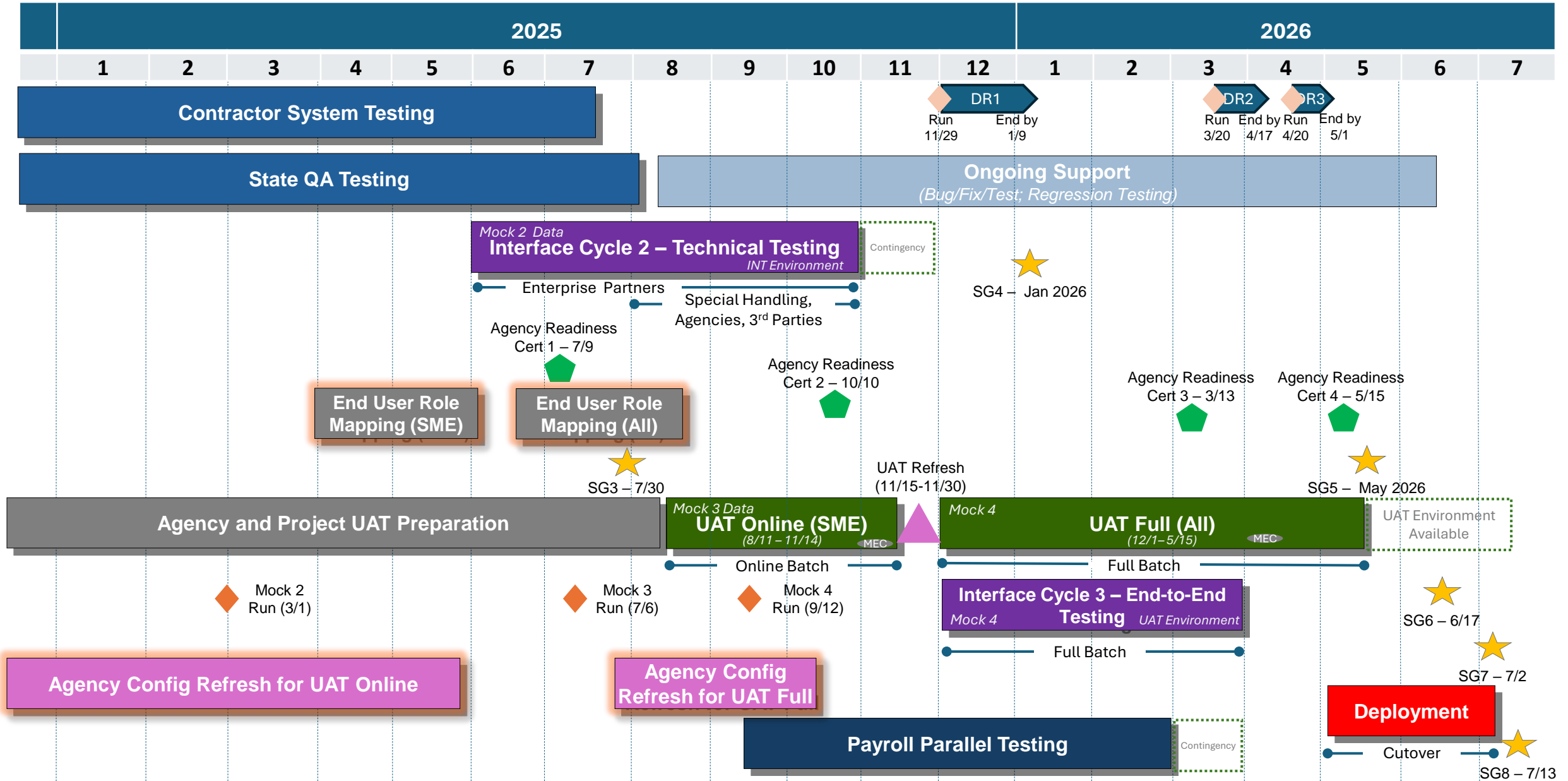


ADVISORY COUNCIL MEETING

MARCH 5, 2025



Testing Timeline



Agency Readiness Open Discussion

- ▶ How will your agency know if it's ready (e.g., YOUR success criteria, internal factors or measures)?
- ▶ What mitigation strategies are you considering if your success measures are not met (e.g., contingency plans, alternative approaches)?
- ▶ What do agencies need that the Project is not currently providing
- ▶ What questions should the Project be asking agencies to determine agency readiness?



DOH Areas for Determining Agency Readiness

A fully developed system in which agencies, including enterprise agency processes, can fully walk through modules, processes, chart of accounts, and validation of migrated data within Florida PALM.

1. Identification of Key Business Processes
2. Validation of Integration with Business Systems
3. User Acceptance Testing
4. Implementation Plan Based on Go-Live Date
5. Development of Agency Training and Help Desk



1. Identification of Key Business Processes

Questions

- ▶ What are the key business processes (e.g., Keep the Lights On [KTLO])?
- ▶ What is their priority for day 1? day 30? day 90? day 180?
- ▶ What are variations in our standard processes?

Resources

- ▶ Current State Business Processes
- ▶ Topics and Activities Listing
- ▶ Change Analysis

Key Outcome:
Test Cases and Test Scripts for UAT



2. Validation of Integration with Business System

- ▶ Test agency business system integration
- ▶ Update business system documentation



3. User Acceptance Testing

- ▶ Train SMEs
- ▶ Allow SMEs to become familiar with system, review processes and ensure basic operational processes can be carried out
- ▶ Train End Users
- ▶ Establish a testing plan that addresses processes based on importance (KTLO)
- ▶ Identify and test user access – access control, approval flow
- ▶ Test all enterprise workflow and processes with individual agencies prior to conclusion of UAT



4. Implementation Plan Based on Go-Live Date

- ▶ Identify critical year-end closing activities
- ▶ Identify recurring month-end activities

Key Outcome:
Closing Calendar of Events



5. Development Agency Training and Help Desk

- ▶ Establish expectations for how / when SMEs are adequately training
- ▶ Establish expectations for how / when end users are adequately trained
- ▶ Create approach for measurement and reporting of training progress
- ▶ Identify internal support and issue escalation path for end users



Success Criteria Tracking

| Measures / Internal Factors and Success Criteria | | | | | | | |
|--------------------------------------------------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------------------------|---------------------------------------|--------------------------------------|
| # | Measure | Internal Factors | Success Criteria | Internal Factor Status | Internal Factor Date Completed | Stage Gate - Check point 1 - Mar 2021 | Stage Gate - Check point 2 - M. 2021 |
| 1 | Remediation | Agency Business System (ABS) Development | 100% Development Complete | In-Progress | | | |
| 2 | Remediation | Unit Testing ABS with APB Broker & FDW (DOH Internal testing with various program areas) | 100% Unit Testing Complete | In-Progress | | | |
| 3 | Remediation | Interface testing with PALM | 90% successful with no show stopper bugs | | | | |
| 4 | Training | SMEs trained on PALM User | 100% SME's are trained | | | | |
| 5 | Training | End users training on PALM user Interface | At least 75% end users are tested in every CHD/Program Area | | | | |
| 6 | Training | All users know how to access PALM User Interface | 90% of the users can access PALM | | | | |
| 7 | Training | Regardless of Go-Live date, UAT must start in August 2025 | 50-75% System Ready for UAT - Uniform generic data to be entered in the system for SME Training / understanding of processes | | | | |
| 8 | UAT | SMEs have successfully completed UAT in PALM | 100% SME's have completed UAT in PALM | | | | |
| 9 | UAT | End users & CHDs have completed UAT in PALM | 75% of the end users have completed UAT | | | | |
| 10 | UAT | All critical Tier 1 & Tier 2 Identified processes are tested in PALM | 100% Processes tested successfully | | | | |
| 11 | UAT | All identified Test cases Tier 1 & Tier 2 are successfully tested in PALM | 100% of the test cases are tested successfully | | | | |
| 12 | UAT | PALM system ready for UAT | 90% System Ready for UAT | | | | |
| 13 | UAT | Show stopper bugs | All critical bugs are resolved | | | | |
| 14 | Readiness Tasks | Tier 1 & Tier 2 - Documentation of Processes updated per new PALM User Interface / Process | 100% Complete | | | | |
| 15 | Readiness | Configuration complete | 90% correct configuration | | | | |
| 16 | Readiness | Conversion complete | 90% correct conversion | | | | |
| 17 | Readiness | Deployment Plan - Technical Plan | 95% Identified & Documented | | | | |
| 18 | Readiness Tasks | Implementation Plan - Business Plan / coordination between PALM, Enterprise Agencies, DFS, and all state agencies must create a template of activities based on Go-Live time frame (July 2026 / January 2027) | 100% Activities identified & Implementation Plan complete | | | | |
| 19 | Readiness Tasks | Chief of Finance must be able to guide and direct resources to the right module / process / SME / | 100% Complete | | | | |
| 20 | Readiness | Create and have a functional Help | 100% set up of help desk | | | | |
| 21 | Readiness Tasks | Deployment of Strike teams to help CHDs | 90% Ready | | | | |
| 22 | Readiness | DOH dedicated Training room | 100% Ready for users | | | | |

CONTACT US

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

[HTTPS://MYFLORIDACFO.COM/FLORIDAPALM/](https://myfloridacfo.com/floridapalm/)

KNOWLEDGE CENTER

[HTTPS://MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO](https://myfloridacfofloridapalm.us.document360.io)

