

Effective Date July 19, 2024

CHIEF FINANCIAL OFFICER MEMORANDUM NO. 28

SUBJECT: FLORIDA PALM SECURITY ACCESS MANAGERS

The Department of Financial Services (DFS) Chief Financial Officer has delegated access control for Florida Planning, Accounting, and Ledger Management (PALM) to each agency. It is the responsibility of each agency to designate a Florida PALM Security Access Manager (SAM). The SAM is the designated agency individual or individuals responsible for granting Florida PALM access to agency end users based on job duties and responsibilities. SAMs use the Florida PALM Identity Access Management tool to manage agency end users' access to Florida PALM (e.g., granting, updating, and removing) by assigning roles. SAMs are responsible for maintaining internal controls based on positions descriptions, separation of duties, and user rights to access specific functions.

A SAM is responsible for maintaining role-based access to end users of Florida PALM, including:

- Adding and removing role access based on the agency's internal procedures.
- Terminating end user accounts when an end user no longer requires access (e.g., end user separates from the agency).
- Updating end user accounts when role job duties change.
- Maintaining a list of users and their access.
- Conducting and documenting at least a quarterly review of end users and their access for appropriateness.
- Notifying the Florida PALM Solution Center and Agency Identity Provider point of contact upon notice that an end user account has been compromised.
- Responding to Accounting and Auditing's (A&A) Governance Administrator inquiries when separation of duty conflicts are identified.

The agency Administrative Service Director, or equivalent, must appoint the agency SAM. The appointed SAM must:

- Complete the Florida PALM Security Access Manager training available in People First Learning Management System (LMS) – Florida PALM Training Highlights – SAM, and
- Have the appropriate level of authority to act on behalf of the agency to make authorized Florida PALM access assignments.

To assign a new SAM, or update information for an existing SAM, the agency Administrative Services Director or equivalent must complete and sign the SAM Access Request and Acknowledgement form (DFS-A0-2206). The form can be found on the Forms Page of the Accounting & Auditing subsection on the MyFloridaCFO.com website. The completed form must be sent to A&A for approval at Access2PALM@myfloridacfo.com.

Agencies must maintain one primary SAM and one backup SAM. Each agency is authorized to have two SAMs unless an exception has been approved by A&A. To request an exception, contact Access2PALM@myfloridacfo.com.

SAMs who have separated from the state, moved to another agency, or changed job responsibilities should be inactivated. To inactivate an authorized SAM, the agency Administrative Services Director or

equivalent will contact DFS A&A at Access2PALM@myfloridacfo.com to request SAM inactivation. The email should include the SAM's name and the effective date for the inactivation.