



*Florida Department of Financial Services*

*Statewide Master Adjustment System*

*Agency User Account Procedures*

July 2024

## **Statewide Master Adjustment System Access**

Statewide Master Adjustment System (SWMA) access is controlled by the Bureau of Financial Reporting (BFR) Access Control Custodian within the Division of Accounting and Auditing. To accommodate the recording of post-closing adjustments as required in compiling the Florida Annual Comprehensive Financial Reports (ACFR), agencies will now process their adjustments in SWMA requiring access to SWMA. The SWMA User ID is the user's agency RACF ID login. The exception to this is State Board of Administration, College, and Universities because they do not have FLAIR.

### **Agency Access Control Custodian**

As a part of data integrity and access control for SWMA, each agency's Administrative Services Director, Chief Financial Officer, or equivalent is the authorized Agency Access Control Custodian, who will maintain their agencies internal access control procedures. The designated Agency Access Control Custodian will serve as the liaison between the agency and the Department of Financial Services (DFS) regarding access to SWMA. The Agency Access Control Custodian must sign the [\*SWMA User Account Request Form \(DFS-AI-0400\)\*](#) to provide authorization of the user roles within SWMA. The form must be signed by the Agency Access Control Custodian. Once completed, the form can be scanned and emailed to [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com).

### **Agency User Accounts**

Agency Access Control Custodian must request a new user account for employees requiring access to SWMA using the [\*SWMA User Account Request Form \(DFS-AI-0400\)\*](#). They must sign the form, scan the form, and email it to the SWMA BFR Access Control Custodian at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com). These procedures should be followed when a correction, update, change, or access termination is made to the Agency Analyst or Agency Proofer roles. This includes when an individual either resigns from the position requiring the Agency Analyst or Agency Proofer role. Agency Proofers or Analyst enter data on behalf of their agency, which will be available to the public and to the Auditor General.

## **Roles Performance in SWMA:**

### **Agency Analyst**

Each agency can request Agency Analyst(s) within the SWMA System using the [\*SWMA User Account Request Form \(DFS-AI-0400\)\*](#). The Agency Analyst may upload or key new adjustments, update, and delete adjustments that have not been proofed, within SWMA System.

### **Agency Proofer**

Each agency can request Agency Proofer(s) within the SWMA System using the [\*SWMA User Account Request Form \(DFS-AI-0400\)\*](#). The Agency Proofer may upload or key new adjustments, update, and delete adjustments that have not been proofed, within SWMA System. The Agency Proofer may proof adjustments entered in the SWMA System by another user. The SWMA System will not allow an Agency Proofer to proof adjustments uploaded or keyed by the same user.

For internal control purposes, the same person is not allowed to serve in both roles. You cannot proof an adjustment you created. When an Agency Proofer uploads or keys an adjustment, the SWMA System recognized the activity as an Agency Analyst role, and the adjustment must be proofed by another Agency Proofer.

## Password Resets

SWMA uses your FLAIR RACF ID password. RACF ID passwords expire in 30 days. If a user forgets the password or becomes locked out of FLAIR, the agency will need to request a reset from their agency FLAIR Access Control Custodian.

## Account Deactivation

When a user resigns from the position requiring access, the Agency Access Control Custodian must complete and submit the [SWMA User Account Request Form \(DFS-AI-0400\)](#) to the BFR Access Control Custodian at [SFRS@MyFloridaCFO.com](mailto:SFRS@MyFloridaCFO.com) to delete the user.

## Annual Verification of User Accounts

Annually, the BFR Access Control Custodian emails the Agency Access Control Custodian a list of the agency’s active users requesting access verification. Upon receipt of the Agency Access Control Custodians email response, the BFR Access Control Custodian will take appropriate action as required. If change is required, the Agency Access Control Custodian must submit a completed [SWMA User Account Request Form \(DFS-AI-0400\)](#) with the change(s) only.

## Revision Control

Name	Action	Date
Niki Nolton	Original	7/18/2024