

Inactivate GL Account in Florida PALM

User Role(s): *DFS COA Maintainer*

Last Updated: *01/27/2025*

Overview

The Division of Accounting and Auditing (A&A) will receive requests to inactivate GL accounts via email from the Division of Treasury (Treasury). Before the GL account can be inactivated in Florida PALM, Treasury must provide A&A with the GL Account Number and the Effective Date (bank account inactivation “as of” date).

Search for GL Account

1. Navigate to the **ChartField Values** page
 - a. Navigation: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > Define ChartField Values
2. Click on the **Account**

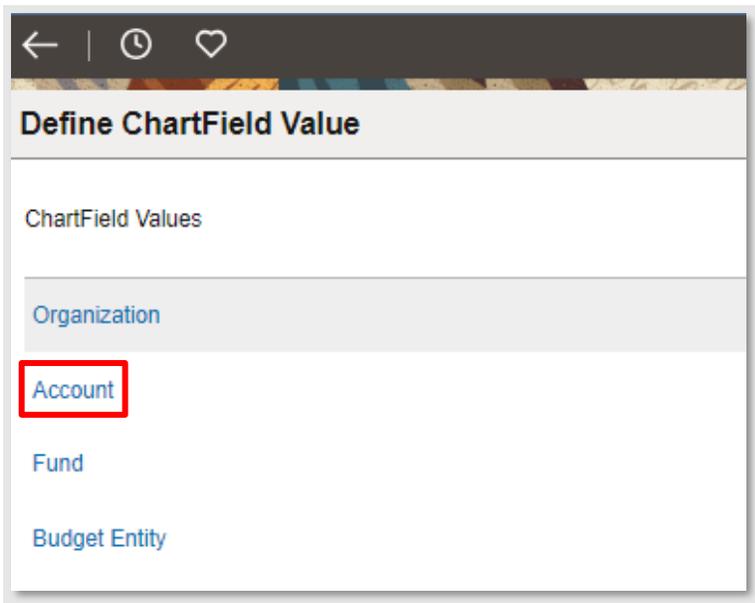


Figure 1: Define ChartField Value Page

3. On the **Find an Existing Value** page
4. Enter **SetID**: STATE
5. Enter **Account**: GL account number, or
6. Enter **Description**: GL account description
7. Select the **Include History** checkbox
8. Click **Search**

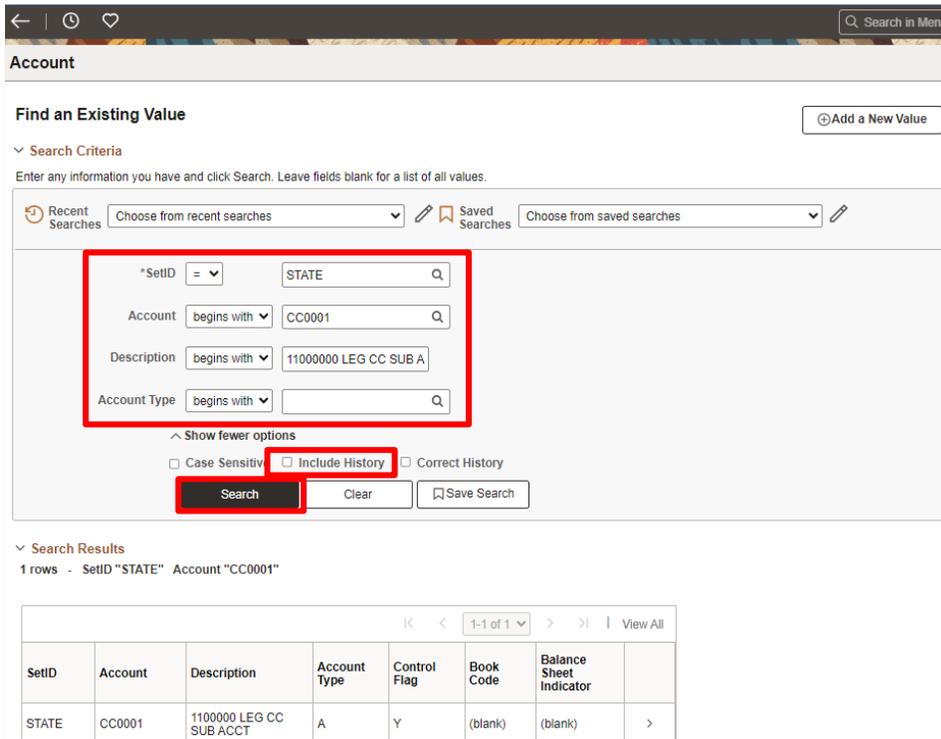


Figure 2: Account Navigation

Add New Effective Date

1. In the **Search** results section, click on the **Account**

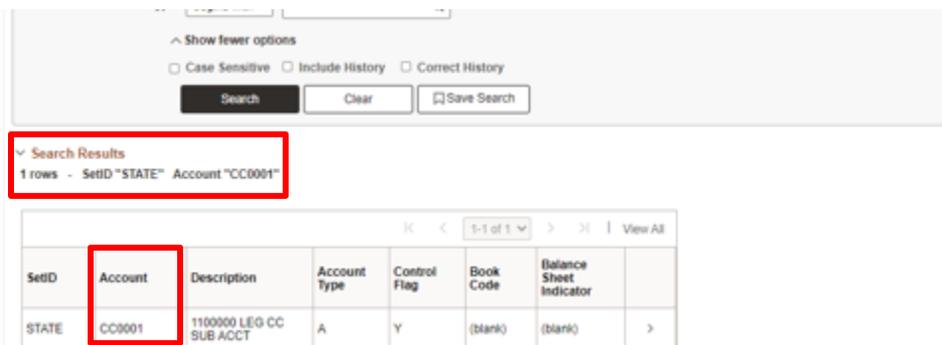


Figure 3: Account Search Results Navigation

2. On the **Account** tab, under the Effective Date, click the **(+)** button to add a new **Effective Date**
3. Click **Correct History** to add a new effective date (activity that will show in history).

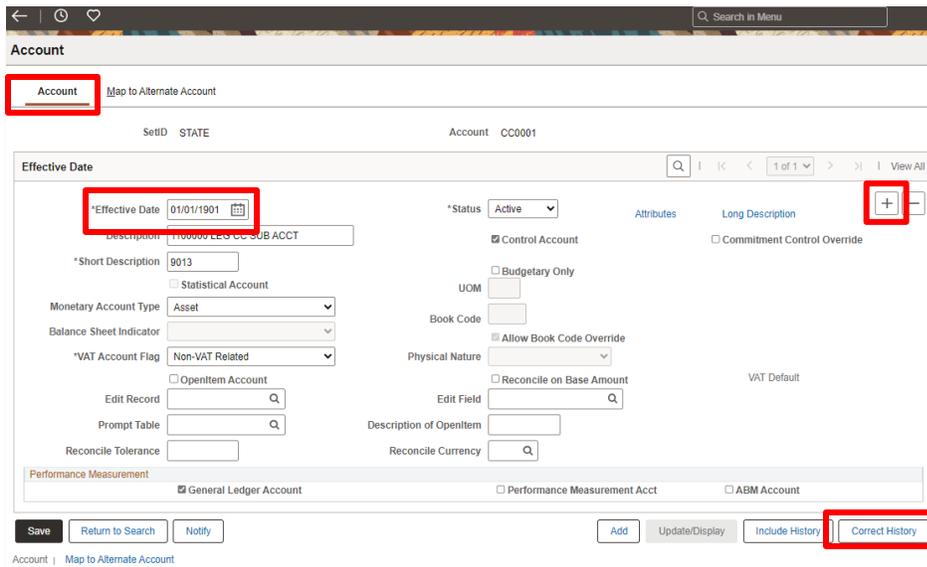


Figure 4: Account Tab Navigation-Effective Date

4. Input the new **New Effective Date** which is the **Inactivation Date** provided by Treasury
5. Update **Status** from **Active** to **Inactive**
6. Click **Save**

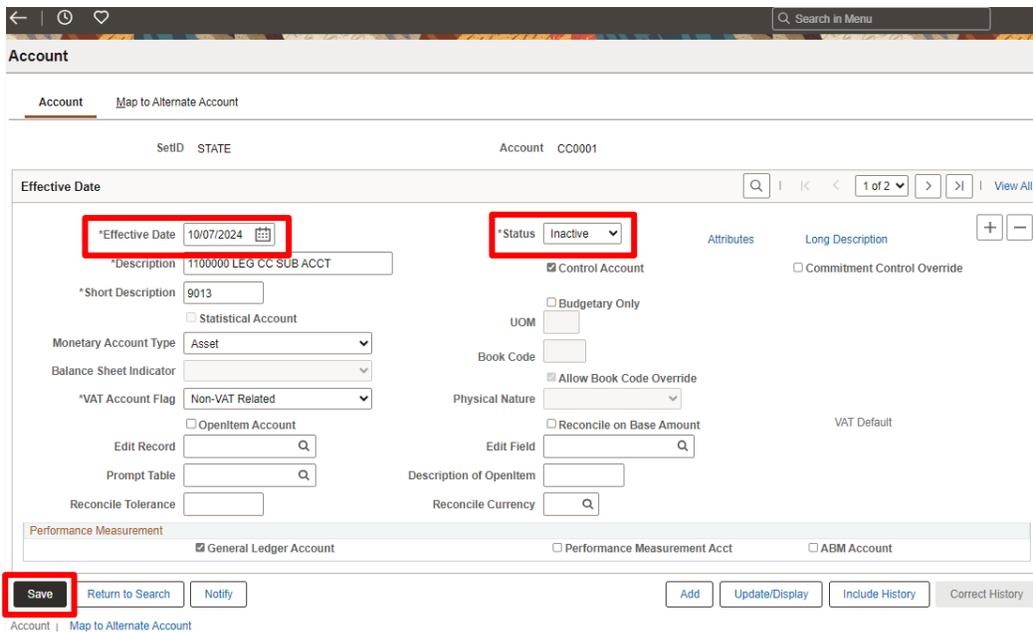


Figure 5: Account Tab Navigation (Inactivation)

Still have questions?

Please contact the Florida PALM Solution Center via the [Customer Portal](#).