AMFR Personas

April
COA Maintainer
(Non-Florida PALM Role)

Agency role responsible for understanding the new COA in Florida PALM and justifying their request for new or updated ChartFields values and assisting in resolving GL journal edit check errors.

Business Process Grouping: General Ledger

Work Goals: Successfully request valid ChartField Values.

Business Subprocess: 10.1.2 Add or Modify Statewide ChartField Values
10.1.3 Add or Modify Fund Values

Responsibilities

I will be responsible for initiating ChartField value requests and submitting Fund Questionnaires for my agency.

What Is In It For Me?

There is currently a need for more consistency in the recording and reporting of transactions in FLAIR so I would like the addition of new COAs in Florida PALM be standardized.

"
After the CMS Wave transition, I am excited thatt the addition of certain COA values will be a centralized process.
"

Susan
DFS COA Approver
(Non-Florida PALM Role)

DFS role responsible for reviewing and approving Florida PALM ChartField requests.

Business Process Grouping: General Ledger

Work Goals: Quickly review and approve valid ChartField requests.

Business Subprocess: 10.1.2 Add or Modify Statewide ChartField Values
10.1.3 Add or Modify Fund Values

Responsibilities

I will be responsible for reviewing and approving/denying ChartField value requests.

What's In It For Me?

I look forward to learning more about Florida PALM ChartField values to prepare for when I am able to utilize the ChartField Request page and workflows after the Central Wave go-live.

"
After the CMS Wave transition, I look forward to being able to help the State of Florida standardize its Chart of Accounts.
"

08/2020

June

DFS COA Maintainer

DFS A&A end user role responsible for completing approved additions and modifications to ChartFields in Florida PALM.

Business Process Grouping: General Ledger

Work Goals: Successfully add or modify ChartField values.

Business Subprocess: 10.1.2 Add or Modify Statewide ChartField Values
10.1.3 Add or Modify Fund Values
10.1.5 Set Up and Maintain Trees and/or Combination Fields

Responsibilities

I am responsible ChartField values, attributes, trees, and combination edits rules in Florida PALM for the State. I also manage the COA Crosswalk Table.

What's In It For Me

I look forward to using improved technology when establishing Chart of Accounts values to be used across the State.

"

I am glad that there is a standardized process to consistently configure ChartFields in Florida PALM.

"

Derek
GL Journal Approver

End user role responsible for approving journals.

Business Process Grouping: General Ledger

Work Goals: Appropriately approve and deny journal entries

Business Subprocess: 10.2.1 Create and Approve Journals

Responsibilities

I am responsible for approving all of the GL journals entered by my staff. I need to make sure they are valid transactions.

What's In It For Me?

I would like a systematic way to track the review and approval of transactions. Currently, my staff have to manually request my approval before entering a transaction in FLAIR.

" I am excited to review and approve transactions in Florida PALM rather than outside of the system. "

Amelia
DFS GL Journal Approver

DFS role responsible for approving redistribution journals.

Business Process Grouping: General Ledger

Work Goals: Appropriately approve and deny journals entered for redistribution

Business Subprocess: 10.2.1 Create and Approve Journals

Responsibilities

I am responsible for approving GL Journals that need to be redistributed.

What's In It For Me?

I am looking forward to an easy way to identify which GL Journals need to be redistributed and efficiently approve the identified journals.

" I am excited to review and approve agency GL Journals in a central location within Florida PALM. "

08/2020

Jonathan

GL Journal Processor

End user role responsible for creating journals.

Business Process Grouping: General Ledger, Treasury Management, Cash Management

Work Goals: Successfully enter journal entries and manage errors

Business Subprocess: 10.2.1 Create and Approve Journals
10.2.2 Edit Check
70.7.1 Manage SPIA Balances
70.7.2 Distribute Interest Apportionment
80.1.2 Invested Cash Checking

Responsibilities

I will be responsible for creating the GL journals for my agency.

What Is In It For Me?

I would like it to be easier to tell when my manager needs me to fix or delete a transaction. She usually has to stop by my desk or email me to let me know. I wish there was a way that I can just check daily without her having to stop by. This way I can get my work done first thing in the morning.

"
I hope that I will be able to enter GL journals as quickly as I was able to enter TR10s in FLAIR.
"

08/2020

Russell
DFS GL Close Processor

DFS A&A end user role responsible for enterprise-level close activities.

Business Process Grouping: General Ledger

Work Goals: Successfully complete period close at an enterprise level

Business Subprocess: 10.3.1 Perform Month End Close

Responsibilities

I am responsible for opening and closing the General Ledger for the State.

What's In It For Me

I look forward to being able to control the opening and closing of accounting periods using Florida PALM.

" I hope that the transition to Florida PALM will be smooth. I hope that I will be able to quickly open and close periods in Florida PALM. "

Stuart
GL Reconciliation Processor

Agency end user role responsible for reconciling the GL.

Business Process Grouping: General Ledger

Work Goals: Successfully reconcile GL corrections

Business Subprocess: 10.3.1 Perform Month End Close

Responsibilities
I am responsible for ensuring that ledger accounts are balanced and managing corrections needed.

What's In It For Me?

I would like to easily review and make corrections to the GL in Florida PALM. It would be nice if I could easily tell if my correction was successful. I would also like to be able to easily create year-end reports with minimal manual manipulation outside of the system.

" I am hoping that it is easy to run reports in Florida PALM. "

08/2020

Mary

Agency Allocation Processor

Agency end user role responsible for managing allocation activities in the GL. DFS acts on behalf of agencies in this role.

Business Process Grouping: General Ledger

Work Goals: Successfully allocate interest apportionments

Business Subprocess: 10.3.2 Perform Allocations

Responsibilities

I am responsible for interest apportionment allocations.

What's In It For Me

I would like to be able to confirm that agency's are accurately getting interest apportionments in Florida PALM.

"
I look forward to using improved technology when confirming interest apportionment balances in Florida PALM.
"

08/2020