Florida PALM

Planning, Accounting, and Ledger Management

Training Liaison Preparation

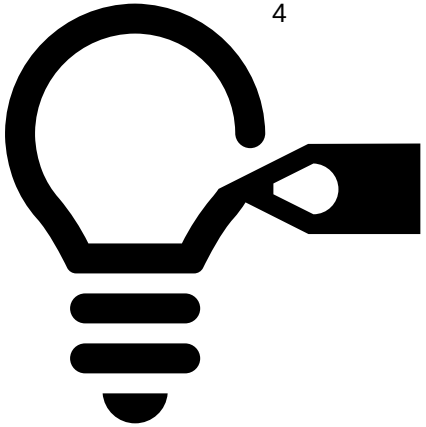
October 27, 2020

FloridaPALM
Planning, Accounting, and Ledger Management

Agenda

- Training Approach
- Training Deployment Timeline
- Training Deployment Activities
- Training Preview Expectations
- Material Walkthrough
- Next Steps

Training Approach



- Role-Based Training
  - Agencies assign end users to Florida PALM end user roles
  - The Project identifies Florida PALM training for end user roles
  - The Project works with agencies to map Florida PALM training to agency end users based on Florida PALM end user roles assigned.

- Curriculum Elements
  - Delivery methods – instructor-led training (ILT) and web-based training (WBT)
  - Training topic types – process overviews and process steps

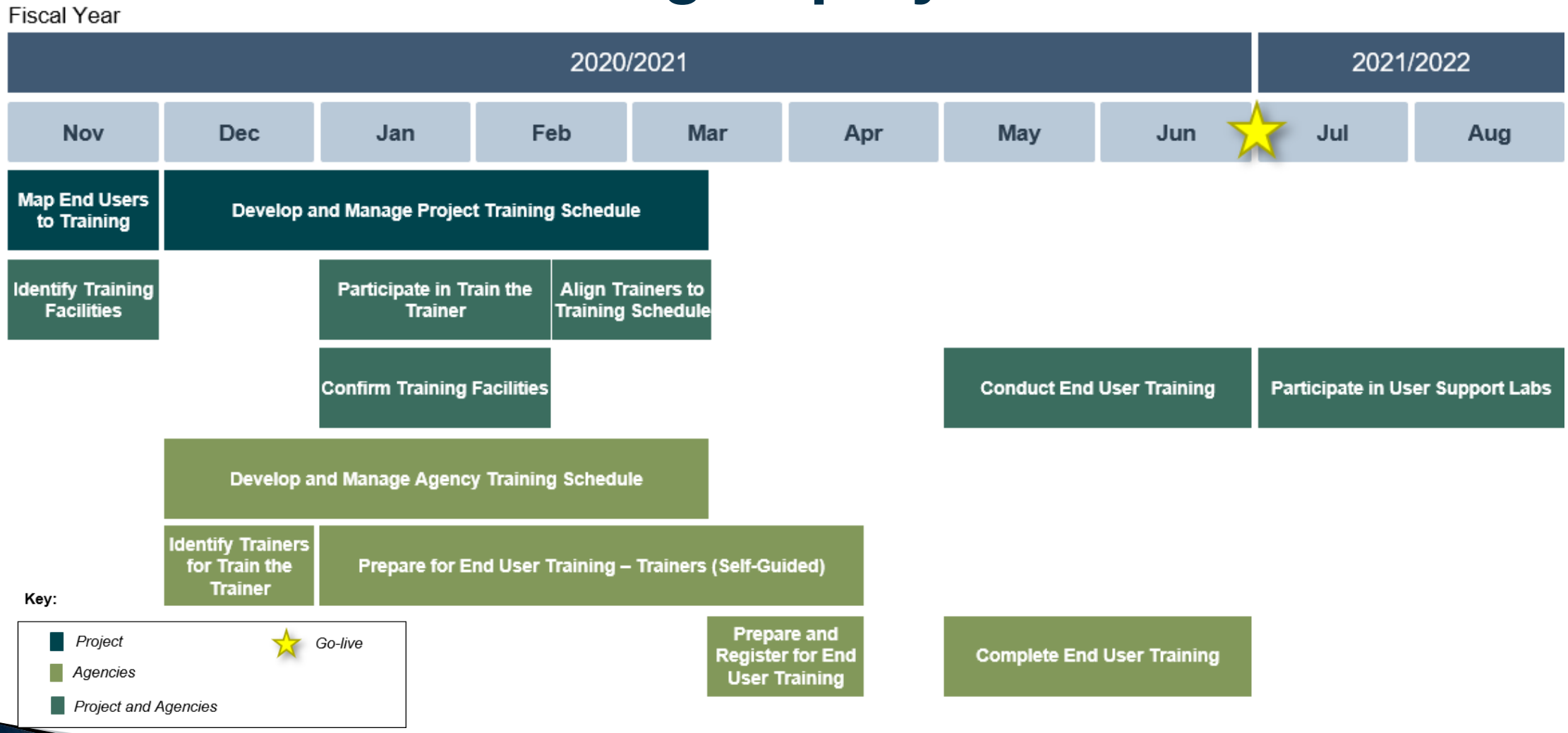
Training Topics – What To Expect

- Process Overviews
  - Narrated, interactive e-learning presentations
  - Introduces key concepts and functionality

- Process Steps
  - Interactive, e-learning simulations
  - On-screen guidance supports end user completion of specified actions
  - Instructs users on how to use the system

- Planned Curriculum
  - 11 Process Overviews
  - 47 Process Steps

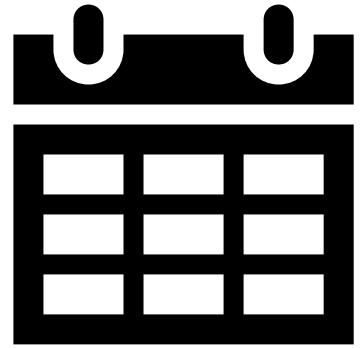
Florida PALM Training Deployment Timeline



Train-the-Trainer (TTT) Model

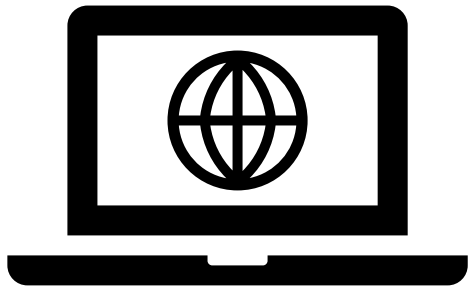
- Objective
  - Prepare agency trainers to deliver Florida PALM training
  - Create a network of trainers across the State
- Approach
  - Evaluate quantity and delivery method of training
  - Agencies identify trainers to participate in TTT
  - Project develops and shares TTT Program schedule
- TTT Program Activities
  - Kickoff – Expectation setting and trainer skills coaching
  - TTT Sessions – Florida PALM delivery of training
  - Self-Study – Training self-guided review of training
  - Teach-backs – Trainer practice and feedback

Training Logistics



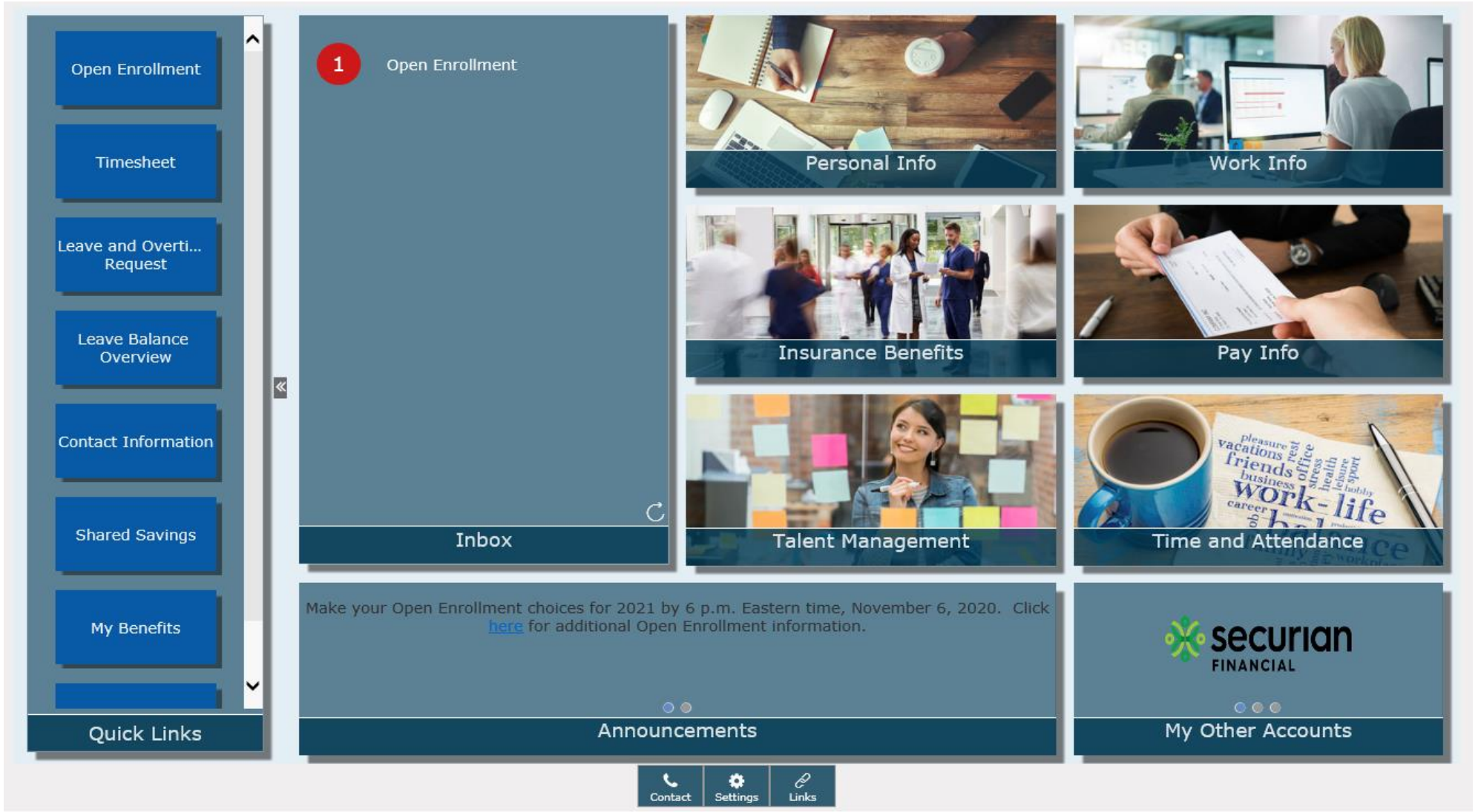
- Facilities Identification
  - What are the potential spaces that can be used?
  - Will they be available during the planned dates of end user training?
- Schedule Development
  - How many classes are needed for each ILT course at your agency?
  - Who will conduct ILT classes for each course?
  - Will the classes be open to other agency end users?
- End User Registration
  - How will you support registration for ILT and completion end user training?
  - How will you support cancelations, no-shows, reschedules, and reasonable accommodation requests?

Training Material Preview



- **Process Overviews**
  - ***Florida PALM/CMS Wave Overview**** *(narrated)*
  - ***COA Overview***
  - Navigation Overview
  - AMFR Overview
  - AR Overview
  - CM Overview
  - TM Overview
- **Process Steps**
  - ***Adding/Modifying Statewide ChartField Values**** *(action)*
  - ***Using an Inquiry Screen***
  - Using Navigation Elements
  - Creating Disinvestment Journals
  - Submitting EPS Requests
  - Submitting the Treasury Correspondence Form

**DRAFT example of end user training experience*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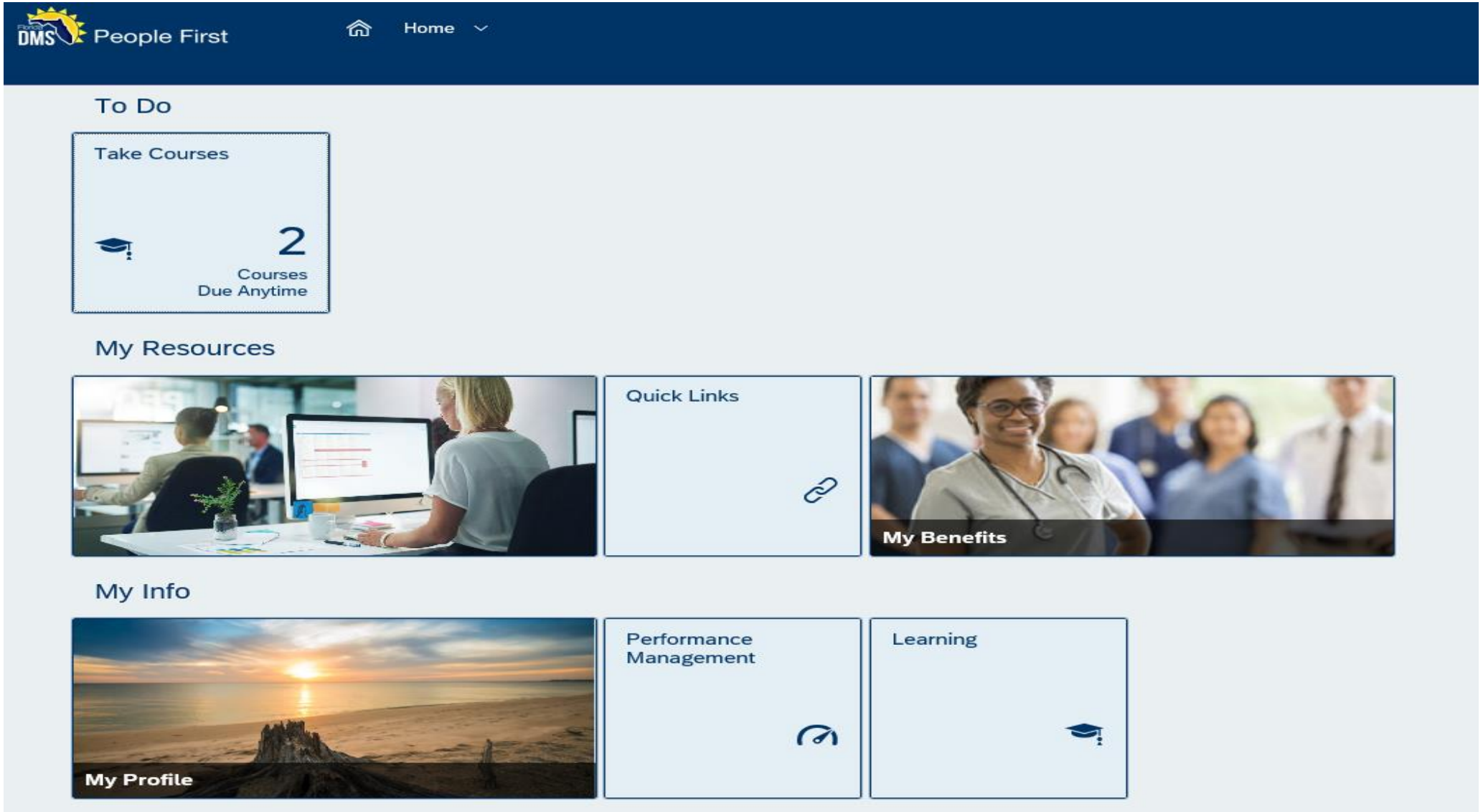
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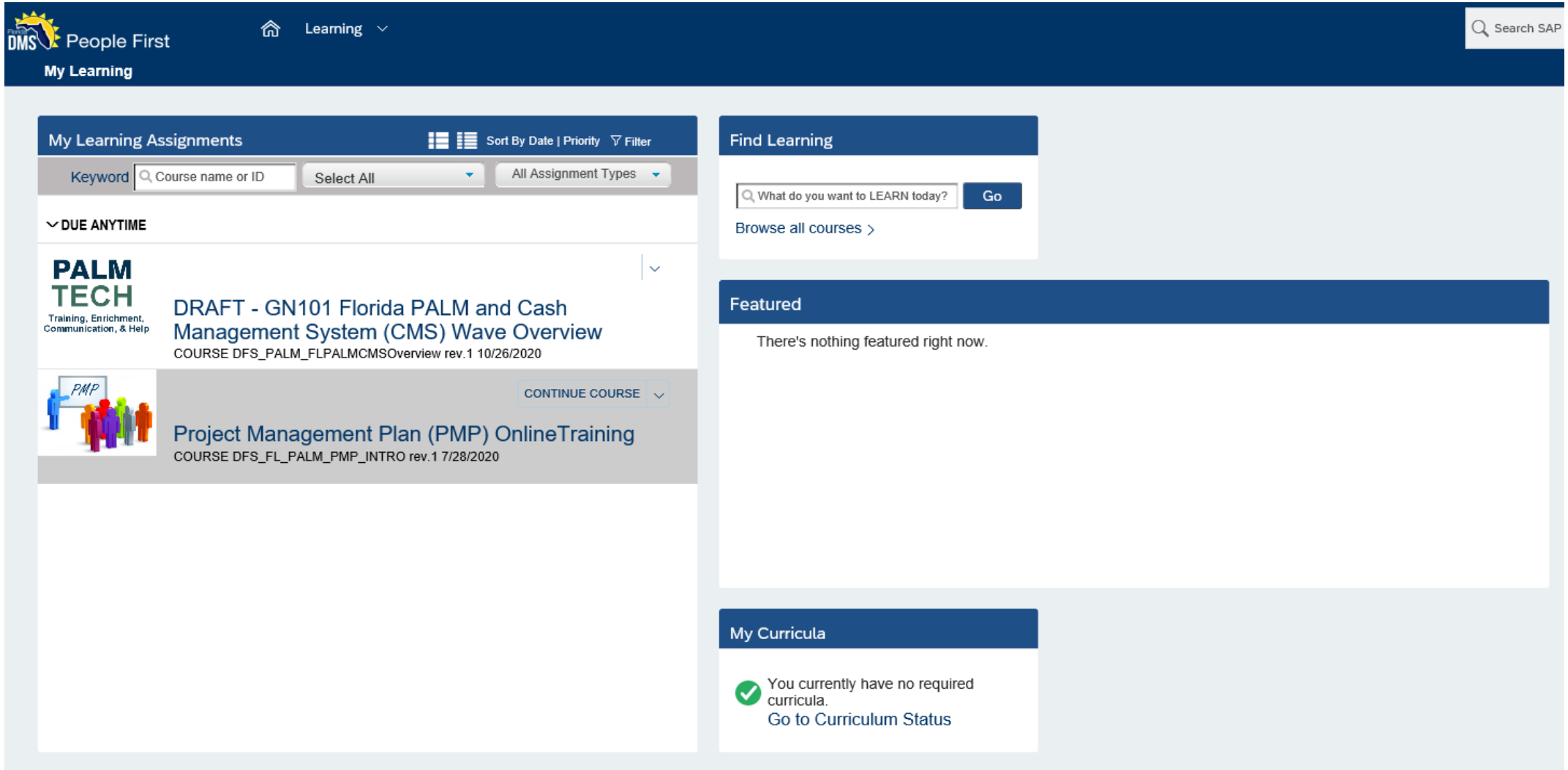
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DRAFT - GN101 Florida PALM and Cash Management System (CMS) Wave Overview
COURSE DFS_PALM_FLPALMCMSOverview rev.1 10/26/2020
CONTINUE COURSE
Project Management Plan (PMP) OnlineTraining
COURSE DFS_FL_PALM_PMP_INTRO rev.1 7/28/2020
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Training Liaison Preparation Next Steps

- Review Topics for Upcoming Discussions
  - Draft Process Overviews and Process Steps
  - Planned List of Florida PALM End User Training Topics

- Participate in Training Discussions:
  - General Knowledge, Navigation, and Reporting Topic Discussions
    - Tuesday, November 10th from 1:00 p.m. – 2:00 p.m.
  - AMFR, AR, CM, and TM Topic Discussions:
    - Thursday, November 12th from 1:00 p.m. – 2:00 p.m.
    - Tuesday, November 17th from 11:00 a.m. – 12:00 p.m.
    - Wednesday, November 18th from 11:00 a.m. – 12:00 p.m.
    - Thursday, November 19th from 11:00 a.m. – 12:00 p.m.

Next Steps

Task Name	Task Planned Start Date	Task Planned End Date
Identify and Prepare Participants for Train-the-Trainer	Mon, 11/30/2020	Fri, 12/11/2020
Create Training Deployment Plan for Florida PALM End User Training	Mon, 1/11/2021	Fri, 2/12/2021
Participate in Train-the-Trainer	Tue, 1/19/2021	Mon, 2/15/2021
Participate in Training Office Hours to Support TTT Self-Study	Mon, 3/1/2021	Fri, 3/26/2021
Distribute Request for End User Training Registration	Mon, 4/5/2021	Fri, 4/30/2021
Monitor Agency Participation of End User Training	Mon, 5/3/2021	Wed, 6/30/2021
Distribute Request for User Support Lab Registration	Mon, 6/21/2021	Fri, 9/10/2021
Monitor Participation in User Support Labs	Tue, 7/6/2021	Tue, 8/31/2021

Contact Information

Contact us

FloridaPALM@myfloridacfo.com

Project Website

www.myfloridacfo.com/floridapalm/

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