

Florida **PALM**

Planning, Accounting, and Ledger Management



CHANGE CHAMPION NETWORK VIRTUAL TOWN HALL

FEBRUARY 03, 2021



Welcome to the Florida PALM Change Champion Network Virtual Town Hall



Agenda

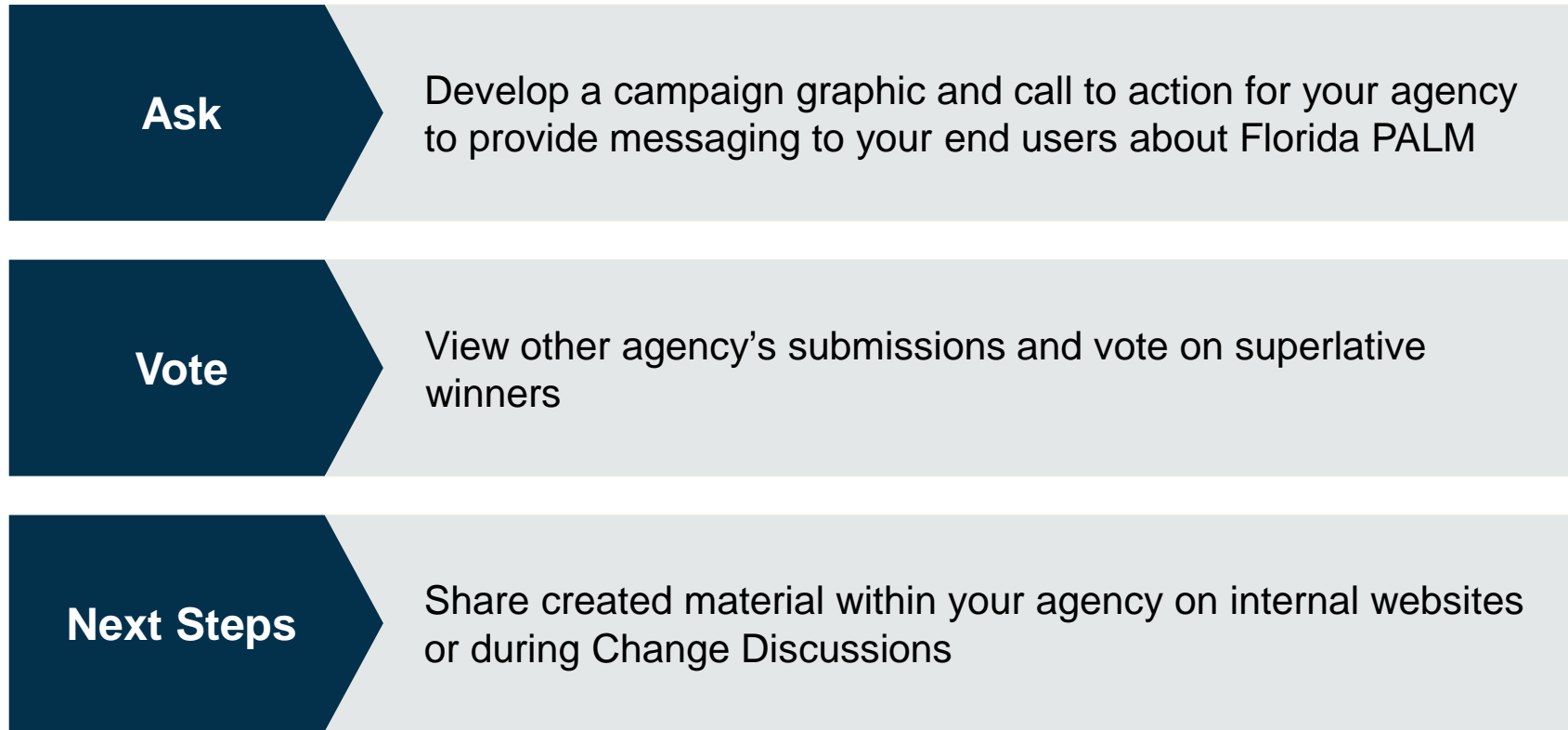
- Agency Activity
- Engaging Super Users
- End User Training
- User Acceptance Testing
- Next Steps



AGENCY ACTIVITY



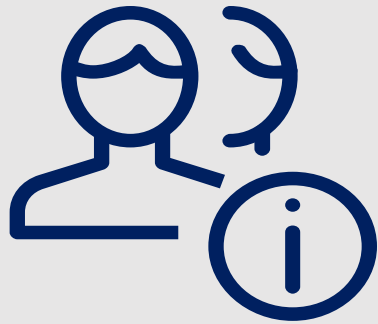
End User Messaging Activity



ENGAGING SUPER USERS



Who are Super Users?



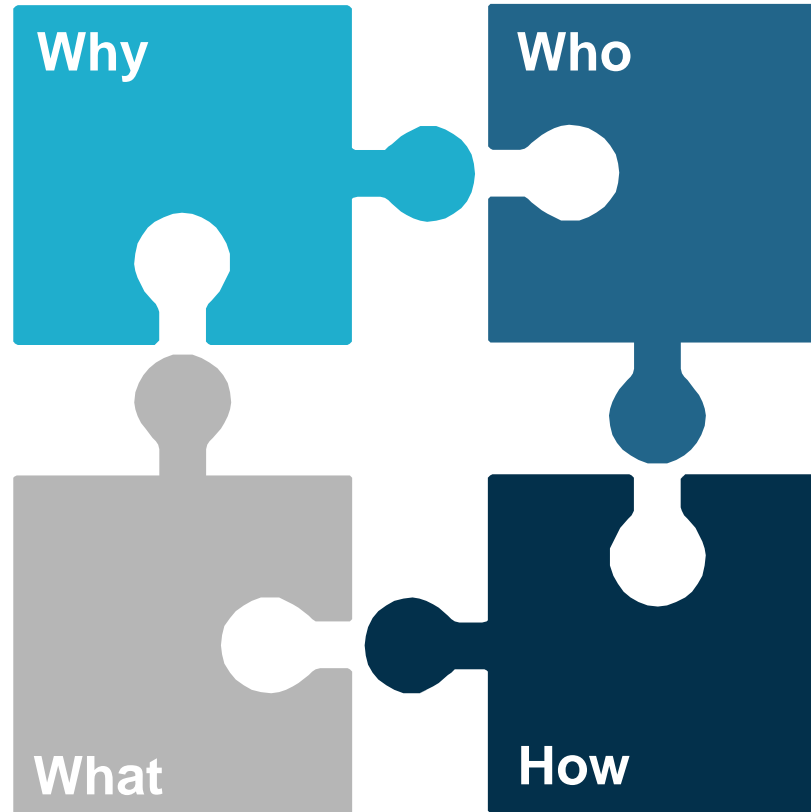
Super Users

Super Users are peer leaders within your organization and will support Florida PALM end users through implementation.



Prepare Tier 0 Support Model

Why a Tier 0 Support Model?



What process will your Tier 0 Support use as an internal model?

Who will be a part of your Tier 0 Support?

How will your Tier 0 Support be prepared?



Super User Journey

Participate

Participate in Florida PALM activities and support completion of Master Readiness Workplan tasks.



Develop Solution Knowledge

Build an understanding of the Florida PALM Solution.



Train

Support agency-specific training.



Provide Ongoing Support

Provide on-site support after transition to Florida PALM.



Agency Input

Carlene Smith

Agency Liaison
Department of
Management Services

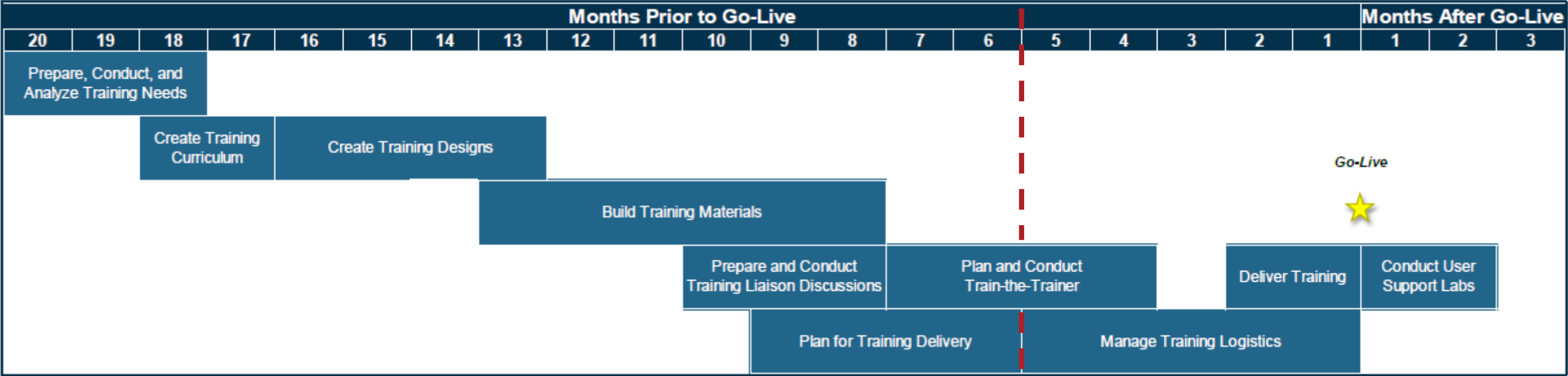
- ▶ Florida PALM Boot Camp
- ▶ Creation of Fundamental Accounting Training
- ▶ Completed tools lay a framework to operate from for subsequent waves



END USER TRAINING



Florida PALM CMS Training Activities



We are here



CMS Wave Overviews

Course ID	Course Name	Course Topic
GN101	Introduction to Florida PALM	Florida PALM Overview
		Chart of Accounts (COA) Overview
		CMS Overview
GN102	Navigating in Florida PALM	Navigation Overview
AMFR101	Introduction to AMFR	Accounts Management and Financial Reporting Overview
AR101	Introduction to AR	Accounts Receivable Overview
CM101	Introduction to CM	Cash Management Overview
TM101	Introduction to TM	Treasury Management Overview
RPT101	Reporting with Florida PALM	Reporting Overview



Security Access Manager Training

- Who** All agencies' designated Security Access Managers (SAMs)
- How** Web-based training
- What** Learn how to add and remove Florida PALM end user roles for agency end users to access Florida PALM



USER ACCEPTANCE TESTING



CMS Wave User Acceptance Testing

Background

- ▶ CMS Wave User Acceptance Testing (UAT) strategically targets representative agencies and a sample of the State's end users to validate Florida PALM
 - DFS Divisions of A&A and Treasury; and, 7 agencies
 - UAT Participants identified through established MRW tasks
 - UAT sessions conducted starting in late March/early April 2021, lasting for 6 weeks
- ▶ Conducted to confirm end users can perform their work functions in Florida PALM
- ▶ Gives participants an opportunity to “see, feel, and experience” Florida PALM before it is deployed into production



CMS Wave User Acceptance Testing (UAT)

Summary

▶ The below table shows the business processes to be tested each week.

	Business Process	Business Process
Week 1	<ul style="list-style-type: none"> • Maintain Bank Accounts • Manage Treasury Correspondence • Process Bank Cash Transfers • Manage Revolving Funds 	Week 4 <ul style="list-style-type: none"> • Distribute Interest • Monitor Trust Fund Cash Balance • Manage Electronic Receipts Data • Process FLAIR Deposits • Treasury Receipts, Adjustments, and Returned Items • Manage and Reconcile Bank Statements
Week 2	<ul style="list-style-type: none"> • Add or Modify Fund Values • Create and Approve Journals • Edit Check (A) • Invested Balance Checking 	
Week 3	<ul style="list-style-type: none"> • Contingency Week 	
		Week 5 <ul style="list-style-type: none"> • Create and Maintain Deals • Additional UAT testing using DFS/agency specific data examples or executing additional data scenarios that were not covered during previous weeks (includes reporting)
		Week 6 <ul style="list-style-type: none"> • Contingency Week



NEXT STEPS



CMS Wave Next Steps



Complete Conducting Change Discussions and Updating Process and Procedure Documentation



Identify Tier 0 Support



Continue developing agency-specific training materials and finalizing your training plan



Participate in IAM Functional Testing



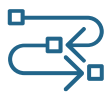
Central Wave and Departmental Wave Next Steps



Review and Share Central Wave Change Impact Materials



Participate in Central Wave Interface Office Hours



Share and Review Updates to Standardized Business Process Models to Prepare for Office Hours



Provide Business System Analysis Approach for the Departmental Wave



Embrace the Journey

CONTACT INFORMATION

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