Current Period

The following are highlights of key Project activities during the current update period:

April 2024

- Hosted a Production Support Round Table that focused on Identity Provider (IDP) subject matter experts and Security Access Manager (SAM) role responsibilities.
- Hosted the Sponsor Summit for Agency Sponsors to discuss agency readiness, planned activities and expectations for the upcoming transition to Florida PALM.
- Completed Segment III Design Workshop that reviewed eight final Financial Wave business process designs.
- Published a new issue of the Reports & Data Quarterly Newsletter (Q3 2024) to provide an at-a-glance summary of key Project activities and solution design information that were completed or shared during the third quarter of the fiscal year 2023-24.

May 2024

- Updated the Change Champion Network Roles and Responsibilities document to clarify the importance of identifying, understanding, reporting, and monitoring agency risks, issues, and mitigation plans.
- Published updated Payroll information on the Payroll Management webpage and on the Payroll Processing Timeline Example.
- Created a new Agency Reporting webpage for stakeholders to easily access a summary of their Agency Dashboard, Bimonthly Reports, and future Readiness Certifications.
- Shared a new graphic on Inter/IntraUnit to help agencies understand the difference between the two commonly used terms.
- Restructured the Training, Education & Development webpage to focus training and education content on the Financials and Payroll implementation, while still making CMS training and learning tools available for current end users.
- Published Lifecycle Overview pages, business process groupings, reports, interfaces, and conversions in the Knowledge Center.

June 2024

- Published PALMcast episode #16 – Organizational Change Management: Engaging Managers and End Users.
- Published a new issue of the Sponsor Scoop to keep your Agency Sponsor informed.
- Transitioned the Interface Catalog and Reports Catalog from Smartsheet to the Knowledge Center.
- Published Lifecycle Overview pages, business process groupings, reports, interfaces, and conversions in the Knowledge Center.

Next Period

The following are highlights of what agencies will be doing during the next update period (July – September 2024):

- Attending Segment IV Design Workshops that span July, August, and September. Segment IV includes critical functions such as:

- o Performing Month End and Year End Close
- o Cash Checking
- o Year End Budget Closing
- o Tax Reporting
- o Bank Account Management and Reconciliation
- o Creating and Maintaining Projects
- o Setting up and Maintaining Positions and Employees
- o Processing Payroll
- o Payroll Accounting
- o Inter/IntraUnit Processing
- Completing Configuration Workbooks, data cleansing activities, and interface and conversion inventories following Segment IV Design Workshops.
- As Design Segments complete, reviewing and updating your Business Process Inventory, documenting changes to your agency business processes and subprocesses.
- Collaborating internally to begin creating an agency specific UAT Plan, beginning with establishing testing objectives, scope, key activities and agency roles and responsibilities.
- Participating in Interface Connectivity Testing (September 2024).

Potential Topics

The following questions are provided for agency consideration to generate communication / messaging topics:

- ***Impact of Changes:*** What are key process changes that your agency learned about during the Segment III design meetings? Are there discussions internally to understand impacts and changes? Have you translated the change to your end users and their supervisors? Have you determined if any agency business system is impacted? If so, are you creating a remediation plan, updating internal documents and processes, sharing impacts with your team and Agency Sponsor?

- ***Knowledge Center Awareness:*** Is your team aware the Knowledge Center is a central location to find business process models, the reports catalog, the interface catalog, conversions, configurations, and business process lifecycles? Do you share when new content is published or that they can become a Florida PALM communications subscriber and get notified?

- ***Data Clean-Up and Transformation:*** What data clean-up has started within your agency? Are there changes that need to occur or that could be adopted even before Florida PALM go-live? Have you shared the changes to the Chart of Accounts? Are your key stakeholders aware that there are new Account values for Florida PALM? Have you used your agency-specific configuration values to create a crosswalk for your end users (e.g., the FLAIR Org code cross walked to the newly configured Florida PALM Organization ChartField)?

- ***Growing Your Internal Network:*** Who are your Subject Matter Experts (SMEs)? Do you have them identified for all Business Process Groupings? Are all of your critical staff engaged? How can you grow your knowledge base (i.e., agency team) in preparation for User Acceptance Testing?