Task Instructions

Task ID: 578
Task Name: *Confirm Identity Provider for Florida PALM*
Task Start Date: May 5, 2025
Task Due Date: May 23, 2025
Project Impact: Indirect

Task Description

Confirm intended identity provider(s) planned to store or contain the agency's users for Florida PALM.

Task Overview

As described in the Identity Access Management (IAM) article, agencies are responsible for identity management and authentication controls (e.g., password policies) for their Florida PALM end users, as well as for configuring and maintaining their agency's Identity Provider (IdP) connection with the Florida PALM IAM tool. Agencies use their IdP as an agency user directory or active directory that contains user credentials. The configuration of the agency IdP with the Florida PALM IAM tool allows for end user single sign-on to Florida PALM.

All agencies established and have maintained an IdP configuration with the Florida PALM IAM tool prior to CMS wave go-live. The configuration and ongoing maintenance is supported by the agency's IdP Subject Matter Expert (SME).

Each agency's IdP configuration with the Florida PALM production environment will soon be configured to the Florida PALM User Acceptance Testing (UAT) environment to support agency end user access for UAT. Some agencies may require additional IdP configurations to be established for UAT if:

- the expanded end user base includes end users with new or different email domains,
- the agency has additional user authentication protocols, or
- the agency has multiple IdPs.

In this task, you will be asked to confirm your current IdP SMEs and review your current and future IdP configuration needs to identify if additional configurations will be needed <u>prior to</u> the start of UAT.

Task Elements

This task contains two parts:

1. Confirm current IdP SMEs
2. Confirm IdP configurations needed for UAT

Confirm Current IdP SMEs

Your IdP SMEs that support your current Florida PALM end users and maintain the IdP configuration with the Florida PALM IAM tool will also be required to support your end user access to the UAT environment. You have previously provided your primary and backup IdP SMEs and their contact information in the "<Agency> Production Support Contacts" worksheet (Figure 1) in your Agency Readiness > Agency Contacts folder in Smartsheet. To prepare for UAT, you must review your identified IdP SMEs and update the information, as needed.

Figure 1: Demo Production Support Contacts worksheet

A new column has been added to your "<Agency> Production Support Contacts" worksheet to confirm that the IdP SMEs are current as of May 2025. Provide a checkmark to confirm that the individuals and their associated contact information is correct. ***It is highly recommended that you have one primary and at least one back-up IdP SME.***

NOTE: *You may have additional Production Support Contacts listed in your worksheet (i.e., File Manager and Batch Error Contact) if you are currently sending interfaces to or receiving interfaces from Florida PALM production. While it is not required as part of this task, it is good practice to review those contacts and update, as needed.*

Confirm IdP Configurations Needed for UAT

Your agency's current IdP configuration to the Florida PALM Production IAM tool will be used for the UAT environment, as well. However, because your agency's end user base may significantly increase from your current population of end users, your agency may require additional IdP configurations to be established for access to UAT.

A new worksheet, "<Agency> UAT IdP", has been added in Smartsheet in your Agency Testing folder, seen below in Figure 2. Use this worksheet to review your current IdP configuration and indicate if additional configurations are needed for UAT. The worksheet includes your current email domain, Authentication Protocol and IdP that is configured with Florida PALM production. You should work with your IdP SME to determine if additional IdP configurations are required.

If you answer 'yes' to any of the following questions below, you may require additional IdP configurations for UAT.

- Are you expecting new end users to access UAT that have different email domains from the current CMS wave end users in Florida PALM production?
  - o Compare the configured email domain(s) in "<Agency> UAT IdP" worksheet to the email domains of your future end users listed in the "<Agency> Implementation End Users" worksheet in your Agency Readiness > Agency Contacts folder in Smartsheet.
- Does your agency have multiple identity providers (e.g., Azure and iDaptive)?
- Does your agency have multiple authentication protocols (e.g., SAML2 and OIDC)?
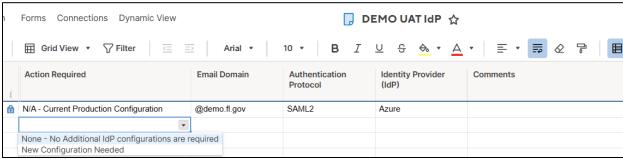
Figure 2: DEMO UAT IdP worksheet

The details of your current IdP configuration with Florida PALM production is provided in the first rows of the "<Agency> UAT IdP" worksheet for reference. The row is locked from editing.

NOTE: *If your agency has more than one IdP configuration, your worksheet will be pre-populated with multiple locked rows displaying your current information.*

Provide a response in the 'Action Required' column. The options in the drop down include:
- None – No Additional IdP configurations are required.
- New Configuration Needed
    - If selected, you must provide the email domain, Authentication Protocol and IdP to be configured.
    - You should add as many new configurations as needed by your agency.

NOTE: *If your agency requires any updates to your current IdP configuration to the Florida PALM production environment, you must contact the Florida PALM Solution Center. Identification of any new IdP configurations in this task is for the purpose of end user access to the UAT environment and will not impact the Florida PALM production environment until cutover for the Financials and Payroll waves, at which time the additional configurations will be established for production.*

How will agencies use this information?

Completion of this task supports your agency preparations for UAT. Confirming your IdP SMEs and IdP configuration needs prepares your agency to support end user access to the UAT environment and future access needs to the production environment at go-live. If additional IdP configurations are needed to be set up for your agency, the Project team will work with your IdP SME(s) to establish the configuration in future RW Task 591 – Confirm IdP Configuration for Florida PALM and add SMEs to Active Directory.

What will the Florida PALM team do with this information?

The Project team will review your submission and prepare to establish any additional IdP configurations as needed in future RW Task 591 – Confirm IdP Configuration for Florida PALM and add SMEs to Active Directory.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table1: Task Completion Rubric

Task Completion Rubric
The agency has confirmed at least one IdP SME in the *<Agency> Production Support Contacts* worksheet by providing a check mark in *Current as of May 2025*.
The agency has either confirmed no additional IdP configurations are needed or provided the required information for additional IdP configurations in the *<Agency> UAT IdP* worksheet. (No yellow cells.)
The Task Tracker has been marked as 100% complete for this Task.

Task Instructions

Review your listed IdP SMEs in the "<Agency> Productions Support Contacts" worksheet and update, if necessary. Confirm your IdP SMEs that are supporting end user access for Florida PALM production, as they will be the same individual supporting user access for UAT.

Compare your current configured email domain to the email domains of your listed future Florida PALM end users and consult with your agency's IdP SMEs to determine if any additional IdP configurations need to be established for UAT. Complete the "<Agency> UAT IdP" worksheet and confirm no additional IdP configurations are needed for UAT or provide the required information if additional IdP configurations are needed.

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts > (Agency) Production Support Contacts

Florida PALM Workbook for (Agency) > Agency Readiness > Testing > (Agency) UAT IdP

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 1.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Review, update if needed and confirm your IdP SMEs in the "<Agency> Production Support Contacts" worksheet.*
2) *Consult with your IdP SME(s) to determine if additional IdP configurations are needed for UAT and complete the "<Agency> UAT IdP" worksheet.*
3) *Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.*
4) *Complete task by **May 23, 2025**.*
5) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
6) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- [Identity Access Management (IAM) article](#)