

Task Instructions

Task ID: 604

Task Name: Create Agency-Specific Learning Materials to Support End Users

Task Start Date: May 04, 2026

Task Due Date: October 30, 2026

Project Impact: N/A

Task Description

Develop learning materials for end users based on updates to the agency Training Plan.

NOTE: This task is open for several months and it is expected that you will maintain your agency’s learning material inventory and progress throughout the duration of the task. This information will be relevant to and included in your Agency Readiness Certification #3 due in June 2026 and presented on your agency’s Monthly Progress Report also beginning in June 2026.

Related Readiness Certification #3 Criteria:

Agency has identified all agency specific learning materials to be developed to support end user training.

Task Instructions

Florida PALM training is being developed based on end user roles and topics from the [Topics and Activities](#), maintained by the Project. As described in the [Training Approach](#), the Project will provide training to end users on system functionality and how to work in Florida PALM, as is described in each role’s Learning Path. It is the **agency’s responsibility** to develop and deliver training on:

- agency-specific policies and procedures,
- understanding and applying the Florida PALM business processes within the agency, and
- agency-specific values (e.g., ChartField values).

Your agency is currently updating your Training Plan (RW Task 607). Now, based on the updates to your agency-specific Training Plan, you must begin creating the agency-specific learning materials your agency has determined your end users will need to successfully adopt Florida PALM.

A new folder, *Agency Training*, and worksheet, *<Agency> Agency-Specific Training Inventory*, have been created in your *<Agency> Florida PALM Workbook* to document the materials you plan to create and to track the progress of material development. Your *<Agency> Agency-Specific Training Inventory* worksheet is populated with the Topics that are applicable to your agency based on your identified applicable Activities in your *<Agency> User Story Activity Coverage* worksheet (i.e., the Activity is not marked as “Not Applicable” for your agency.)

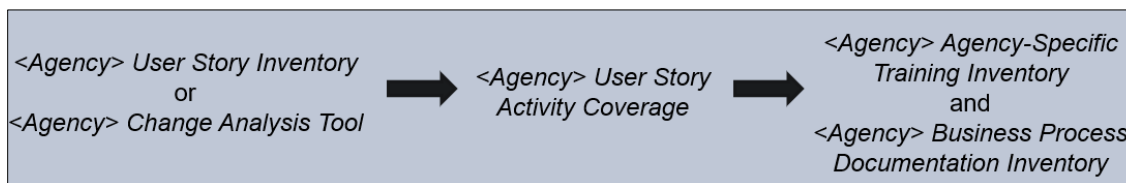


Figure 1: Cross-worksheet Connections for Agency Applicable Topics and Activities

| Error Messages | Business Progress Grouping | Topic | Do you plan on creating Agency-Specific Training? | Primary Owner | Intended Audience | Size of Audience | Describe the Agency Specific Learning Material | Status of Agency Specific Training | Comments |
|----------------|----------------------------|-------|---|---------------|-------------------|------------------|--|------------------------------------|----------|
| | | | | | | | | | |

Figure 2: Agency-Specific Training Inventory Worksheet

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Training

The information below describes the columns in the worksheet and provides instructions on how to complete them.

- **Error Messages** (locked from editing)
 - Review any error messages and take action to resolve. This column is updated via overnight processing.
- **Business Process Grouping** (locked from editing)
 - Auto-populated to indicate the related Business Process Grouping for the selected Topic.
- **Topic** (locked from editing)
 - Auto-populated with applicable Topics from your <Agency> *User Story Activity Coverage*
- **Do you plan on creating Agency-Specific Training?** (required for all applicable topics)
 - Use the dropdown to indicate if you plan to create agency-specific training for the topic.
 - Options include:
 - Yes
 - No
 - If “Yes” is selected for a Topic, all other columns are required to be completed, except the Comments column.
- **Primary Owner**
 - List the person at your agency who is primarily responsible for creating the learning material(s) for that topic.
- **Intended Audience**
 - Identify the intended audience for the learning material. This could include certain divisions or programs, positions, end user roles, etc.
- **Size of Audience**
 - From the ranges provided, select the estimated size of audience that will be recipients of the learning material.
- **Type of Learning Material(s)**
 - Use the dropdown to select the type of learning materials that are being created for each topic. You may select more than one.
 - Options include:
 - Classroom Training
 - Web-based Training
 - Videos
 - Job Aids
 - Other

- **Status of Agency Specific Learning Materials**
 - Use the dropdown to report the status of the development of your agency specific learning materials for each Topic.
 - Options include:
 - Not Started
 - In Progress
 - On Hold
 - Complete
- **Comments (Optional)**
 - Provide any comments for agency-use only.

Task Completion Requirements

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

Table 1: Task Completion Rubric

| Task Completion Rubric |
|---|
| All required fields have been completed in the <Agency> Agency-Specific Training Inventory worksheet in Smartsheet. |
| There are no error messages in the Error Message column. |
| Task tracker must be marked as 100% complete. |

Supporting Materials & Resources:

- Agency Training Plan
- [Florida PALM Topics and Activities](#)
- [Training Approach](#)
- [User Story Activity Coverage Supplemental](#)