

# Our Goal is to Transform Florida's Financial Management

Reduce the State's risk exposure by harnessing **MODERN** financial management technology built on the premises of scalability, flexibility, and maintainability;

Improve state and agency specific decision making by capturing a **CONSISTENT** and an expandable set of data;

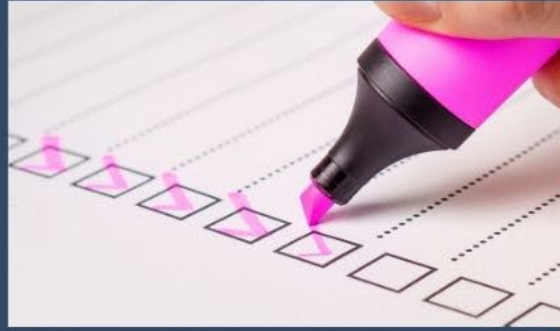
Improve the State's financial management capabilities to enable more **ACCURATE** oversight of budget and cash demands today and in the future; and

Increase internal controls by enabling **STANDARDIZATION** and automation of business processes within and between DFS and agencies.



## FLAIR Study

Foundational study comparing options to enhance or replace the state's accounting and cash management systems



## Business Requirements

Functional, technical, and reporting requirements the new financial management system must provide



## Processes Models

Business processes that describe system functionality and their financial management processes

# The anchoring documents

Before the journey, these set the Project's course



Division of Accounting and Auditing manages FLAIR. FLAIR is the state's accounting system responsible for accounts payable, accounts receivable, cash projections, payroll, and reporting.



Division of Treasury managed the Cash Management System. CMS was responsible for managing cash and investments. Florid PALM is now used to meet cash management needs.



Office of Information Technology maintains FLAIR and connecting programs. They are responsible for patches, upgrades, or enhancements required to operate the state's finances.

# Florida PALM is cloud-based

Florida PALM operates on Oracle® PeopleSoft 9.2, leverages a Service Oriented Architecture (SOA), is hosted by Oracle Cloud Infrastructure, and is connected via MyFloridaNet-2. Florida PALM is a web-based software with a single sign-on experience.



# Stakeholders



Agencies



Enterprise  
Partners



Third Parties



Vendors and  
Citizens

# Project Timeline

## 2014

- The Project began and the Executive Steering Committee Meeting (ESC) was organized

- The Project brand become Florida Planning Accounting and Ledger Management (Florida PALM)
- The ESC expanded to 15 members
- The Project Management Plan and Project Charter were implemented

## 2015

## 2016-2017

- Business Requirements were approved
- Level 2 Business Process Models were approved
- The Invitation to Negotiate (ITN) was released
- Conducted contract negotiations

# Project Timeline

## 2018

- Software and Systems Integrator (SSI) contract was signed
- Design, Development, and Implementation (DDI) began
- DDI deliverables and timeline approved by ESC for implementation approach: Pilot, Wave 1, Wave 2, Phase II

- Agencies created Change Champion Networks
- Standardized Business Process Models were approved
- Implementation shift to waves by function: CMS, Central, Departmental, Payroll, Phase II
- Chart of Accounts Design was approved
- “Go” decision to start building Florida PALM

## 2019- 2020

## 2021

- Updated Standardized Business Process Models were approved
- Implementation shift to combine Central and Departmental Waves
- “Go” decision to deploy the CMS Wave
- Florida PALM launched CMS functionality
- Florida PALM Solution Center was created

# Project Timeline

## 2022

- Conducted Personalized Agency Working Sessions
- Contracted for Information Warehouse Assessment
- Received positive results from Treasury Calculations Audit
- First year-end closing activities successfully completed in Florida PALM

- Reviewed and confirmed system requirements
- New Timeline released – January 2026 Go-Live!
- Major Implementation started: Financials, Payroll, & Data Warehouse
- Agency Current State Analysis Readiness Workbook tasks began
- Began Design Workshops by Design Phase Segment

## 2023

## 2024

- Completed Design Workshops
- System Build began
- System Testing began
- The Knowledge Center launched



# Project Timeline

2025  
In Progress

- Extended Timeline released – July 2026 Go-Live!
- Build and Testing activities continue
- Data Conversion now aligns with a fiscal year cutover

Watch our story

<https://myfloridacfo.com/floridapalm/about-us>



**2026 Major  
Implementation**

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**Financials Wave**

**Payroll Wave**

**Data Warehouse**

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**Legacy Systems  
Being Replaced**

**Central + Departmental FLAIR**

**FLAIR Payroll**

**Information Warehouse**

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**Transition**

**All agencies at once**

**Allows robust agency user acceptance testing**

**Dedicated hypercare and post-go live support**