Florida PALM
Planning, Accounting, and Ledger Management

Department of Financial Services
Advisory Council Meeting Minutes

Date	July 16, 2025	**Time**	10:00 a.m. – 12:00 p.m.
Location	Department of Environmental Protection		
Objective	Advisory Council Monthly Meeting		
Attendees	Advisory Council: Amy Barrow (DOR); ~~Stephanie Cabrera (FLHSMV)~~; ~~Ramon Evans (APD)~~; ~~Lyndell Francis (DBPR); Lydia Griffin (DEP)~~; Renee Hermeling (DFS); Robert Herron (DOH); ~~Jim Lewandowski (FDACS)~~; ~~Tanya Maphis (FWC)~~; Nona McCall (JAC); Mike Moore (FDLE); Cheryl Morgan (FDOT); Stephen Russell (DMS); Lisa Simpson (COM); Erica Starling (FDC); ~~Mary Sweat (DCF)~~; Alexandra Weimorts (DFS) Facilitators: Jimmy Cox (DFS), Renee Hermeling (DFS), Robert Herron (DFS), Angie Robertson (DFS)		
Related Documents	Presentation		

Topic	Facilitator(s)
Opening Remarks	
Welcome and Roll Call	Robert Herron
Discussion Topics	
Agency Readiness Certification #1 Open Discussion	Angie Robertson
UAT Online Topic Cadence and Logistics	Jimmy Cox Angie Robertson
Time Permitting – Requested Topics • *A&A Draft Policy for Florida PALM* • *Approach for cutover and fiscal year end processes for go-live*	Jimmy Cox Renee Hermeling
Closing Remarks	
Reminders and Action Items	Robert Herron

Welcome and Opening Remarks

Facilitated by Robert Herron

Mr. Robert Herron, Chair, opened the meeting with roll call and welcomed the group. A representative was present for APD, DCF, DEP, FDACS, FLHSMV, and FWC.

Agency Readiness Certification #1 Open Discussion

Facilitated by Angie Robertson

An open discussion was held on the Agency Readiness Certification #1 task. The Council shared a few ways they were preparing to certify their readiness to begin User Acceptance Testing. There were no concerns raised by the Council on being ready to certify their readiness for UAT by the

submission deadline; however, one Council member shared they anticipate having readiness stipulations noted in their submission. The common theme for completing readiness was completing the user stories, as well as role mapping challenges.

UAT Online Topic Cadence and Logistics

Facilitated by Jimmy Cox, Angie Robertson

To help agencies better understand participation for UAT Online sessions, Mr. Jimmy Cox discussed traits and characteristics for agency-identified Subject Matter Experts (SMEs). Agencies role-mapped an abundance of SMEs to participate in UAT Online; however, only a limited number can attend in person.

Session pre-materials are planned to be published one week in advance of the week's subject/sessions. The intent is to give SMEs time to test the transactions, including role mapped credentials, before attending the UAT session so they can ask questions and have the Project team guide them through issues or scenarios.

Mr. Cox said all role-mapped SMEs will be given access to the UAT environment at the same time. The environment will be available for SMEs to test with agency data and user stories, as desired. When pre-materials are released for each session, SMEs should not wait for Project-hosted sessions to start testing.

After access is given to the role-mapped SMEs, they should first test their ability to log into Florida PALM. When SMEs log in for the first time, they should be connected to their agency's network for authentication. SMEs attending the in-person session should also test logging in while in a remote location (i.e., not an agency location). This is critical as UAT in-person participants must bring their own laptops to the UAT sessions, so access must be tested and issues resolved prior to attending UAT.

It is important Security Access Managers (SAMs) and Identity Provider (IdP) SMEs be available to assist SME users during UAT in-person sessions and virtual sessions. A calendar of weekly UAT sessions is available on the Florida PALM website. The Project will be hosting an Agency SAM and IdP workshop on August 13, 2025, to ensure SAMs and IdP staff understand their roles and responsibilities prior to UAT sessions starting the week of August 18, 2025.

A Council member suggested a tip for those attending in-person sessions; set up a Microsoft Teams meeting and record themselves working through transactions. The recording can be helpful when working through transactions on their own, back at their office, after the UAT session and to train or support other SMEs during UAT Online.

Mr. Cox discussed the UAT Online registration process. The UAT prerequisites trainings must be completed prior to SMEs registering for UAT sessions (in-person or virtual). SMEs from the same agency should attend the UAT session together (e.g., with complementary roles in order to complete a transaction). In-person sessions will be held twice a week (likely, Tuesday and Wednesday) and one or more virtual sessions each week for out-of-town agencies (likely, Thursday). Ms. Robertson mentioned that registration will open on a rolling basis; registration for August will open in July. SMEs should work with their Training Liaisons to register.

The Council shared concern with having enough agency data to complete online transactions adequately. The group discussed ideas for gathering sample transactions, including those from prior year. The samples used will need to coded or recorded against the FY 25/26 budget combination of available codes. Mr. Cox further reminded the group that UAT Online is testing

online transactions, not end-to-end transactions, so some transactions will not be fully completed (e.g., deposit verification).

Mr. Cox shared the calendar of subjects and briefly discussed the August sessions. He further shared the Author role in DW/BI (e.g., to create queries), will not be available for testing in UAT Online as previously planned. SMEs that were role mapped to that role will be given a Consumer role until later in the UAT testing timeline. In addition, due to licensing limitations, all DW/BI roles will be managed by the Project team, not Security Access Managers. He also noted Payroll functionality will not be tested in UAT Online. Both Payroll and Fiscal Year-End testing sessions will be held during Full UAT..

Agency Submitted Topics

Facilitated by Jimmy Cox and Renee Hermeling

A&A Draft Policy for Florida PALM

Ms. Renee Hermeling shared that DFS Accounting and Auditing (A&A) created A&A Florida PALM Connection website where they will publish draft financial policy updates on a rolling basis. The first set is scheduled to be published by the end of July. Advisory Council members will be notified of changes on the website. Agencies are welcome to provide feedback on the policy changes with A&A. This website is also linked on the Florida PALM website under the Enterprise Partners link on the Agency Readiness page.

Approach for cutover and fiscal year end processes for go-live

Mr. Cox shared the Project team has been working closely with A&A to develop a cutover plan and checklist that will be used to help inform agencies. He shared a high-level plan to take Central FLAIR offline on June 26, 2026. The downtime window will run from June 26 – July 13, when Florida PALM goes live. A date has not been determined for bringing Departmental FLAIR offline.

Closing Remarks

Facilitated by Robert Herron

The next Advisory Council meeting will be held on August 20. Mr. Herron adjourned the meeting.