Florida PALM

Planning, Accounting, and Ledger Management

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APRIL 25, 2024

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Agenda

- RW Tasks: Reaching Key Milestones
  - Tips to get caught up – Rinse and Repeat
- Mindful Task Management:
  - Prioritization Techniques for Overwhelmed Teams
- New Knowledge Center Resources
  - Demos, Finding Module Configurations

Fiscal Year 2024/2025

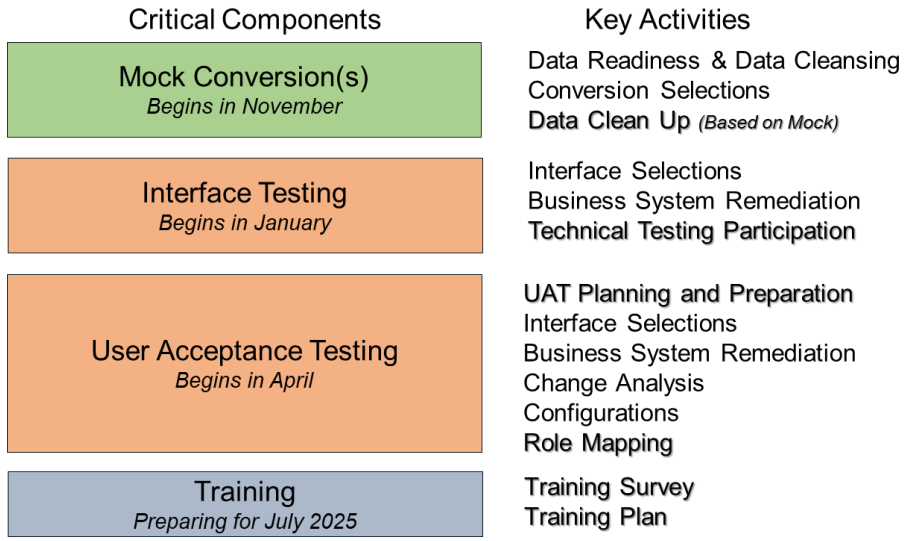
Critical Components	Key Activities
Mock Conversion(s) *Begins in November*	Data Readiness & Data Cleansing Conversion Selections **Data Clean Up** ***(Based on Mock)***
Interface Testing *Begins in January*	Interface Selections Business System Remediation **Technical Testing Participation**
User Acceptance Testing *Begins in April*	**UAT Planning and Preparation** Interface Selections Business System Remediation Change Analysis Configurations **Role Mapping**
Training *Preparing for July 2025*	**Training Survey** **Training Plan**

Key Milestones

- Oct. '24 - Ready for Mock Conversion
- Dec. '24 - Ready for Interface Testing
- June '25 - Ready for Full Integration Testing
- Nov. '25 – Agency Readiness Certification
- Jan. '26 – Go Live

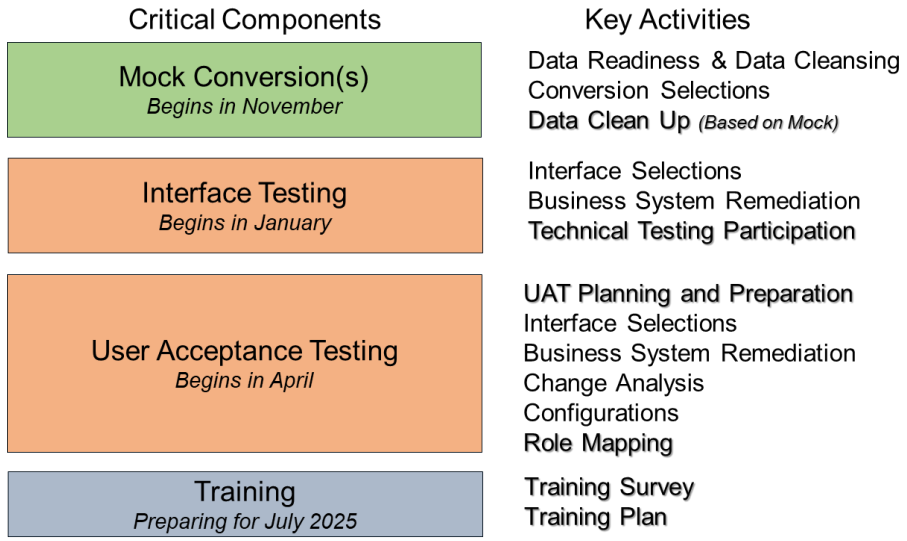
Current RW Tasks

RW Tasks in Progress
513 - Complete Configuration Workbooks for Segments I and II
519 - Remediate Agency Business Systems based on Segment I
522 - Manage Agency-specific Implementation Schedule, Risks and Issues
524 – Complete and Submit Florida PALM End User Readiness Survey Analysis
527 - Identify Change Impacts and Update Agency Business Process Documentation for Segment III
528 - Update Agency Business System Documentation for Segment III
530 - Update Florida PALM Interface Inventory for Segment III



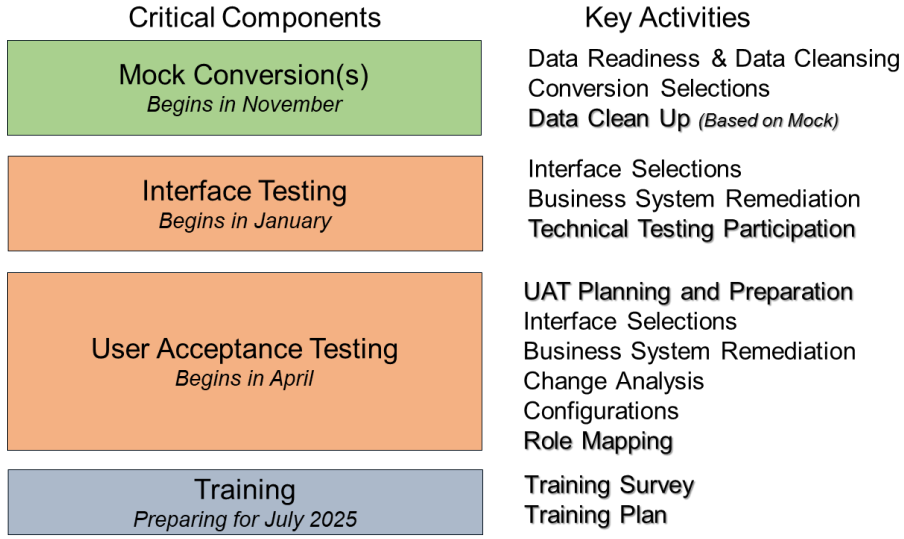
Upcoming RW Tasks

RW Tasks Releasing April/May/June
526 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment III
529 - Update Florida PALM Conversion Inventory for Segment III
531 – Remediate Agency Business Systems based on Segment II
532 - Submit Bimonthly Agency Readiness Status Report
533 - Manage Agency Specific Implementation Schedule, Risks and Issues
534 - Update CCN and Contacts
535 - Update Workforce Readiness Plan
536 - Create Agency Specific User Acceptance Testing Plan
537 - Update Authorized Smartsheet Users



Future RW Tasks

RW Tasks Releasing in July
538 - Submit Bimonthly Agency Readiness Status Report
539 - Manage Agency Specific Implementation Schedule, Risks and Issues
540 - Share Florida PALM Updates
541 - Complete Configuration Workbooks for Segment IV
542 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV
543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV
544 - Update Agency Business System Documentation for Segment IV
545 - Update and Finalize Florida PALM Conversion Inventory for Segment IV
546 - Update Florida PALM Interface Inventory for Segment IV
547 - Remediate Agency Business Systems based on Segment III



Mindful Task Management

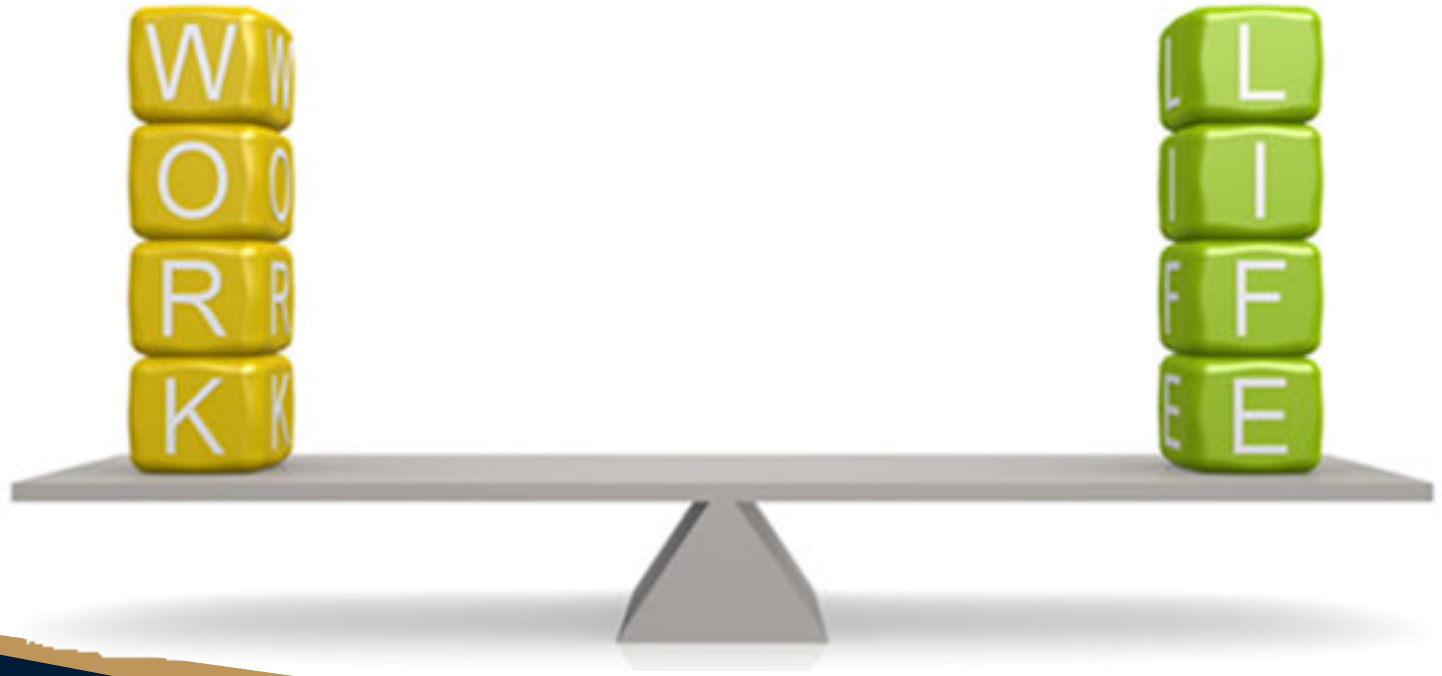
Prioritization Techniques for Overwhelmed Teams

- Mindful Prioritization
  - How to prioritize effectively
    - Time Blocking
    - Goal Setting
    - Delegate and Collaborate

Mindful Task Management

Helpful Tips for Maintaining Work-Life Balance

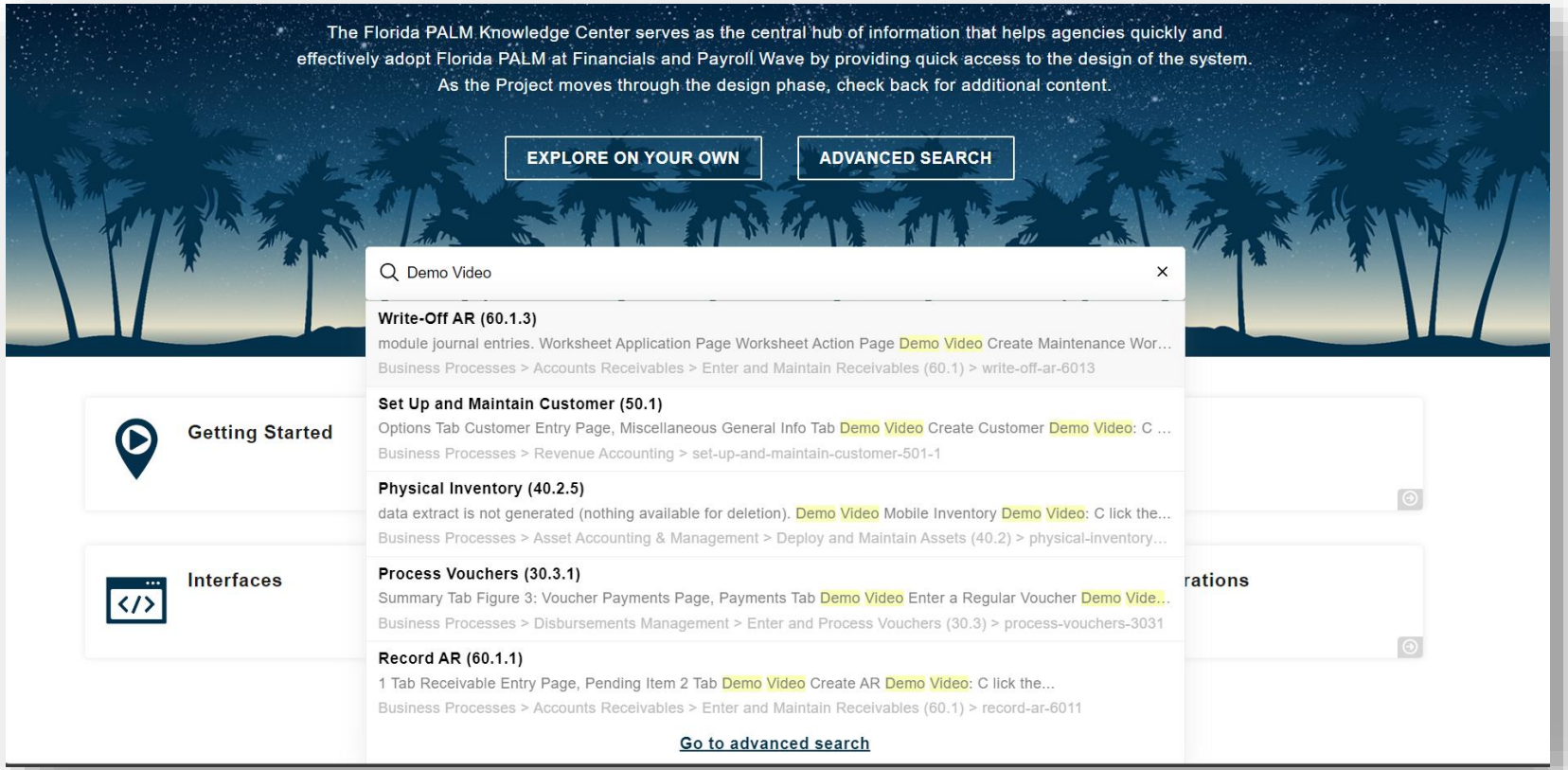
- Maintaining Work/Life Balance
  - How to maintain a proper balance
    - Stress Reduction Techniques
    - Set Boundaries
    - Practice Self-Care



New KC Resources

Now Live THE Florida PALM KNOWLEDGE CENTER
A central repository for Florida PALM documentation

Segment Design workshop demonstration videos have been uploaded



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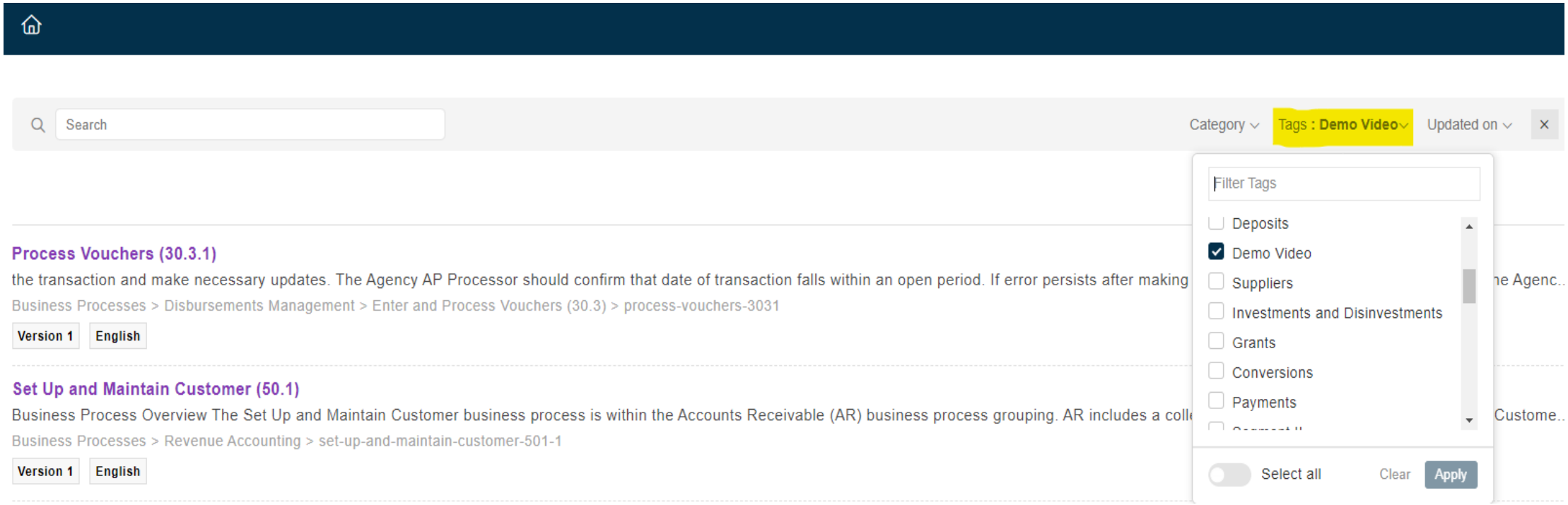

New KC Resources

Table of Contents section titled Demo Video!

Demo Video

Enter a Regular Voucher Demo Video: Click the image below to view a demonstration video on entering a Regular Voucher.

Table of contents

Business Process Overview
Business Process Diagram
Business Roles
Business Process Flows
Details
Demo Video
Accounting Events
Reports
Conversions
Interfaces
Forms
Workflows
Agency Configurations
Version History

Tags

Segment I | Demo Video | Business Processes

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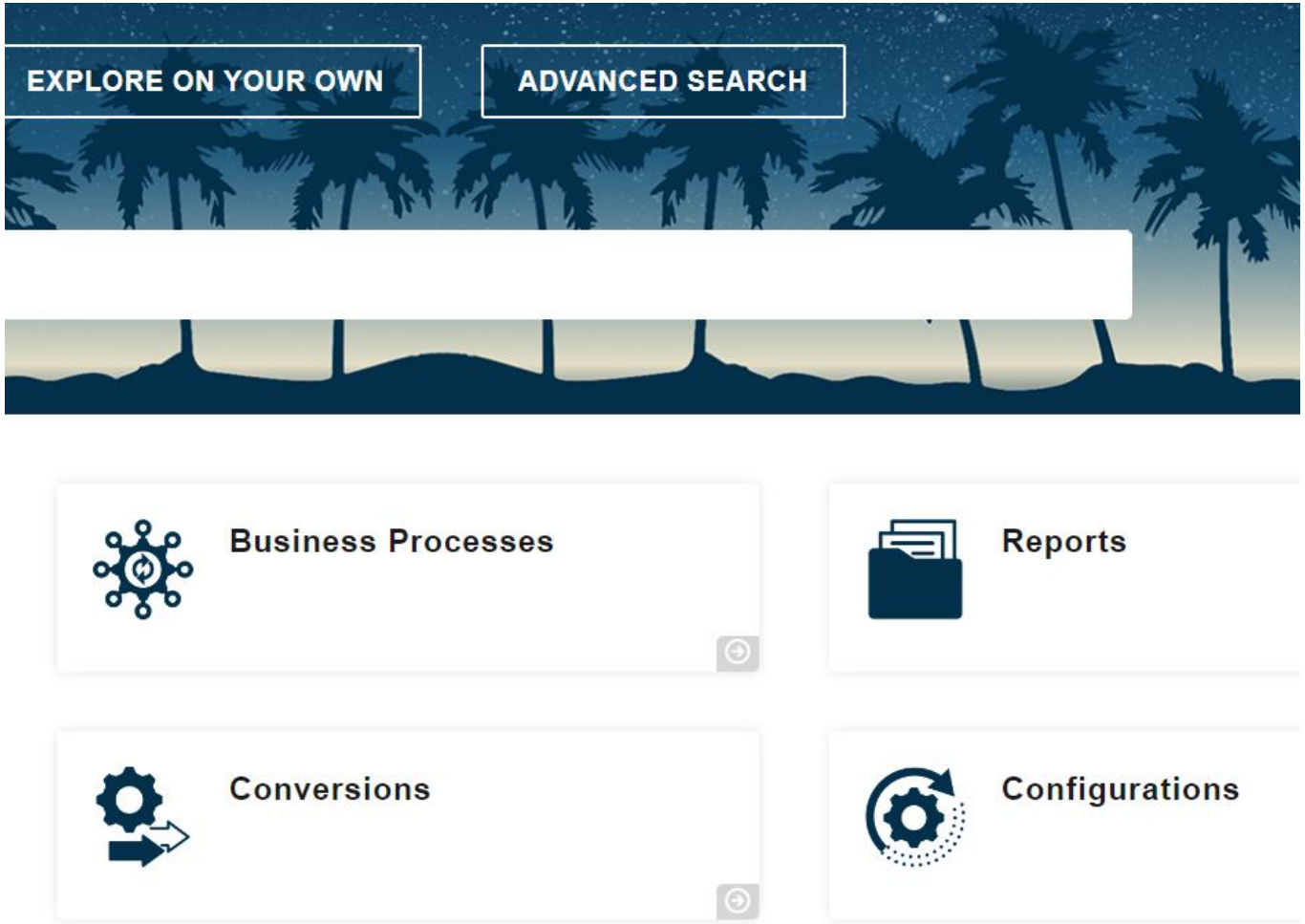

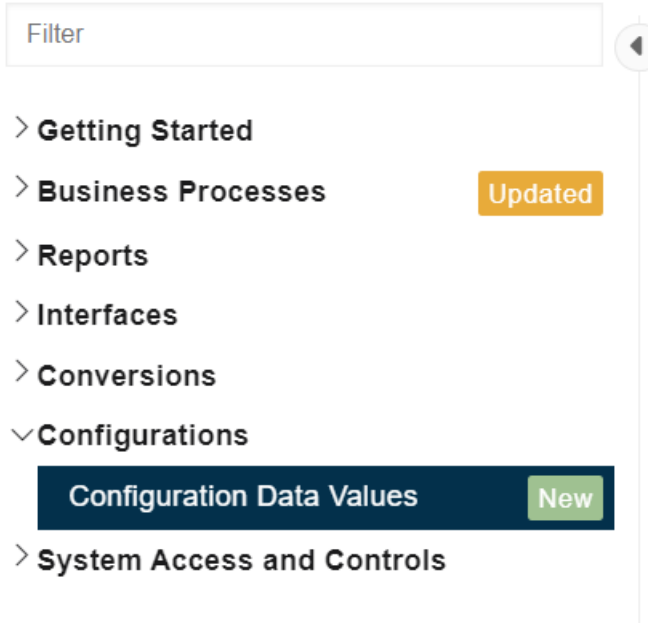

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