

# FloridaPALM

Planning, Accounting, and Ledger Management



| Task ID | Critical Operational Element | Task Name  | Task Description   |
|---------|------------------------------|--|--|
| 324     | Data                         | Complete FLAIR Data Elements Inventory                 | Complete and submit the FLAIR Data Elements Inventory documenting data elements your agency currently uses and how they are being u        |
| 325     | Processes                    | Complete Data Security and Access Survey               | Complete and submit the Data Security and Access Survey to inform how you currently manage data security and user access.                  |
| 326     | Technology                   | Update Current Agency Business Systems                 | Review and update the current Agency Business Systems. Re document each of current systems technical design for each system.               |
| 327     | Data                         | Complete Reports Inventory                             | Complete and submit the Reports Inventory documenting all agency FLAIR reports.  |
| 328     | Processes                    | Document Current Agency Business Processes             | Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.                 |
| 329     | People                       | Update CCN and Project Contacts                        | Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.                        |
| 330     | People                       | Update Authorized Sheet Users                          | Review, update and confirm authorized users access to all Florida T resources.   |
| 331     | N/A                          | Submit Monthly Agency Report                           | Agency Sponsor to confirm a monthly report, in the Project, to provide a status report on the agency to the project sponsor for the month. |
| 332     | N/A                          | Create Agency Specific Risk and Issues Management Plan | Create or update a plan to identify and manage agency specific risk Florida PALM implementation.   |
| 333     | People                       | Create Workforce Readiness Plan                        | Create a plan to identify and assess impacted stakeholders within your agency.   |

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

MAY 23, 2024



# Agenda

- Agency Readiness Reporting
- Task Verifications
- Looking Ahead
- RW Task Questions



# Agency Readiness Reporting

MyFloridaCFO



Florida PALM

Home / Agency Reporting

## Agency Readiness Reporting

Agencies must ready their people, processes, technology and data for a successful transition to Florida PALM. Agency readiness progress is reported to the Project through readiness workplan tasks and bimonthly status reports and then summarized on the Agency Status Report Dashboard. The [Understanding Your Dashboard](#) document provides an overview of all the Dashboard elements.

Beginning in March 2025, Agencies will provide quarterly Readiness Certification Updates with a final submission of Readiness Certification in November 2025.

|   |   |   |
|---|---|---|
|  <p><b>SUMMARY OF DASHBOARDS</b></p> |  <p><b>BIMONTHLY REPORTS</b></p> |  <p><b>READINESS CERTIFICATION</b></p> |
|---|---|---|

[Agency Reporting \(myfloridacfo.com\)](https://myfloridacfo.com)



# Task Verifications - Complete

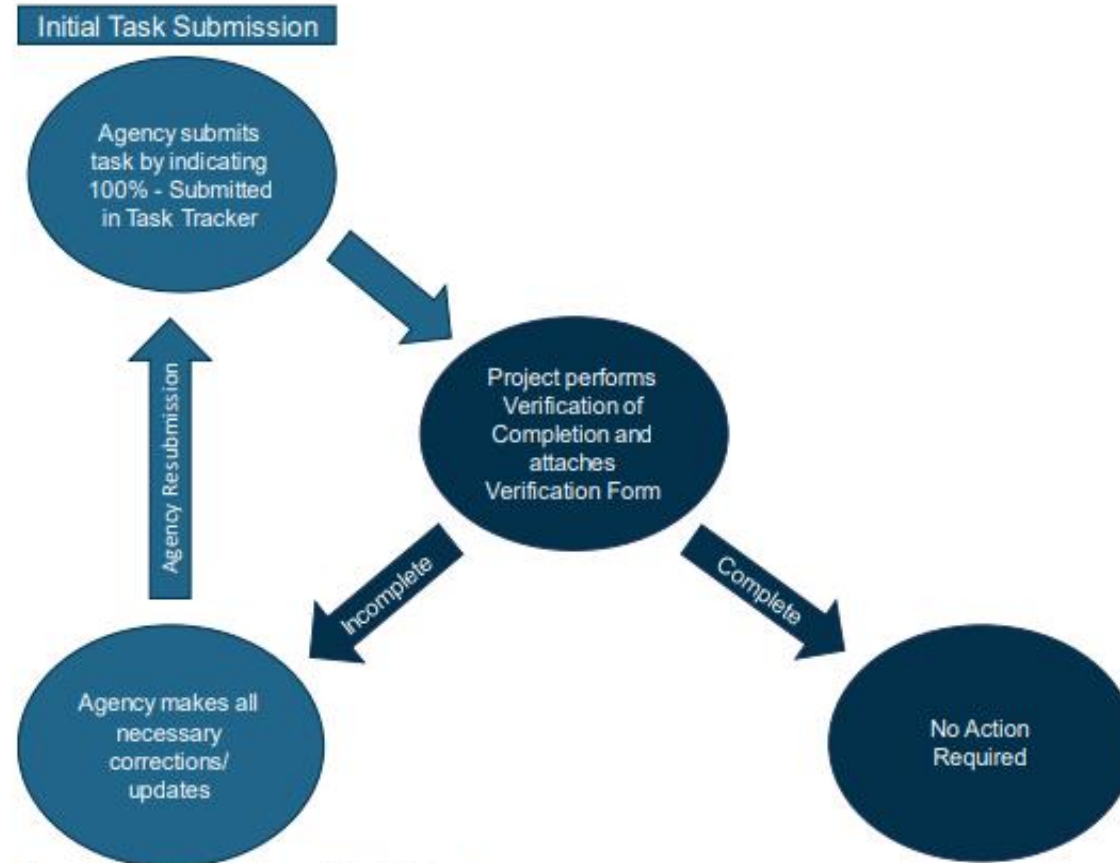


Figure 3: Task Submission and Verification Process

(79) DEMO Readiness Workplan Task Tracker - Smartsheet.com



APR

MAY

JUN

JUL

AUG

SEP

OCT

519: Remediate Agency Business Systems based on Segment I

541: Complete Configuration Workbooks for Segment IV

558: Update Agency Business System Documentation

524: Complete and Submit End User Readiness Survey Analysis

535: Update Workforce Readiness Plan

526: Complete Data Readiness Analysis and Data Cleansing Activities for Segment III

542: Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV

527: Identify Change Impacts and Update Agency Business Process Documentation for Segment III

543: Identify Change Impacts and Update Agency Business Process Documentation for Segment IV

528: Update Agency Business System Documentation for Segment III

544: Update Agency Business System Documentation for Segment IV

529: Update Florida PALM Conversion Inventory for Segment III

545: Update and Finalize Florida PALM Conversion Inventory for Segment IV

530: Update Florida PALM Interface Inventory for Segment III

546: Update Florida PALM Interface Inventory for Segment IV

531: Remediate Agency Business Systems based on Segment II

557: Update Florida PALM Interface Inventory for Data Warehouse

547: Remediate Agency Business Systems based on Segment III

561: Remediate Agency Business Systems based on Segment IV

534: Update CCN and Contacts

537: Update Authorized Smartsheet Users

540: Share Florida PALM Updates

549: Submit Training Survey

559: Share Florida PALM Updates

536: Create Agency Specific User Acceptance Testing Plan

540: Identify & Confirm File Managers

550: Confirm Receipt & Distribution of MFT Credentials

553: Prepare for Interface Testing

554: Participate in Connectivity Testing for Cycle 1 Interface Testing and Mock Conversion 1

555: Certify Data Readiness in Preparation for Mock Conversion 2

556: Certify Conversion Files in Preparation for Mock Conversion 2

560: Submit Change Analysis Tool



# Questions?



# CONTACT INFORMATION

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