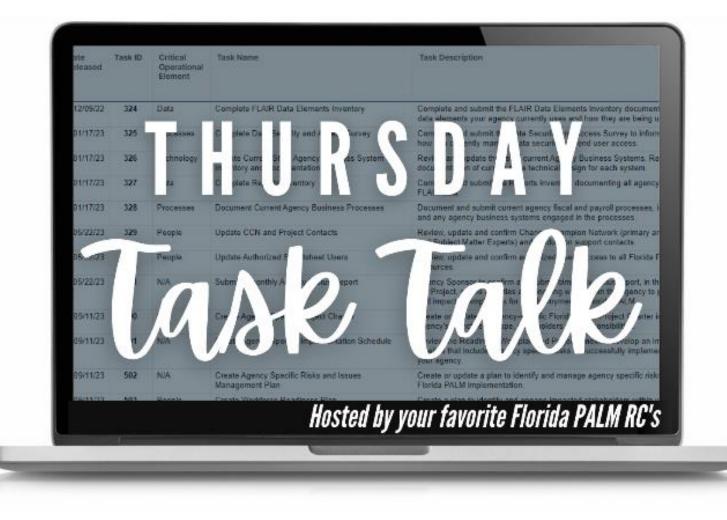
# Florida PALM

#### Planning, Accounting, and Ledger Management





#### MAY 30, 2024





## Agenda

Suppliers Conversion and Data Readiness
Newly Updated Training Page and resources
RW Task Questions





Task Talk 05/30/2024

#### **Suppliers Conversion**

- Conversion File APC001
- Supplier data will be primarily converted from the FLAIR SWVF
- A new Florida PALM Supplier ID will be generated for each record found on the with corresponding addresses, contact and Location files
  - A one-time crosswalk associating the source system supplier ID to the new Florida PALM Supplier ID will be provided
  - TIN and SSN will act as a key field that will be in both FLAIR and Florida PALM records, acting a bridge between the two systems





#### **Suppliers Data Readiness**

- Agencies should focus on evaluation and clean-up of confidential suppliers or those unique to the agency in the FLAIR SWVF
- Resources:
  - Statewide Vendor File Record Search <u>statewidevendorfilerecordsearch.pdf</u>
  - Statewide Vendor File Reference Guide <u>swvf-manual-2022.pdf</u>
  - Confidential Vendor Records: <u>confidentialvendorrecords.pdf</u>
    - Delete or update a record-Email VMS section at: <u>StatewideVendorFile@myfloridacfo.com</u>
- Additional guidance regarding the SWVF may be provided from A&A at a later time



Task Talk

#### **Guidance for Suppliers Conversion (Task 529)**

Data Type ▽ 台	Florida PALM Conversion(s)	Primary Source System(s) ∄	Conversion Needed	Agency Data Outside of Primary Source System(s)	Agency Maintained Data Source
Suppliers	APC001 - Suppliers Conversion	Statewide Vendor File / FRS / EFT File / PYRL / W9 / MFMP	Yes	No	





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#### **Guidance for Suppliers Data Readiness (Task 526)**

Data Type	Florida PALM	Primary Source	Data Readiness	Data	Current-State Data
	Conversion(s)	System(s)	Evaluation	Cleansing Plan	Readiness Status
♥ ₫   Suppliers	APC001 - Suppliers Conversion	Statewide Vendor File / FRS / EFT File / PYRL / W9 / MFMP	Cleansing Needed	Complete	Data Clean Up Complete and Being Monitored for Conversion

- Evaluate confidential suppliers or those unique to your agency
- Determine current state and cleanse data
- Data Cleansing Plan should include:
  - Approach to determining the continued need for data values
  - How to get confidential and agency unique suppliers to a clean state and maintained
  - Working A&A when additional guidance is provided (TBD)





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## **Newly Updated Training Page**

Home / User Support / End User Training

#### Financials & Payroll Waves Training

Future end users will engage a journey to learn Florida PALM. Starting now, future end users can engage learning tools to begin their understanding of Florida PALM. Agencies and the Project team will progress *together* to develop, deploy, measure end user training. Support and hyper care will be available after go-live for end users.



#### CMS Wave Training

PALM TECH training provides both focused learning programs as well as supplemental resources. Learning programs were developed for specific end users based on their role and are located in People First Learning Management System (LMS). These focused programs teach end users how to complete daily operations within Florida PALM. Access these programs under LMS Training. Supplemental resources were developed to support the learning programs as well as be quick reference aids while working within Florida PALM. These include videos, job aids, brief tutorials, and tips & tricks. The supplemental resources are grouped by category, below.

MANUALS









End User Training (myfloridacfo.com)



05/30/2024

Task Talk

PALM

TECH

Training, Enrichment, Communication, & Help

**HELPFUL LINKS** 

### **Questions?**







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# **CONTACT INFORMATION**

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