

# 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 Staffsheet 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 the Agency Sponsor. The report will include the Agency to Project Impact Report for the Agency Sponsor.
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 Webinars Readiness Plan	Create a plan to identify and assess impacted stakeholders within the agency that includes agency specific tasks to successfully implement your agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

MAY 30, 2024



# Agenda

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



# 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 - [statewidevendorfilerecordsearch.pdf](#)
  - Statewide Vendor File Reference Guide - [swvf-manual-2022.pdf](#)
  - Confidential Vendor Records: [confidentialvendorrecords.pdf](#)
    - Delete or update a record-Email VMS section at:  
[StatewideVendorFile@myfloridacfo.com](mailto:StatewideVendorFile@myfloridacfo.com)
- ▶ Additional guidance regarding the SWVF may be provided from A&A at a later time



# Guidance for Suppliers Conversion (Task 529)

Data Type	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	



# Guidance for Suppliers Data Readiness (Task 526)

Data Type	Florida PALM Conversion(s)	Primary Source System(s)	Data Readiness Evaluation	Data Cleansing Plan	Current-State Data 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)

# 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.

**PALM  
TECH**  
Training, Enrichment,  
Communication, & Help



## 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.



[End User Training \(myfloridacfo.com\)](https://myfloridacfo.com)





# Questions?



# CONTACT INFORMATION

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