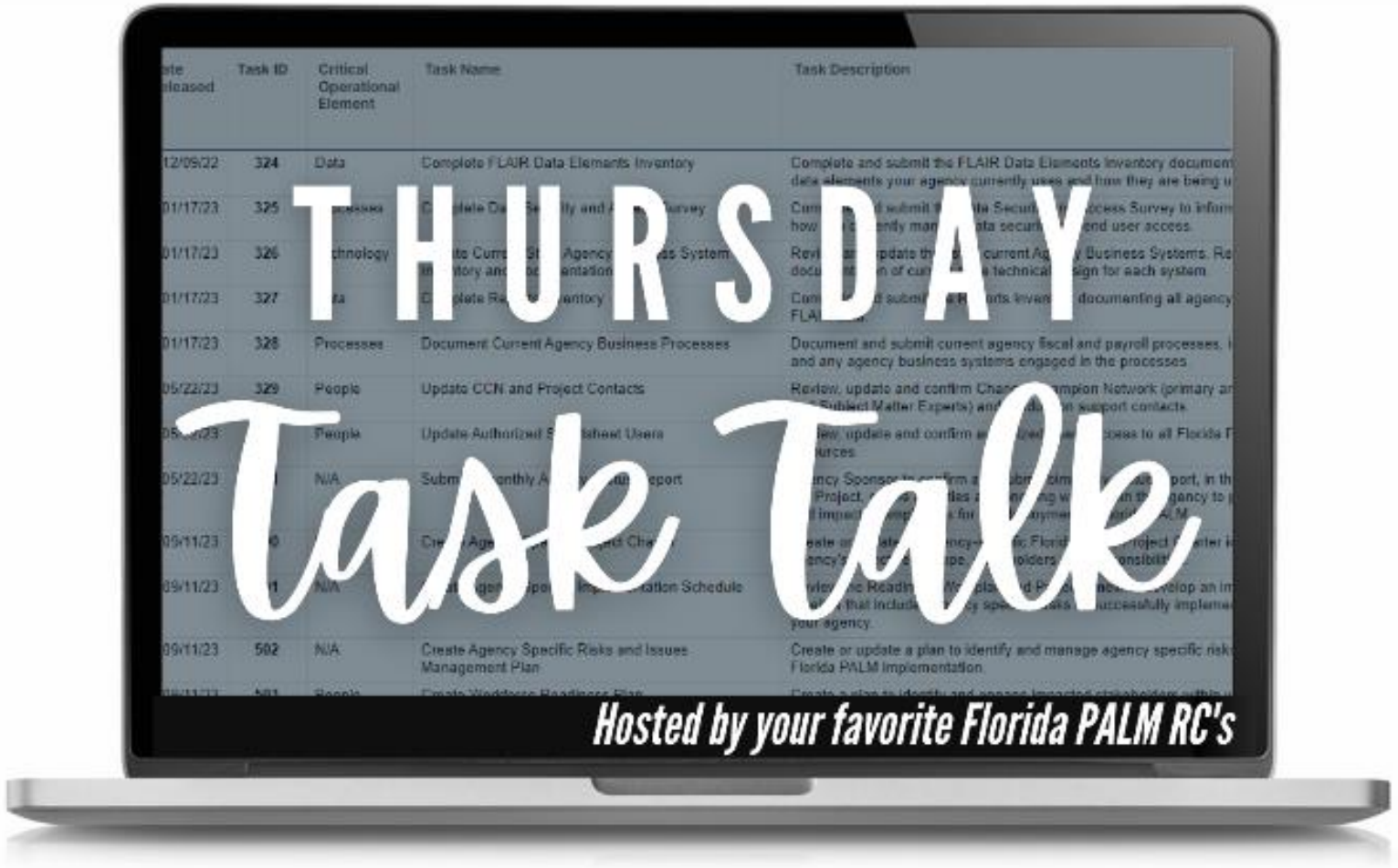
Florida PALM

Planning, Accounting, and Ledger Management

CHIEF FINANCIAL OFFICER
Jimmy Patronis
FLORIDA DEPARTMENT OF FINANCIAL SERVICES



DECEMBER 12, 2024

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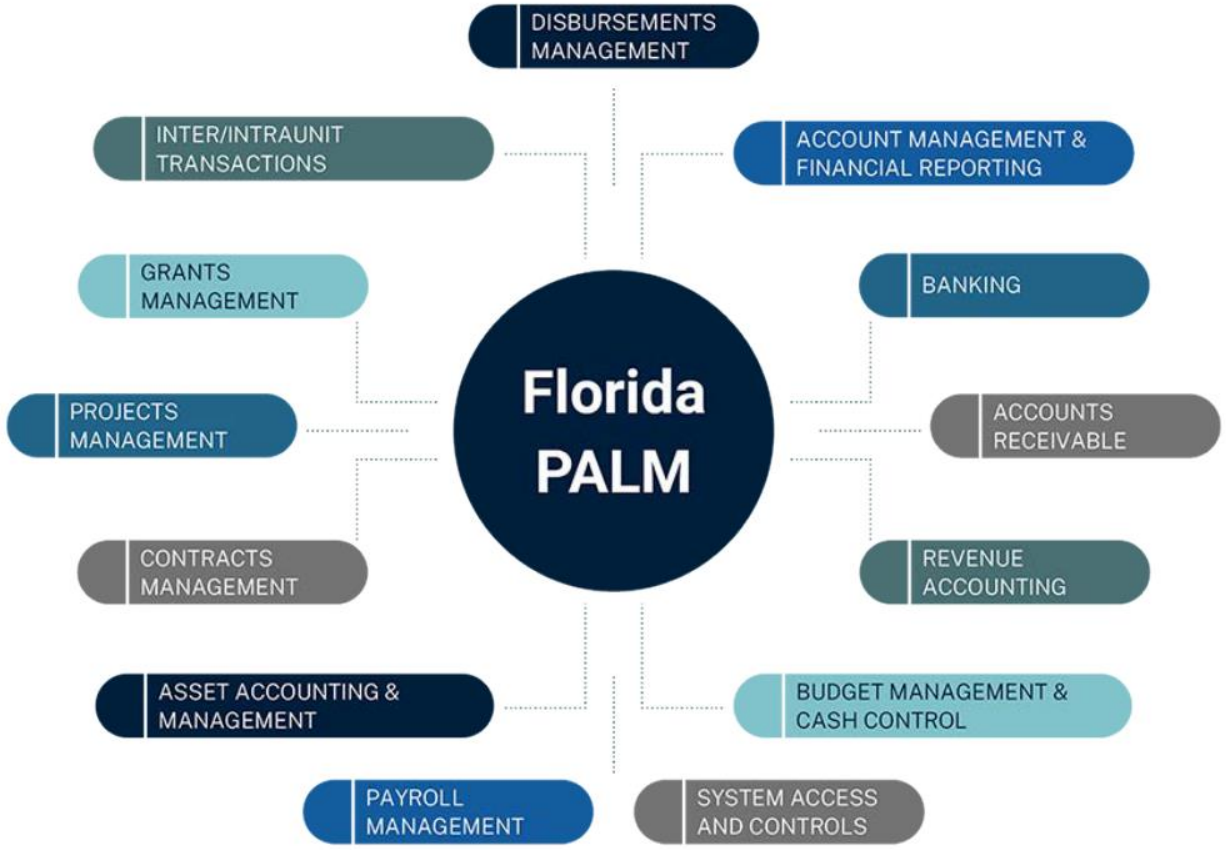
Agenda

- New Resources
  - Florida PALM Topics and Activities List
  - Agency Readiness Certification Criteria
- Task Spotlight
  - 560: Submit Change Analysis Tool
  - 564: Update Future Florida PALM End Users
  - 536-C: Create Agency Specific User Acceptance Testing Plan
  - 568: Create Training Plan for Agency Managed End User Training
- Reminders
- Questions

Readiness Workplan Task Resources

Business Process Groupings

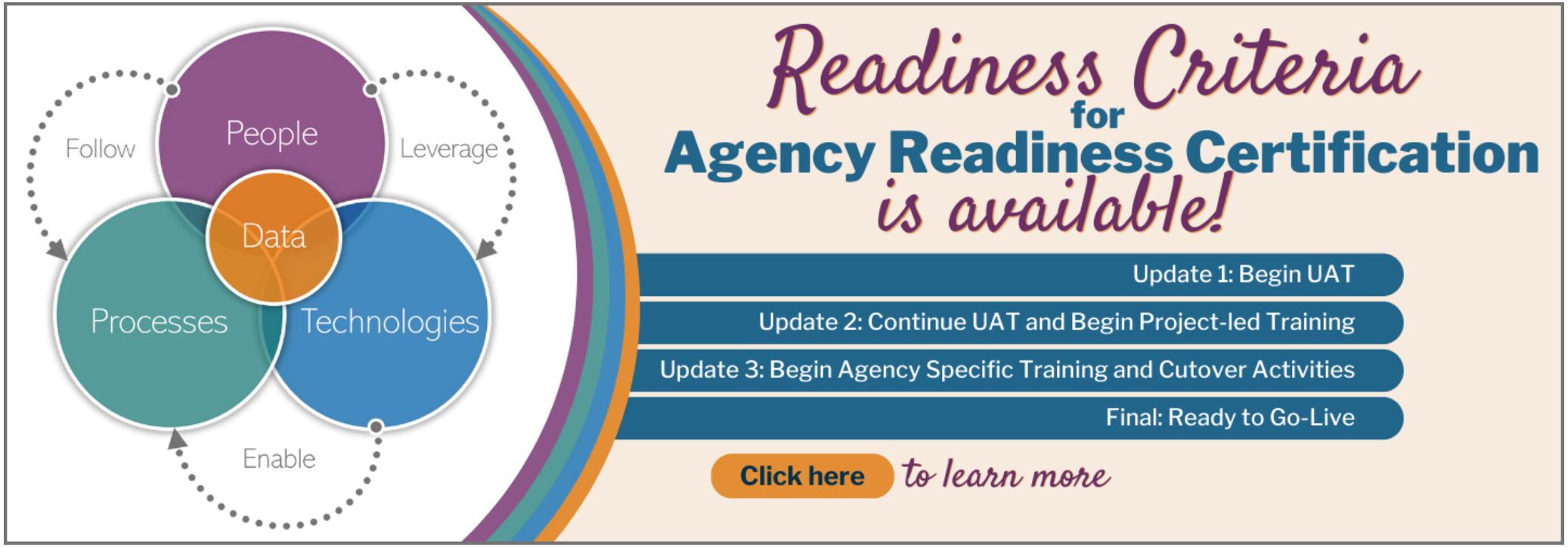


Topics and Activities

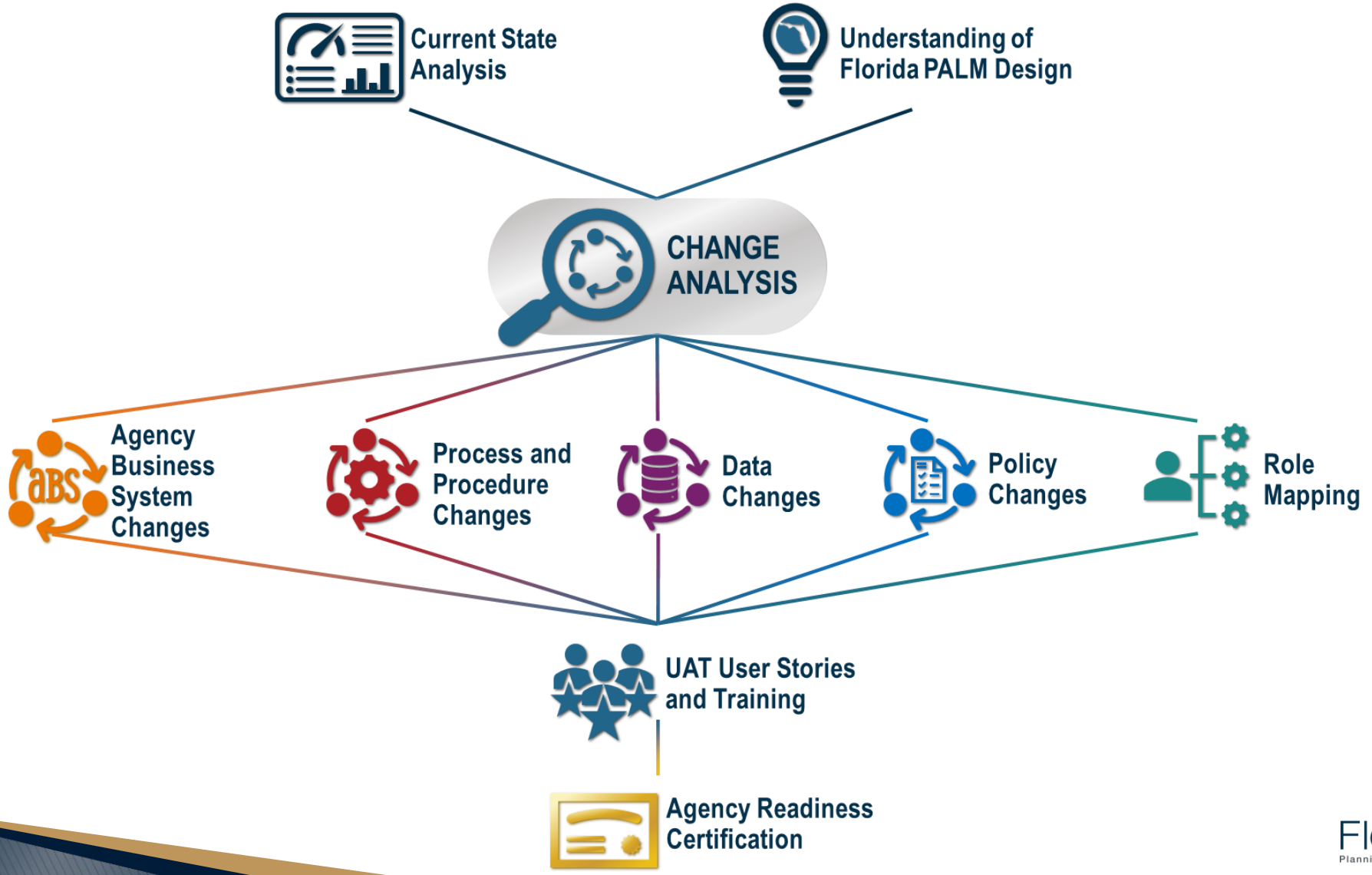
The Topics and Activities list, maintained by the Project within Smartsheet and linked below, serves as the foundation for understanding the functions to be performed in Florida PALM and will support preparation for User Acceptance Testing and Training. It is structured to provide greater details for business process groupings.

Agency Readiness Certification

- Agencies will begin providing updates to Agency Readiness Certification in March 2025 with final submission in November 2025



Path to Agency Readiness Certification



560: Submit Change Analysis Tool

Due January 31, 2025

Task Description:

The purpose of this task is to complete the Change Analysis Tool which will allow you to consolidate, review and update or confirm your identified change impacts.

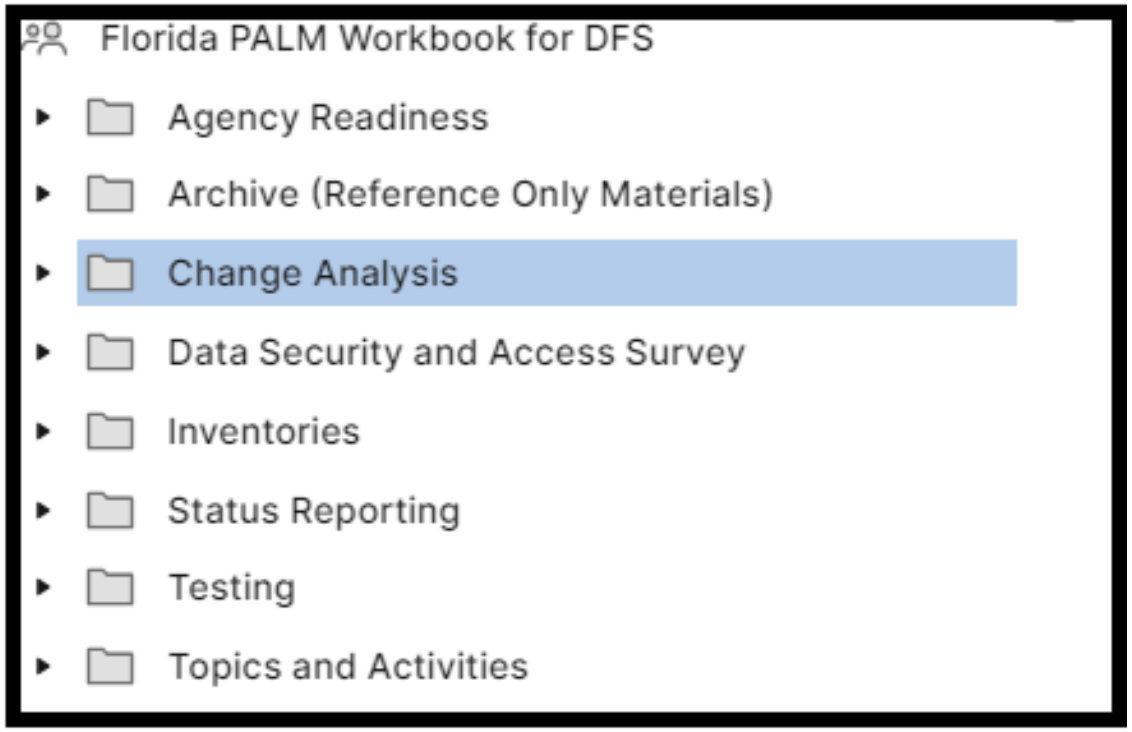
The Change Analysis Tool will also allow you to pull much of the work you have completed across multiple worksheets (e.g., Current State Business Process Inventory, FLAIR Data Elements Inventory, Florida PALM Interfaces Inventory) into one combined tool.

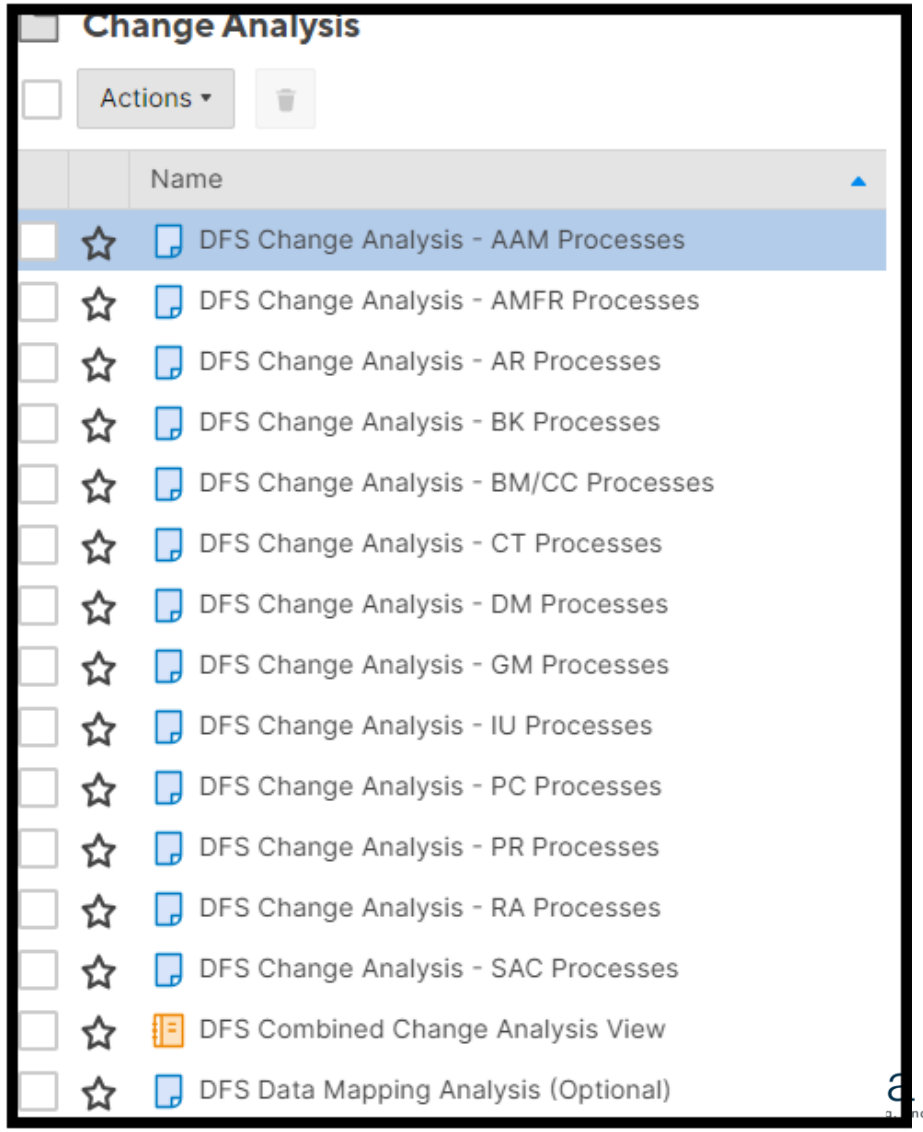
Task Elements:

- Review the Florida PALM Topics and Activities list
- Complete the Change Analysis Worksheet for each Business Process Grouping (BPG)
- Complete Data Mapping Analysis Worksheet (Optional)

560: Submit Change Analysis Tool

Due January 31, 2025



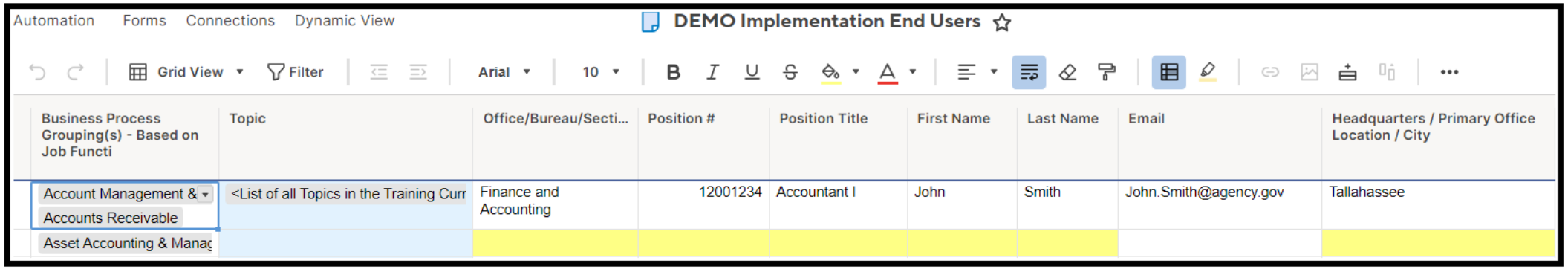


564: Update Future Florida PALM End Users

Due January 10, 2025

Task Elements:

- Review and update the Implementation End Users Worksheet
  - Select Business Process Groupings which access is needed for end user job function
  - Select Topics to support role mapping, testing and training activities
    - Florida PALM Topics & Activities list
  - Complete end user information and required fields



Business Process Grouping(s) - Based on Job Functi	Topic	Office/Bureau/Secti...	Position #	Position Title	First Name	Last Name	Email	Headquarters / Primary Office Location / City
Account Management & Accounts Receivable	<List of all Topics in the Training Curr	Finance and Accounting	12001234	Accountant I	John	Smith	John.Smith@agency.gov	Tallahassee
Asset Accounting & Manag								

536-C: Create Agency Specific User Acceptance Testing Plan **Due January 31, 2025**

UAT Planning Objectives:

536-A: Established testing objectives, key activities, and agency roles & responsibilities

536-B: Identified key components of test execution including test management

536-C: Confirm business processes to be tested and identify UAT success criteria

Subtask C Elements:

1. Review the updated UAT Approach
2. Continue developing your UAT Plan:
   a. Confirmation of Testing Scope
   b. Identification of Success Criteria
   c. Mitigation
3. Submit your unanswered UAT questions

568: Create Training Plan for Agency Managed End User Training **Due March 28, 2025**

Readiness Tasks
- RW 560 – Submit Change Analysis Tool
- RW 564 – Update Future Florida PALM Users
- RW 567 – Share, Review, and Update Configuration Workbooks
- RW 573 – Complete and Submit End User Role Mapping Worksheet

Topics and Activities List

Agency Knowledge
- Schedule
- Logistics
- Participant Management
- Content Delivery
- Assessment and Evaluation
- Feedback Collection

RW 568
Create **Training Plan** for Agency Managed End User Training

Elements to Include:
- Overview
- Roles and Responsibilities
- Training Planning and Execution

RW 604
Create Agency Specific Training

RW 625
Conduct Agency Specific Training

568: Create Training Plan for Agency Managed End User Training **Due March 28, 2025**

Task Elements:

- Review the Training Approach Document
- Review the Florida PALM Topics and Activities list
- Complete and submit Task 568 Create Agency Managed Training Plan

Training Plan (template):

- Overview
- Roles & Responsibilities
- Training Planning and Execution
  - Audience and Participants
  - Logistics
  - Curriculum and Materials
  - Timeline
  - Tracking and Measurement

Reminder: Upcoming Due Dates

December 13

- ✓547 – Remediate Agency Business Systems based on Segment III
- ✓557 – Confirm Interface Inventory for Cycle 2 Interface Testing
- ✓567-A-I Share, Review, and Update Configuration Workbooks

December 27

- ✓563 – Manage Agency-specific Implementation Schedule, Risks and Issues

Questions?

Contact us

FloridaPALM@myfloridacfo.com

Project Website

www.myfloridacfo.com/floridapalm/

Knowledge Center

https//:myfloridacfofloridapalm.us.document360.io

Knowledge Center

Chief Financial Officer Jimmy Patronis Florida Department of Financial Services

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