

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 document detailing data elements your agency currently uses and how they are being used.
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 State Agency Business Systems	Review and update the current Agency Business Systems. Re-documentation of current state 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 additional support contacts.
	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida resources.
	N/A	Submit Monthly Agency Status Report	Agency Sponsor to confirm and submit monthly status report, in the Project, and identify any issues arising within the agency to project impact responses for implementation of the PALM.
		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM Implementation.
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THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

MAY 8, 2025



Agenda

- Agency Training Workgroup – UAT Prerequisite Training
- Task Review
 - 599 – Submit Bimonthly Status Report
- Task Spotlight:
 - 578 – Confirm Identity Provider for Florida PALM
- Reminders





UAT Prerequisite Training

Agency Collaboration

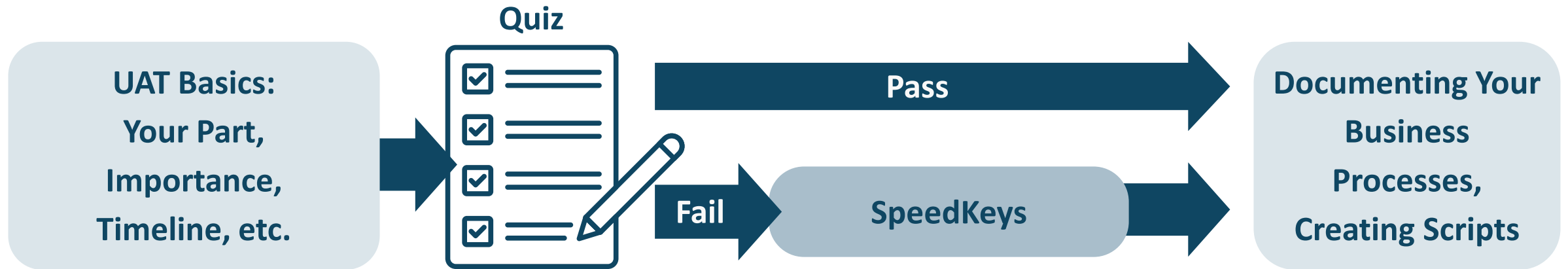


DFS Strategy for Prerequisite Training

- Using a preschool to kindergarten strategy.
- Focusing on training that builds end-user confidence about what they are supposed to do during UAT.
- Aligning content to user types (i.e., those who enter data into Florida PALM vs. those who only pull data.)
- Creating a progressive training plan with opt-out questions for users with core competencies.
- Delivering and tracking via the PeopleFirst LMS.



Training Overview



- Some trainings will be mandatory for all end-users.
 - *Reporting errors during UAT, getting access to the test environment.*
- Some trainings will be able to be bypassed by passing a short quiz.
 - *Excel basics, basic computer competency.*
- Some trainings will be only required for end-users in certain divisions.
 - *Governmental Accounting Basics.*

Collaborative Agencies

Department of Health

Department of Education

Department of Corrections

Department of Financial Services

Executive Office of the Governor

Justice Administrative Commission

Agency for Persons with Disabilities

Department of Children and Families

Department of Management Services

Office of the State Courts Administrator

Department of Environmental Protection

Department of Highway Safety and Motor Vehicles

Department of Business and Professional Regulation

Florida Legislature

Department of Revenue

Department of Commerce

Department of Elder Affairs

Fish and Wildlife Commission

Department of Transportation

Department of Veterans Affairs

Office of the Attorney General

Department of Juvenile Justice

with guidance from The Florida PALM Project



Core Tenets



1. The goal of this collaboration is to divide and conquer on common trainings to avoid duplication of efforts.
2. Each individual's efforts should be focused on trainings that are part of their agency's training plan.
3. Training should be developed in a way that can be shared across agencies.
4. Agencies can use deliverables in the manner that best suits their end-users.
5. All members will use their best effort to adhere to deadlines and ask for assistance if needed.
6. This collaboration is a work in progress, so this list is not meant to be exhaustive. We will add as we learn.



Content Development Process

Divide Content into Sections:

- **Subgroups** form, meet between large group meetings, and develop an outline and/or script for that section.
- Subgroups **share** that content in a group SharePoint in Microsoft Word.
- Other team members review and provide comments and feedback.
- After review/feedback, the large group will collaborate on expected final deliverable.

Ongoing Large Group Meetings:

- Review and discuss content, provide and share guidance, and help team members overcome obstacles.

Expected Deliverables:

- Subgroups will place outline/script in a Word document that other agencies can utilize.
- If appropriate, subgroups will record training and share recording.
- Agencies can use the recording or use the outline/script to create their own agency-specific training or utilize the training as is.

Training Buckets

UAT Purpose/Expectations

- What is UAT?
- Testing Timeline

Arm Yourself w/Knowledge

- Business Processes
- Reports Catalog

PALM Functional Bus. Proc.

- Module Interactions
- Data/Reporting

SpeedKeys

- Understanding and use of

Preparing for UAT

- Documenting business processes

System Access

- Login Information
- Who is your SAM?

Executing Test Cases

- Documentation
- Thinking critically

Reporting Results

- Defect Tracking
- Asking for help

Post UAT

- Continue to practice
- Update procedures

Excel Basics/Computers

- Sorting data
- Basic formulas

Budget Overview

- Budgetary vs Transactional

Articulate Experts

- Quizzes
- Navigation



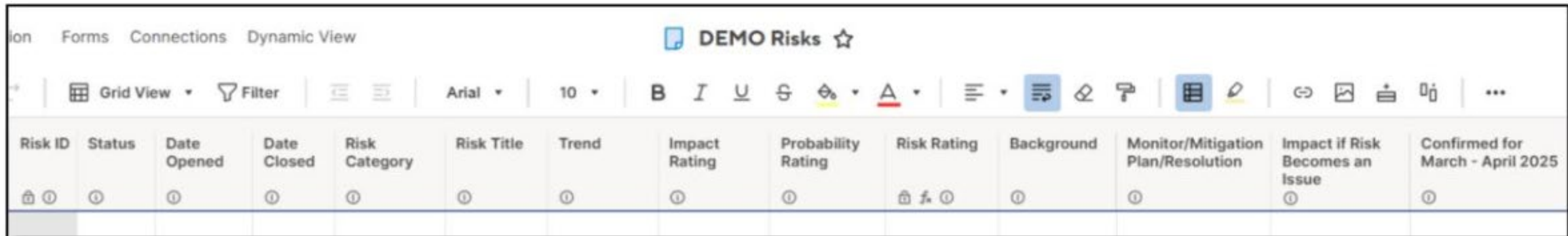
Let us know if you'd like to join
the group!

Questions?



Guidance for Bimonthly Agency Readiness Status Report Completion

- Risks, Issues, and Assumptions must be confirmed to appear on your dashboard and should be added before Sponsor confirmation of the Bimonthly Status Report
- Reporting period comments are required to be added each reporting period
- All fields are required with the exception of “Date Closed”, which is only required after the items is closed



The screenshot shows a software interface for managing risks. At the top, there are tabs for 'ion', 'Forms', 'Connections', and 'Dynamic View'. Below these is a header bar for 'DEMO Risks' with a star icon. A toolbar contains various icons for grid view, filter, text formatting (bold, italic, underline, link, unlink, text color, background color), and other actions. The main area is a table with the following columns: Risk ID, Status, Date Opened, Date Closed, Risk Category, Risk Title, Trend, Impact Rating, Probability Rating, Risk Rating, Background, Monitor/Mitigation Plan/Resolution, Impact if Risk Becomes an Issue, and Confirmed for March - April 2025. Each column has a small circular icon with a question mark below it, indicating required fields. The table is currently empty.

Risk ID	Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Impact Rating	Probability Rating	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Confirmed for March - April 2025
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578 – Confirm Identity Provider for Florida PALM

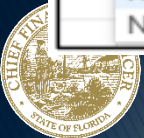
Due 5/23/2025

1. Confirm current IdP SMEs

Forms Connections Dynamic View DEMO Production Support Contacts ☆									
Grid View Unnamed Filter Arial 10 B I U ☒ ✎ A ☰ ☷ 🔍 📄 📁 📧 ⌵ ⌴									
Role	First Name	Last Name	Email	Contact Phone Number	Contact Phone Number (Secondary)	Resource Type	Company Name (Staff Aug Only)	Current as of May 2025	Comments
IDP SME - Primary	Nikki	Klein	NK Nikki Klein	850-410-1239		FTE		<input type="checkbox"/>	
IDP SME - Backup	Tachiana	Friend	TE Tatiana Eubanks	850-111-1111		Staff Aug	Testing	<input type="checkbox"/>	

2. Confirm IdP configurations needed for UAT

Forms Connections Dynamic View DEMO UAT IdP ☆					
Grid View Filter Arial 10 B I U ☒ ✎ A ☰ ☷ 🔍 📄 📁 📧 ⌵ ⌴					
	Action Required	Email Domain	Authentication Protocol	Identity Provider (IdP)	Comments
🔒	N/A - Current Production Configuration	@demo.fl.gov	SAML2	Azure	
	<div>None - No Additional IdP configurations are required</div> <div>New Configuration Needed</div>				

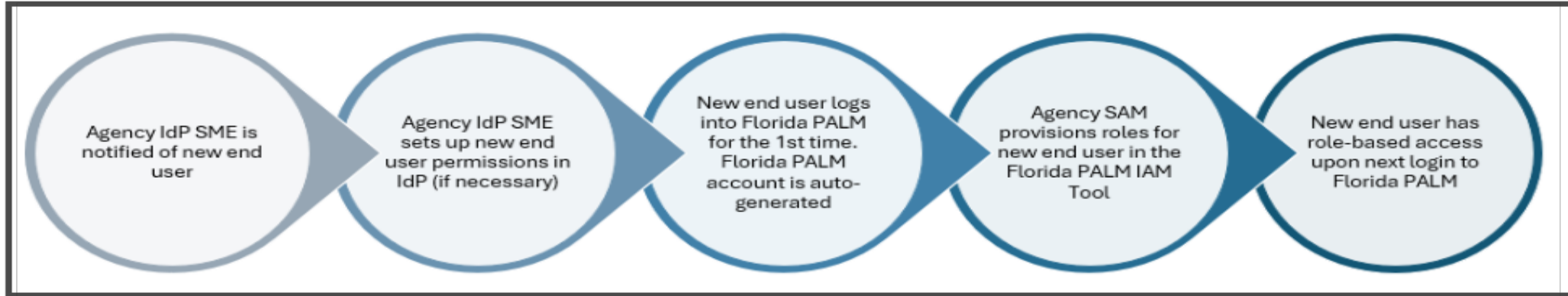


578 – Confirm Identity Provider for Florida PALM

Due 5/23/2025

Resource: Knowledge Center article on Identity Access Management (IAM)

Establishing End User Access



IAM Maintenance

Agencies retain full control over their agency's end users. The following account administrative functions are maintained and controlled through an agency's IdP:

- ✓ Account creation
- ✓ Account deactivation/deprovisioning
- ✓ Password management functionality
- ✓ Account lock and unlocking
- ✓ Any additional security mechanisms that are currently provided by your agency such as multifactor authentication
- ✓ Device/workstation management



RW Tasks for May

599	Submit Bimonthly Agency Readiness Status Report	Agency Sponsor to confirm and submit bimonthly status report, in the format provided by the Project, on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of Florida PALM.	05/01/25	05/12/25
578	Confirm Identity Provider for Florida PALM	Confirm intended identity provider(s) planned to store or contain the agency's users for Florida PALM.	05/05/25	05/23/25
571	Complete Data Cleansing Based on Mock Conversion 2	Review Mock Conversion 2 results and perform data cleansing activities to prepare data for Mock Conversion 3.	5/12/2025	6/20/2025
659	Update Conversion Field Mapping	Complete and submit mapping of FLAIR codes (ORG, OCA, Grant ID, and Location Code) to Florida PALM values for Mock Conversion 3.	5/19/2025	6/20/2025
657	Submit Updated Configuration Workbooks	Update Configuration Workbooks to prepare for Mock 3	05/19/25	06/20/25
573-A	Complete and Submit End User Role Mapping Worksheet for UAT	Complete and submit the End User Role Mapping Worksheet to assign end users to Florida PALM end user roles to SMEs for UAT.	05/19/25	06/20/25
574	Prepare Documentation for User Acceptance Testing	Create and prepare User Acceptance Testing user stories and materials.	06/02/25	08/08/25



Reminders: Upcoming Due Dates for Current Tasks

May 12

- ✓ 599 – Submit Bimonthly Status Report

May 23

- ✓ 578 – Confirm Identity Provider for Florida PALM

May 30

- ✓ 568 – Create Training Plan for Agency End User Training



QUESTIONS?



COWBOY & REMINGTON



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KNOWLEDGE CENTER

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