

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. Record the current state of each system's technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency 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 backup Subject Matter Experts) and additional support contacts.
	People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida PALM resources.
	N/A	Submit Monthly Agency Status Report	Agency Sponsor to confirm and submit monthly status report, in the format of the Project, to the agency's sponsor, ensuring the agency to provide impact reports for the project.
		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks and issues related to the project.
		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks and issues related to the project.
		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks and issues related to the project.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

JULY 17, 2025



Agenda

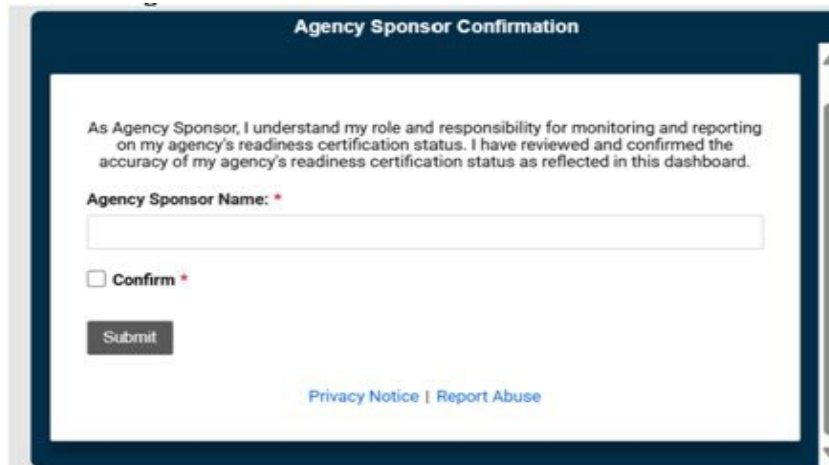
- Task Review:
 - 593 Readiness Certification #1
- Task Spotlight:
 - 573-B End User Role Mapping for Remaining End Users
- UAT Update
- Reminders



593 – Update Readiness Certification #1

Due 7/18/2025

- Must be reviewed and submitted by your Primary Agency Sponsor
- Report will be presented to ESC and published online
- Tips & Suggestions
 - ✓ Ensure your Comments are meaningful and appropriate for criteria
 - ✓ Mitigation plans are complete



Agency Sponsor Confirmation

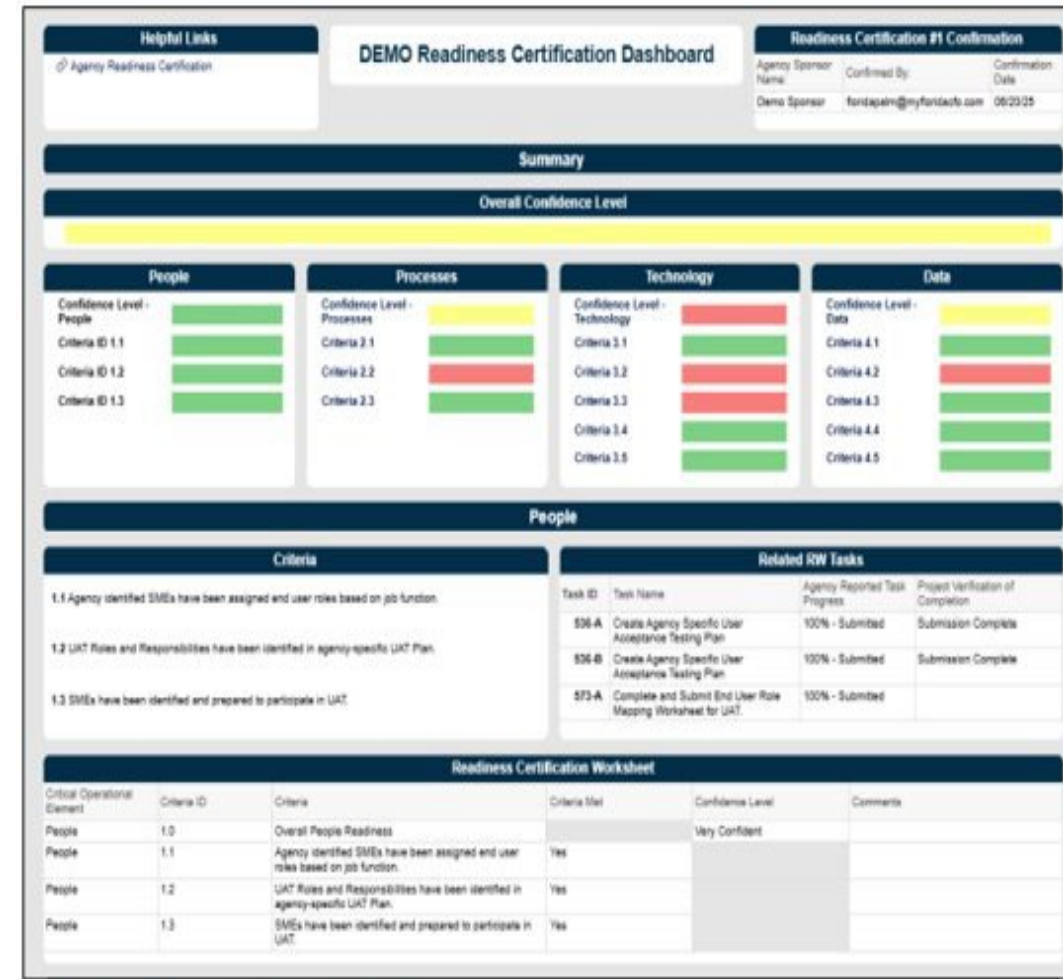
As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness certification status. I have reviewed and confirmed the accuracy of my agency's readiness certification status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

[Privacy Notice](#) | [Report Abuse](#)

Figure 3: Agency Sponsor Confirmation Submission Form located on the Dashboard



Helpful Links
Agency Readiness Certification

DEMO Readiness Certification Dashboard

Readiness Certification #1 Confirmation
Agency Sponsor Name: Demo Sponsor
Confirmed By: fontapalm@myfontapalm.com
Confirmation Date: 06/23/25

Summary

Overall Confidence Level

People

Confidence Level - People	Criteria ID	Confidence Level
Criteria ID 1.1		Very Confident
Criteria ID 1.2		Very Confident
Criteria ID 1.3		Very Confident

Processes

Confidence Level - Processes	Criteria ID	Confidence Level
Criteria 2.1		Very Confident
Criteria 2.2		Not Confident
Criteria 2.3		Very Confident

Technology

Confidence Level - Technology	Criteria ID	Confidence Level
Criteria 3.1		Very Confident
Criteria 3.2		Not Confident
Criteria 3.3		Not Confident
Criteria 3.4		Very Confident
Criteria 3.5		Very Confident

Data

Confidence Level - Data	Criteria ID	Confidence Level
Criteria 4.1		Very Confident
Criteria 4.2		Not Confident
Criteria 4.3		Very Confident
Criteria 4.4		Very Confident
Criteria 4.5		Very Confident

People

Criteria	Related RW Tasks																
1.1 Agency identified SMEs have been assigned and user roles based on job function.	<table border="1"><thead><tr><th>Task ID</th><th>Task Name</th><th>Agency Reported Task Progress</th><th>Project Verification of Completion</th></tr></thead><tbody><tr><td>536-A</td><td>Create Agency Specific User Acceptance Testing Plan</td><td>100% - Submitted</td><td>Submission Complete</td></tr><tr><td>536-B</td><td>Create Agency Specific User Acceptance Testing Plan</td><td>100% - Submitted</td><td>Submission Complete</td></tr><tr><td>573-A</td><td>Complete and Submit End User Role Mapping Worksheet for UAT.</td><td>100% - Submitted</td><td></td></tr></tbody></table>	Task ID	Task Name	Agency Reported Task Progress	Project Verification of Completion	536-A	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete	536-B	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete	573-A	Complete and Submit End User Role Mapping Worksheet for UAT.	100% - Submitted	
Task ID	Task Name	Agency Reported Task Progress	Project Verification of Completion														
536-A	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete														
536-B	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete														
573-A	Complete and Submit End User Role Mapping Worksheet for UAT.	100% - Submitted															
1.2 UAT Rules and Responsibilities have been identified in agency-specific UAT Plan.																	
1.3 SMEs have been identified and prepared to participate in UAT.																	

Readiness Certification Worksheet

Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
People	1.0	Overall People Readiness		Very Confident	
People	1.1	Agency identified SMEs have been assigned and user roles based on job function.	Yes		
People	1.2	UAT Rules and Responsibilities have been identified in agency-specific UAT Plan.	Yes		
People	1.3	SMEs have been identified and prepared to participate in UAT.	Yes		

Figure 1: Demo Readiness Certification Dashboard



573-B – End User Role Mapping for Remaining End Users

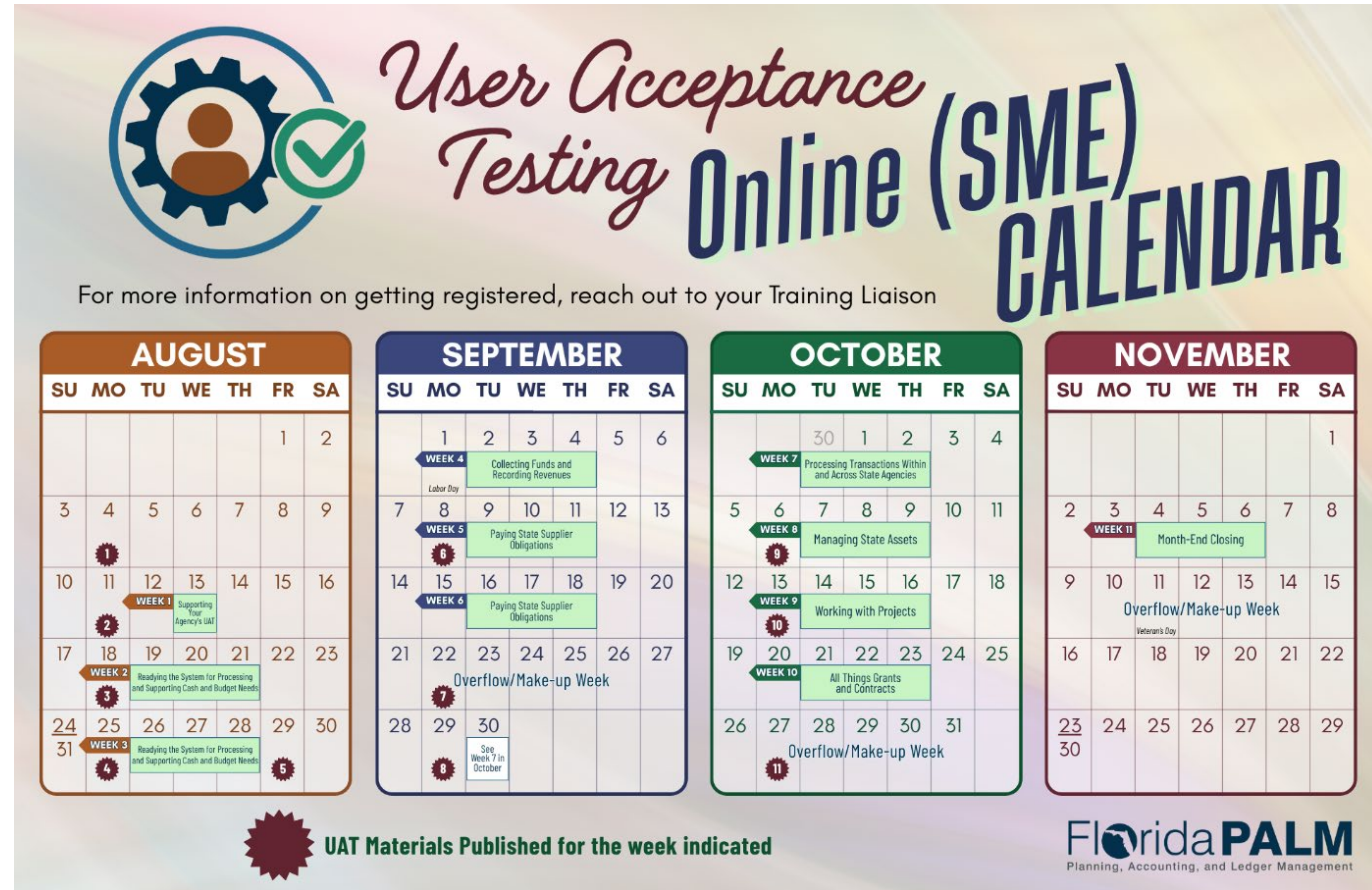
UAT **Due 10/3/2025**

- Task submission will be used to load all end users for UAT FULL
 - Roles loaded in UAT Online (SMEs) will not automatically get loaded for UAT FULL
 - Work with your Agency SAM to keep any role changes in UAT in sync with Role Mapping
 - SAMs will have access to the UAT Access Control Report
- What's new?
 - Consolidated Implementation End User Worksheet and Role Mapping Worksheet into one worksheet
 - UAT SME column is locked based on previous submission of 573-A
 - Recent end user role changes noted in the task instruction



UAT Online Calendar

- Registration coming soon
- UAT SMEs must complete prerequisite training prior to registering for a UAT session
- In-person sessions will be limited to 2 SMEs per agency, and they should attend same day
- In person requires SME to bring own device
- Online sessions planned for each week and will be open to all SMEs
- UAT session pre-materials planned to be provided a week in advance



Agency UAT Contacts

- UAT roles should have been identified as part of your Agency UAT Plan
- Review and update your UAT contacts in the <Agency> Testing Support worksheet to ensure your UAT contacts UAT related receive communications

Navigation: Agency Workspace > Agency Readiness > Agency Contacts

Forms Connections Dynamic View

DEMO Testing Support ☆

Grid ▾ Filter ▾ ≡ ≡ Arial ▾ 10 ▾ B I U ▾ ▾ ▾ ▾ ▾ ▾ ▾ ▾

Agency MFT Server Confirmation 	Role	First Name	Last Name	Email
Cloud-based/Vender hosted				
	File Manager - Primary	Johnny	Smith	
	UAT Coordinator - Primary			
	UAT Coordinator - Backup			
	Testing Error Triage Team ▾			



Reminders: Upcoming Task Due Dates

July 18

- ✓ 593 - Update Agency Readiness Certification #1

July 25

- ✓ 576 - Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing
- ✓ 616 – Share Florida PALM Updates

August 8

- ✓ 574 - Prepare Documentation for User Acceptance Testing



Questions?

BROUGHT TO YOU
BY:
MAXY & ZIGGY



CONTACT US

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

WWW.MYFLORIDACFO.COM/FLORIDAPALM/

KNOWLEDGE CENTER

[HTTPS//:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO](https://:MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO)

