

Florida **PALM**

Planning, Accounting, and Ledger Management



Due Date	Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	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.
01/17/23	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.
01/17/23	326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the technical design for each system.
01/17/23	327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
01/17/23	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.
05/22/23	329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
05/22/23		People	Update Authorized Spreadsheet Users	Review, update and confirm authorized spreadsheet access to all Florida FIRM resources.
05/22/23		N/A	Submit Monthly Agency Risk Report	Agency Sponsor to confirm a monthly risk report, in the format of the Project Risk Report, to the Agency to provide impact reports for the Agency's FIRM implementation.
09/11/23	500		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
09/11/23	501	People	Create Workforce Readiness Plan	Review the Readiness Plan and Project Schedule to develop an implementation plan that includes agency specific tasks to successfully implement your agency.
09/11/23	502	N/A	Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
09/11/23	503	People	Create Workforce Readiness Plan	Create a plan to identify and assess impacted stakeholders within your agency.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

AUGUST 14, 2025



Agenda

➤ Task Spotlight:

- 587-A, B, C – Complete Data Cleansing Based on Mock Conversion 3 (APC001 Suppliers, PCC001 Projects)
- 661 – Update Conversion Field Mapping
- 662 – Submit Updated Configuration Workbooks

➤ Task Reminders

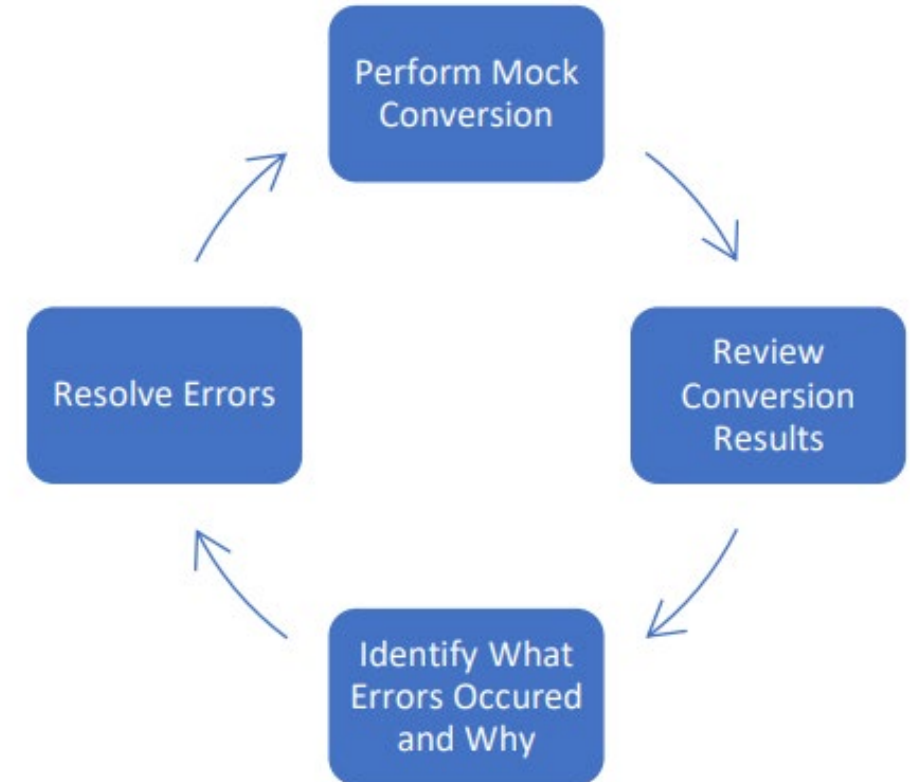


587-A – Data Cleansing Based on Mock Conversion 3

Due October 3

- Mock Conversion 3 results have been loaded into Secure File Share
- Supplemental guidance for all conversions have been updated
- The Mock Conversion worksheet in Smartsheet has been updated with your Mock 3 stats
- Complete data cleansing as needed and record progress in the Mock Conversion worksheet

TIP: Cleanse Grants, Contracts and Projects by August 30 – remove special characters from ID and Descriptions



587-B – Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers

Due August 29

Task Elements:

1. Review the APC001 Supplier Crosswalk
2. Confirm Confidential Suppliers
3. Review and update your Agency Supplier Record workbook.

Agency Supplier Record

- Agency Supplier Records are loaded through APC001
- Records were loaded for all agencies; worksheets have been updated to reflect what was loaded
- Previous worksheet submission is located in your archive folder

Confidential Supplier

Instances a supplier may need to remain confidential:

- Confidential informants
- Relationship between the agency and supplier is confidential

The following assumptions are considered when defining a confidential supplier:

- Agency supplier records will not be marked as confidential.
- A&A will approve all supplier records.
- The voucher's confidential indicator should be sufficient in most situations to protect confidential



587-C – Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects

**Midpoint Data Refresh Data: August 30, updating September 8
Due October 3**

- Required for all agencies participating in Projects conversion – PCC001
- Review Projects and provide updated information for Mock Conversion 4
- Mock 3 Conversion Load Status
 - Successful
 - Excluded
 - Errors
- For all Projects, indicate if they should be included in Mock Conversion 4
 - If yes, you must include Project Type, Start Date and End Date

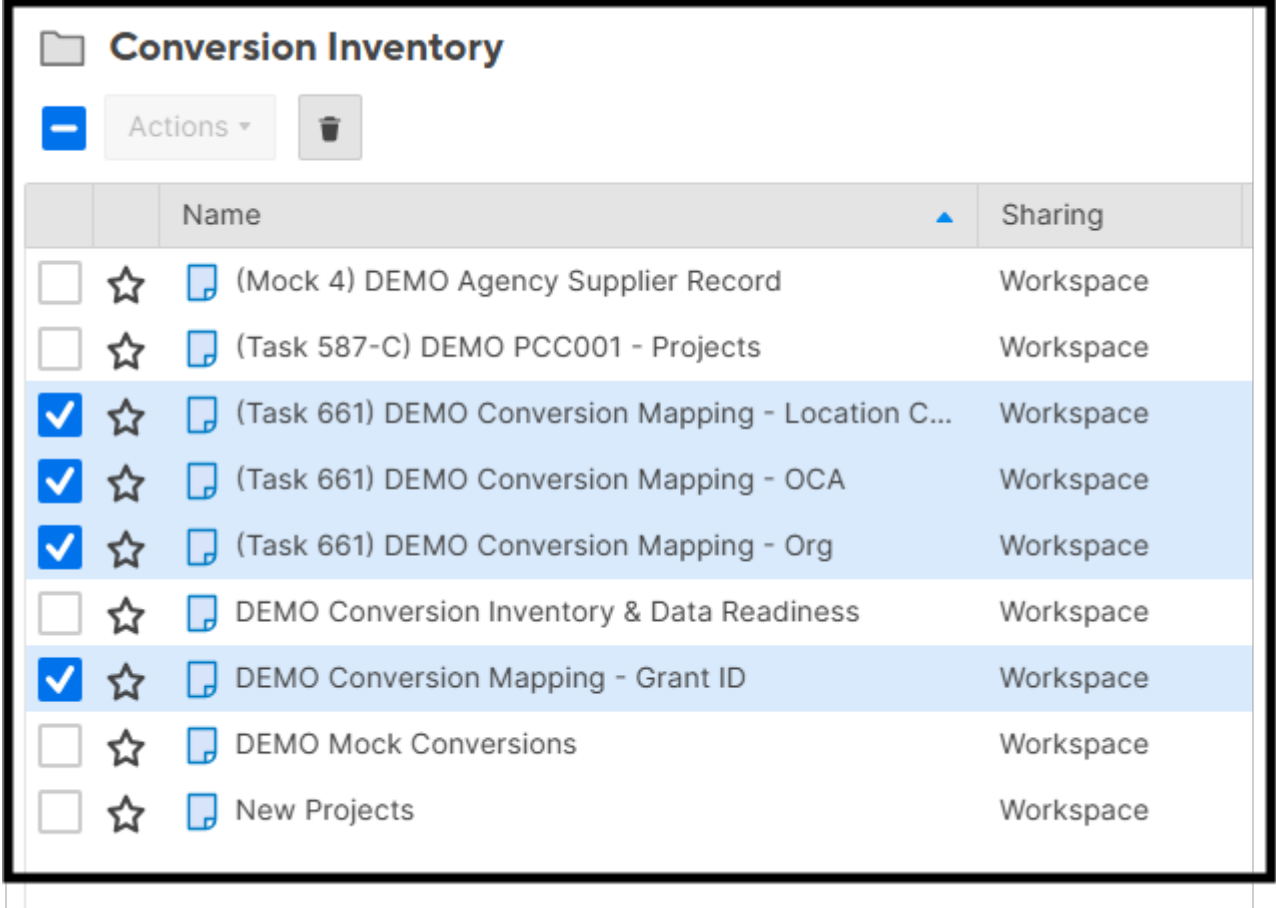
TIP: Complete this worksheet prior to Conversion Mapping and Speedkey worksheets



661 – Update Conversion Field Mapping

Midpoint Data Refresh Data: August 30, updating September 8
Due October 3

- Review and update workbooks for Mock Conversion 4



		Name	Sharing
<input type="checkbox"/>	☆	(Mock 4) DEMO Agency Supplier Record	Workspace
<input type="checkbox"/>	☆	(Task 587-C) DEMO PCC001 - Projects	Workspace
<input checked="" type="checkbox"/>	☆	(Task 661) DEMO Conversion Mapping - Location C...	Workspace
<input checked="" type="checkbox"/>	☆	(Task 661) DEMO Conversion Mapping - OCA	Workspace
<input checked="" type="checkbox"/>	☆	(Task 661) DEMO Conversion Mapping - Org	Workspace
<input type="checkbox"/>	☆	DEMO Conversion Inventory & Data Readiness	Workspace
<input checked="" type="checkbox"/>	☆	DEMO Conversion Mapping - Grant ID	Workspace
<input type="checkbox"/>	☆	DEMO Mock Conversions	Workspace
<input type="checkbox"/>	☆	New Projects	Workspace



662 – Submit Updated Configuration Workbooks

**Midpoint Data Refresh Data: August 30, updating September 8
Due October 3**

- Commitment Control (KK)
 - Allotments Budget Control Structure
- General Ledger (GL)
 - Organization
 - Budget Translation Tree Structure
 - Default Interest Apportionment
 - General Ledger
 - Allocation
 - Other Accumulator 1
 - Other Accumulator 2
- Project Costing (PC)
 - PC Source Type
 - PC Category
 - PC Subcategory

- All
 - Org Security Rule
 - SpeedKey
- Payroll (PR)
 - Default Funding
 - Position Funding
 - CJIP Funding
 - FFIP Funding
- Accounts Receivable (AR)
 - Distribution Code
- Cash Management (CM)
 - Consolidated Revolving Account
- Asset Management (AM)
 - Location
 - Area ID

***NEW Position Funding – OPS indicator column to ensure the correct category is being used for the position type**



Reminders – Upcoming Task Due Dates

August 29

- ✓ 574 – Prepare Documentation for User Acceptance Testing
- ✓ 660 – Submit Monthly Progress Report – Testing
- ✓ 587B – Complete Data Cleansing Based on Mock Conversion 3 – APC001

October 3

- ✓ 587A – Complete Data Cleansing Based on Mock Conversion 3
- ✓ 587C – Complete Data Cleansing Based on Mock Conversion 3 – PCC001
- ✓ 661 – Update Conversion Field Mapping
- ✓ 662 – Submit Updated Configuration Workbooks



Questions?

HAZE



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ANZAI



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