

Florida **PALM**

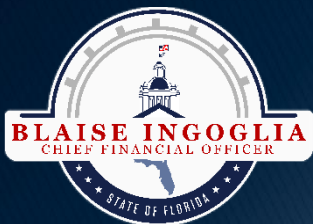
Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

JUNE 4, 2026



Agenda

- ▶ June Task Releases
 - 679 – Monthly Progress Report: Updates
 - 701 – Submit Configuration & Conversion Workbooks: Updates
 - 702 – Submit Role Mapping
- ▶ Critical Dates
- ▶ Readiness Certification #3
- ▶ Resource Updates:
 - Topic & Activity List Change Log
 - New Learning Materials Matrix
- ▶ Task Reminders
- ▶ Questions



679 – Monthly Progress Report: Updates

Due 6/30/2026

What's New?

- Removed UAT Session Participation and Training Plan Questionnaire widgets
- Showing cumulative (life to date) stats for Cycle 3 and User Story Testing

Inbound Cycle 3 Testing Progress - Cumulative

Total ABS Interface Connections = 1

- Interfaces Tested Multiple Times To Date = /

- Interfaces Tested Multiple Times Successfully To Date = /

Percent of Interfaces Tested Successfully To Date = %

Outbound Cycle 3 Testing Progress - Cumulative

Total ABS Interface Connections = 8

- Interfaces Tested Multiple Times To Date = /

- Interfaces Tested Multiple Times Successfully To Date = /

Percent of Interfaces Tested Successfully To Date = %

User Story Testing Progress - Cumulative

Applicable Activities =

- Applicable Project Recommended Activities = /

Applicable Activities Tested at Least Once To Date = /

- Applicable Project Recommended Activities Tested at Least Once To Date = /

Applicable Activities Tested Successfully To Date = /

- Applicable Project Recommended Activities Tested Successfully To Date = /

Percent of Applicable Project Recommended Activities Tested Successfully To Date = %

679 – Monthly Progress Report: Updates

Due 6/30/2026

What's New?

- Added widgets for Business Process Documentation Updates and Agency-Specific Training Inventory

Business Process Documentation Updates

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /
- Number of Topics Requiring Documentation Updates/Creation = /

Agency-Specific Training Inventory

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /
- Number of Topics Requiring Training Materials = /

701 – Submit Configuration & Conversion Workbooks

Due 6/17/2026

What's New?

- CRA workbooks have been moved from Secure File Share to Smartsheet

Data Refresh

- The Project will perform a data refresh of agency worksheets by Monday, June 8. This update will include any new FLAIR data as of **May 22, 2026**
 - Lookup worksheets including COA and Grant IDs
 - May have downstream impacts to other worksheets: conversion mappings, SpeedKey, and Payroll worksheets
 - Payroll worksheets (Position Funding, CJIP, FFIP) – COMPLETE
 - Any new positions require agency response
 - PCC001 – Projects
 - Any new project require agency response
 - Any removed projects may have downstream impacts: conversion mappings, SpeedKey, and Payroll worksheets
 - Conversion Mapping
 - New values require agency response



702 – Submit Role Mapping Worksheet

Due 6/26/2026

Requirements

- All end users must be role mapped
 - Ensure name and email addresses are entered correctly
- SOD Conflicts must be removed or granted an exception by A&A
 - SOD in exception status must have A&A form attached to Role Mapping
- Users with errors will not be loaded for UAT Refresh



Upcoming Critical Dates

June 17

- Config and Conversion Workbooks Close
- Data Cleansing Complete for DR2

June 26

- Role Mapping Close
- SOD conflicts must be resolved

June 30

- Report testing progress

July 10

- Readiness Certification 3



Readiness Activities

Criteria for Agency Readiness Certification #3

Continue UAT and Prepare for Training – Due July 10

People

Updated Training Plan

Identification of training materials to be developed

All end users are role mapped

SOD conflicts resolved

Plan to ensure all end users practice in UAT

Processes

Agency has successfully tested at least one user story for each applicable Project Recommended Standard Activity

Plan to complete testing of all processes after UAT refresh

Identification of all process documentation to be created or updated

Technology

All Cycle 3 interfaces have been successfully tested more than once

Agency has produced and tested all inbound files in UAT or has a plan to complete before the UAT refresh

Plan to complete interface testing after UAT refresh

Agency Business Systems are being remediated based on UAT findings

Data

Agency specific configurations are being tested and maintained in configuration workbooks

Agency configuration and conversion workbooks are complete and error free

Agency has cleansed data in FLAIR, FACTS and MFMP; ready for Dry Run 2

Updates: Topic & Activity List Change Log

What's New?

- A new tool to allow agencies to quickly identify changes to the Topic and Activities List
- A link to the *Changes to Florida PALM Topics and Activities* report view has been published to the Florida PALM Knowledge Center in the *Topics and Activities* article.

Key fields

- Summary of Action Taken: A brief description of the change, the reason for the change and additional details for items where Agency Action Required is "Yes".
- Nature of Change: The value (from a standard list) that indicates the type of change made.
- Agency Action Required: A "Yes" or "No" indicator. If "Yes" is selected, the row will highlight yellow, to give clear indication of some agency action needed.
- Action Options: An indicator of available or required agency actions (if needed), or the rationale for why no action is needed.



Updates: New Learning Materials Matrix

What's New?

- The Learning Materials Matrix (LMM), has been published to the User Acceptance Testing Materials page of the Knowledge Center.

Key users of the LMM

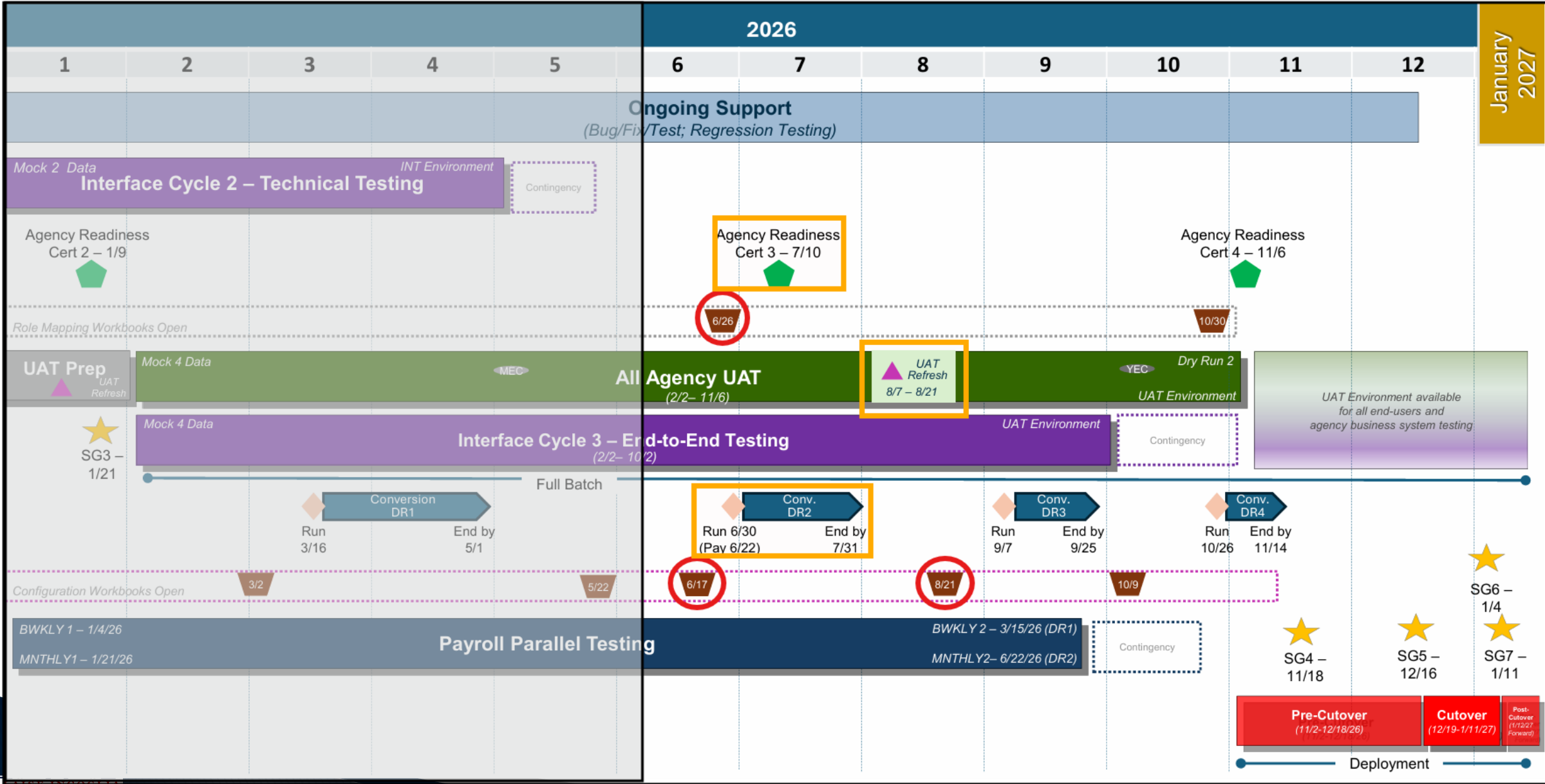
- Designed for agency CCNs that are managing the end user engagement and agency-specific materials development for their agency.
- For individual end users, the best source of consolidated learning information is their assigned role(s) Learning Path.

Elements of the LMM

- Agency and Agency Specific Roles, by Topic and Activity
- Process Step Status
- Learning Path Status
- Pending Actions

Learning Path	
This table shows the available learning materials for each of the Topics and Activities this End User Role will be assigned.	
Topic	Learning Material
All Agency UAT Participant Prerequisites	Please refer to the Learning Paths section of the UAT Prerequisites article to identify the training required for end users assigned a role in this Business Process Grouping.
Topic: Processing Vouchers	Future Topic Specific Web Based Training
Activity 1: Entering a Voucher Manually Activity 2: Using the Inbound Voucher Spreadsheet Upload Activity 3: Modifying a Voucher	Activity 1: Process Steps Demo: Creating a Regular Voucher Activity 2: Process Steps Demo: Process Vouchers via Spreadsheet Upload Activity 3: Process Steps
Topic: Interface Error Handling Process	Future Topic Specific Web Based Training
Activity: Reviewing and Resolving Spreadsheet Upload Errors	Process Steps





Task Reminders

Current Tasks Due Dates:

Friday, June 5

- ✓ 607 – Update Training Plan

Wednesday, June 17

- ✓ 698 – Complete Data Cleansing in Preparation for Dry Run 2
- ✓ 701 – Submit Configuration & Conversion Workbooks

Friday, June 26

- ✓ 702 – Submit Role Mapping

Tuesday, June 30

- ✓ 679 – Submit Monthly Progress Report – Testing, Training



Questions?

Working Together to
Transform Florida

SCAN ME

Florida **PALM**
Planning, Accounting, and Ledger Management



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