

FloridaP^{ALM}

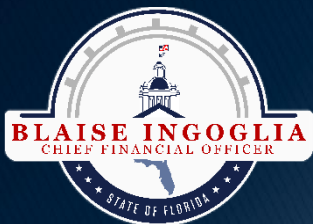
Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

JULY 16, 2026



FloridaPALM
Planning, Accounting, and Ledger Management

Agenda

- ▶ Task Spotlight:
 - 705 – Complete Data Cleansing in Preparation of Dry Run 3
- ▶ Updates/Reminders
 - 681 – Submit Monthly Progress Report – Testing, Training, Cutover
 - Payroll Configuration Workbook Refresh
 - Deployment Planning
 - UAT Engagement Plan
 - Agency UAT Statistics and Agency Readiness Certifications
- ▶ OCM Minute with Amy Topol, DFS
- ▶ Upcoming Task Due Dates
- ▶ Questions

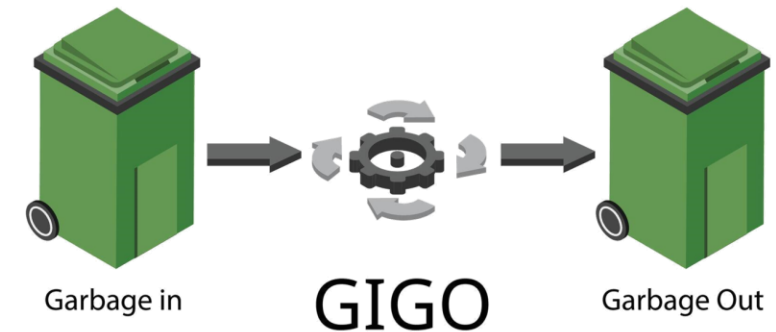


705 – Complete Data Cleansing in Preparation for Dry Run 3

Due September 4

- ▶ With less than 6 months to go-live, agencies must ensure data readiness for cutover.
- ▶ Ensure your agency has developed and employed processes to maintain data readiness.
- ▶ Dry Run 2 results will be shared as they become available.
 - CTC001 and GMC001 results and updated guidance has been shared so far.
 - Agencies will be notified as more become available.
- ▶ After reviewing your Dry Run 2 Conversion results in SFS, perform any necessary data cleansing and record progress in Smartsheet.

Avoid the GIGO Effect



Updates/Reminders

- ▶ July Monthly Progress Reports (Task 681)
 - Dashboard build is underway, we expect all updates to Dashboards to be completed today.
 - Requirements for this month:
 - Confirmation of Risks and Issues
 - Risk and Issue Logs have been moved to the Monthly Progress Report folder in Smartsheet.
 - Risks and Issues must be updated and confirmed each month moving forward.
 - Assumptions are no longer required. Assumptions log and the Bimonthly Status Report folder have been moved to Agency Archive workspace in Smartsheet.
 - Deployment Plan Questionnaire – provide an update on how your planning efforts are going.
 - Agency Supplier Testing – UAT Tickets must be submitted by **7/24** to be included for the Supplier Conversion in Dry Run 3.
- ▶ Payroll Configuration worksheets have been refreshed with new data this week. Review and resolve any new errors by July 31. (Task 703)



Updates/Reminders

- ▶ Deployment Planning Update in Knowledge Center
 - Updated this week to include information for Enterprise System Downtime.



To Subscribe!

Enterprise System Downtime

The below accordions provide key downtime planning dates for each of the impacted enterprise systems.

- FLAIR - Central
- FLAIR - Departmental
- FLAIR - PYRL
- FLAIR - Information Warehouse (IW)
- Legislative Appropriations System / Planning and Budgeting Subsystem (LAS/PBS)
- MyFloridaMarketPlace (MFMP)
- Statewide Travel Management System (STMS)
- Florida Accountability and Contract Tracking System (FACTS)
- PCard Works
- Florida Integrated Payee System (FLIPS)
- Florida PALM Cash Management System (CMS)
- People First (PF)

IN THIS ARTICLE

- Preparing for Deployment - Dry Runs
- Deployment - Pre-Cutover
- Deployment - Cutover
- Deployment - Post Cutover
- Deployment Activities Timetable - DRAFT
- Enterprise System Downtime

Updates/Reminders

▶ UAT Engagement Plan

- Template provided and available on the [Agency Readiness webpage](#)
- Leverages the UAT Plans you have already created and your testing progress provided in Monthly Progress Reports
- Due by July 31 from Agency Sponsor to EOG/OPB, Chair or the Senate Appropriations Committee, Chair of the House Budget Committee, and Florida PALM Project Director
- Plans will be published on the Florida PALM website and shared with the ESC

Readiness Workplan

324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting which FLAIR data elements your agency currently uses and how they are being used.	12/09/22	03/31/23
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform the Project about how you currently manage data security and end user access.	01/23/23	01/13/23
326	Technology	Update Current State Agency Business System Inventory and Documentation	Review and update the list of current Agency Business Systems. Review and design for each system.	03/13/23	11/27/23
327	Data	Complete Reports Inventory	Review and update the list of current Agency Business Systems. Review and design for each system.	04/03/23	07/28/23
328	People	Update COB and Project Contacts	Review, update and confirm Change Champion Network (primary and back-up liaisons and Subject Matter Experts) and production support contacts.	05/22/23	04/12/23
329	People	Update Authorized SmartSheet Users	Review, update and confirm authorized users' access to all Florida PALM SmartSheet.	06/12/23	06/23/23
330	Processes	Document Current Agency Business Processes	Document and submit current agency Social and payroll processes, including the people and any agency business systems engaged in the processes.	07/31/23	12/15/23
331	N/A	Submit Bimonthly Agency Status Report	Agency Sponsor to confirm and submit bimonthly status report in the format.	09/01/23	09/11/23

Current Tasks

681 - Submit Monthly Progress Report - Testing, Training, Cutover
1 July, 2026-31 July, 2026

703 - Maintain Configuration and Conversion Workbooks
1 July, 2026-31 July, 2026

704 - Maintain Role Mapping Worksheet
1 July, 2026-21 August, 2026

586 - Create Agency Deployment Plan and Cutover Checklist to Prepare for Go-Live
29 June, 2026-11 September, 2026

602 - Update Agency Business Process Documentation
4 May, 2026-30 October, 2026

604 - Create Agency-Specific Learning Materials to Support End Users
4 May, 2026-30 October, 2026

Archived Tasks

Fiscal Year 2026-2027
Fiscal Year 2025-2026
Fiscal Year 2024-2025
Fiscal Year 2023-2024
Fiscal Year 2022-2023
Fiscal Year 2021-2022

RW Task Resources

Common Documents

Conversion/Configuration Supplementals

Testing Documents

[UAT Engagement Plan Template](#)

This template is provided to support agency completion and submission of the required UAT Engagement Plan as set forth in Section 249 of the General Appropriations Act of 2026 by the July 31, 2026 deadline.

Updates/Reminders

- ▶ Website Update – UAT Statistics on the [Testing webpage](#)
 - New UAT Statistics section, which includes information about log ins, time spent in the system, and number of key transactions, such as vouchers, deposits, etc.
 - Will be updated monthly

All Agency User Acceptance Testing

February – October 2026

The Project hosted in-person sessions for all agencies from February – May 2026. Testing resources, including materials and recordings from the UAT sessions, can be found on the Knowledge Center's [User Acceptance Testing Materials](#) page.

Agencies should be testing all upstream and downstream processes, testing system integrations, maintaining configuration and role mapping workbooks (e.g., new COA values, mappings), and resolving data conversion errors from mock conversion and dry runs.

UAT Statistics

In the accordions below are files that provide graphs and statistics of agency UAT environment usage and transactional volumes during the All-Agency UAT period (February 2026 forward).

Overall

By Agency

Data Refresh August 7, 2026 – August 21, 2026

During the UAT refresh, the UAT environment will be unavailable. A PeopleTools upgrade will be applied, Dry Run 2 data will be applied, all agency transactions will be wiped, Separation of Duties (SOD) conflicts will be enforced, and agencies will need to confirm their FLAIR balances. Following the refresh, agencies are expected to again test their end-to-end processes.

November 2026 – Go Live

The UAT environment will be available to agencies for training, and end user and business system testing purposes. The Project team will begin focusing on cutover and conversion activities but will continue to support agency testing through Testing Customer Portal tickets.



Updates/Reminders

► Readiness Certification

- All certifications have been submitted and published to the website - [Agency Readiness Certification #3](#)

Readiness Certification Update #3

Agency Confidence Level & Readiness Criteria Status

The below information is based on Agency Sponsor responses to the Update Agency Readiness Certification #3 Readiness Workplan task.

These buttons link to Smartsheet reports showing a snapshot of the Confidence Levels and Readiness Criteria for all agencies using the colors assigned to those responses (red, yellow, green). Within the Technology report, if an agency marked "N/A" for a Readiness Criteria, it will appear grey.

OVERALL **PEOPLE** **PROCESSES** **TECHNOLOGY** **DATA**

These buttons link to Smartsheet reports showing the comments (if any) that were provided for each Confidence Level response.

Extract of Confidence Level Comments *Extract of Confidence Level Comments* *Extract of Confidence Level Comments* *Extract of Confidence Level Comments* *Extract of Confidence Level Comments*

OVERALL **PEOPLE** **PROCESSES** **TECHNOLOGY** **DATA**

These buttons link to Smartsheet reports showing any comments provided for the individual Readiness Criteria response to each Critical Operational Element.

Extract of Criteria Comments *Extract of Criteria Comments* *Extract of Criteria Comments* *Extract of Criteria Comments* *Extract of Criteria Comments*

PEOPLE **PROCESSES** **TECHNOLOGY** **DATA**

These buttons link to .pdf reports showing a breakdown of the "Met" or "Not Met" Readiness Criteria.

Criteria Met/Not Met *Criteria Met/Not Met* *Criteria Met/Not Met* *Criteria Met/Not Met* *Criteria Met/Not Met*

OVERALL **PEOPLE** **PROCESSES** **TECHNOLOGY** **DATA**

These buttons link to Smartsheet reports showing the mitigations described for the individual "Not Met" Readiness Criteria response to each Critical Operational Element.

Mitigations for Not Met *Mitigations for Not Met* *Mitigations for Not Met* *Mitigations for Not Met* *Mitigations for Not Met*

PEOPLE **PROCESSES** **TECHNOLOGY** **DATA**

<< Previous

Other Resources

- [All Agencies Certification Dashboards](#) - a .pdf document of all Agency Readiness Certification #3 Dashboards, which have been submitted to date
- [Understanding Your Dashboard](#) - a .pdf document that explains the components of the Agency Readiness Certification Dashboard
- [Readiness Certification Criteria](#) - a .pdf document that explains the readiness criteria by critical operational element and is also found on the [Agency Reporting](#) page

Confidence Overall & by Critical Operational Element

Agency	Overall Confidence Level	Confidence Level - People	Confidence Level - Processes	Confidence Level - Technology	Confidence Level - Data
AHCA					
APD					
CITRUS					
COM					
DACS					
DBPR					
DCF					
DEM					
DEP					
DFS					
DJJ					
DLA					
DMA					
DMS					
DOAH					
DOE					
DOEA					
DOH					
DOL					
DOR					
DOS					
DVA					
EOG					
FCOR					
FDC					
FDLE					
FDOT					
FGCC					
FLHSMV					
FSDB					
FWC					
JAC					
LEG					
PSC					
SCS					



ADKAR and the Kübler-Ross Change Curve

A

Awareness of the need for change.

D

Desire to participate in the change.

K

Knowledge on how to change.

A

Ability to implement required skills and behaviors.

R

Reinforcement to sustain the change.



ADKAR and the Kübler-Ross Change Curve

The Change Curve Model highlights five distinct emotional stages employees typically move through during change:





The 5 Stages of the Change Curve



Denial

Feeling
Disbelief

Symptom

This won't affect me.
It will never happen.



Anger

Feeling
Frustration/Fear

Symptom

Why is this
happening right now?



Bargaining

Feeling
Seeking exceptions

Symptom

What if we did it
this way instead?



Depression

Feeling
Overwhelm

Symptom

I can't do this.
Low performance.



Acceptance

Feeling
Adaptation

Symptom

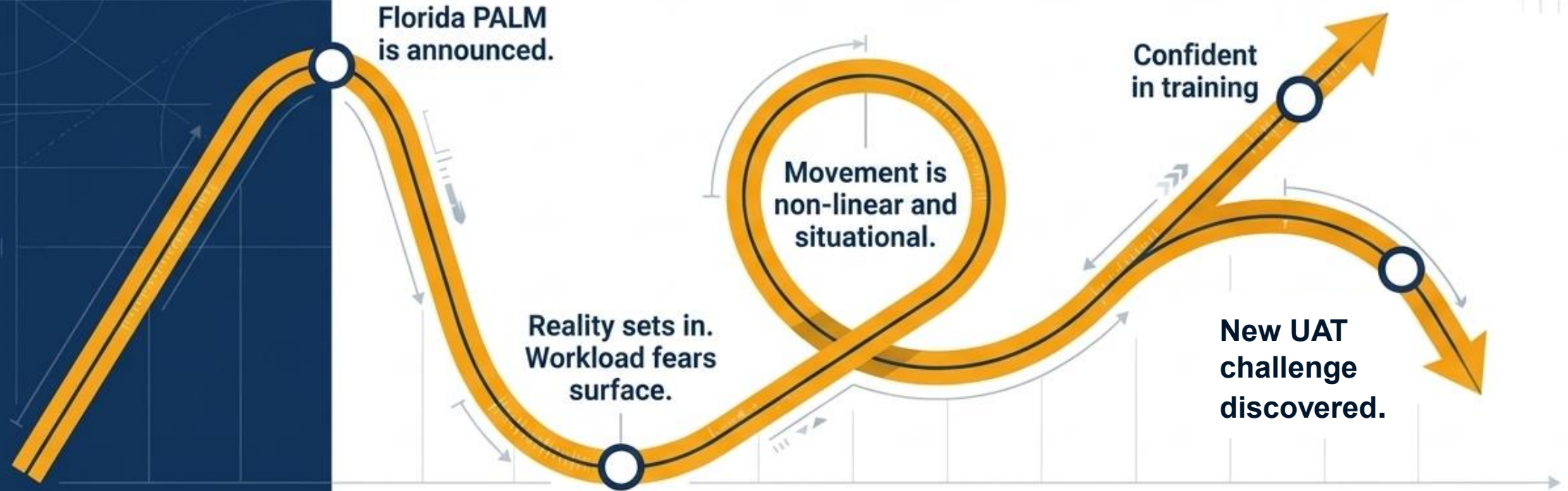
Let's figure this out.



Don't argue with emotions. Empathy + structure turns resistance into readiness.

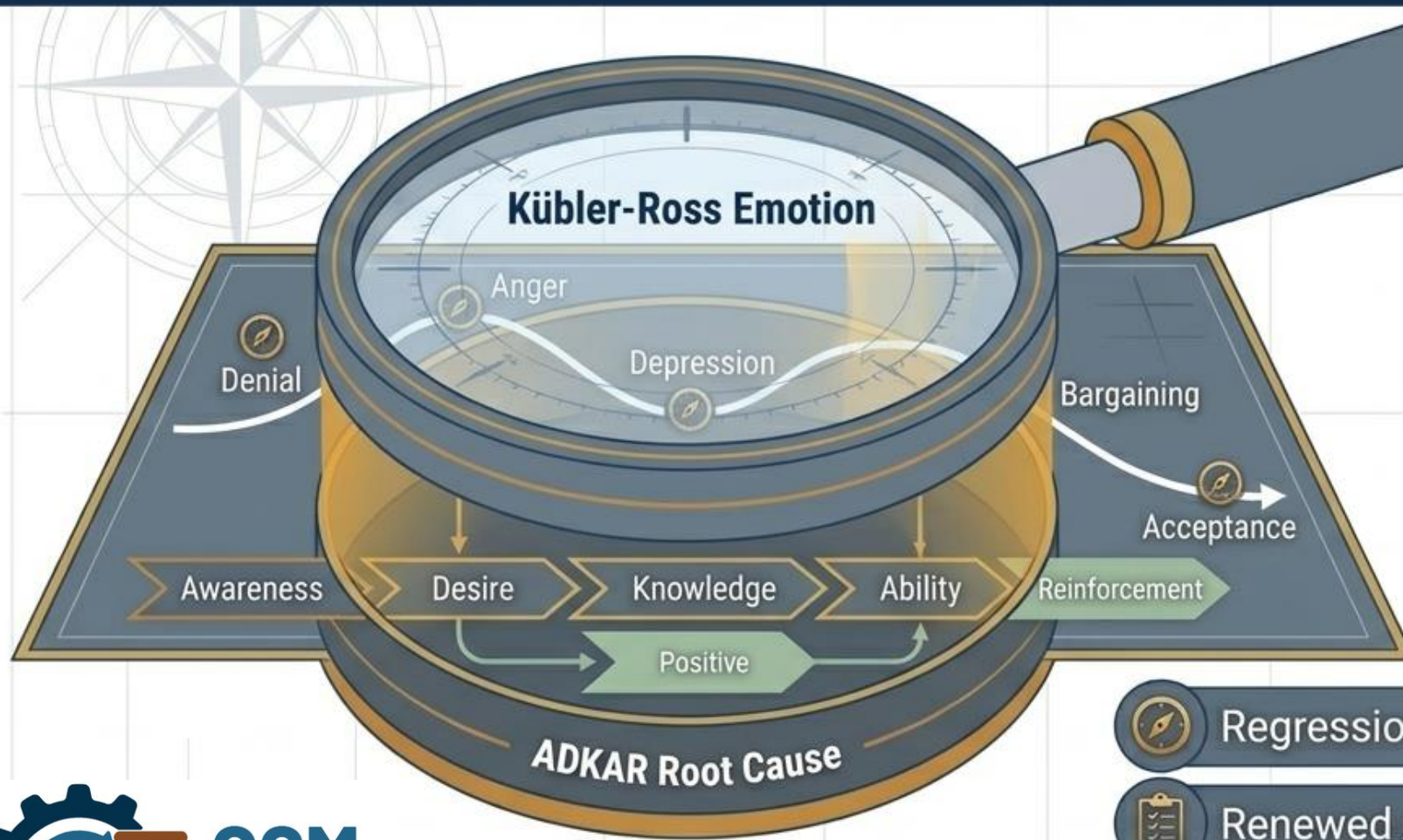


MOVEMENT THROUGH THE CHANGE CURVE IS CYCLICAL AND SITUATIONAL



When people move backwards on the change curve, they're not failing—they're processing. Progress in one dimension does not guarantee emotional stability in another.

Look for the emotional stage → Apply ADKAR support.



Instead of asking "why are they stuck?" ask "what stage are they in right now and what do they need?"

When someone appears to slide backward, it signals an unmet ADKAR element.





ALIGNING THE CHANGE CURVE WITH ADKAR

Quote	Kübler-Ross Stage	ADKAR Gap	Leadership Action
"This isn't necessary. It will never happen."	Denial	Awareness	Use targeted communication and visible sponsorship to explain the "why".
"I'm frustrated and unsure."	Anger	Desire	Use coaching to help individuals commit and identify WIIFM.
"What does this mean for me?"	Bargaining	Knowledge	Use training and Knowledge Center resources to clarify next steps.
"I can't do this."	Depression	Ability	Use support, UAT practice, and coaching to rebuild confidence.
"I'm adjusting – but will it stick?"	Acceptance	Reinforcement	Use feedback and recognition to lock in new behaviors.



More Resources

AGENCY EXCHANGE
LIBRARY

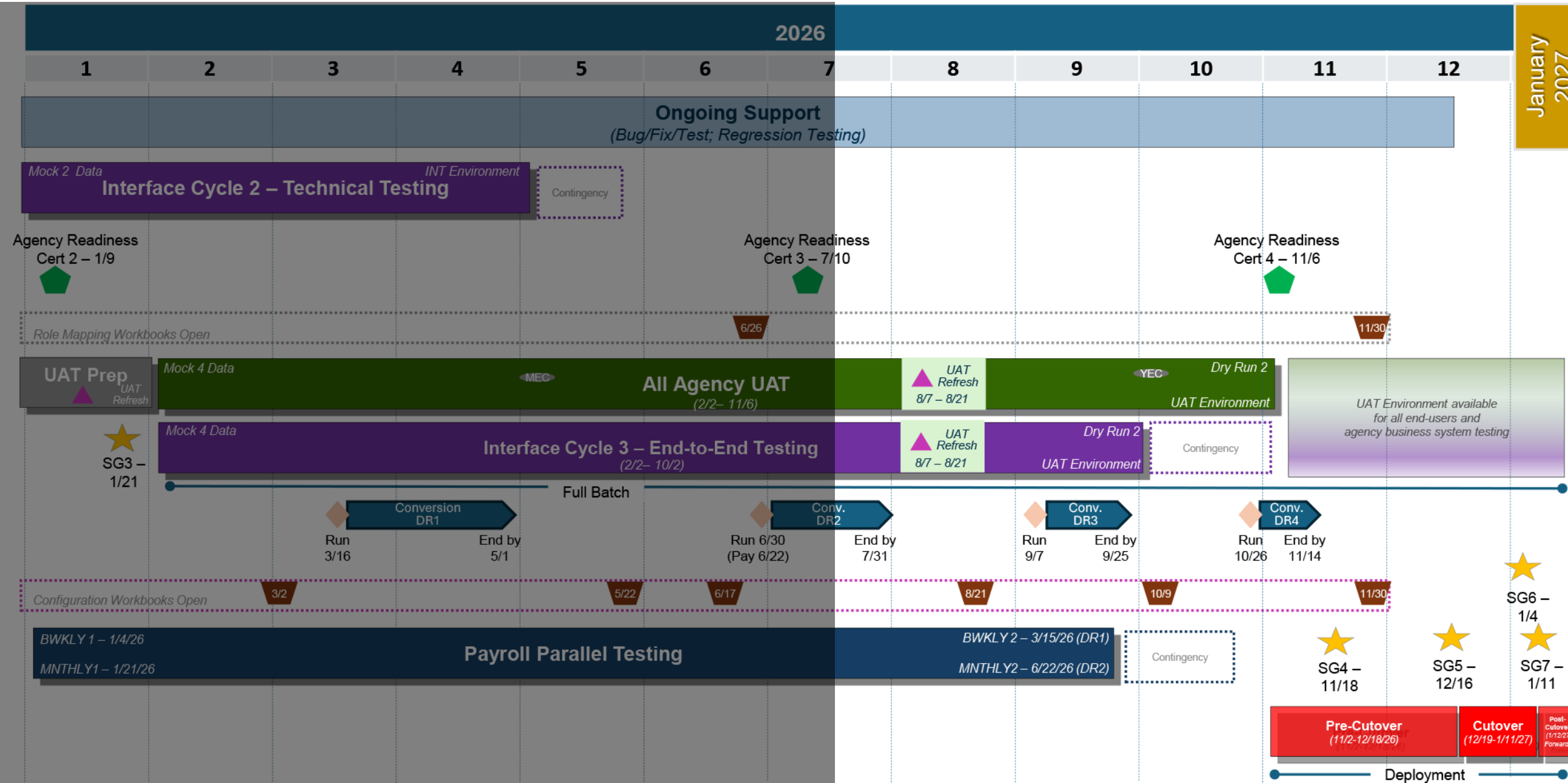


PALMcast

CCN CONTACTS

Testing Timeline

As of June 23, 2026



Task Reminders

Upcoming Due Dates:

Friday, July 31

- ✓ 681 – Submit Monthly Progress Report - Testing, Training, Cutover
- ✓ 703 – Maintain Configuration and Conversion Workbooks
- ✓ UAT Engagement Plans

Friday, August 21

- ✓ 704 – Maintain Role Mapping Worksheet

Friday, September 4

- ✓ 705 – Complete Data Cleansing in Preparation for Dry Run 3

Friday, September 11

- ✓ 586 – Create Agency Deployment Plan and Cutover Checklist to Prepare for Go-Live



Task Reminders

**October Due Dates:
Don't wait!**

Friday, October 30

- ✓ 602 – Update Agency Business Process Documentation
- ✓ 604 – Create Agency-Specific Learning Materials to Support End Users

Current State Business Process Documentation

Task 328



Identify Change Impacts and Update Agency Business Process Documentation for Segments

Task 515

Task 527

Task 543



Change Analysis Tool

Task 560



Questions?



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