

FloridaP^{ALM}

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

OCTOBER 15, 2026



Agenda

- ▶ Task Spotlight:
 - ▶ 712 – Complete Data Cleansing in Preparation for Go-Live
 - ▶ 714 – Submit Configuration and Conversion Workbooks
- ▶ Spill The Training Tea!
- ▶ Upcoming Due Dates and Reminders
- ▶ Questions



Task 712 – Complete Data Cleansing in Preparation for Go-Live **Due – 12/23***

Final Task to cleanse FLAIR, FACTS, and MFMP data before go-live

- ▶ Critical that your agency maintains cleansed data in legacy systems until cutover.
- ▶ Dry Run 4 results will be released as they become available.
- ▶ Supplementals will be updated when each conversion results are released
- ▶ Do not wait to act! – Some data types have earlier cut off dates

Data Type	Due Date	Impact
Agency Supplier Record	11/6/2026	This is the final date to request any updates or changes to an Agency Supplier Record. Requests must be submitted via UAT ticket. <i>Any changes identified after this date will need to be addressed after go-live.</i>
Projects	11/13/2026	Projects must be entered in FLAIR by this date to be included in the final refresh of an agency's PCC001- Project workbook, which is used for the PCC001 Projects Conversion. <i>Projects created after this date will not be included in an agency's workbook and will not be included in final conversion at cutover.</i>
Grants	11/13/2026	Grants must be in FLAIR by this date to be included as a valid ChartField in an agency's Configuration Lookup Values in Smartsheet, making the Grant ID available to be used in SpeedKeys and mapping worksheets.
Grants, Contracts and Suppliers	12/4/2026	Final date for additions or updates to Grants, Contracts, and Suppliers in FLAIR to be included in conversion for go-live. <i>A freeze will be implemented for these data types; no new grants, contracts or suppliers can be added beyond this date.</i>

Task 714 – Submit Configuration and Conversion Workbooks

Due – 11/30 6:00pm

- ▶ **Final** submission of workbooks for cutover.
- ▶ Any items in error will not be loaded and will need to be addressed by agency after go-live.
- ▶ Workbooks will be refreshed with new data – be prepared to respond!
 - Refresh data is a direct correlation to what your agency has done in FLAIR. Agencies will receive only new, changed, or removed records that need to be addressed when agency action is taken in FLAIR or People First. Largest impact is Position Funding and Conversion Mapping worksheets.

Date	Description
11/13/2026	Project completes final data pull from FLAIR and People First for updated values for agency confirmation workbooks.
11/20/2026	Project provides refreshed workbooks based on the final data pull.
11/30/2026	Agencies must have responded to refreshed data and cleared any error messages.



It's Training Time!

- Tomorrow – Payroll WBT release
- Monday's – Weekly DW/BI Support Sessions have started
- Tuesday's – ***Learning Matters*** - Weekly Training Topics Working Sessions have started
- Next Week – *Building Reports & Queries* in-person sessions

Are you ready?

Preparing for Training

Planned in-person sessions

- ▶ Intended to supplement WBT, so participants will be required to complete all online WBT before attending
- ▶ Will have a cap per agency, so registration is through UAT Coordinators / Liaisons
- ▶ Will be recorded and made available for re-listening
- ▶ Each session will be a single day event



Session Topic	Dates
Building Reports & Queries	10/19 – 10/23
Inter/IntraUnit Lifecycle	11/3 – 11/5
Deposit Lifecycle	11/9 & 11/10
FCO Project Lifecycle	11/12 & 11/13
Voucher Lifecycle	11/16 – 11/18
Payroll Lifecycle	11/30 – 12/3



Indicates that registration is now open!

Training Completion and Reporting

Subject Area	# of Completions
Setting Up and Maintaining Suppliers FLPALM_DM_SUAMS	25
Creating and Maintaining Encumbrances FLPALM_DM_CME	35
Entering and Processing Vouchers FLPALM_DM_EPV	47
Recording and Managing Manual Payments FLPALM_DM_RAMMP	2
Managing Payment Cancellations FLPALM_DM_MP	52
Managing AP/PO Transactions FLPALM_DM_MAPT	46
Processing IU Transactions FLPALM_DM_PIT	34
Managing IU Transactions FLPALM_DM_MIT	39

As of 10/13

What we know about training completion:

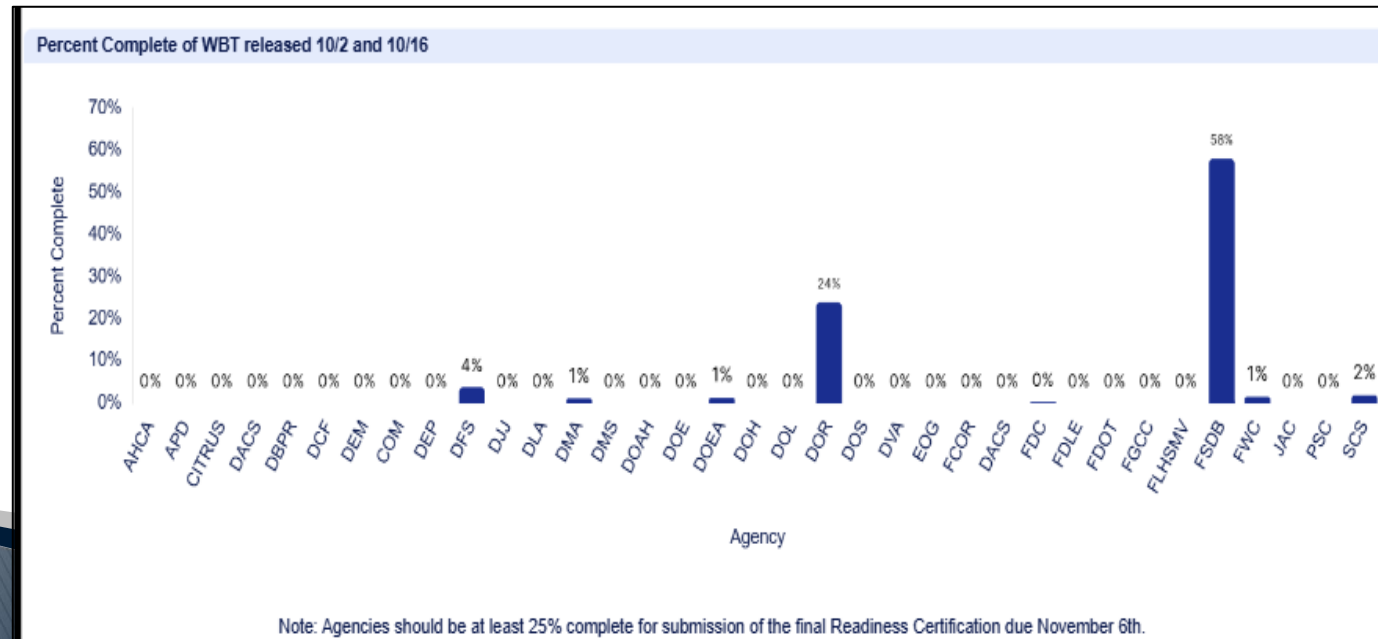
- 339 individuals have started or completed
- 280 completions to-date!
- Feedback in end of course (EOC) survey indicate:
 - The WBT is being (largely) well received
 - More hands-on is desired



Training Completion and Reporting

- ▶ End users must complete WBT in the LMS based on role assignment
- ▶ Agencies must track and report completion
- ▶ Readiness Certification #4 Criteria – 25% WBT Completion of released trainings by 10/30
- ▶ The WBT Release Schedule provides planned and actual release dates

WBT Delivery Timeline		
Planned Completion Date	Business Process Grouping	Approximate % of Total Users*
October 2	Disbursements Management Inter/IntraUnit Management	42%
October 16	Payroll Management	6%
October 30	Account Management and Financial Reporting Budget Management and Cash Control Accounts Receivable Revenue Accounting Contracts Management Grants Management Project Management	27%
November 6	Asset Accounting and Management Managing Month-End Closing	7%
November 30	Banking** Reporting in Florida PALM	11%



Task / Other Reminders

Wednesday, October 21

- ✓ Sponsor Summit

Monday, October 26

- ✓ Pulse Check #5 – Last One!

Friday, October 30

- ✓ 602 – Update Agency Business Process Documentation
- ✓ 604 – Create Agency-Specific Learning Materials to Support End Users
- ✓ 623 – Create Agency Post-Implementation Support Plan
- ✓ 715 – Maintain Role Mapping Worksheet

Friday, November 6

- ✓ 628 –Readiness Certification #4
- ✓ UAT Ends

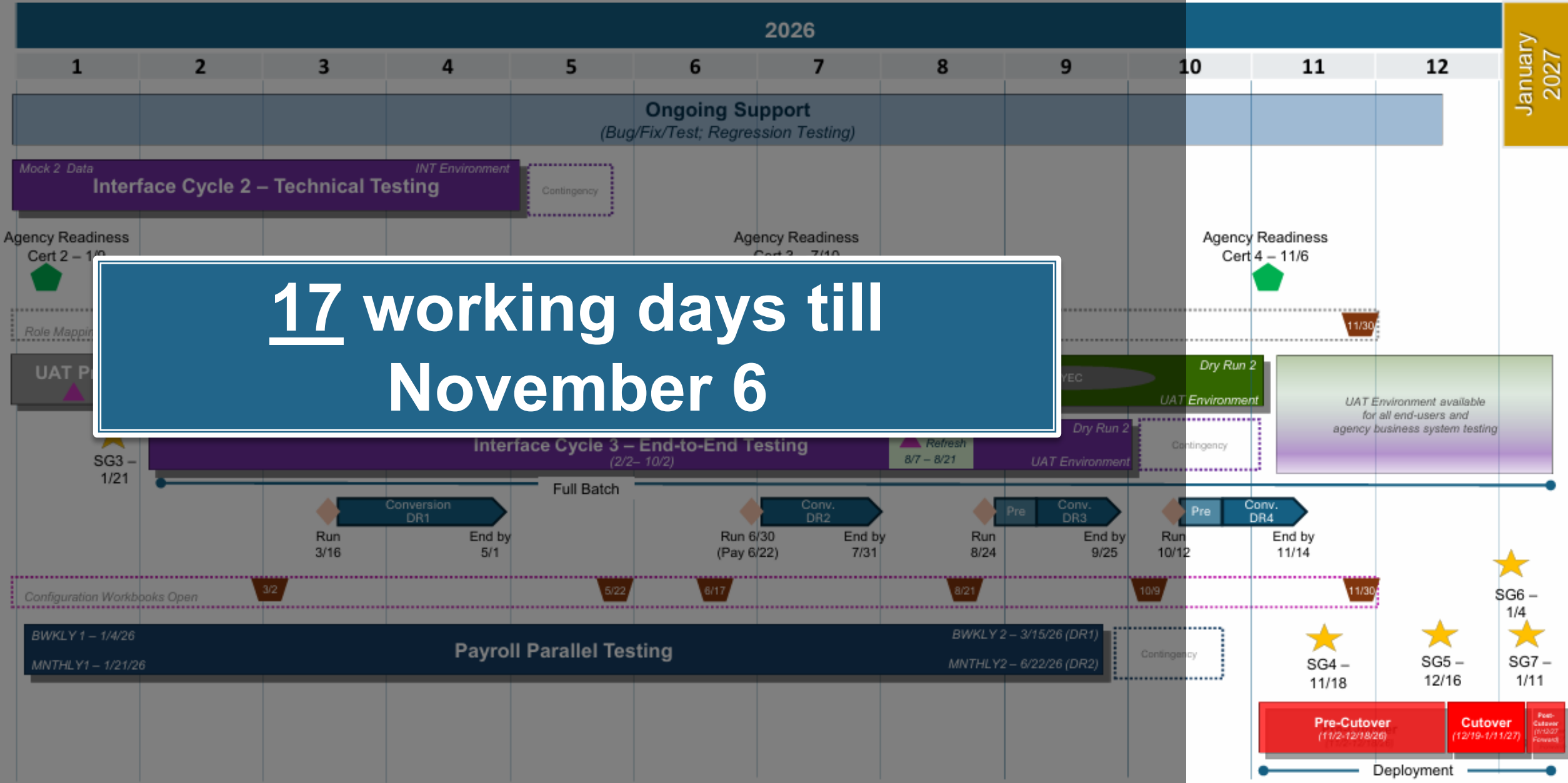
Friday, November 30

- ✓ 714 – Submit Configuration and Conversion Workbooks



Testing Timeline

As of July 21, 2026



Questions?

Don't forget to send your testing questions in for tomorrow's UAT Office Hours

**FRIDAYS THRU
NOVEMBER 6th**



UAT Ends in November!

**Help your agency meet its
UAT objectives for Agency
Readiness Certification #4**

To support your testing efforts, the Project team has scheduled Office Hours for each Friday of the remaining weeks of user acceptance testing.

To add Office Hours to your calendar, visit the
UAT Communication Page

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