Florida PALM

Planning, Accounting, and Ledger Management



BLAISE INGOGLIA
CHIEF FINANCIAL OFFICER
STATE OF FLORIDA

THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

OCTOBER 29, 2026

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STATE OF FLORIDA

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Agenda

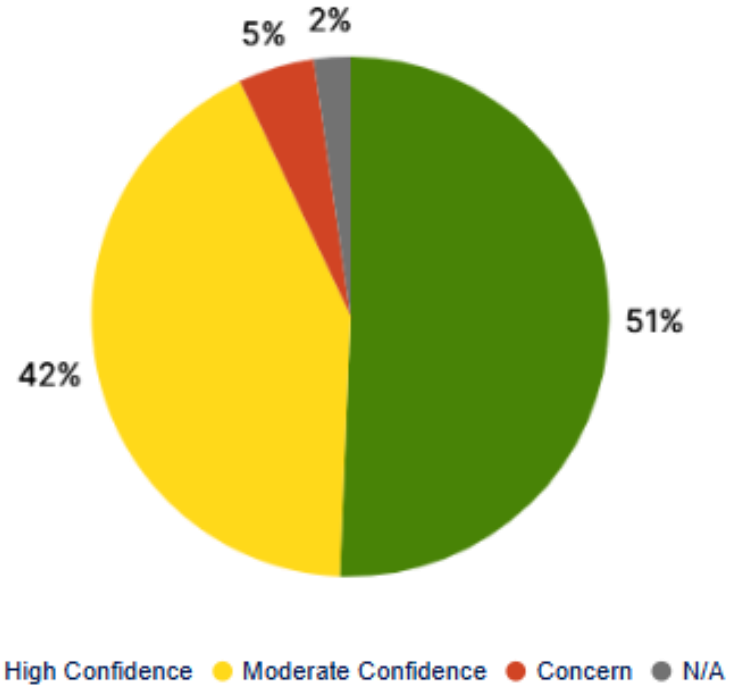
- Role Mapping – SOD Governance
- Readiness Certification #4
- Spill The Training Tea!
- Upcoming Due Dates and Reminders
- Questions

Role Mapping – SOD Governance

- SOD exception requests for Production are due by Friday, 11/13/2026 to Access2PALM@myfloridacfo.com
  - SAMs cannot have processor/approver/maintainer end user roles in Florida PALM; submitted requests will be denied.
  - Requests must include written/drafted mitigating procedures and/or business rules.
- A&A will work with the agencies to extend previously approved SOD exceptions for ‘UAT ONLY’ through the end of the year, to allow for agencies to have more practice in UAT.
- A&A will not be approving permanent SOD exception requests.

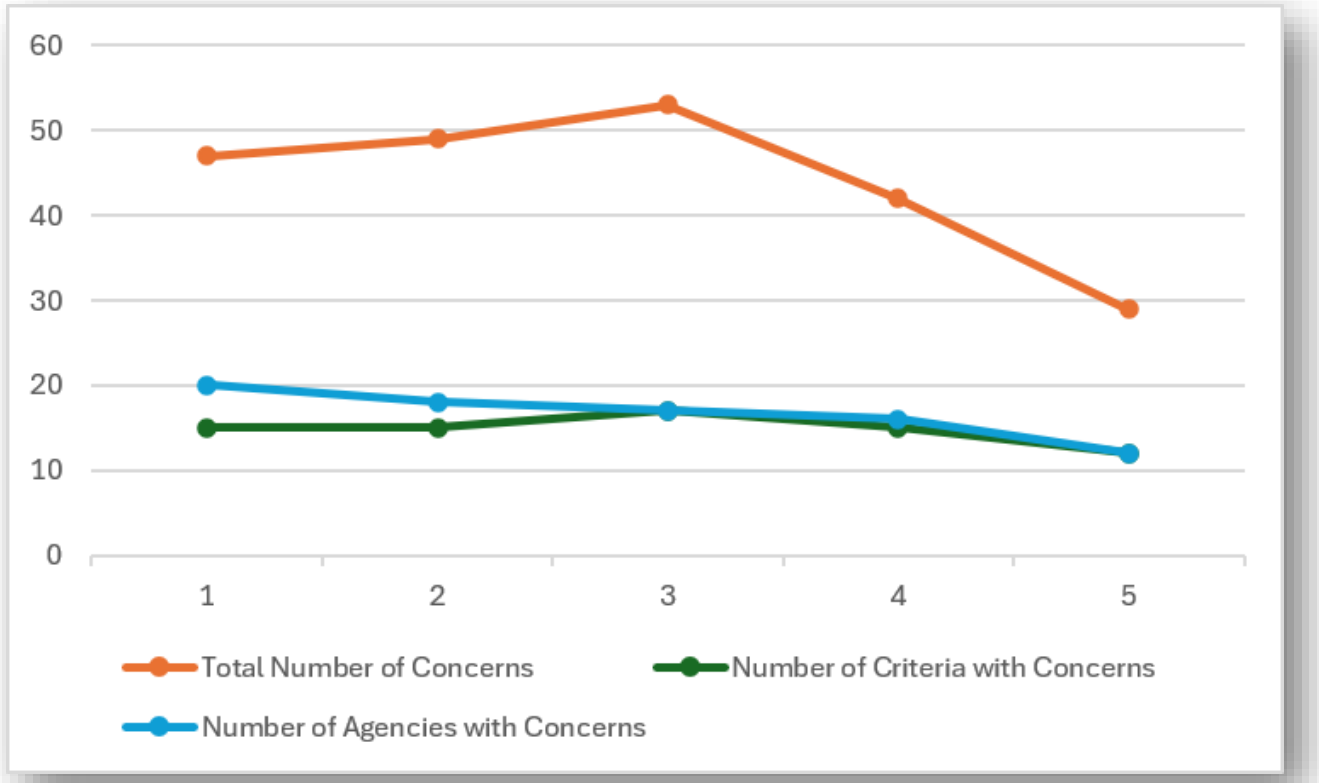
Readiness Certification #4 – Pulse Checks

Pulse Check #5
Confidence – All Responses



Pulse Check 5 Dashboard

Trends Across All Pulse Checks



- Across the 5 Pulse Checks, the number of criteria with “concerns” are trending downward

Readiness Certification #4 – Due 11/10

- Ready for Go Live - The culmination of all readiness and testing activities
- Due date extended, hard close on 11/10
- Criteria Updates –
  - Focus on critical processes and reporting needs (needed within 60 days of deployment)
    - 2.1 – ***Agency*** critical business processes have been tested and validated.
    - 2.2 – ***Agency critical*** process changes have been identified and at least 50% of ***critical*** business process documentation has been updated and prepared for distribution, and agency has a fully documented plan to complete the updates to all ***critical*** processes and distribute prior to ***go-live***.
    - 4.4 – ***Agency critical*** reporting needs and solutions have been tested and validated.
  - Updated based on timing of Dry Run 4
    - 4.2 – Agency data in FLAIR, FACTS and MFMP is cleansed based on Dry Run 3 conversion results.
    - 4.3 – Agency has a plan to cleanse data based on Dry Run 4 results and maintain the data until cutover.

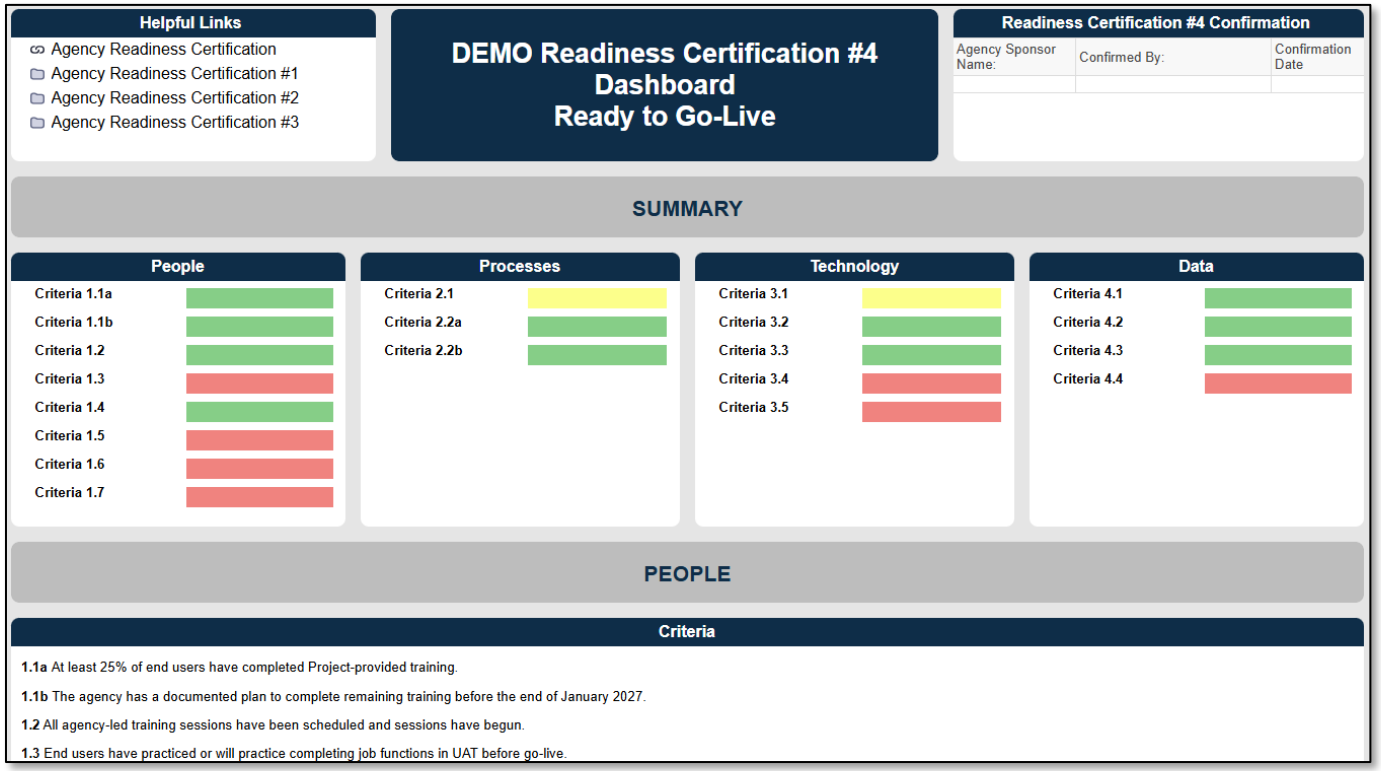
Readiness Certification #4 – Due 11/10

- Complete a series of worksheets to
  - Confirm testing completion of agency critical business processes
  - Confirm testing completion of all interfaces, if applicable
    - Any ***interfaces not successfully tested*** by the time of the submission of this certification will not be available for use by the agency at go-live. Those interfaces ***will be deferred*** for agency use, unless otherwise approved by Project Leadership.
  - Confirm testing completion of critical reporting needs
  - Confirm agency-led training sessions
  - Confirm status of agency readiness certification criteria
    - If your agency is not facilitating agency-led training sessions, contact your Readiness Coordinator to have the “Criteria Met” selection updated to N/A.
  - Provide mitigation plans for any criteria not met
  - Submit Readiness Certification Dashboard

Readiness Certification #4 – Due 11/10

Dashboard Summary Widgets

- For most criteria
  - Met = Green
  - Not Met = Red
  - N/A = Gray
- For testing completion of Processes (2.1), Interfaces (3.1) and Reporting Needs (4.4)
  - 100% = Green
  - 75%-99.99% = Yellow
  - Less than 75% = Red
    - Calculations are based on responses in related worksheets





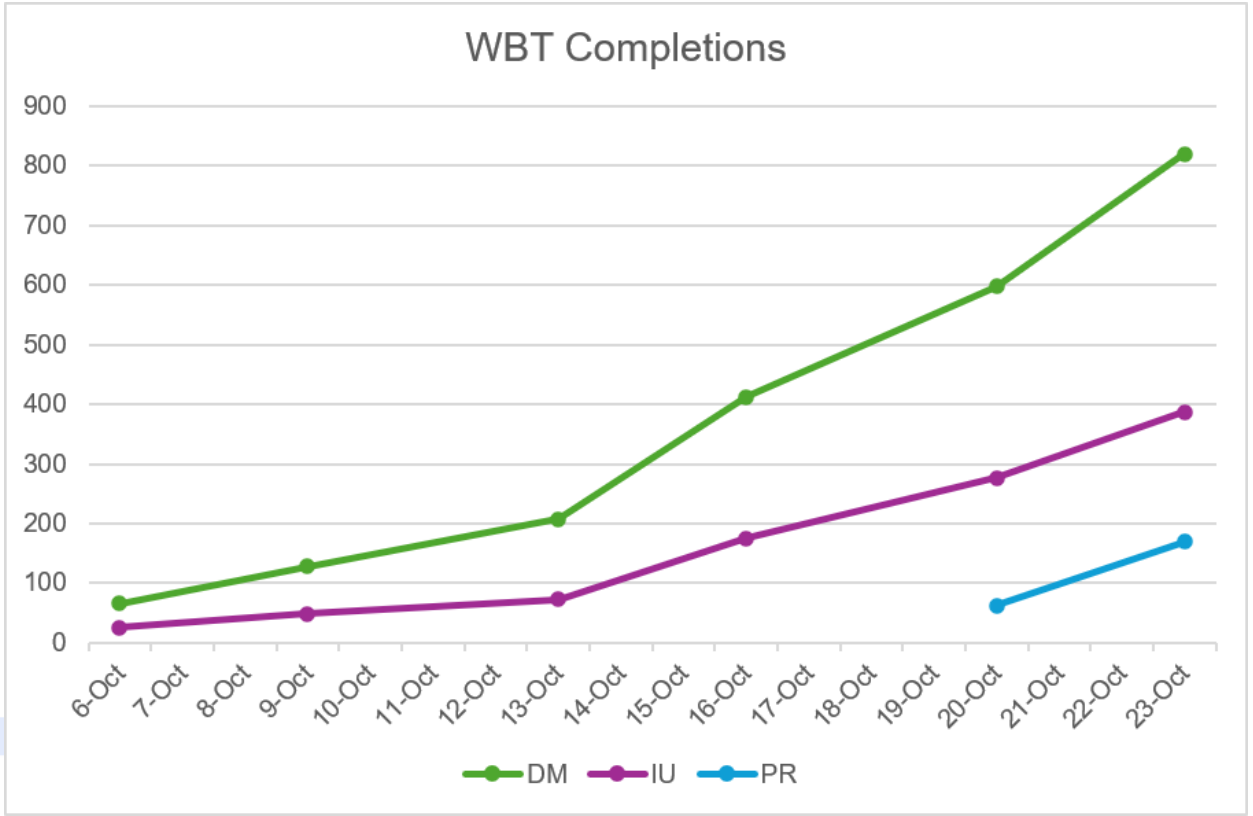
It's Training Time!

- Next week – *Understanding the Inter/IntraUnit Lifecycle*
- Mondays – *DW/BI Virtual Support Sessions*
- Tuesdays – *Learning Matters*

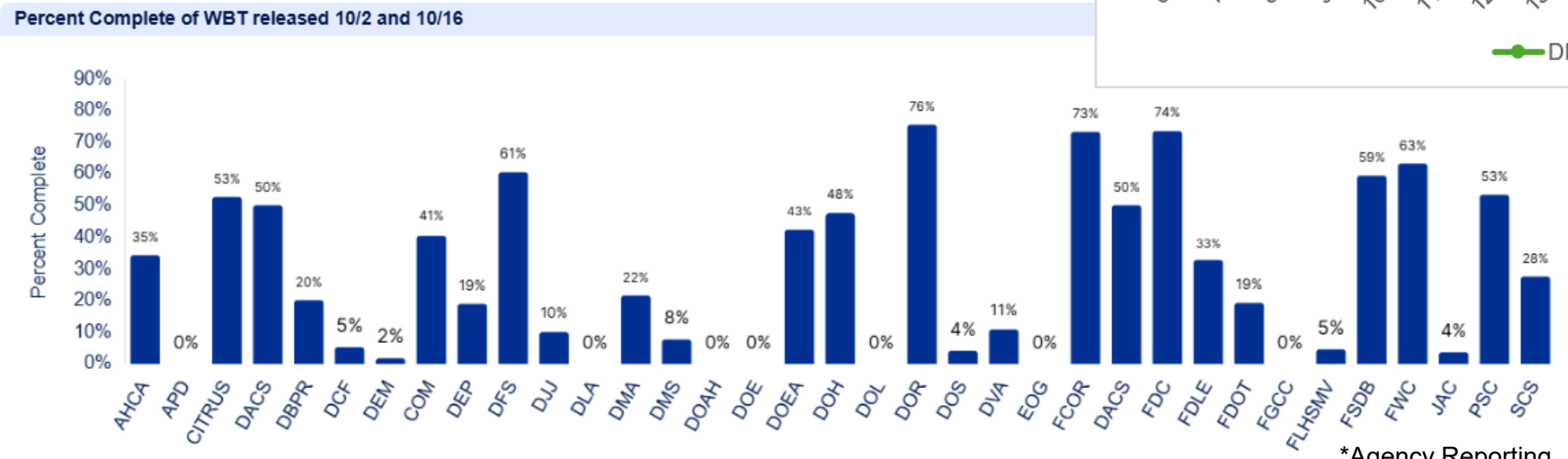
Training Activities

Web Based Training

- Over 1300 course completions to-date
- Over 770 individuals have started or completed a course
- 2 agencies have no courses started; 2 agencies without completions



*LMS Reporting, As of 10/23



*Agency Reporting, *As of 10/28*

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Training Activities

Survey Feedback



Overall Satisfaction

(on a 5-point scale)

- Disbursements Management – 3.77
- Inter/IntraUnit – 4.18
- Payroll – 4.22

More Prepared to Perform in Florida PALM

- Disbursements Management – 66%
- Inter/IntraUnit – 77%
- Payroll – 73%

Training Activities
Upcoming Publishing

- Web Based Training
  - October 30:
    - Account Management and Financial Reporting (AMFR) – 2 Subject Areas
    - Budget Management and Cash Control (BMCC) – 2 Subject Areas
    - Accounts Receivables (AR) – 3 Subject Areas
    - Revenue Accounting (RA) – 1 Subject Area
    - Grants Management (GM) – 1 Subject Area
    - Contract Management (CT) – 1 Subject Area
    - Projects Management (PM) – 1 Subject Area
  - November 6:
    - Asset Accounting and Management (AAM) – 5 Subject Areas
    - Account Management and Financial Reporting (AMFR) – 1 Subject Area

Task / Other Reminders

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
- ✓ 692 – Submit Monthly Progress Report

Friday, November 6

- ✓ **Last day to submit requests for Agency Supplier Record changes**
- ✓ **UAT Ends**

Tuesday, November 10

- ✓ 628 –Readiness Certification #4

Friday, November 13

- ✓ **Production ChartField Configuration Freeze**

Friday, November 30 – Final Workbook Submissions

- ✓ 714 – Submit Configuration and Conversion Workbooks
- ✓ 711 – Submit Role Mapping

Testing Timeline

As of July 21, 2026

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6 working days till November 6

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***

Contact us

FloridaPALM@myfloridacfo.com

Project Website

www.myfloridacfo.com/floridapalm/

Knowledge Center

https//:myfloridacfofloridapalm.us.document360.io

Knowledge Center

Blaise Ingoglia
Chief Financial Officer
State of Florida

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