New to Florida PALM Job Aid
Last Updated: *07/11/2022*

Overview
This job aid is for end users who are new to using Florida PALM, highlighting key resources to help end users stay informed and gain additional information. Supervisors request specific access for end users through the agency's Security Access Manager (SAM). The SAM will assign each end user a role based on the job duties and responsibilities of the employee. This job aid covers resources located on the Florida PALM website and Florida PALM training found on the People First Learning Management System (LMS).

Florida PALM Website (www.MyFloridaCFO.com/FloridaPALM/)
The website contains information about the Project, implementation, user support, and resource materials. We recommend users bookmark the Florida PALM website in their web browser and review all available information. End users may find the below links helpful in gaining knowledge about Florida PALM.

Implementation Tab
Communications (under Resources)
- ☐ Subscribe Now (Click link to subscribe and stay informed)

FAQS
- ☐ Project Overview and System Implementation FAQs

User Support Tab
Operations page
> **Agency Support**
> - ☐ **List of Contacts**
>
> **Helpful Links**
> - ☐ User Support FAQs

End User Training page
> **Manuals**
> - ☐ Florida PALM End User Manual
>
> **Helpful Links**
> - ☐ Taking Florida PALM Training
> - ☐ Learning Management System (LMS)
> - ☐ Training Curriculum and Role to Course Matrix
>
> **Categories***
> **General Information** – recommend users watch the below recordings and videos
> > Learning Opportunities
> > - ☐ Tips & Tricks: Making Florida PALM Work for You
> > - ☐ Tips & Tricks: Resources at Your Fingertips

Training Video
☐ General Navigation

*Each category section can be expanded to view any available Checklists, Graphics, In Real Life (IRL) videos, Job Aids, Learning Opportunities, and Training Videos.

People First LMS

The Taking Florida PALM Training Job Aid provides guidance on how to access the People First LMS. PALM TECH courses are based on end user roles and may include one or more training topics. You can see a list of all training topics by role by viewing the Training Curriculum and Role to Course Matrix on the Florida PALM User Support End User Training page, under Helpful Links.

PALM TECH – The Florida PALM Overviews course is recommended for all users. This training provides a series of overviews on key topics and activities in Florida PALM.

Course Title: PALM TECH - Florida PALM Overviews

The following topics are covered in this course.

Navigating in Florida PALM
☐ Signing into Florida PALM
☐ Navigating in Florida PALM
☐ Managing Personalization
☐ Performing Searches
☐ Using a WorkCenter

Introduction to Florida PALM
☐ Florida PALM Overview
☐ Cash Management System (CMS) Wave Overview
☐ Chart of Accounts Overview

Business Process Overviews
☐ Accounts Management and Financial Reporting (AMFR) Overview
☐ Accounts Receivable (AR) Overview
☐ Cash Management (CM) Overview
☐ Treasury Management (TM) Overview

Reporting Basics for Florida PALM
☐ Reporting Overview
☐ Using an Inquiry Screen
☐ Running a Query
☐ Running a Report

Processing Interfaces in Florida PALM
☐ Interface Overview

All PALM TECH courses are available to anyone with People First LMS access. Employees should ensure they take courses that relate to the Florida PALM role(s) they have been assigned.