

DATE: July 9, 2025

TO: Agency Addressed (No. 3, 2025-2026)

FROM: Renée Hermeling, Director  
Division of Accounting and Auditing, Department of Financial Services

SUBJECT: TRAININGS AVAILABLE JULY 2025: NEW AND UPDATED

The Department of Financial Services (DFS) is pleased to announce the release of seven self-paced, on demand training courses available in People First.

1. **Florida Planning Accounting and Ledger Management (PALM) Security Access Manager (SAM) Training – On Demand:** Supports roles and responsibilities of SAMs in managing security access for Florida PALM agency end users.
2. **Florida PALM Chart of Accounts (COA) Training – On Demand:** The Florida PALM Chart of Accounts is pivotal in journal entry because it tells the story of what occurred with the business activity. This training gives the foundational basis of the state's accounting system and how the Chart of Accounts will transform from Florida Accounting Information Resource (FLAIR) to Florida PALM. This on-demand training allows you to explore the importance of the Chart of Accounts. We demonstrate the ChartField values and allow you to enter the values in the appropriate fields within the journal. The training concludes with some knowledge checks to reinforce your learning.
3. **Workiva Success – Navigation and Overview for Agency – On Demand:** Provides basic navigation within Workiva. This is designed for staff working with Financial Statements.
4. **Workiva Closing Package – On Demand:** Provides an overview of the forms used in Workiva and the data required to complete them. This is designed for staff working with Financial Statements.
5. **24-25 Fiscal Year End Workshop – On Demand:** Recording that supports the 24/25 Fiscal Year-End (FYE) workshop covering a variety of topics including due dates and guidance for processing payments and deposits prior to fiscal year-end.
6. **2025 Financial Reporting Workshop – On Demand:** Recorded version of the Financial Reporting workshop which provided updated information for Workiva, Governmental Accounting Standards Board (GASB) 87 and 96 Lite, overview of Governmental Accounting Standards Board Statements being implemented in FYE 2025 and FYE 2026, website updates and other information related to the preparation of the Annual

Comprehensive Financial Report (ACFR). This recorded training is primarily for agency personnel involved in the preparation of the financial information reported in the ACFR.

7. **2024 Florida Accountability Contract Tracking System (FACTS) Technical Workshop** – On Demand: This recorded session provides guidance to Agency Technical Contacts, who are designated to serve as the liaison between the agency and the Department of Financial Services regarding File Transfer Protocol (FTP) accounts and interfacing with FACTS. The workshop covers technical changes made to FACTS in preparation for Florida PALM implementation and necessary preparation for agencies, specifically when batching records to FACTS.
8. **Interest Penalties Training – On Demand:** This On-Demand training covers processing interest penalties generated when payments are not processed in accordance with Section 215.422, Florida Statutes.

State employees may follow the steps below to view and register for available classes:

1. Log into People First.
2. Click on the Talent Management tile.
3. Select Learning from the dropdown menu at the top left next to the Home icon.
4. Using the Find Learning tile, search for the statewide classes in the catalog by title or by choosing a category (see list above). The search box or browse all courses link may be used.
5. Scroll to find the appropriate class title.
6. Click on See Classes to view available dates.
7. Click on Register Now

Non-State Employees who are interested in registering for classes should contact the Office of Florida Financial Education at [DFSFinancialEd@myfloridacfo.com](mailto:DFSFinancialEd@myfloridacfo.com) with a first name, last name, email address, and agency represented to obtain a username and password to register in People First. For questions regarding registration, please contact the Office of Florida Financial Education at [DFSFinancialEd@myfloridacfo.com](mailto:DFSFinancialEd@myfloridacfo.com).

To learn more about upcoming trainings, please visit the [Training Calendar](#) on the DFS website. The calendar lists all available training sessions for a six-month period and is updated every January and July.

To view all published FLAIR & Cash Management System (CMS) Treasury Management Job Aids, visit: [Training | Job Aids](#) and for the Florida PALM Job Aids, visit: [End User Training](#). The websites are updated periodically as new job aids are developed so be sure to check back often. If you have any questions, email: [dfsfinancialled@myfloridacfo.com](mailto:dfsfinancialled@myfloridacfo.com).