

Effective Date March 19, 2025

CHIEF FINANCIAL OFFICER MEMORANDUM NO. 28

SUBJECT: FLORIDA PALM SECURITY ACCESS MANAGERS UPDATE

The Department of Financial Services (DFS) Chief Financial Officer has delegated access control for Florida Planning, Accounting, and Ledger Management (PALM) to each agency. It is the responsibility of each agency to designate a Florida PALM Security Access Manager (SAM). The SAM is the designated agency individual or individuals responsible for granting Florida PALM access to agency end users based on job duties and responsibilities. SAMs are responsible for maintaining internal controls based on positions descriptions, separation of duties, and user rights to access specific functions.

The agency Administrative Service Director, or equivalent, must appoint the agency SAM. The appointed SAM must:

- Complete the Florida PALM Security Access Manager training available in People First Learning Management System (LMS) – Florida PALM Training Highlights – SAM, and
- Have the appropriate level of authority to act on behalf of the agency to make authorized Florida PALM access assignments.

To assign a new SAM, or update information for an existing SAM, the agency Administrative Services Director or equivalent must complete and sign the SAM Access Request and Acknowledgement form (DFS-A0-2206). The form can be found on the Forms Page of the Accounting & Auditing subsection on the MyFloridaCFO.com website. The completed form must be sent to Accounting and Auditing (A&A) for approval at Access2PALM@myfloridacfo.com.

Agencies must maintain at least one primary SAM and one backup SAM. A&A will approve an agency having more than two SAMs in accordance with the standard below:

- If an agency has less than 100 End Users, the agency cannot exceed two SAMs.
- If an agency has between 101 and 200 End Users, the agency cannot exceed three SAMs.
- If an agency has between 201 and 300 End Users, the agency cannot exceed four SAMs.
- If an agency has more than 301 End Users, the agency can have five SAMs.

An exception will be considered on a case-by-case basis. To request an exception, contact Access2PALM@myfloridacfo.com.

SAMs who have separated from the state, moved to another agency, or changed job responsibilities should be inactivated. To inactivate an authorized SAM, the agency Administrative Services Director or equivalent will contact A&A at Access2PALM@myfloridacfo.com to request SAM inactivation. The email should include the SAM's name and the effective date for the inactivation.

For more information about Florida PALM SAMs including a list of responsibilities and step-by-step instructions for adding and removing roles, refer to the Security Access Management User Manual available on the Florida PALM website: [SAM User Manual](#).