Florida**PALM**
Planning, Accounting, and Ledger Management

Department of Financial Services
Task 662-A – Submit Updated Configuration Workbooks – State Program Selection for Budget Allotments

Task Instructions

Task ID: 662-A
Task Name: *Submit Updated Configuration Workbooks – State Program Selection for Budget Allotments*
Task Start Date: September 15, 2025
Task Due Date: October 29, 2025
Project Impact: *Direct*

Task Description

Provide agency selection of State Program for budget allotments.

Task Overview

In order to execute a business process within Florida PALM, the system must first be configured. A configuration establishes the parameters and initial settings needed to enable transactions to be recorded and data to be stored within Florida PALM. Florida PALM will be configured with both statewide and agency-specific information prior to the Financials and Payroll implementation. The purpose of an agency configuration workbook is to document and confirm detailed agency-specific values that will be set up in Florida PALM to support agency business.

This task requires agencies to confirm if the State Program ChartField <u>should</u> or <u>should not</u> be used on budget allotments. Primary Agency Sponsors must confirm their agency's decision on the use of State Program on budget allotments in Florida PALM by completing the State Program Selection form.

Options for use of State Program on budget allotments in Florida PALM are described below.

- If State Program <u>is configured</u> to be used on budget allotments, it will be a <u>required field for all budget allotments</u> in Florida PALM. Agencies will be required to include a State Program value for all budget allotments.
- If State Program is <u>not configured</u> to be used on budget allotments, the field <u>will not be available for use</u> in Florida PALM. Agencies will not be able to use State Program on any budget allotments.

Task Elements

Submit the State Program Selection Form

Your Primary Agency Sponsor must complete the *State Program Selection* form. A new worksheet, *(Mock 4) (Agency) State Program Selection,* has been added to your Configuration Workbook Inventory, Commitment Control folder. Use this worksheet to navigate to the *State Program Selection* form.

Smartsheet Navigation:
>   *Florida PALM Workbook for (Agency) > Configuration Workbook Inventory > Commitment Control (KK) > (Mock 4) (Agency) State Program Selection*
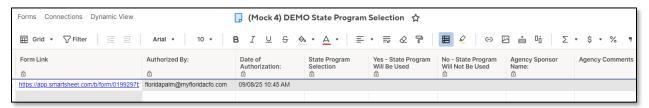
Figure 1: (Mock 4) Agency State Program Selection

NOTE: *This worksheet contains locked columns, which will be automatically populated upon your Primary Agency Sponsor's completion of the form linked in the first row of your worksheet.*
It is <u>required</u> that your Primary Agency Sponsor complete and submit this form.

State Program Selection Form

Question 1 – Does your agency want to use State Program as part of your budget allotments within Florida PALM?

Once you have made your selection, you will be prompted to answer Question 2 to confirm your agency's understanding of the State Program selection as shown in Figures 3 and 4.
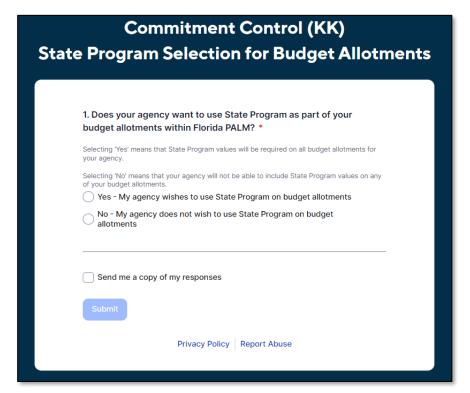

Figure 2: Form Question 1

Question 2 - Please confirm your agency's understanding of their State Program selection.

![Florida PALM - Planning, Accounting, and Ledger Management]
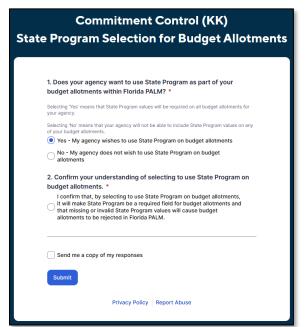
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Selection for Budget Allotments

If opting to use State Program, you must confirm that you understand the State Program ChartField will be required on all budget allotments and that missing or invalid State Program values will cause budget allotments to be rejected in Florida PALM as shown in Figure 3.

If opting out of using the State Program ChartField, you must confirm that you understand State Program will not appear on any of your agency's budget allotments in Florida PALM as shown in Figure 4.
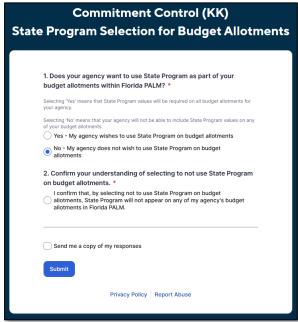

Figure 3: Question 2 – Yes

Figure 4: Question 2 - No

After completing the confirmation for Question 2, Agency Sponsors will be required to enter their name and submit the form.

NOTE: *If your agency decides to change your State Program selection after this form is submitted, your Primary Agency Sponsor will be required to resubmit this form.*

How will agencies use this information?

The State Program selection is crucial for your agency to be able to ensure intended configuration and budgetary controls are in place. If your agency does not complete the State Program Selection form, your agency will be defaulted to not use State Program in your budget allotments in Florida PALM.

What will the Florida PALM Team do with this information?

This task has a direct impact to the Florida PALM Project. The Florida PALM team will use your State Program selection to configure the system.

The Project team will also review your task submission based on the following criteria to confirm completion:

Table 1: Task Completion Rubric

Task Completion Rubric
Primary Agency Sponsor has submitted the State Program Selection form.
The RW Task Tracker, Agency Reported Task Progress column, has been updated to 100% - Submitted.

Task Instructions

Work with your CCN and SMEs to determine if your agency requires the use of State Program for budget allotments, then have your Primary Agency Sponsor submit the *State Program Selection* form.

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 1 above.

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Collaborate with your CCN, functional, and technical SMEs to decide if your agency will need to use State Program in budget allotments.*
2) ***Primary Agency Sponsor*** *to complete and submit the State Program Selection form.*
3) *Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator and Technical Readiness Team.*
4) *Complete task by* ***October 29, 2025****.*
5) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
6) *If you have questions regarding this task, participate in the Thursday Task Talks or contact your Readiness Coordinator.*