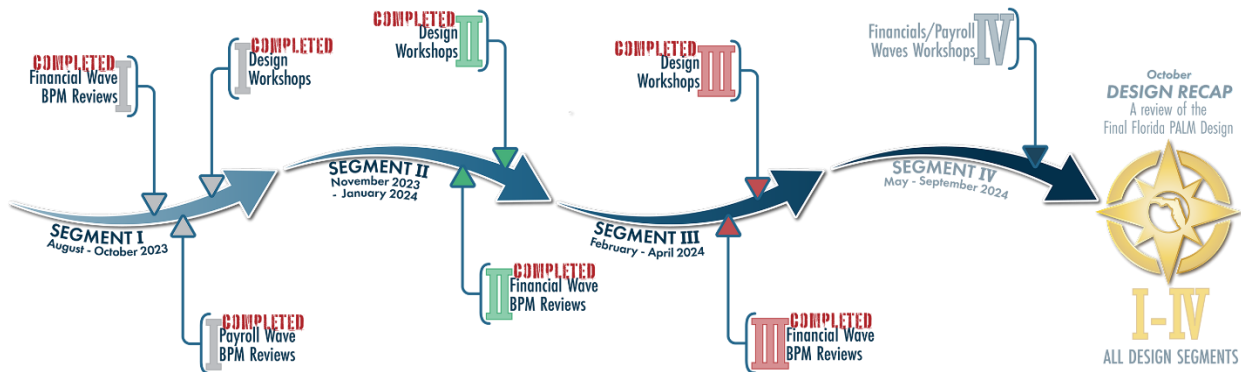


Florida PALM Updates *First Quarter Calendar Year 2024*

- Published the [Standardized Account Values](#) for Expenditures and Revenues under Chart of Accounts on the Florida PALM webpage.
- Published a new issue of the [Reports & Data Quarterly Newsletter](#) (Q2 2024) to provide an at-a-glance summary of key Project activities and solution design information that were completed or shared during the second quarter of the fiscal year 2023-24.
- Shared a new [Data Availability](#) graphic to describe how reporting will work in Florida PALM.
- Published a new issue of the [Sponsor Scoop](#) (Feb. 2024) to keep your Agency Sponsors informed.
- Published two new [PALMcast](#) episodes:
 - 14 – Organizational Change Management: Desire (Feb. 2024) – A continuation of the OCM series
 - 15 – Getting Ready for Data Day (Mar. 2024) – A tool to help attendees prepare for Data Day
- Launched [Knowledge Center](#), a standalone resource to help agencies quickly access information that describes the business processes, reports, interfaces and conversions for Financials and Payroll Wave functionality. Key features include:
 - Getting Started – Detail about Chart of Accounts Design, including an overview of each ChartField, and Budget Structure Design, including an overview of the various budget structures planned for Florida PALM
 - Business Processes – Searchable Business Process Model flows and diagrams released by Segment to support agency understanding and participation in Design meetings
 - Reports, Interfaces and Conversions – Detailed descriptions and layouts, including field level data, interfaces, and conversions by Segment
 - Configurations – A growing list of Enterprise configuration values, including field names and valid values or defaults, by module
 - System and Access Controls – Information about end user roles, by module, released by Segment
- Surveyed all Change Champion Network Liaisons and Agency Sponsors to gain an agency perspective on their agency engagement and agency readiness, summarized, and shared the findings in a [Summary Report](#).
- Florida PALM (production) implemented [PeopleSoft system upgrades and enhancements](#) to provide better functionality and improved user experience. Key changes included a new look and feel and enhanced navigation. This type of periodic upgrade and enhancements can be expected into the future with Florida PALM, as the software is supported and continuously enriched by the software provider.
- Hosted a [Change Champion Network Town Hall](#) on Leap Day (February 29) to foster how to “LEAP” into a successful transition. Key themes included:
 - Strategies for staying on track with RW tasks and implementation milestones by leveraging resources
 - Engaging everyone on the CCN, SMEs, and end users, as well as managers of end users
 - Practical tips for learning now and beyond
 - Insight into DEP’s approach to change management and FDC’s approach to create awareness within their agency

- Hosted Data Day, which was attended by over 300 agency participants from all agencies. Topics included:
 - Identifying available resources to help agencies understand their data
 - Guidance for evaluating agency legacy data
 - Discussion on the Project's interface and conversion approach and next steps, including testing and cutover
- Completed [Design Segments II & III](#) Business Process Model Reviews and Design Workshops, which covered 17 Business Process Models across 8 Business Process Groupings.



Preparing for next period:

- Finalizing the Sponsor Summit plans for the April 11 event, hosted by the Florida PALM Executive Sponsor, Steven Fielder. All agency Sponsors are invited to join Steven and Project Director, Jimmy Cox, and Deputy Project Director, Angie Robertson for discussion on upcoming implementation activities and challenges facing agencies in their readiness activities.
- Preparing for [Design Segment IV and the All-Segments Recap](#). Segment IV includes critical functions such as:
 - Performing Month End and Year End Close
 - Cash Checking
 - Year End Budget Closing
 - Tax Reporting
 - Bank Account Management and Reconciliation
 - Creating and Maintaining Projects
 - Setting up and Maintaining Positions and Employees
 - Processing Payroll
 - Payroll Accounting
 - Inter/IntraUnit Processing
- Completing Segment I Build, continue with Segment II Build, and begin preparing System Test Scripts for System Testing set to begin in the Summer of 2024.
- Ongoing Knowledge Center content release, including Overview Pages for more Business Process Groupings. Look for the “new” or “update” icons to see recently added or updated content.
- Planning for User Acceptance Testing (UAT) – Agencies will be asked to begin their UAT planning in late June. The UAT period will be from April – November 2025 and involve all agencies and all agency SMEs and End Users. UAT will give exposure to agency users while giving agencies the opportunity to confirm new processes and agencies’ business system remediation efforts.

The following questions are provided for agency consideration to generate communication / messaging topics:

- **Participation in Design Sessions:** How many of your SMEs attended Design Segment sessions? Are you sending information about Project-led meetings and encouraging registration and attendance?
- **Impact of Changes:** What are key process changes that your agency learned about during the Segment II and III design meetings? Are there discussions internally to understand impacts and changes? Have you translated the change to your End User? Have you determined if any agency business system is impacted? If so, have you started discussing the needed changes to your agency business system(s)?
- **Knowledge Center Awareness:** How can the Knowledge Center support your agency's learning journey? Have you shared the link to the new agency resource?
- **Data Clean-Up:** What data clean-up has started within your agency? Are there changes that will be needed to occur, or that could be adopted, even before Florida PALM go-live?
- **Chart of Accounts:** Have you shared information about the new COA structure and published Account values?
- **Growing Your Internal Network:** Who are your Subject Matter Experts (SMEs)? Do you have them identified for all Business Process Groupings? Are all of your critical staff engaged? How can you grow your knowledge base (i.e., Team) to support your agency on your transition journey? Are your future End Users growing?