

# Florida **PALM**

Planning, Accounting, and Ledger Management



# EXECUTIVE STEERING COMMITTEE

DEPARTMENT OF FINANCIAL SERVICES

JUNE 23, 2021



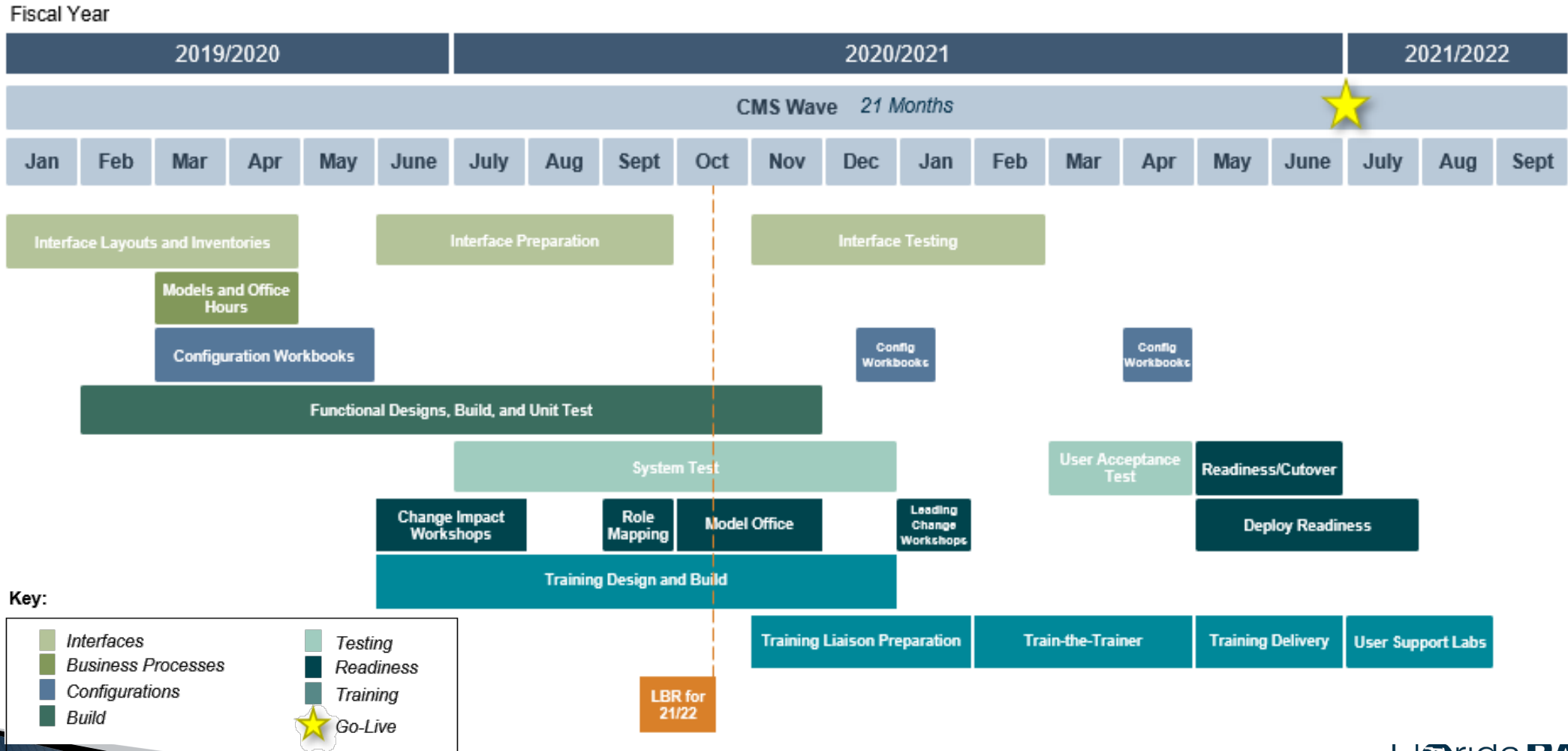
# PROJECT UPDATE

MATT COLE, SCOTT FENNELL, SHELLEY McCABE, MELISSA TURNER



# Florida PALM Project Update

## Schedule – CMS Wave Activities



# Florida PALM Project Update

## CMS Wave

- ▶ Amendment 5 Update
- ▶ Amendment 6 Update
- ▶ PCR 79



# Florida PALM Project Update

## CMS Wave

- ▶ Known Issues Update
- ▶ Pre-Cutover Activities
- ▶ Planned functions for transition
  - July 6 (forms, CRA, COA)
  - July 15 (trust fund invest/disinvest)
  - July 19 (deposits and returned items)



# Florida PALM Project Update

## CMS Wave Training

### ▶ CMS Wave Training

- 34 of 34 agencies have accessed web-based training (WBT)
- 31 of 32 agencies, 252 participants, have participated in an instructor-led training (ILT)
- 27 agencies have completed ILT for 100% of their identified end users
- 32 of 34 agencies completed at least 70% of available training

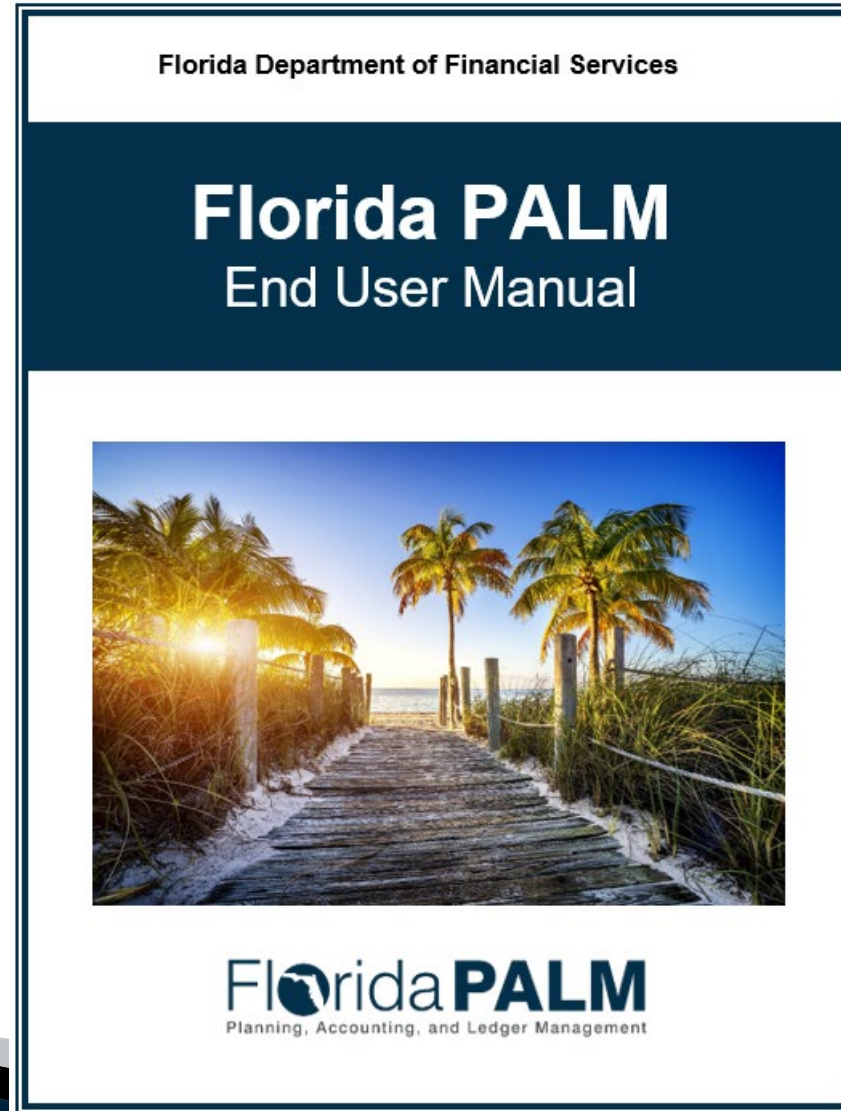
### ▶ User Support Labs begin July 13

- Registrations will be required
- 30-minute windows will be available
- Super Users should attend with end users (up to 3 per agency per registration)



# Florida PALM Project Update

## End User Manual





# Florida PALM Project Update

## Production Support

- ▶ Provides services for application maintenance, infrastructure maintenance and production operations support of the Florida PALM Solution.
  - Tier 0 (Super Users/Trainers) – Organizations will use these resource as the first line for questions and issue resolution before contacting the Florida PALM Solution Center.
  - Tier 1 (Florida PALM Solution Center) – where all inquires and direct end user interactions regarding the Florida PALM Solution will be routed, triaged, and resolved where possible, when not resolved by Tier 0.
  - Tier 2 (Production Operations Support) – provides additional support and resolution to functional incidents escalated from Tier 1.
  - Tier 3 (Application / Infrastructure Maintenance) – provides required break/fix changes to resolve incidents escalated from Tier 1 or 2; and, planned maintenance including applying application patches. (Implementation will follow Production Support Configuration Management Plan).



# Florida PALM Project Update

## Production Support

### Welcome to the User Support Page

#### Tier 0 Support

Contacts for each agency's internal Florida PALM Support Team

- Agency Tier 0 Support
- Security Access Managers (SAM)
- Super Users
- CCN Contacts

#### PALM TECH

Florida PALM Training Resources

- Taking Florida PALM Training
- Learning Management System (LMS)
- Training Curriculum and Role to Course Matrix

#### Helpful Links

- Florida PALM Supported Browsers
- MyFloridaMarketPlace
- Department of Financial Services
- Division of A&A
- Division of Treasury
- People First
- Office of Florida Financial Education
- FLAIR (OIT Help Desk)
- Department of Revenue Taxpayer Assistance



**SolutionCenter**

Solutions in the PALM of your hand

Still have questions about Florida PALM? Contact the Florida PALM Solution Center!

Hours of Operation:  
 8:00 a.m. to 5:00 p.m. (Eastern)  
 Monday through Friday (Except Holidays)

Solution Center Contact Information:  
**Phone Number:** Coming Soon!  
**Email:** Coming Soon!  
**Other:** Coming Soon!



# Florida PALM Project Update

## Production Support

- ▶ Planned Maintenance Windows:
  - July – Monday, Wednesday, Friday, 7pm to 8:30pm
  - August – Tuesday and Thursday from 7pm to 8:30pm
  - After August – Thursday from 7pm to 8:30pm



# UPCOMING

MELISSA TURNER



# Florida PALM Project Update

## Upcoming

- ▶ Completion of Pre-Cutover Activities
- ▶ Start of Cutover Activities
- ▶ Decision to Launch
- ▶ Launch
- ▶ Daily Post-Launch Status
- ▶ Start of Post-Cutover Activities
- ▶ Completion of Cutover Activities



# NEXT SCHEDULED MEETING

JUNE 30, 2021



# CONTACT INFORMATION

[FLORIDAPALM@MYFLORIDACFO.COM](mailto:FLORIDAPALM@MYFLORIDACFO.COM)

[MYFLORIDACFO.COM/FLORIDAPALM](https://MYFLORIDACFO.COM/FLORIDAPALM)

