

Date	March 5, 2025	Time	10:00 a.m. – 12:00 p.m.
Location	District Court of Appeal		
Objective	Advisory Council Monthly Meeting		
Attendees	<p>Advisory Council: Chad Barrett (DCF), Amy Barrow (DOR), Stephanie Cabrera (FLHSMV), Ramon Evans (APD), Lyndell Francis (DBPR), Lydia Griffin (DEP), Renee Hermeling (DFS), Robert Herron (DOH), Jim Lewandowski (FDACS), Tanya Maphis (FWC), Nona McCall (JAC), Mike Moore (FDLE), Cheryl Morgan (DOT), Stephen Russell (DMS), Lisa Simpson (COM), Erica Starling (FDC), Alexandra Weimorts (DFS)</p> <p>Facilitators: Jimmy Cox (DFS), Renee Hermeling (DFS), Robert Herron (DFS), Angie Robertson (DFS)</p>		
Related Documents	Presentation		

Topic	Facilitator
Welcome and Opening Remarks	Robert Herron
Amendment 12 Overview	Jimmy Cox Angie Robertson
Open Discussion – Agency Readiness	Robert Herron
Requested Topic: <i>What are the reasons agencies pay other agencies via paper warrant?</i>	Renee Hermeling
Closing Remarks	Robert Herron

Welcome and Opening Remarks

Facilitated by Robert Herron

Mr. Robert Herron, Chair, opened the meeting with roll call and welcomed the group. A representative was present for DCF and DOT.

Amendment 12 Overview

Facilitated by Jimmy Cox

Mr. Jimmy Cox shared the go-live date for the Financials, Payroll, and Data Warehouse implementation was changed from January 2026 to July 2026. Two factors that impact the approved new go-live date are;

- A new Stage Gate decision for the Florida PALM Executive Steering Committee (ESC) to determination if the go-live date should further extend to January 2027. This decision would be no later than January 30, 2026, and would support agency readiness, if agencies and enterprise partners needed additional time to prepare.
- A new decision point for the incoming CFO to confirm the Major Implementation timeline. This must be done no later than June 30, 2025.

The main difference between the July 2026 and January 2027 is the elongated User Acceptance Testing (UAT) and Training timeframes to support agency readiness. Build and Testing activities do not change.

Mr. Cox reviewed the updated Testing Timeline. He noted the Interface Cycle 3 End-to-End Testing with agencies occurs during the same time as UAT Full, where end users will be able to test their selected interfaces with their agency data. Mr. Cox noted Ongoing Support reflects the iteration of work to make system updates (due to errors or enhancements), re-testing, training, and communications. UAT is extending by two months and beginning in August after fiscal year end activities. Mr. Cox clarified the audience for UAT Online and UAT Full and the activities that will occur during each.

Open Discussion – Agency Readiness

Facilitated by Robert Herron

The Council was sent questions pertaining to agency readiness for consideration prior to the meeting. Mr. Herron facilitated the discussion about agency readiness focusing on agency success criteria, mitigation strategies, and what agencies needed from the Project. The Council shared several perspectives on their success criteria, including;

- Getting the expected results in Florida PALM when conducting agency business processes (paying bills, depositing revenue, and pulling data).
- Being able to retrieve data through a system generated report (canned, and pre-built before go-live) and a custom report created by end users via the Data Warehouse.
- Focusing on the accuracy of their chart of accounts.
- Making sure all users across their agency are thoroughly trained.
- Remediating and successfully testing interfaces with agency business systems.
- Receiving information as early as possible to leverage for agency trainings.

Mr. Herron further facilitated conversation by sharing the perspective from DOH on how to be successful through an agency readiness plan. He offered several considerations, focusing on the identifying key business processes that are needed to “keep the lights on”. He described a strategy for making a tiered priority list of business processes that are crucial for day 1 versus others that can have a mitigation plan upon go-live. When discussing the integration of agency business systems, he shared a strategy some agencies are employing to test the remediation of their business systems now. For example, they are testing if their business system can generate a file based on the interface file layout on the Interface Catalog before Interface Testing activities with the Project begins.

The Council shifted into a discussion about the timing of Florida PALM training materials. Mr. Cox reminded the Council, once the system is built, the Project’s Training Team will create step-by-step process steps with screen shots for agencies to use and customize prior to UAT Full and Agency-Led Training. Florida PALM will train agencies on the standard processes and agencies will be expected to build upon that and conduct trainings for their unique business process. Mr. Cox highlighted the importance of agency’s testing/training on processes or business systems that impact federal funding.

The Council discussed the possibility of creating an Agency Readiness Checklist to help agencies better understand and measure their success path. A communication will be sent to the Council to gauge interest of a workgroup, following the meeting.

Walk On Topic

Mr. Cox asked the Council to re-evaluate funding needs based on the go-live date change. The Project will reach out to agencies to collect feedback to then share with the Legislature.

Agency-to-Agency Payments

Ms. Renee Hermeling asked the Council for feedback on how and why agencies pay other agencies. Currently, a Florida statute states agency-to-agency payments must be conducted through a Journal Transfer unless there is an exception. Ms. Hermeling said DFS has not had requests, nor granted, exceptions. She requested the Council reach out directly to her for further information.

Closing Remarks

Facilitated by Robert Herron

The next Advisory Council meeting will be held on April 16. Mr. Herron adjourned the meeting.