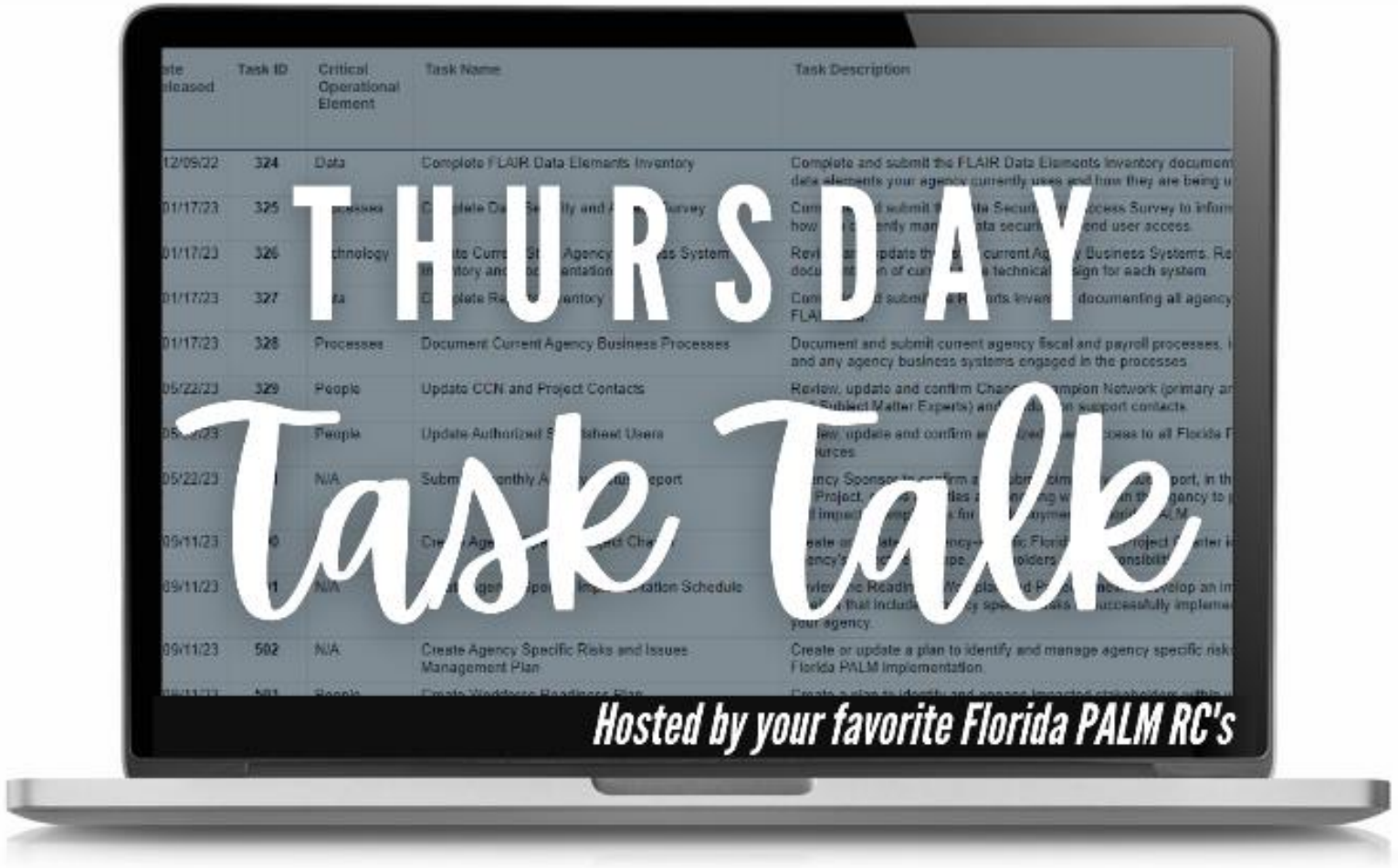
Florida PALM

Planning, Accounting, and Ledger Management

CHIEF FINANCIAL OFFICER
STATE OF FLORIDA



APRIL 17, 2025

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Planning, Accounting, and Ledger Management

Agenda

- Task Spotlight:
  - 598 - Share Florida PALM Updates
  - 579 - Confirm UAT SMEs
- Remediation Task Update
- Guidance for Bimonthly Agency Readiness Status Report Completion
- Reminders

576– Share Florida PALM Updates

Due 4/25/2025

Stakeholder Group	Example Communication Topics	Example Communication Channels
Agency Leadership	• Agency progress towards milestones • Risks and mitigations • Resource needs (e.g., positions or funding)	Executive Briefings
CCN and SMEs	• Agency transformation activities • Agency readiness tasks	Workshops, Meetings, Emails
Implementation End Users	• Training opportunities • Key milestone dates (Project and Agency) • Change Impacts (e.g., COA changes, configuration values)	Posters, Newsletters, Meetings, Emails
Other	• Information specifically affecting a team (e.g., Agency Business System team)	Briefings, Emails

579 – Confirm UAT SMEs

Due 5/2/2025

Forms Connections Dynamic View

DEMO Implementation End Users

Grid View Filter Arial 10

UAT SME	Business Process Grouping(s)	Topic	Office/Bureau/Secti...	Position #	Position Title	First Name	Last Name	Email
☑	Accounts Receivable	[AR] Entering and Main [AR] Managing AR Dep [AR] Managing Direct J [AR] Managing Electror [AR] Managing Returne	Financial Services	1201234	Accountant II	John	Smith	John.Smith@agency.gov
☑	Account Management & Financial F	[AMFR] Managing Ente [AMFR] Managing the E [AMFR] Opening and C [AMFR] Processing Jou	Financial Services	123456	Government Analyst I	Jane	Smith	Jane.Smith@agency.gov
☑	Asset Accounting & Management	[AAM] Acquire and Set [AAM] Initiating, Approv [AAM] Managing Asset	Financial Services	1002233	Government Analyst II	Bob	Smith	Bob.Smith@agency.gov

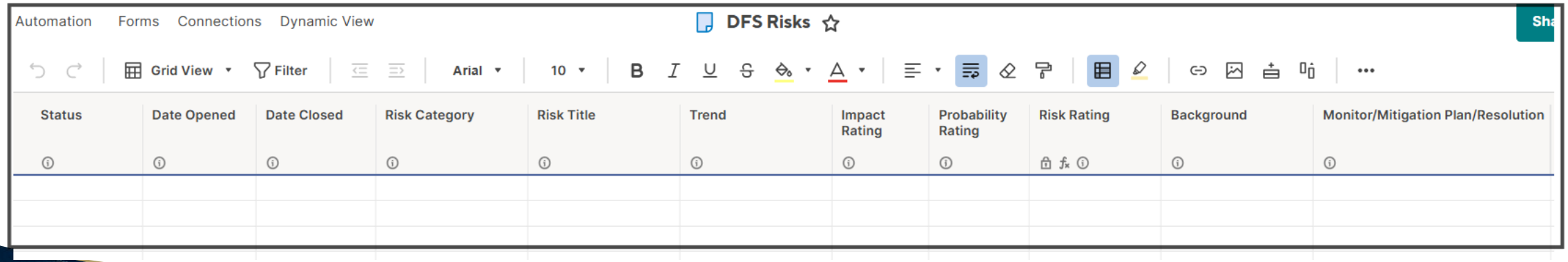
- Update and confirm your UAT SMEs
  - Do you have the right people identified for this role?
  - Do you have enough SMEs for each Business Process Grouping?
  - Do we have enough SMEs to support UAT logistics & agency-specific training efforts?

ABS Documentation Updates and Remediation Tasks by Segments Updates

- All segment related tasks have closed
- Any outstanding ABS Documentation Updates and Remediation updates can be completed in current task 576 - Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing
- New drop-down options available in *the Implementation Interfaces and Documentation* worksheets to indicate work continuing in RW Task 576
- Verification forms updated to allow task completion if new drop-down option is selected
- RCs will send communication to applicable agencies

Guidance for Bimonthly Agency Readiness Status Report Completion

- "Manage risks and issues" tasks have been removed from RW (Task 590)
  - Current Risk & Issue logs have been archived
  - New worksheets are available with additional fields of information (e.g., trend, dates)
  - Purpose for each field has been clarified
  - Conditional formatting added to help identify state or outdated information



Reminders: Upcoming Due Dates for Current Tasks

April 25

- ✓ 598 – Share Florida PALM Updates

April 20

- ✓ ~~590 – Manage Agency Specific Risks & Issues~~

May 2

- ✓ 536-C – Create Agency Specific User Acceptance Testing Plan
- ✓ 560 – Submit Change Analysis Tool
- ✓ 579 – Confirm UAT SMEs

May 30

- ✓ 568 – Create Training Plan for Agency End User Training

Georgie

Questions?

Harry

Contact us

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Project Website

www.myfloridacfo.com/floridapalm/

Knowledge Center

https//:myfloridacfofloridapalm.us.document360.io

Knowledge Center

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