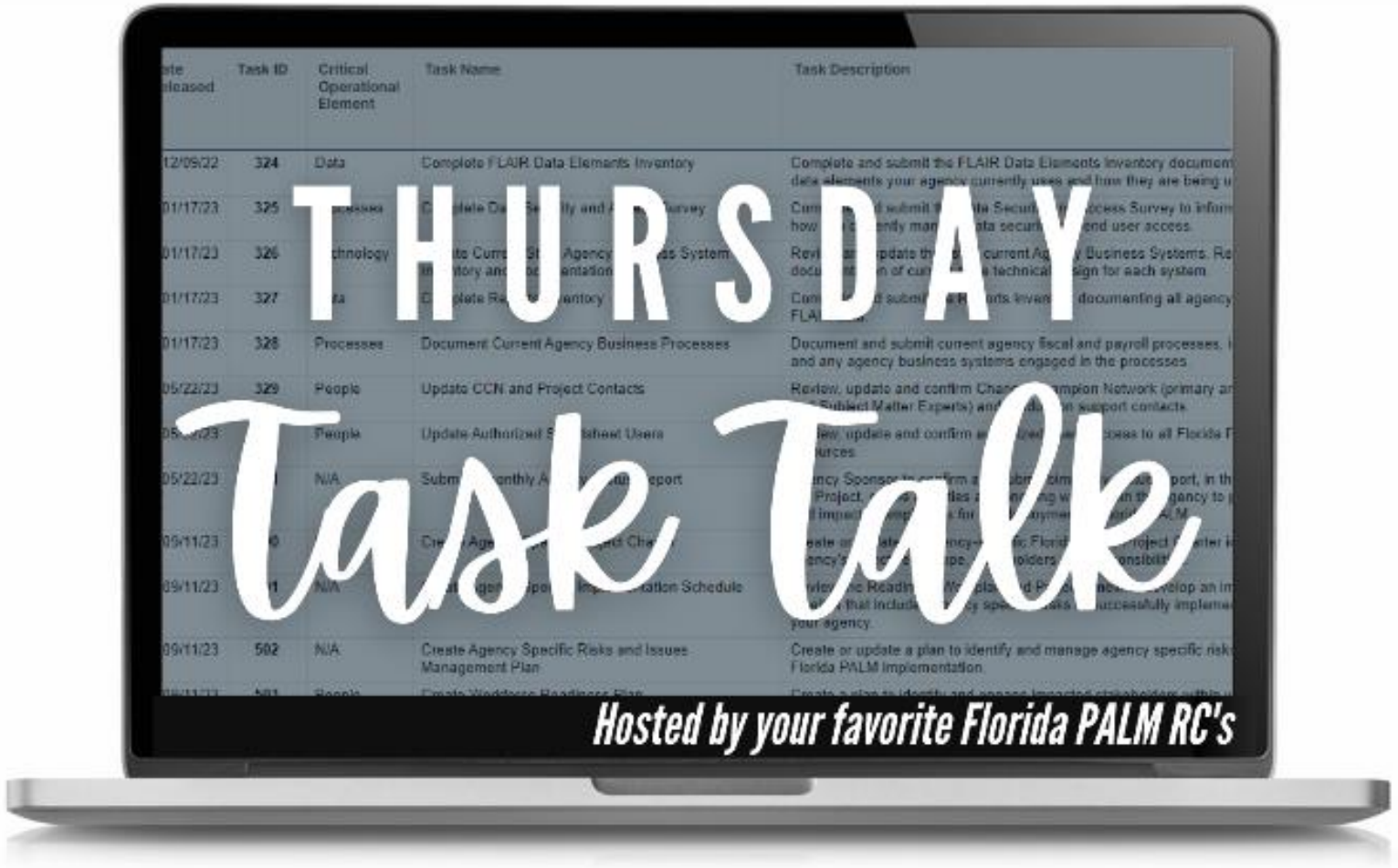
Florida PALM

Planning, Accounting, and Ledger Management

CHIEF FINANCIAL OFFICER
STATE OF FLORIDA



JUNE 26, 2025

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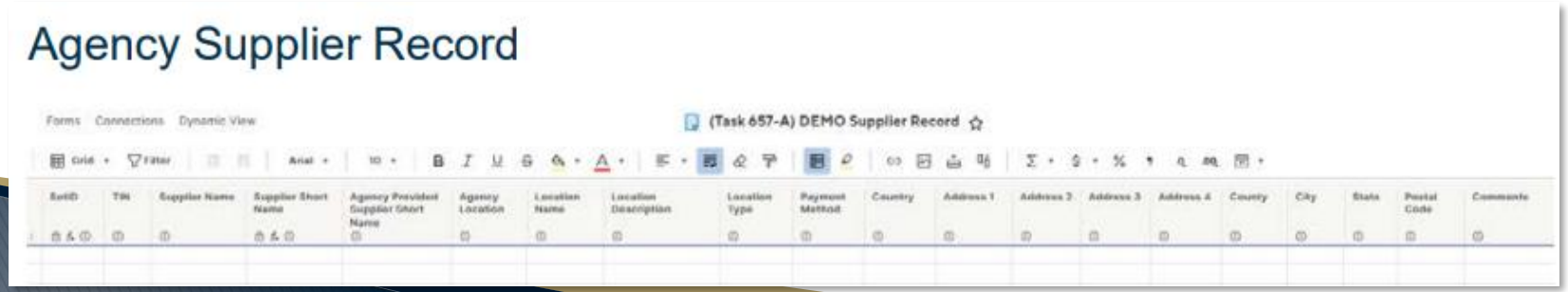
Agenda

- Task Review:
  - 657A – Submit Config Workbooks – Agency Supplier Record
- Task Spotlight:
  - 610 - Update Authorized Smartsheet Users
  - 591 - Confirm IdP Configuration for Florida PALM
  - 593 - Update Agency Readiness Certification #1
- Reminders

657-A - Submit Updated Configuration Workbooks – Agency Supplier Record

Due 6/27/2025

- Purpose
  - To establish Supplier record for your agency in Mock Conversion 3
  - Required for agencies to receive warrant, ACH or wire payments
  - If an agency only receives payments via credit card, an agency Supplier record is not needed in Florida PALM. – Note in Task Tracker
- Considerations
  - A Supplier record must be established for each unique TIN where the agency needs to receive payments for:
    - special handling that cannot be processed within the Inter/IntraUnit module,
    - SPIA payments, or
    - revolving fund replenishments
- No Smartsheet validation – error messages



610 - Update Authorized Smartsheet Users

Due 7/11/2025

Task Instructions

1. Review who currently has access to your Florida PALM Workbook for <Agency> and Florida PALM Archive for <Agency> Workbook.

2. Decide if the person's access should:

a. Remain the same;

b. Be removed; or

c. Be updated to 'Editor – Cannot Share' or 'Viewer'.

3. Add other CCN members who need access to your Florida PALM Agency Workbook.

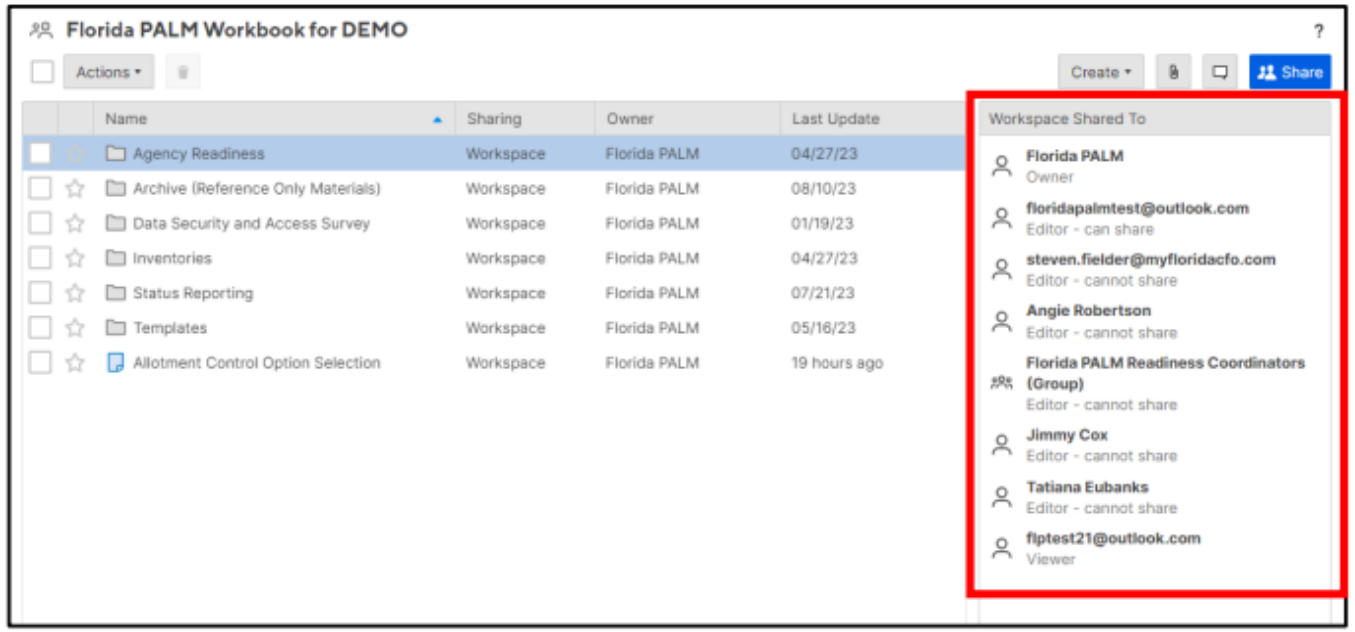


Figure 1: Shared Workspace

591 - Confirm IdP Configuration for Florida PALM

Due 7/11/2025

Task Elements:

- IdP SMEs add UAT SMEs to the Agency Active Directory Florida PALM Security Group
- SAMs confirm access to the Florida PALM UAT Access Management tool
- Establish new IdP configuration (select agencies)

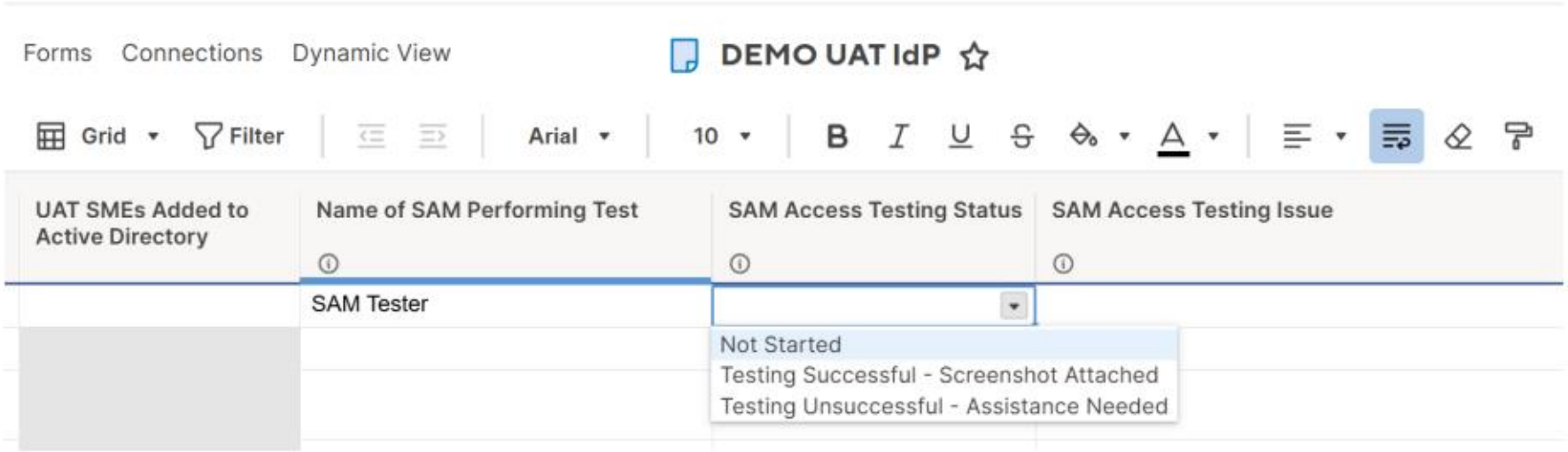


Figure 2: SAM Testing Columns in <Agency> UAT IdP worksheet

593 - Update Agency Readiness Certification #1

Due 7/18/2025

- Review Agency Readiness Certification Criteria and your Agency's readiness progress
- Confirm status of Agency Readiness Certification Criteria

Forms Connections Dynamic View

DEMO Readiness Certification

Grid Filter Arial 10

Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
People Processes Technology Data	N/A	Overall Readiness			
People	1.0	Overall People Readiness			
People	1.1	Agency identified SMEs have been assigned end user roles based on job function.			
People	1.2	UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.			
People	1.3	SMEs have been identified and prepared to participate in UAT.			
Processes	2.0	Overall Processes Readiness			
Processes	2.1	Agency UAT success criteria has been identified.			
Processes	2.2	Change impacts have been identified for agency processes.			
Processes	2.3	Creation of at least 75% of the Project-recommended standard UAT scenarios.			
Technology	3.0	Overall Technology Readiness			

Figure 1: DEMO Readiness Certification Worksheet

593 - Update Agency Readiness Certification #1

Due 7/18/2025

- Provide mitigation plans for any criteria not met
- Complete and Submit Readiness Certification Dashboard

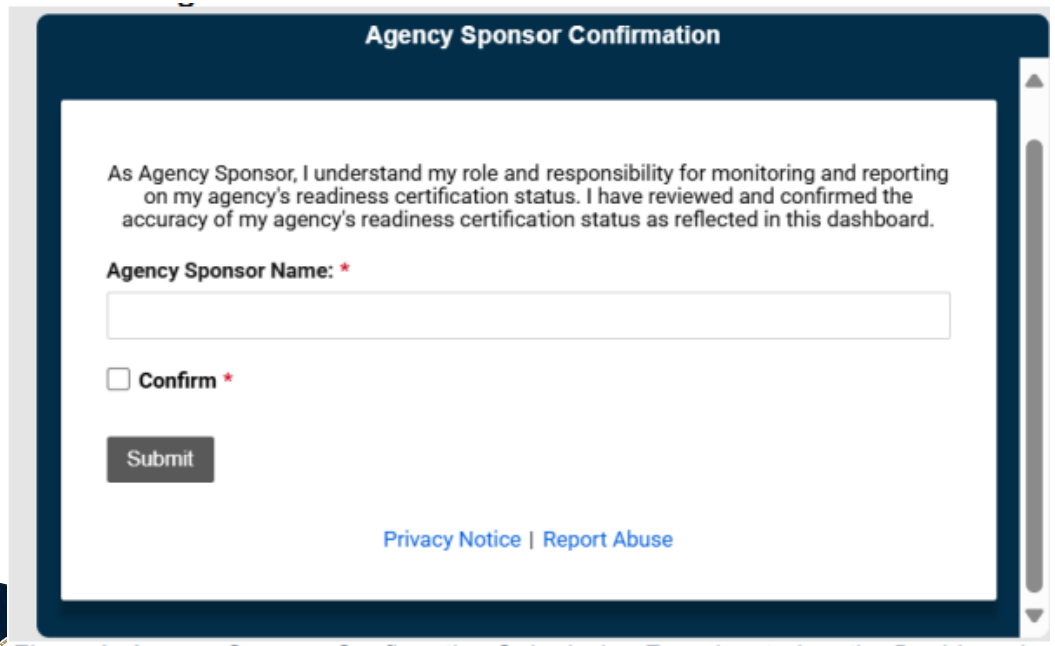


Figure 3: Agency Sponsor Confirmation Submission Form located on the Dashboard

Figure 1: Demo Readiness Certification Dashboard

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Reminders: Upcoming Task Due Dates

June 27

- ✓ 657-A – Submit Updated Configuration Workbooks – Agency Supplier Record

July 11

- ✓ 591 - Confirm IdP Configuration for Florida PALM
- ✓ 610 - Update Authorized Smartsheet Users

July 18

- ✓ 593 - Update Agency Readiness Certification #1

July 25

- ✓ 576 - Complete Internal Agency Business System Test and Remediation to Prepare for Cycle 2 - Technical Interface Testing

August 8

- ✓ 574 - Prepare Documentation for User Acceptance Testing

Questions?

MOOSE

Contact us

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Project Website

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Knowledge Center

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Knowledge Center

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