

FloridaPALM

Planning, Accounting, and Ledger Management

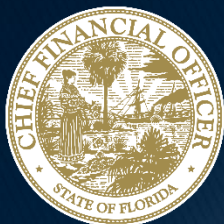


Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory document detailing all data elements your agency currently uses and how they are being used.
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how your agency manages data security and user access.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Record the current technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency reports.
328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and additional support contacts.
	People	Update Authorized Signatory Users	Review, update and confirm authorized signatory access to all Florida PALM systems.
	N/A	Submit Monthly Agency Health Report	Agency Sponsor to confirm and submit monthly report, in the Project Health Report, detailing the agency's progress in the project.
		Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risks to Florida PALM implementation.
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THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

JUNE 26, 2025



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

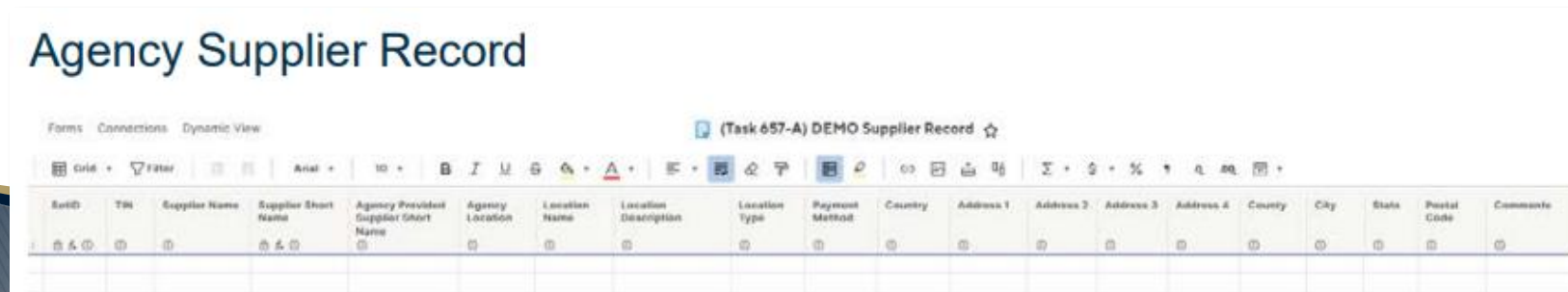
➤ Purpose

- 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



The screenshot shows the 'Agency Supplier Record' form in the Florida PALM system. The form is titled 'Agency Supplier Record' and has a subtitle '(Task 657-A) DEMO Supplier Record'. It features a toolbar with various icons for editing and viewing. Below the toolbar is a table with the following columns: Entity, TIN, Supplier Name, Supplier Short Name, Agency Provided Supplier Short Name, Agency Location, Location Name, Location Description, Location Type, Payment Method, Country, Address 1, Address 2, Address 3, Address 4, County, City, State, Postal Code, and Comments. The table is currently empty.

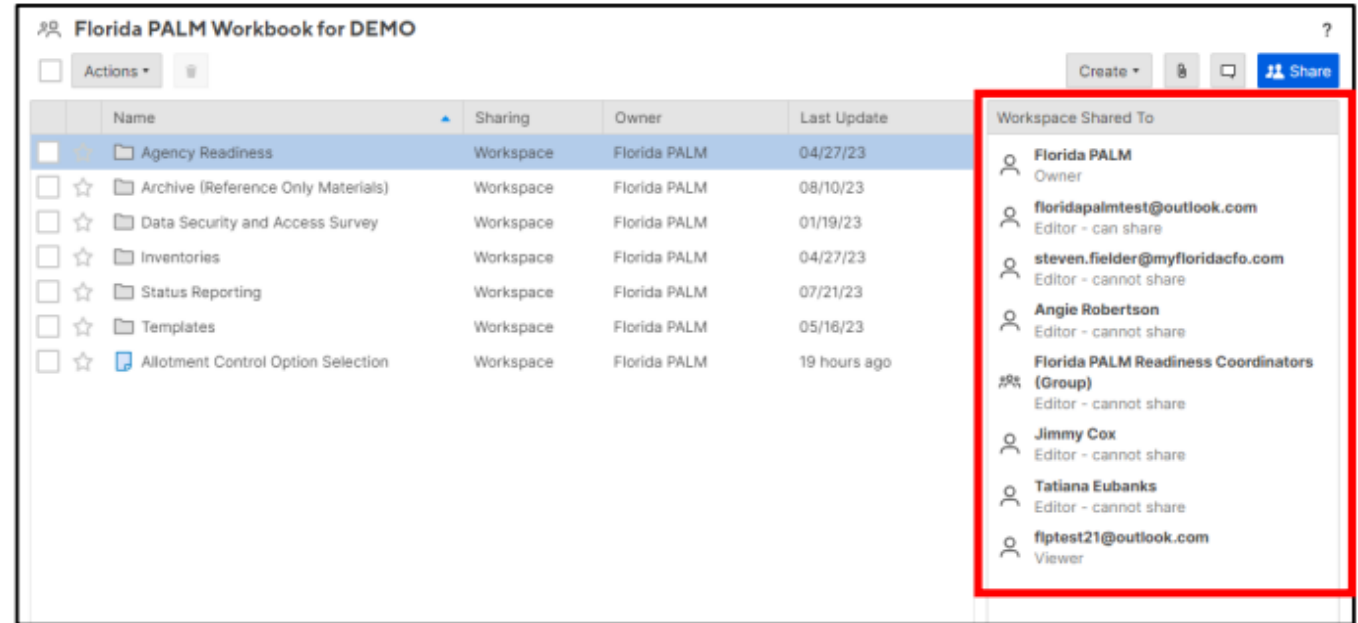


610 - Update Authorized Smartsheet Users

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.



Name	Sharing	Owner	Last Update
Agency Readiness	Workspace	Florida PALM	04/27/23
Archive (Reference Only Materials)	Workspace	Florida PALM	08/10/23
Data Security and Access Survey	Workspace	Florida PALM	01/19/23
Inventories	Workspace	Florida PALM	04/27/23
Status Reporting	Workspace	Florida PALM	07/21/23
Templates	Workspace	Florida PALM	05/16/23
Allotment Control Option Selection	Workspace	Florida PALM	19 hours ago

Workspace Shared To
Florida PALM Owner
flordapalmtest@outlook.com Editor - can share
steven.fielder@myfloridacfo.com Editor - cannot share
Angie Robertson Editor - cannot share
Florida PALM Readiness Coordinators (Group) Editor - cannot share
Jimmy Cox Editor - cannot share
Tatiana Eubanks Editor - cannot share
flptest21@outlook.com Viewer

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)

The screenshot displays a web-based worksheet titled "DEMO UAT IdP". The interface includes tabs for "Forms", "Connections", and "Dynamic View". Below the tabs is a toolbar with options for "Grid", "Filter", font settings (Arial, size 10), and various text formatting icons. The main area contains a table with four columns: "UAT SMEs Added to Active Directory", "Name of SAM Performing Test", "SAM Access Testing Status", and "SAM Access Testing Issue". The first row of data shows "SAM Tester" in the second column. A dropdown menu is open for the "SAM Access Testing Status" column, showing three options: "Not Started", "Testing Successful - Screenshot Attached", and "Testing Unsuccessful - Assistance Needed".

UAT SMEs Added to Active Directory	Name of SAM Performing Test	SAM Access Testing Status	SAM Access Testing Issue
	SAM Tester	<div>Not Started Testing Successful - Screenshot Attached Testing Unsuccessful - Assistance Needed</div>	

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 B I U

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			

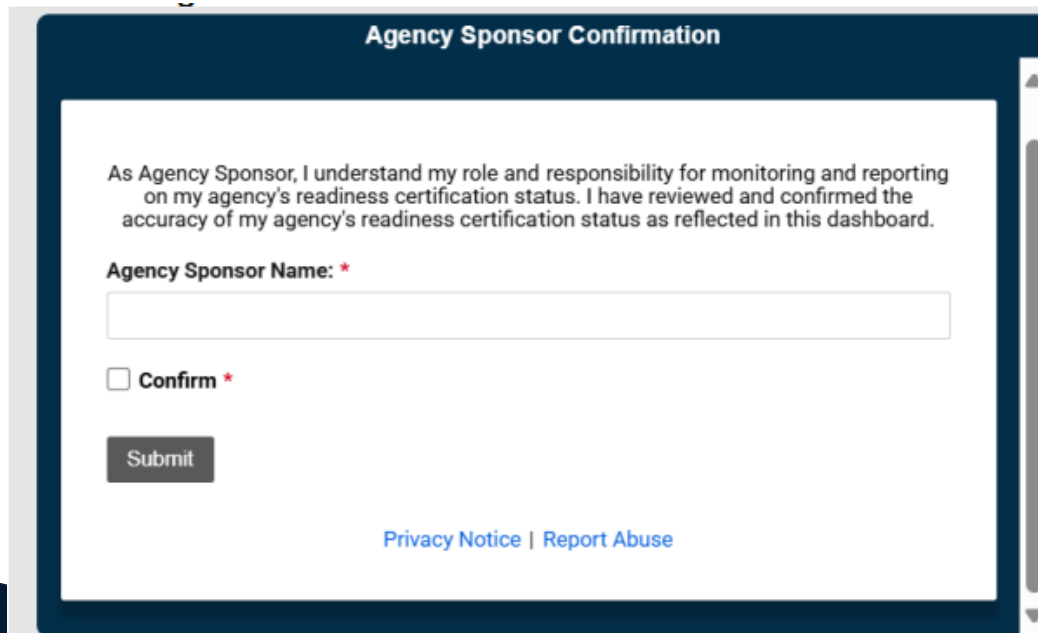
Figure 1: DEMO Readiness Certification Worksheet



593 - Update Agency Readiness Certification #1

Due 7/18/2025

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



Agency Sponsor Confirmation

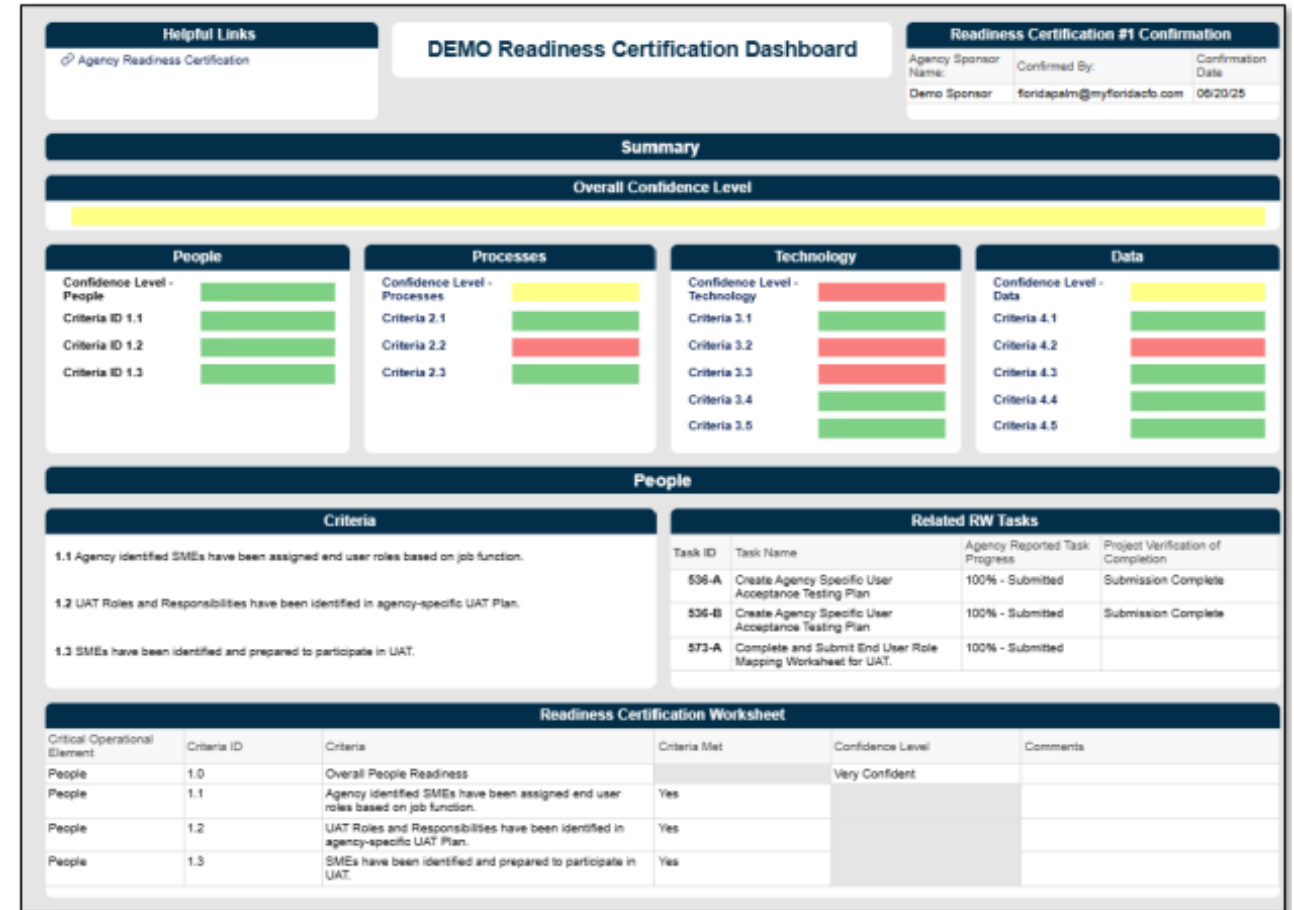
As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness certification status. I have reviewed and confirmed the accuracy of my agency's readiness certification status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

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



Helpful Links
Agency Readiness Certification

DEMO Readiness Certification Dashboard

Readiness Certification #1 Confirmation
Agency Sponsor Name: Demo Sponsor
Confirmed By: floridapalm@myfloridapalm.com
Confirmation Date: 06/20/25

Summary
Overall Confidence Level:

People	Processes	Technology	Data
Confidence Level - People: 	Confidence Level - Processes: 	Confidence Level - Technology: 	Confidence Level - Data:
Criteria ID 1.1: 	Criteria 2.1: 	Criteria 3.1: 	Criteria 4.1:
Criteria ID 1.2: 	Criteria 2.2: 	Criteria 3.2: 	Criteria 4.2:
Criteria ID 1.3: 	Criteria 2.3: 	Criteria 3.3: 	Criteria 4.3:
		Criteria 3.4: 	Criteria 4.4:
		Criteria 3.5: 	Criteria 4.5:

People

Criteria	Related RW Tasks																
1.1 Agency identified SMEs have been assigned and user roles based on job function.	<table border="1"><thead><tr><th>Task ID</th><th>Task Name</th><th>Agency Reported Task Progress</th><th>Project Verification of Completion</th></tr></thead><tbody><tr><td>506-A</td><td>Create Agency Specific User Acceptance Testing Plan</td><td>100% - Submitted</td><td>Submission Complete</td></tr><tr><td>506-B</td><td>Create Agency Specific User Acceptance Testing Plan</td><td>100% - Submitted</td><td>Submission Complete</td></tr><tr><td>573-A</td><td>Complete and Submit End User Role Mapping Worksheet for UAT.</td><td>100% - Submitted</td><td></td></tr></tbody></table>	Task ID	Task Name	Agency Reported Task Progress	Project Verification of Completion	506-A	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete	506-B	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete	573-A	Complete and Submit End User Role Mapping Worksheet for UAT.	100% - Submitted	
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506-A	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete														
506-B	Create Agency Specific User Acceptance Testing Plan	100% - Submitted	Submission Complete														
573-A	Complete and Submit End User Role Mapping Worksheet for UAT.	100% - Submitted															
1.2 UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.																	
1.3 SMEs have been identified and prepared to participate in UAT.																	

Readiness Certification Worksheet

Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
People	1.0	Overall People Readiness		Very Confident	
People	1.1	Agency identified SMEs have been assigned and user roles based on job function.	Yes		
People	1.2	UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.	Yes		
People	1.3	SMEs have been identified and prepared to participate in UAT.	Yes		

Figure 1: Demo Readiness Certification Dashboard



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



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KNOWLEDGE CENTER

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