

FloridaPALM

Planning, Accounting, and Ledger Management



THURSDAY Task Talk

Hosted by the Florida PALM Readiness Team

JUNE 11, 2026



Agenda

- ▶ Task Spotlight:
 - 702 Role Mapping Requirements - Resolve Errors & SOD Conflicts
 - 701 Configuration & Conversion Workbooks – The Zero/Zero/Zero Club!
- ▶ Critical Dates
- ▶ Readiness Certification #3
- ▶ Resource Updates:
 - RW Updates
 - Deployment Article
- ▶ Task Reminders
- ▶ Questions




702 – Submit Role Mapping Worksheet

Due 6/26/2026

Requirements

- All end users must be role mapped
 - Ensure name and email addresses are entered correctly
- **SOD Conflicts must be removed or granted an exception by A&A prior to task close**
 - SOD conflicts in exception status must have A&A form attached to Role Mapping
 - 16 agencies currently have SOD Conflicts in Role Mapping
- SOD Conflict Updates
 - Most conflicts between AP roles and KK roles have been removed
 - Agency SOD Conflict Matrix and agency Smartsheets updated
- Users with errors will not be loaded for UAT Refresh



Department of Financial Services
Division of Accounting and Auditing

Florida PALM Separation of Duties (SOD) Conflict Request Form

Complete this form to request approval of a SOD Conflict within Florida PALM. Submit the completed form to Access2PALM@myfloridacfo.com for approval from DFS Accounting & Auditing. SOD Conflict exceptions will be granted for 60 days or less.

Security Access Manager Information	
Employee Name:	Position Title:
Employee Position Number:	Agency/Division/Bureau:
Phone Number:	Email Address:

Agency Authorized Approver (Finance and Accounting Office)		
Approver First Name:	Approver Last Name:	Agency/Division/Bureau:
Phone Number:	Email Address:	
Authorizing Approver Signature: <hr/>		



Zero/Zero/Zero Club

Configuration/Conversion

– DUE 6/17

- DBPR
- FLHSMV
- DOL
- DOR
- DOAH
- FCOR
- LEG
- PSC



Role Mapping – DUE 6/26

- DBPR
- COM
- DACS
- DOE
- DOEA
- DFS
- DOH
- FLHSMV
- DOL
- DMS
- DMA
- FCOR
- FDC
- FDOT
- FWC
- FSDB
- LEG

Upcoming Critical Dates

June 17

- Config and Conversion Workbooks Close
- Data Cleansing Complete for DR2

June 26

- Role Mapping Close
- SOD conflicts must be resolved

June 30

- Report testing progress

July 10

- Readiness Certification 3



Readiness Activities

Criteria for Agency Readiness Certification #3

Continue UAT and Prepare for Training – Due July 10

People

Updated Training Plan

Identification of training materials to be developed

All end users are role mapped

SOD conflicts resolved

Plan to ensure all end users practice in UAT

Processes

Agency has successfully tested at least one user story for each applicable Project Recommended Standard Activity

Plan to complete testing of all processes after UAT refresh

Identification of all process documentation to be created or updated

Technology

All Cycle 3 interfaces have been successfully tested more than once

Agency has produced and tested all inbound files in UAT or has a plan to complete before the UAT refresh

Plan to complete interface testing after UAT refresh

Agency Business Systems are being remediated based on UAT findings

Data

Agency specific configurations are being tested and maintained in configuration workbooks

Agency configuration and conversion workbooks are complete and error free

Agency has cleansed data in FLAIR, FACTS and MFMP; ready for Dry Run 2

Resource Update – RW Updates

RW Updated 6/10:

- RW Task 586 – Create Agency Deployment Plan and Checklist to Prepare for Go-Live
 - New Start Date: 6/29
 - New End Date: 9/11
- RW Task 623 – Create Agency Post-Implementation Support Plan
 - New Start Date: 9/14
- RW Task 714 – Submit Configuration and Conversion Workbooks in Preparation for Go-Live
 - End Date Added (previously TBD): 11/30
- RW Tasks 690 and 693 – Submit Bimonthly Agency Readiness Status Report
 - Tasks removed
 - Agencies will only submit Monthly Progress Reports effective for FY 2026/2027



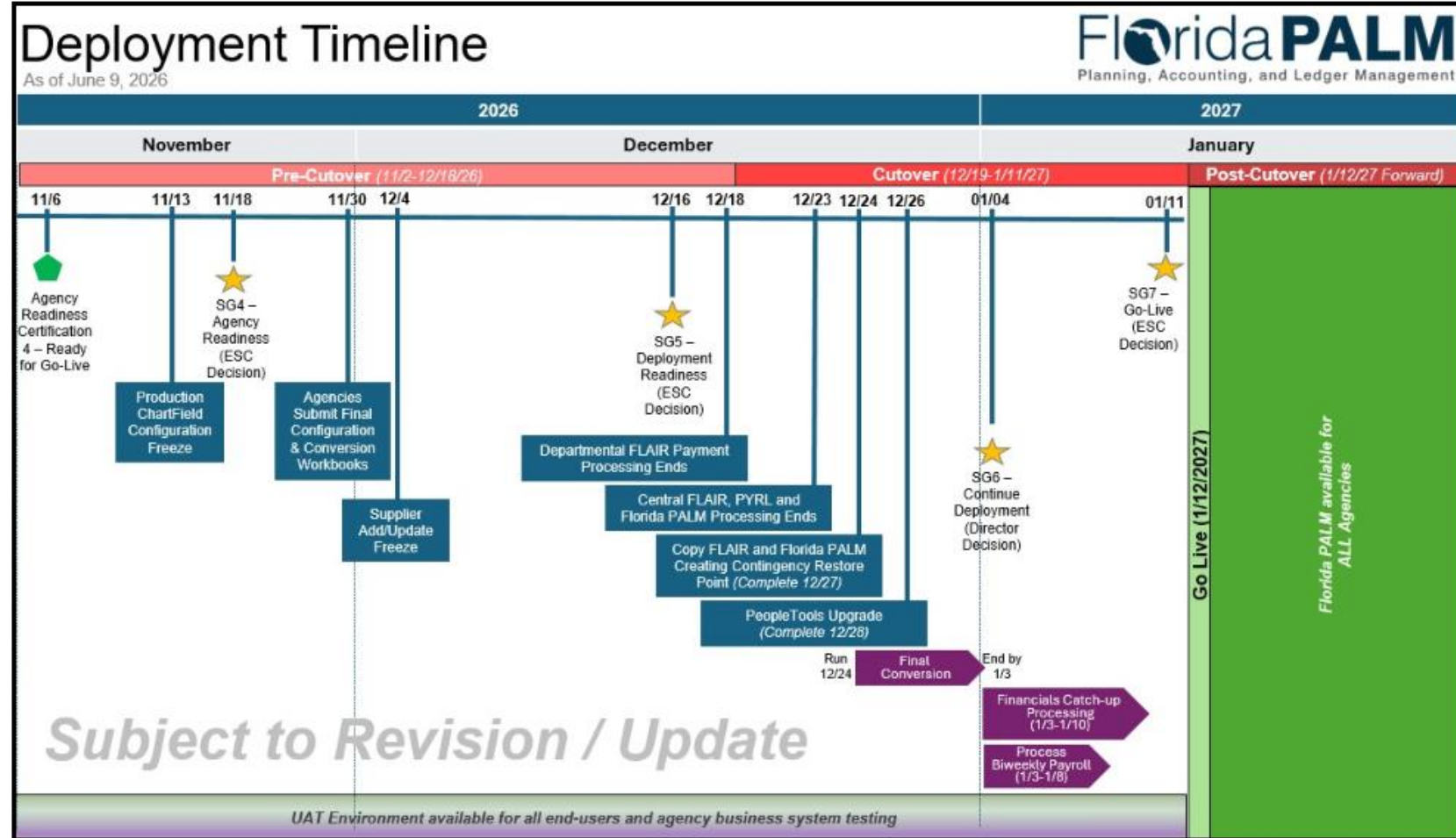
Resource Update - Deployment Planning

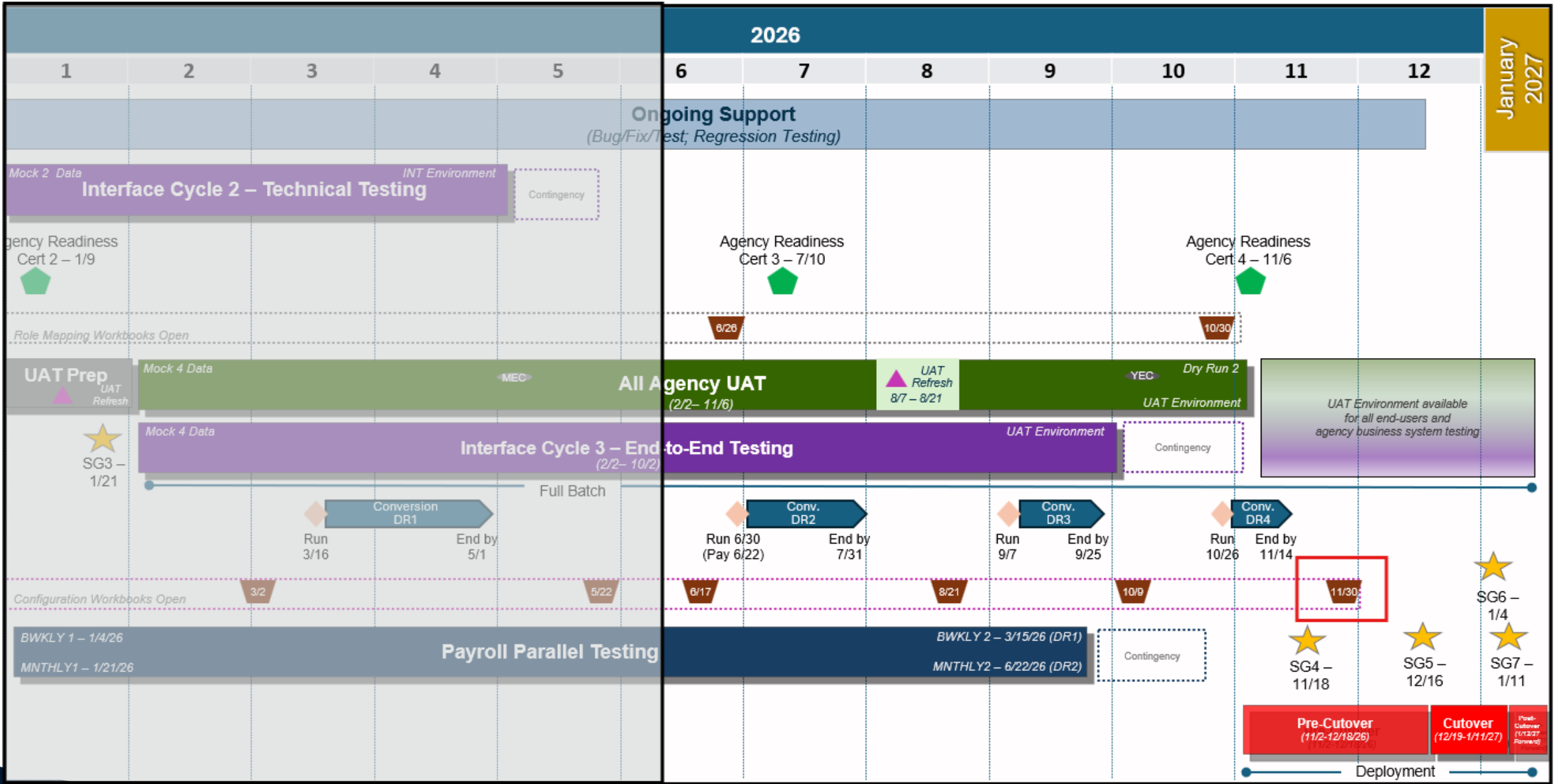
Resources:

- Deployment Planning Knowledge Center Article released
- DRAFT Deployment Timeline and Deployment Activities Timetable

More to Come...

- Deployment information will continue to be updated
- Task 586 Agency Deployment Plan & Cutover Checklist





*Updated 6/10



Task Reminders

Current Tasks Due Dates:

Wednesday, June 17

- ✓ 698 – Complete Data Cleansing in Preparation for Dry Run 2
- ✓ 701 – Submit Configuration & Conversion Workbooks

Friday, June 26

- ✓ 702 – Submit Role Mapping

Tuesday, June 30

- ✓ 679 – Submit Monthly Progress Report – Testing, Training

Knowledge Center Known Issue

For archived messages, view the [Archived Message Board Communications](#)

6/10/26 - Awareness: KC "Follow" Alerts - It has been reported that the KC may not be sending emails based on updates to pages that users may have "followed". We are working with the [Document360](#) team to research and resolve. In the meantime, you may visit the [Knowledge Center Change Catalog](#) for a list of changes that have been made to the KC content.



Questions?



CONTACT US

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