

# Florida **PALM**

Planning, Accounting, and Ledger Management



# THURSDAY Task Talk

*Hosted by the Florida PALM Readiness Team*

JUNE 25, 2026



# Agenda

- ▶ Task Spotlight:
  - 619 – Update Agency Readiness Certification #3
- ▶ Critical Dates
- ▶ Resource Updates:
  - RW Updates
- ▶ OCM Minute
- ▶ Task Reminders
- ▶ Questions



# 619 – Update Agency Readiness Certification #3

## 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

*\*Criteria response populated by Project*

6/25/2026

# 619 – Update Agency Readiness Certification #3

## Due July 10

- ▶ Agency opportunity to
  - Reflect on progress and current readiness
  - Provide update on UAT Progress and Training Preparations
  - Determine and document strategies to complete testing and kick-off training efforts
- ▶ Past progress reporting data, including cumulative testing, provided in Agency Archive Workspace
- ▶ Requires responses for criteria and confidence levels overall and by critical operational element (people, processes, technology, data)
  - Responses should be based on progress made as of June 30 (submission forms to be activated on July 1)
  - Comments are not required but encouraged
  - Some responses auto-populated based on RW Tasks and Progress Reporting data
- ▶ Mitigation Plans required for any criteria not met



# 619 – Update Agency Readiness Certification #3

## Due July 10

**Helpful Links**

- Agency Readiness Certification
- Agency Readiness Certification #1
- Agency Readiness Certification #2

**DEMO Readiness Certification #3 Dashboard**

Continue UAT and Prepare for Training

**Readiness Certification #3 Confirmation**

Agency Sponsor Name:	Confirmed By:	Confirmation Date:
DEMO Sponsor	floridapalm@myfloridacfo.com	04/22/26

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**SUMMARY**

Overall Confidence Level

**People**

Confidence Level - People

Criteria 1.1	Green
Criteria 1.2	Green
Criteria 1.3	Red
Criteria 1.4	Green
Criteria 1.5	Red

**Processes**

Confidence Level - Processes

Criteria 2.1	Yellow
Criteria 2.2	Green
Criteria 2.3	Red

**Technology**

Confidence Level - Technology

Criteria 3.1	Green
Criteria 3.2	Green
Criteria 3.3	Green
Criteria 3.4	Red

**Data**

Confidence Level - Data

Criteria 4.1	Green
Criteria 4.2	Green
Criteria 4.3	Green

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**PEOPLE**

Criteria

1.1 Agency Training Plan has been updated.

1.2 Agency has identified all agency specific learning materials to be developed to support end user training.

1.3 All agency end users have been role mapped in preparation for the UAT refresh.

1.4 All SOD conflicts have been resolved or approved by A&A for the UAT refresh.

1.5 Agency is prepared to execute plan to ensure all end users practice job functions after UAT refresh.

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**Agency-Specific Training Inventory**

Applicable Topics Based on User Stories =

- Number of Topics Dispositioned for Updates/Creation = /
- Number of Topics Requiring Training Materials = /

**Role Mapping**

Number of End Users Role Mapped =

Number of End Users with SOD Conflicts =

- Approved SOD Conflicts =
- Unapproved SOD Conflicts =
- Available DW/BI Licenses Exceeded =

**Related RW Tasks**

Task ID	Task Name	Agency Reported Task Progress	Project Verification of Completion
607	Update Training Plan	100% - Submitted	Submission Complete
702	Submit Role Mapping Worksheet	75% - Consolidating/Input Information for Submission	

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**Readiness Certification Worksheet**

Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
People	1.0	Overall People Readiness		Yellow	
People	1.1	Agency Training Plan has been updated.	Yes		
People	1.2	Agency has identified all agency specific learning materials to be developed to support end user training.	No	Red	
People	1.3	All agency end users have been role mapped in preparation for the UAT refresh.			
People	1.4	All SOD conflicts have been resolved or approved by A&A for the UAT refresh.			
People	1.5	Agency is prepared to execute plan to ensure all end users practice job functions after UAT refresh.		Yellow	

- ▶ Dashboard design presents progress data to support criteria
- ▶ Confidence Level Colors
  - ‘Extremely Confident’ and ‘Very Confident’ selections will display as green
  - ‘Moderately Confident’ and ‘Becoming Confident’ selections will display as yellow
  - ‘Somewhat Concerned’ or ‘Highly Concerned’ selections will display as red
- ▶ Criteria Response Colors
  - “Criteria Met” will display as green
  - “Criteria Not Met” will display as red
- ▶ Responses to be published to website and shared with ESC

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6/25/2026

# 619 – Update Agency Readiness Certification #3

**Due July 10**

- ▶ People criteria being populated by the Project

Criteria ID	Criteria	Resource	Requirement for Criteria to be Met	Related Dashboard Widget
1.1	Agency Training Plan has been updated	<Agency> RW Task Tracker	Task 607– Update Training Plan was submitted on time and has been verified as complete	Related RW Task widget in the People section
1.2	Agency has identified all agency specific learning materials to be developed to support end user training	<Agency> Agency-Specific Training Inventory	Agency has dispositioned which Topics require agency-specific training and has provided a response for all Topics in the 'Do you plan on creating Agency-Specific Training?' column	Agency-Specific Training Inventory widget in the People section
1.3	All agency end users have been role mapped in preparation for the UAT refresh	<Agency> RW Task Tracker	Task 702 – Submit Role Mapping Worksheet was submitted on time and has been verified as complete	Related RW Task widget in the People section
1.4	All SOD conflicts have been resolved or approved by A&A for the UAT refresh	<Agency> Role Mapping Worksheet	No SOD conflicts exist, or any remaining SOD conflicts have been granted an exception by A&A and the approval form has been attached to the worksheet	Role Mapping widget in the People section



# 619 – Update Agency Readiness Certification #3

**Due July 10**

- ▶ Process criteria being populated by the Project

Criteria ID	Criteria	Resource	Requirement for Criteria to be Met	Related Dashboard Widget
2.1	Agency testers have successfully tested at least one user story for each applicable Project Recommended Standard Activity	<Agency> User Story Inventory Worksheet OR <Agency> Change Analysis Worksheet  Monthly Progress Reporting (February – June)  See note below	Agency has reported at least one test for each applicable Project Recommended Standard Activity, where the performance outcome is 'Above Expectation' or 'Satisfactory' in Monthly Progress Reporting from February – June	User Story Testing Progress – Cumulative widget in the Processes section
2.3	Agency has identified all process documentation to be created or updated based on testing results	<Agency> Agency Business Process Documentation Inventory Worksheet	Agency has dispositioned which documentation require creation or updates and has provided a response for all Topics in the 'Do you need to create or update documentation?' column of the worksheet	Business Process Documentation Updates in the Processes section

# 619 – Update Agency Readiness Certification #3

## Due July 10

- ▶ Technology criteria being populated by the Project
- ▶ N/A populated for agencies with no interfaces

Criteria ID	Criteria	Resource	Requirement for Criteria to be Met	Related Dashboard Widget
3.1	All Cycle 3 interfaces have been successfully tested in UAT multiple times	<Agency> Interface Cycle 3 – Full Integration Testing Worksheet  Monthly Progress Reporting (February – June)	Agency has reported at least more than one test for each interface, where the performance outcome is 'Above Expectation' or 'Satisfactory' in Monthly Progress Reporting from February – June	Cycle 3 Interfaces – Inbound and Cycle 3 Interfaces – Outbound widgets in the Technology section

# 619 – Update Agency Readiness Certification #3

## Due July 10

- ▶ Data criteria being populated by the Project

Criteria ID	Criteria	Resource	Requirement for Criteria to be Met	Related Dashboard Widget
4.2	Agency configuration and conversion workbooks are complete and contain no errors	<Agency> RW Task Tracker	Task 701 – Submit Configuration and Conversion Workbooks and Task 713 – Confirm Supplier Records were submitted on time and verified as complete	Related RW Tasks and Worksheet Errors widgets in the Data section
4.3	Agency data in FLAIR, FACTS and MFMP are cleansed and ready for Dry Run 2 conversion	<Agency> RW Task Tracker	Task 698 – Complete Data Cleansing in Preparation for Dry Run 2 was submitted on time and verified as complete	Related RW Tasks widget in the Data section

# 619 – Update Agency Readiness Certification #3

## Due July 10

- ▶ Past Progress Reporting data, including cumulative data, has been added to your Archive Workspace

Browse

- ▶ Florida PALM Archive for DFS
- ▶ Florida PALM Archive for DJJ
- ▶ Florida PALM Archive for DLA
- ▶ Florida PALM Archive for DMA
- ▶ Florida PALM Archive for DMS
- ▶ Florida PALM Archive for DOAH
- ▶ Florida PALM Archive for DOE
- ▶ Florida PALM Archive for DOEA
- ▶ Florida PALM Archive for DOH
- ▶ Florida PALM Archive for DOL
- ▶ Florida PALM Archive for DOR

Florida PALM Archive for DFS

Actions


	Name	Sharing	Owner	Last Update
<input type="checkbox"/>	☆ Archive - Agency Readiness	Workspace	Florida PALM	10/23/25
<input type="checkbox"/>	☆ Archive - Inventories	Workspace	Florida PALM	06/18/25
<input type="checkbox"/>	☆ Archive - Status Reporting	Workspace	Florida PALM	06/18/25
<input type="checkbox"/>	☆ Archive - Configurations	Workspace	Florida PALM	06/19/26
<input type="checkbox"/>	☆ Archive - Conversions	Workspace	Florida PALM	06/19/26
<input checked="" type="checkbox"/>	☆ Archive - Dashboard Data	Workspace	Florida PALM	06/22/26
<input type="checkbox"/>	☆ Archive - End User Role Ma...	Workspace	Florida PALM	12/23/25

File Automation Forms Connections Dynamic View Archive - Dashboard Data

Grid Filter Arial 10 B I U

	Month	Worksheet Title
1	February	Cycle 3 Testing
2	February	User Story Inventory
3	March	Cycle 3 Testing
4	March	User Story Inventory
5	April	Cycle 3 Testing
6	April	User Story Inventory
7	May	Cycle 3 Testing
8	May	User Story Inventory
9	June	Cycle 3 Testing
10	June	User Story Inventory
11	February - June 21	Cummulative Cycle 3 Testing
12	February - June 22	Cummulative User Story Inventory

# Upcoming Critical Dates

- June 17**
  - ~~• Config and Conversion Workbooks Close~~
  - ~~• Data Cleansing Complete for DR2~~**COMPLETED**
- June 26**
  - Role Mapping Close
  - SOD conflicts must be resolved
- June 30**
  - Report testing progress
- July 10**
  - Readiness Certification 3

# Role Mapping Zero Club

- AHCA
- DBPR
- **COM**
- DACS
- DCF
- DOE
- **DOEA**
- DFS
- **DOH**
- DJJ
- FLHSMV
- DOL
- DMA
- **FCOR**
- **FDC**
- FDOT
- FWC
- **FSDB**
- JAC
- LEG

***\*Submitted early***



# Resource Update – RW Updates

## RW Updated 6/23 – Shifts final submission of Role Mapping to 11/30

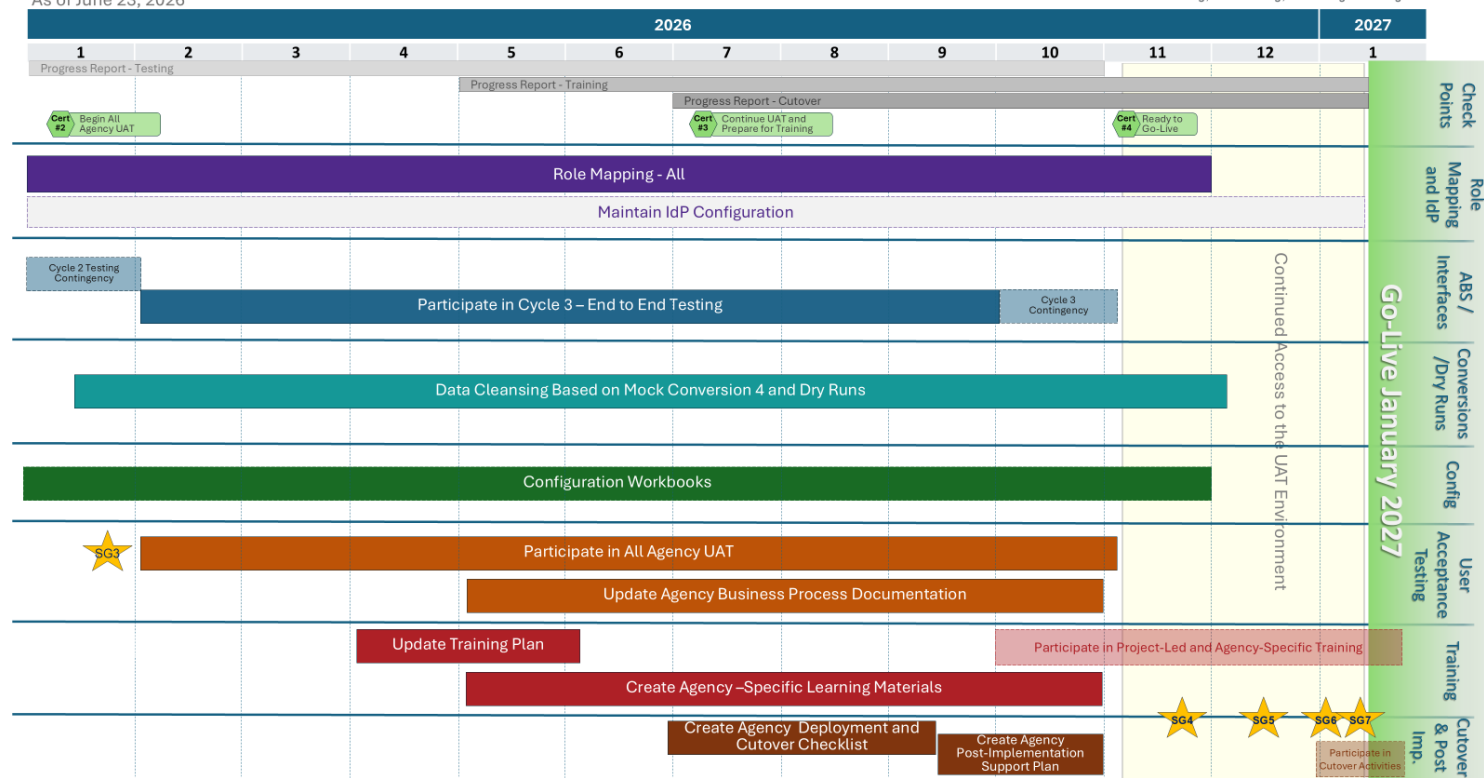
- NEW RW Task 715 – Maintain Role Mapping Worksheet has been added for the month of October 2026
- RW Task 711 – Submit Role Mapping Worksheet (final submission) has been updated to begin November 2, 2026 and end November 30, 2026.

Also updated the following –

- Testing Timeline
- Deployment Timeline
- Agency Readiness Implementation Timeline
- UAT Timeline
- RDNS Certification #4 Criteria

### Implementation Timeline for Agency Readiness

As of June 23, 2026



# Testing Timeline

As of June 23, 2026

January 2027

2026											
1	2	3	4	5	6	7	8	9	10	11	12

**Ongoing Support**  
 (Bug/Fix/Test; Regression Testing)

Mock 2 Data  
**Interface Cycle 2 – Technical Testing**  
 INT Environment  
 Contingency

Agency Readiness  
 Cert 2 – 1/9

Agency Readiness  
 Cert 3 – 7/10

Agency Readiness  
 Cert 4 – 11/6

Role Mapping Workbooks Open

**UAT Prep** UAT Refresh  
 Mock 4 Data  
 <MEC>  
**All Agency UAT** (2/2 – 11/6)  
 UAT Refresh 8/7 – 8/21  
 Dry Run 2  
 UAT Environment  
 UAT Environment available for all end-users and agency business system testing

★ SG3 – 1/21

Mock 4 Data  
**Interface Cycle 3 – End-to-End Testing** (2/2 – 10/2)  
 UAT Refresh 8/7 – 8/21  
 Dry Run 2  
 UAT Environment  
 Contingency

Full Batch

Conversion DR1  
 Run 3/16 End by 5/1

Conv. DR2  
 Run 6/30 (Pay 6/22) End by 7/31

Conv. DR3  
 Run 9/7 End by 9/25

Conv. DR4  
 Run 10/26 End by 11/14

Configuration Workbooks Open

BWKLY 1 – 1/4/26  
 MNTHLY1 – 1/21/26  
**Payroll Parallel Testing**

BWKLY 2 – 3/15/26 (DR1)  
 MNTHLY2 – 6/22/26 (DR2)  
 Contingency

★ SG6 – 1/4  
 ★ SG4 – 11/18  
 ★ SG5 – 12/16  
 ★ SG7 – 1/11

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 Pre-Cutover (11/2-12/18/26)  
 Cutover (12/19-1/11/27)  
 Post-Cutover (1/12/27 Forward)

Deployment



# OCM Minute

- ▶ Exposure to UAT provides the opportunity to increase people readiness now
- ▶ Resistance is real – ADKAR can help
- ▶ ADKAR – an OCM model for individual change
- ▶ Use ADKAR to find the barrier point for the individual resister
- ▶ Tailor your strategy to overcome the resistance based on the barrier



# OCM Minute

- ▶ **Awareness Barrier**
  - Communicate benefits of change
  - Address misinformation or myths about the change
- ▶ **Desire Barrier**
  - WIFM – What’s In It For Me? – link change to personal, team or organizational benefits
  - Involve the person in shaping the change
- ▶ **Knowledge Barrier**
  - Provide targeted training, resources, learning materials
  - Break down complex changes into manageable steps

<b>A</b>	<b>Awareness</b> - Of the need for change
<b>D</b>	<b>Desire</b> - To participate and support the change
<b>K</b>	<b>Knowledge</b> - On how to change
<b>A</b>	<b>Ability</b> - To implement required skills and behaviors
<b>R</b>	<b>Reinforcement</b> - To sustain the change

# OCM Minute

## ▶ Ability Barrier

- Offer hands-on practice,
- Provide tools, templates, and support systems
- Encourage peer learning and shadowing

## ▶ Reinforcement Barrier

- Recognize and reward early adopters
- Embed change into performance evaluations

<b>A</b>	<b>Awareness</b> - Of the need for change
<b>D</b>	<b>Desire</b> - To participate and support the change
<b>K</b>	<b>Knowledge</b> - On how to change
<b>A</b>	<b>Ability</b> - To implement required skills and behaviors
<b>R</b>	<b>Reinforcement</b> - To sustain the change

# Task Reminders

## Upcoming Due Dates:

### Friday, June 26

- ✓ 702 – Submit Role Mapping

### Tuesday, June 30

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

### Friday, July 10

- ✓ 619 – Update Agency Readiness Certification #3
- ✓ 680 – Submit Bimonthly Agency Readiness Status Report (Releasing next week)

***No Thursday Task Talk  
next week (7/2)***



# Questions?

Working Together to  
*Transform Florida*

SCAN ME

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