

# FloridaPALM

Planning, Accounting, and Ledger Management



# JAC CONNECT & COLLABORATE CONFERENCE 2024

MAY 9, 2024



# Agenda

- ▶ What is Florida PALM?
- ▶ Why is Florida PALM Happening NOW?
- ▶ What is Changing?
- ▶ What are Key Aspects of the Florida PALM Timeline?
- ▶ What is Agency Readiness Certification?



# What is Florida PALM?

- ▶ Enterprise Project to replace the State's legacy accounting system, Florida Accounting Information Resource System (FLAIR), and the State's legacy Cash Management System (CMS)
  - CMS went live in Florida PALM in July 2021
  - FLAIR replacement will go live in January 2026
- ▶ FLAIR consists of the following systems that will all be replaced:
  - Central Accounting (State's Master Books)
  - Department Accounting (Agencies' Master Books)
  - Payroll (PYRL) – State's Payroll System
  - Employee Information Center (EIC)
  - Information Warehouse (FLAIR IW) and Various Reporting Tools
- ▶ Statewide Project where agencies must remediate their agency business systems

## Florida PALM

Planning, Accounting, and Ledger Management

Florida's journey to a new, modern financial management system





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### Project Overview

The State of Florida has embarked on a multiyear endeavor to replace the accounting and cash management systems (FLAIR and CMS) with a cloud-based financial management solution. The Florida PALM Team is working with agencies to design and implement a standardized, scalable, statewide system that will enhance Florida's business practices and position Florida for future innovation. CMS successfully transitioned to Florida PALM in 2021.

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### Florida PALM Priorities

 <b>Maintain and Prepare Existing Systems</b>  DFS will continue operating FLAIR and CMS until all agencies are fully transitioned to Florida PALM	 <b>Build and Transition to Florida PALM</b>  The Florida PALM Team will collaborate with agencies and other stakeholders as they transition to the new system	 <b>Bridge the Systems</b>  The Florida PALM Team will work with agencies to develop interfaces between the various systems	 <b>Benefit Agencies</b>  Agencies will benefit from enhanced features, improved user access, and a modernized user experience
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### Transition Timing

**CMS Wave**

July 2021

All agencies transitioned for CMS functionality. Transitioned July 6, 2021

**Financials & Payroll Go-Live**

January 2026

Financials, Payroll, and Data Warehouse will be implemented together with all agencies.

**Hypercare and Support**

2026 - 2027

Dedicated hypercare and post-implementation support will be available

For a more detailed timeline, visit the [Florida PALM Timeline Page](#)

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Learn more about Florida's financial transformation journey: <https://myfloridacfo.com/floridapalm/>



# Why is Florida PALM Happening NOW?



- ▶ FLAIR is at end-of-life
- ▶ FLAIR is over 40-years old and becoming more and more difficult to maintain
- ▶ Since the technology it is built upon is outdated, finding development staff to maintain and improve FLAIR is increasingly more difficult
- ▶ Must be able to meet changing standards (e.g., GASB, Legislative)

# What is Changing?

- ▶ Everything tied to FLAIR is changing (what makes FLAIR unique)
  - Chart of Accounts (COA) Structure, Transaction Types, Interfaces, Reports
  - Processing Logic, Workflow, User Interface, Data Structure / Reporting
- ▶ FLAIR Org Code will no longer exist
- ▶ FLAIR Account Code (29-digit code) will no longer exist
  - Some attributes will be retained as separate Chart of Accounts values
  - Some attributes will not exist (e.g., GAFR Fund, IBI, Year)
  - New COA elements are available to agencies
- ▶ End Users are expanding due to expanded capabilities

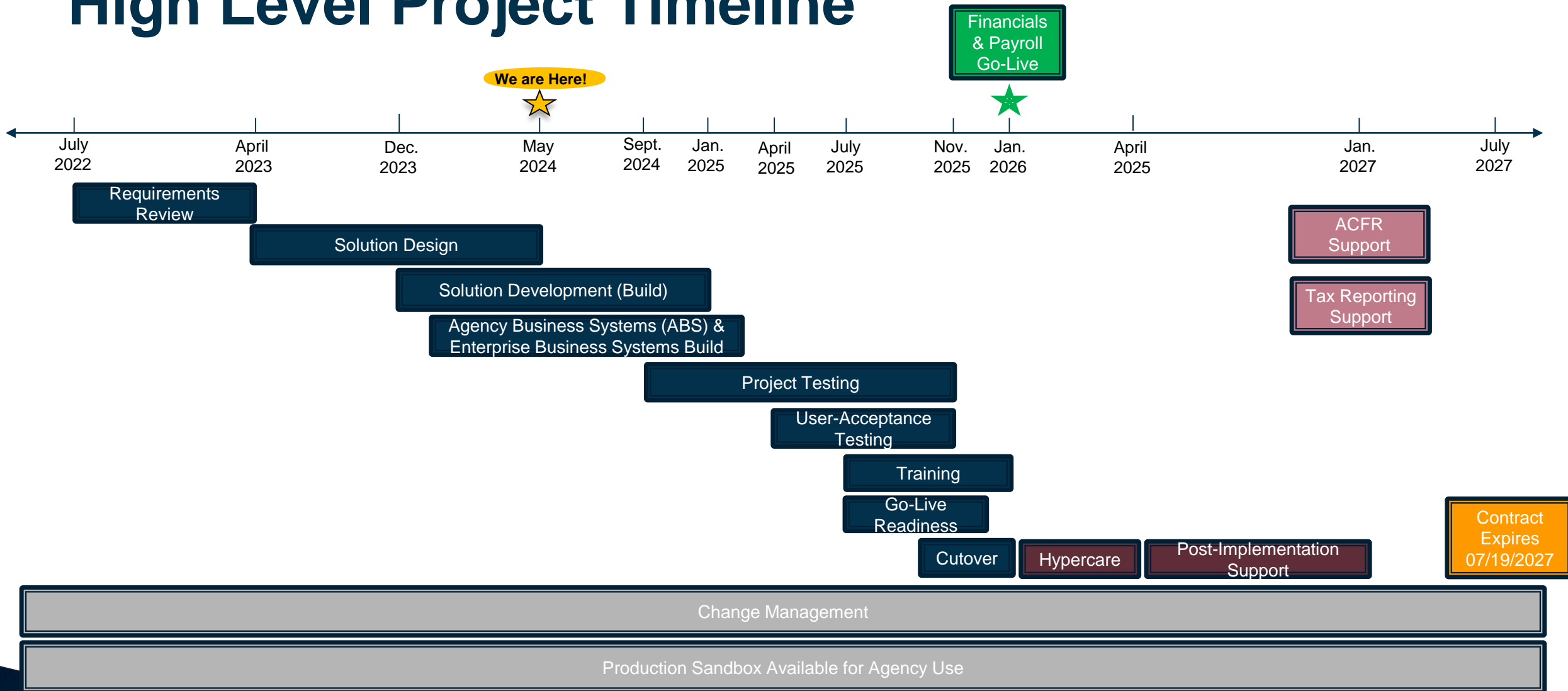


# What are Key Aspects of the Florida PALM Timeline?

- ▶ Replaces all components of FLAIR for all agencies simultaneously
- ▶ Focuses on implementing solution capabilities that meet the State's current financial and payroll needs (replaces FLAIR, does not replicate!)
- ▶ Minimizes overlapping of implementation stages (i.e., design, build, test)
- ▶ Provides for a post implementation period that includes additional resources and focus on operational stability
- ▶ Allows State Project resources to move through the system release lifecycle for the Financials and Payroll implementations
- ▶ Allocates extended time and a dedicated environment for agency testing
- ▶ Acknowledges the importance of reporting by:
  - providing advanced reporting capabilities
  - empowering agencies through data and self-service reporting capabilities

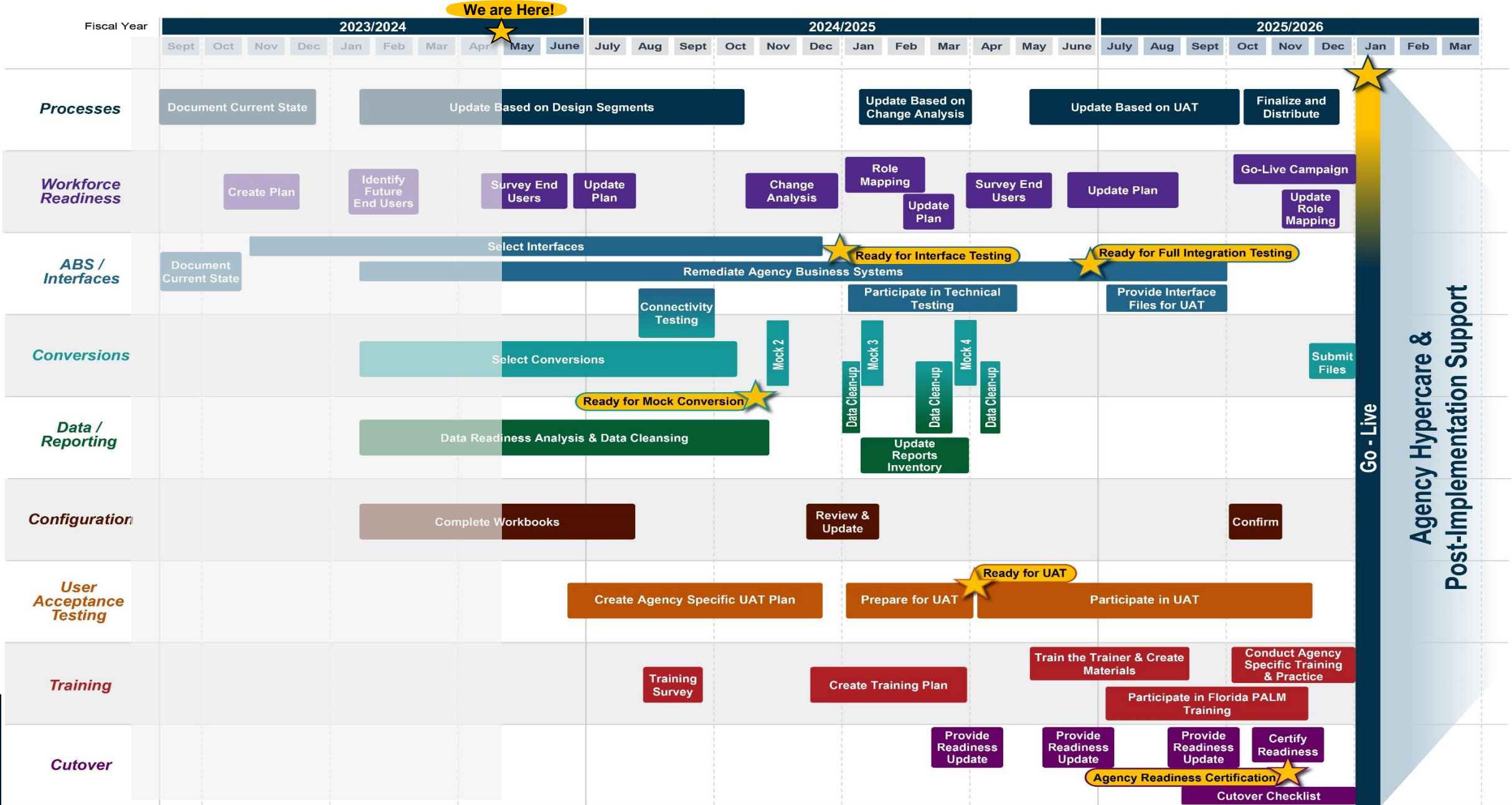


# High Level Project Timeline





# Agency Implementation Roadmap

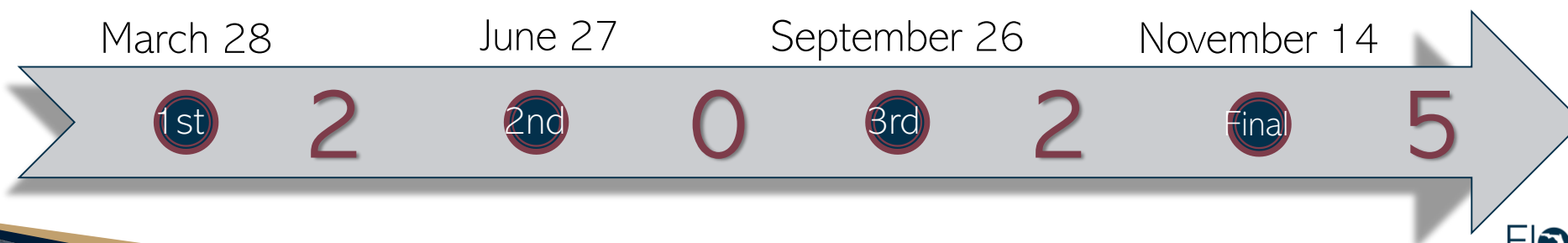
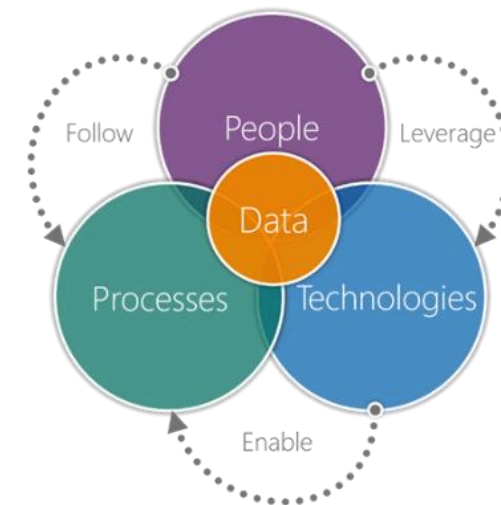


Go - Live

Agency Hypercare & Post-Implementation Support

# What is Agency Readiness Certification?

- ▶ **Purpose:** Ensure agencies are completing the necessary activities to ready their people, processes, technology and data for the Florida PALM Implementation in January 2026
- ▶ **Use:** Inform the Project, the Executive Steering Committee and Executive Stakeholders of each agency's progress and readiness



# Q & A



# CONTACT INFORMATION

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