

# FLORIDA PALM UPDATE

FASAASD MEETING  
DECEMBER 10, 2021



# Florida PALM Project

## Production Support

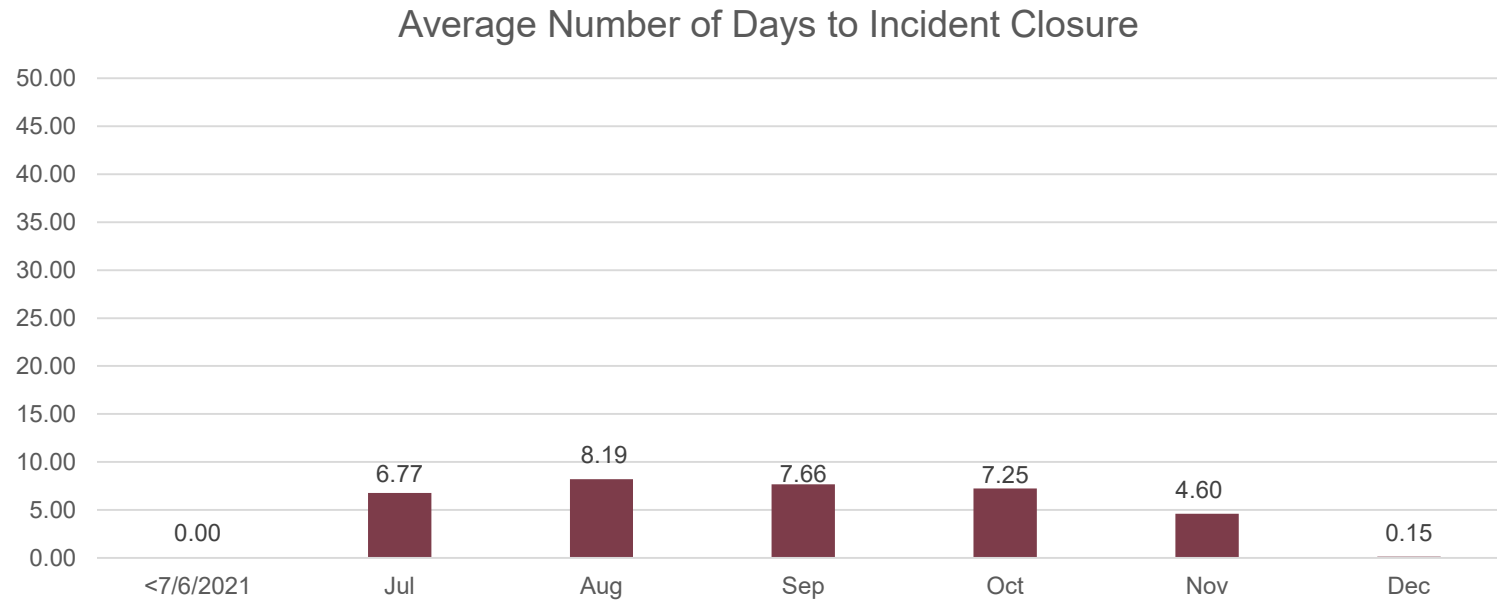
- ▶ Production Support Round Table
  - 129 attendees, 31 of 34 agencies represented
  - Next Round Table is scheduled for December 15; 61 registrants
- ▶ Query Writing PALMcast
- ▶ New Learning Opportunity
  - Collaboration with DFS Office of Florida Financial Education (OFFE)
  - First session will be December 15
  - Three sessions in January, two in February, two in March



# Florida PALM Project

## Production Support

### ► Production Metrics



# Florida PALM Project

## Production Support

- ▶ Planned updates for Florida PALM
  - New consolidated CRA report
  - Fund selection on disinvestments
  - Communication protocols including
    - Batch/bank file delays
    - Planned outages
    - New system defects with defined workarounds
    - Resolved system defects
  - Externally managed investments



# Florida PALM Project

## CMS Wave Lessons Learned – Project Team

| Topic         | What Went Well  |
|---------------|---|
| Communication | Conducting regular meetings with enterprise partners and third parties to discuss concerns and resolutions      |
| Planning      | Including Go/No-Go points of evaluation helped with the commitment process for activities and schedule planning |
| Training      | Providing agencies with training and manuals enabled agencies to use Florida PALM at launch                     |
| Deployment    | Running through dress rehearsals and training multiple times prepared the team for launch                       |

| Topic      | Opportunities for Improvement   |
|------------|---|
| Planning   | Help agencies better understand how to use the Readiness Workplan to effectively plan for and complete tasks              |
| Testing    | Use data during testing that produces accurate reports and transactions   |
| Deployment | Use real data during Full Dress Rehearsal to eliminate unforeseen problems after launch                                   |
| Production | Use consistent terminology among the Project team, agencies, and third parties to avoid confusion and unexpected outcomes |
| Production | Clear delineation of roles and responsibilities between the Project and Solution Center                                   |



# Florida PALM Project

## CMS Wave Lessons Learned – DFS Enterprise Team

| Topic         | What Went Well   |
|---------------|--|
| Communication | Conducting regular meetings and providing consistent communications                                  |
| Planning      | Maintaining detailed task log to manage, plan, and track activities needed to implement Florida PALM |
| Production    | Having Project team members on-site for launch and holding Hyper Care meetings                       |

| Topic      | Opportunities for Improvement  |
|------------|--|
| Planning   | Include both functional and technical team in Florida PALM discussions for key designs and decisions |
| Planning   | Increase staffing available for transition activities and review staffing assignments                |
| Deployment | Have back-up team members identified for each implementation area for timely coverage of problems    |
| Testing    | Use real data during testing activities  |



# Florida PALM Project

## CMS Wave Lessons Learned – Agency Internal Reflection

| Topic         | What Went Well  |
|---------------|---|
| Communication | Conducting recurring meetings with respective audience; including leadership and subject matter experts in discussion for complex issues; Readiness Coordinators helped stay on track |
| Planning      | Having a Project Manager on the team  |
| Training      | Completing training closer to implementation was helpful  |
| Training      | Holding internal agency-specific trainings and bootcamps  |
| Deployment    | Holding pre-launch meetings to communicate expectations, needs, and desired outcomes  |
| Production    | Having support from subject matter experts and Super Users to help learn how to use Florida PALM  |
| Production    | Participating in the User Support Labs  |

| Topic    | Opportunities for Improvement  |
|----------|--|
| Planning | Increase CCN communication with leadership and agency staff; increase participation in the CCN                         |
| Planning | Identify detail questions to ask the Project team to gain a better understanding of PALM processes and associated data |
| Planning | Create an internal crosswalk or a definitions document for users   |
| Planning | Request demonstration of critical processes  |
| Planning | Conduct an agency meeting, to review and discuss system training and testing, before the Launch date                   |
| Training | Allow for open office hours after end users complete training to minimize retraining efforts                           |
| Training | Augment web-based training to prepare staff, in advance, to use Florida PALM   |
| Training | Clarify terminology to avoid misinterpretation   |



# Florida PALM Project

## CMS Wave Lessons Learned – Agency Feedback for Project

| Topic         | What Went Well  |
|---------------|---|
| Communication | Soliciting and incorporating feedback from stakeholders   |
| Planning      | Providing Change Impact tool and Journey Maps   |
| Training      | Using tools to get ready: Business process models, Role Mapping Handbook, Model Office, Go Live Checklist, meetings/workshops |
| Production    | Knowing who to call for system help   |
| Production    | Having Hyper Care support was very helpful  |

| Topic     | Opportunities for Improvement  |
|-----------|--|
| Reporting | Offer a Reporting Manual, that goes into a detail view of the report options                     |
| Reporting | Provide reports with data prior to go-live so agencies can verify all data elements are provided |
| Reporting | Have instructor-led query writing training   |
| Testing   | Solicit test and training cases that match more closely end-user job functions.                  |
| Testing   | Include day-to-day processes (i.e., user access) during operational testing                      |
| Testing   | Add test cycle called 'data validation' to also include batch cycle confirmation                 |
| Training  | Need more in depth training for Tier 0 members to better assist staff                            |







# Embrace the Journey

**Florida PALM**  
Planning, Accounting, and Ledger Management

FASAASD Meeting

# CONTACT INFORMATION

CONTACT US

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