

Task Instructions

Task ID: 602

Task Name: Update Agency Business Process Documentation

Task Start Date: May 04, 2026

Task Due Date: October 30, 2026

Project Impact: N/A

Task Description

Update agency business process documentation based on User Acceptance Testing.

NOTE: This task is open for several months and it is expected that you will maintain your agency’s learning material inventory and progress throughout the duration of the task. This information will be relevant to and included in your Agency Readiness Certification #3 due in June 2026 and presented on your agency’s Monthly Progress Report also beginning in June 2026.

Related Readiness Certification #3 Criteria:

Agency has identified all process documentation to be created or updated based on testing results.

Task Instructions

You previously created a Current State Business Process Documentation Inventory (RW Task 328) and then made iterative updates to your process documentation based on the Florida PALM design (RW Tasks 515, 527 and 543). Now, you must review your agency business process documentation and create and/or update your documentation based on what your agency has learned and continues to learn during UAT.

A new worksheet, *<Agency> Business Process Documentation Inventory*, has been created in your *<Agency> Business Processes Inventory* folder. Your *<Agency> Business Process Documentation Inventory* worksheet is populated with the Topics that are applicable to your agency based on your identified applicable activities in your *<Agency> User Story Activity Coverage* worksheet (i.e., the activity is not marked as “Not Applicable” for your agency.)

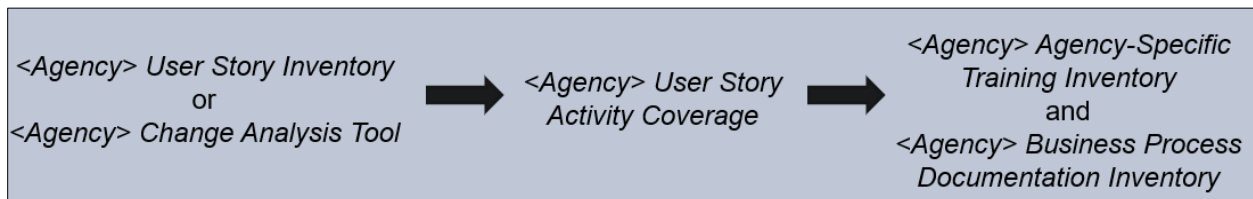


Figure 1: Cross-worksheet Connections for Agency Applicable Topics and Activities

Error Messages	Business Process Grouping	Topic	Do you need to create or update documentation?	Primary Owner	Impacted Users/Roles	Documentation Type	Documentation Status	Comments

Figure 2: DEMO Business Process Documentation Inventory

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Inventories > Business Process Inventory

The information below describes the columns in the worksheet and provides instructions on how to complete it.

- **Error Messages** (locked from editing)
 - Review any error messages and take action to resolve. This column is updated via overnight processing.
- **Business Process Grouping** (locked from editing)
 - Auto-populated to indicate the related Business Process Grouping for the selected Topic.
- **Topic** (locked from editing)
 - Auto-populated applicable Topics from your *<Agency> User Story Activity Coverage* worksheet.
- **Do you need to create or update documentation?** (required for all applicable topics)
 - Use the dropdown to indicate whether you need to create or update business process documentation for the topic.
 - Options include:
 - Yes
 - No
 - If “Yes” is selected for a topic, all other columns are required to be completed, except the Comments column.
- **Primary Owner**
 - List the person at your agency who is primarily responsible for completing documentation updates.
- **Impacted Users/Roles**
 - Indicate the users or roles that will benefit from the updated documentation. This could include key roles involved in the process, and those that provide information or that consume information from the process.
- **Documentation Type**
 - Use this dropdown to select the type of documentation that is being created or updated for the Topic. You may select more than one.
 - Options include:
 - Standard Operating Procedures
 - Desktop Procedures
 - Job Aids
 - Policies
 - Other
- **Documentation Status**
 - Use the dropdown to maintain the status of your business process documentation updates.
 - Options include:
 - Not Started
 - In Progress
 - On Hold
 - Complete
- **Comments** (Optional)

- Provide any comments for agency-use only.

Task Completion Requirements

The Project team will review your task submission based on the following criteria to confirm completion:

Table 1: Task Completion Rubric

Task Completion Rubric
All required fields have been completed in the <Agency> <i>Business Process Documentation Inventory</i> worksheet in Smartsheet.
There are no error messages in the Error Message column.
Task tracker must be marked as 100% complete.

Supporting Materials & Resources:

- [Florida PALM Topics and Activities](#)
- [User Story Activity Coverage Supplemental](#)