Florida PALM
Planning, Accounting, and Ledger Management

Department of Financial Services
Advisory Council Meeting Minutes

Date	January 24, 2023	**Time**	10:00 a.m. – 12:00 p.m.
Location	Department of Financial Services, Division of Workers' Compensation 1579 Summit Lake Drive, Room 115 Tallahassee, Florida 32317		
Objective	Advisory Council Monthly Meeting		
Attendees	Advisory Council: Mike Alexander (DHSMV), Amy Barrow (DOR), Amber Burns (FWC), Ramon Evans (APD), Jennifer Gaines (DMS), Lydia Griffin (DEP), Renee Hermeling (DFS), Robert Herron (DOH), Sally Huggins (DBPR), Jim Lewandowski (FDACS), Tony Lloyd (DCF), Nona McCall (JAC), Mike Moore (FDLE), Cheryl Morgan (DOT), Lisa Simpson (COM), Erica Starling (FDC), Alexandra Weimorts (DFS) Facilitators: Jimmy Cox (DFS); Nikki Klein (DFS); Dawna Johnson (DFS); Brendan Jones (DFS); Tony Lloyd (DCF), Angie Robertson (DFS)		
Related Documents	Presentation		

Topic	Facilitator
Welcome and Opening Remarks	Tony Lloyd
Legislative Budget Request Update	Steven Fielder
Readiness and Implementation • CCN Pulse Survey • Agency Dashboard	Nikki Klein Angie Robertson
Segment II Design Topics • SpeedKeys • FACTS / Contracts / Grants	Jimmy Cox Dawna Johnson Brendan Jones
Other	
Closing Remarks	Tony Lloyd

Welcome and Opening Remarks: Facilitated by Tony Lloyd
Mr. Tony Lloyd opened the meeting with roll call and welcomed the group. Representatives were present in the place of Council members for the following agencies: APD, DEP, and JAC.

Legislative Budget Request Update: Facilitated by Steven Fielder
Mr. Steven Fielder gave an update on the legislative budget process. He suggested each agency include funding requests for Florida PALM in their Legislative Budget Request (LBR), if they have not already. The funding will likely be appropriated to agencies individually, rather than in a lump sum fashion (e.g., Administered Funds).

Readiness and Implementation: Facilitated by Angie Robertson, Nikki Klein

CCN Pulse Check

The Project sent a survey to all agency CCN members with the goal of gaining perspective into their agency readiness and agency engagement. Ms. Angie Robertson shared agency feedback from the survey, highlighting metrics and trends. Agencies responded to specific questions about the *Readiness Workplan* (RW) and *agency engagement* regarding the support they receive within their agency and from the Project. They were given the opportunity to write comments and share specific suggestions, improvements, detail additional needs or assumptions. Ms. Robertson encouraged the Council to continue communicating, expanding awareness within their agency, getting their agency involved and educating them about Florida PALM.

Bimonthly Agency Readiness Status Report

Ms. Nikki Klein shared proposed updates to the Agency Dashboard. The updates were based on previous feedback from agencies, the Council, and the Executive Steering Committee (ESC). Proposed changes include updates to placement of the dials, refinement of the RW Task dial and timeliness measurements, and the addition of a new RW Task Project completeness assessment for tasks. With no objections to the proposals, the Project plans to share the same information with the Executive Steering Committee for their feedback.

Segment II Design Topics: Facilitated by Jimmy Cox

Mr. Cox discussed the Segment II Design Workshops that were conducted over two weeks in January. He shared the purpose of the workshops and what to look forward to following design segments III and IV (e.g., Data Warehouse design, cutover activities). The Project team then addressed some design questions agencies raised during the Segment II workshops.

Design Consideration – SpeedKeys

Agencies raised the following concerns during the Segment II Design Workshop:

1) Inability to change the ChartField values assigned to a SpeedKey
2) Limitation of decimal place for allocation within a SpeedKey

Mr. Cox shared that the Project discussed the concerns in the days following the Workshops and led the Council through discussion of the findings. He reminded the Council of the purpose of SpeedKeys: to speed/streamline data entry (including spreadsheet upload) in Florida PALM. They are not included in interfaces for agency business systems. SpeedKeys are a PeopleSoft customization feature, built on delivered PeopleSoft capabilities, with limited flexibility. The inability to update a SpeedKey once created cannot be changed; a SpeedKey, once it is created, can either be used (active) or inactivated. The SpeedKey decimal places is limited to two places after the decimal. He noted that while decimal places in SpeedKeys are limited, within transactions, the decimal is oftentimes greater than two. He also reminded the Council that SpeedKeys are optional with the exception of a few places (e.g., Pcard Works system and Payroll). The Council asked clarifying questions and shared specific agency needs with the Project team.

Design Consideration – FACTS Integration

Agencies raised the following concerns during the Segment II Design Workshop:

1) Updates in Florida PALM when FACTS is right, but Florida PALM has different values
2) Contract amounts do not change in Florida PALM when the contract amount changes in FACTS
3) Grants in ChartFields when it will not be used long-term

Mr. Cox addressed the concerns by stating files from FACTS will stay in sync with Florida PALM through a rolling five-day system integration refresh (i.e., last five days of activity is sent every day from FACTS). Initial contract amount will not update in Florida PALM if the amount changes in FACTS which is true to how FACTS and FLAIR currently operate. Lastly, non-exempt agencies must maintain contracts and grant information in FACTS which will feed Florida PALM; they are not created in or by Florida PALM. Grant IDs are required on revenue transactions in order for the information to be sent to FACTS; however, Grant IDs are not required on contract expenditures as long as the agency has a way of managing, tracking and tying their grant related expenditures back to each individual grant.

Other Feedback

Following the Segment II Design Workshop, the Project team shared design considerations they plan to implement:

1) Add Budget Period to the Schedule of Allotments
2) Add Posting Date to Investment Balance Report
3) Add a Location Code for Assets – Area ID

Project Values

The Project team briefly discussed the Project Values and Activity Codes. The presentation details the Project Values; the Council did not discuss this section in totality.

Other: Facilitated by Jimmy Cox
The March meeting will be rescheduled to March 25. Meeting invitations will be updated following the meeting. The February meeting will remain on February 21.

Closing: Facilitated by Tony Lloyd
Mr. Lloyd concluded the meeting.