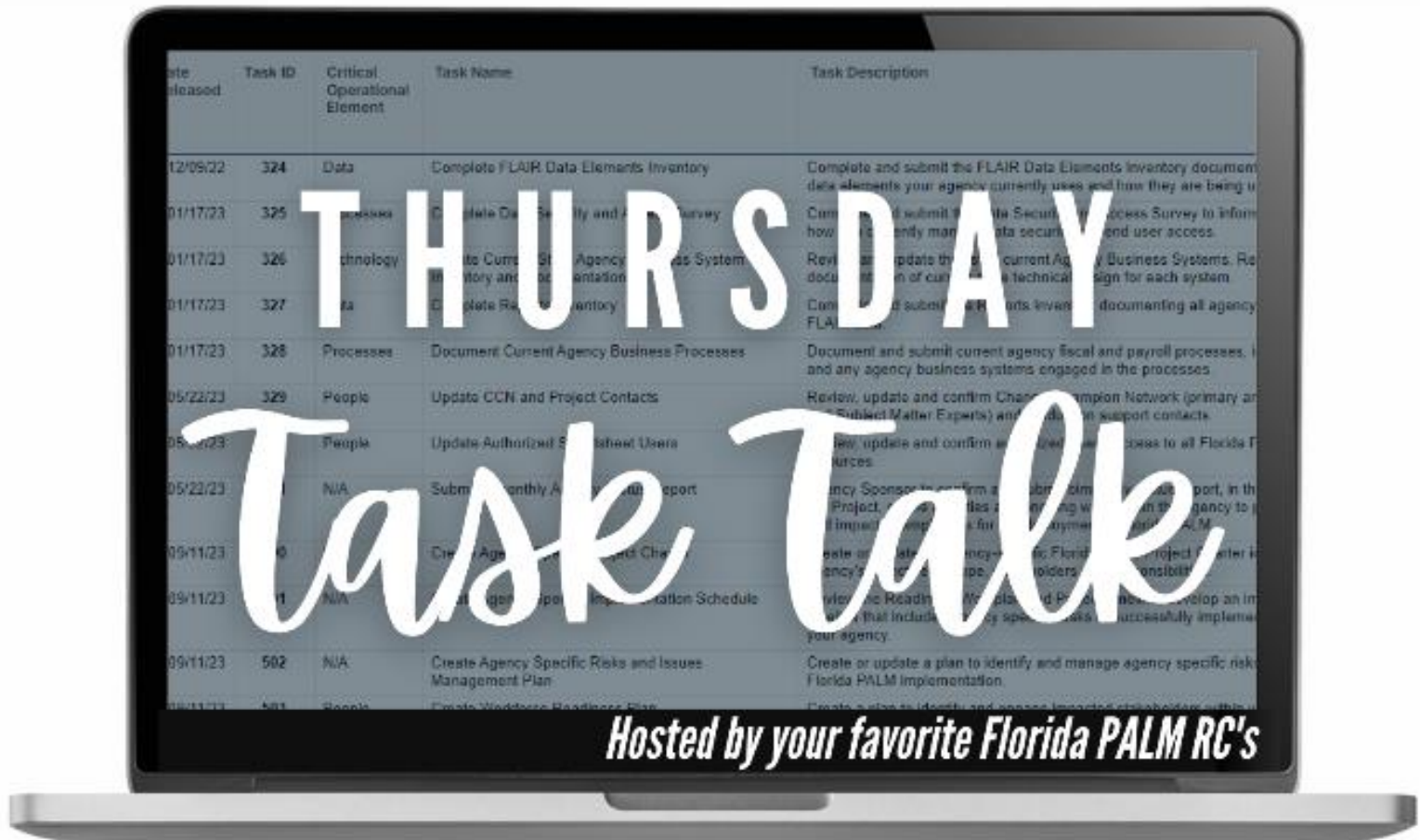


FloridaPALM

Planning, Accounting, and Ledger Management





Task Release Date	Task ID	Critical Operational Element	Task Name	Task Description
12/09/22	324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting data elements your agency currently uses and how they are being u
01/17/23	325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how you currently manage data security and user access.
01/17/23	326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Re document each of current systems technical design for each system.
01/17/23	327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
01/17/23	328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
05/22/23	329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
05/22/23		People	Update Authorized Sheet Users	Review, update and confirm authorized users access to all Florida T resources.
05/22/23		N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project, to provide a status report on the agency to the project sponsor for the Agency's implementation of the project.
09/11/23	500		Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM implementation.
09/11/23	501	People	Create Workforce Readiness Plan	Develop an implementation plan that includes agency specific tasks to successfully implement your agency.
09/11/23	502	N/A	Create Agency Specific Risks and Issues Management Plan	Create or update a plan to identify and manage agency specific risks Florida PALM implementation.
09/11/23	503	People	Create Workforce Readiness Plan	Develop an implementation plan that includes agency specific tasks to successfully implement your agency.

THURSDAY Task Talk

Hosted by your favorite Florida PALM RC's

APRIL 11, 2024



Agenda

- ▶ Organization ChartField Configuration – Tree Structure
- ▶ RW Task 523 Overview
- ▶ Task Verification Process
- ▶ Tasks Due Tomorrow





By using trees, parent/child relationships or roll-ups are defined for use across, security, reporting and elsewhere where a roll-up of information is needed.

ida PALM Trees



General Ledger Module

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System functionality to organize ChartField values into a hierarchical structure



- DFS GL COA Maintainer
- Agency GL COA Maintainer



Trees simplifies the representation of complex relationships, making it easier to manage data hierarchies



- Facilitate reporting at summarized level
- Assign Security Permissions
- Facilitate Budget

RW Task 523 – Share Florida PALM Updates

- ▶ Task Due – April 19 (2 weeks duration)
- ▶ Purpose – To increase awareness and support of Florida PALM implementation within your agency
- ▶ Requirements:
 - Communicate with all key stakeholder groups
 - Agency Leadership
 - CCN and SMEs
 - End Users
 - Share your agency communications (January – April) in Smartsheet
 - Attach supporting documentation
 - Let us know if we can share your resource in the Agency Exchange Library
- ▶ Best Practice – continue to update communication worksheet to support this quarterly recurring task



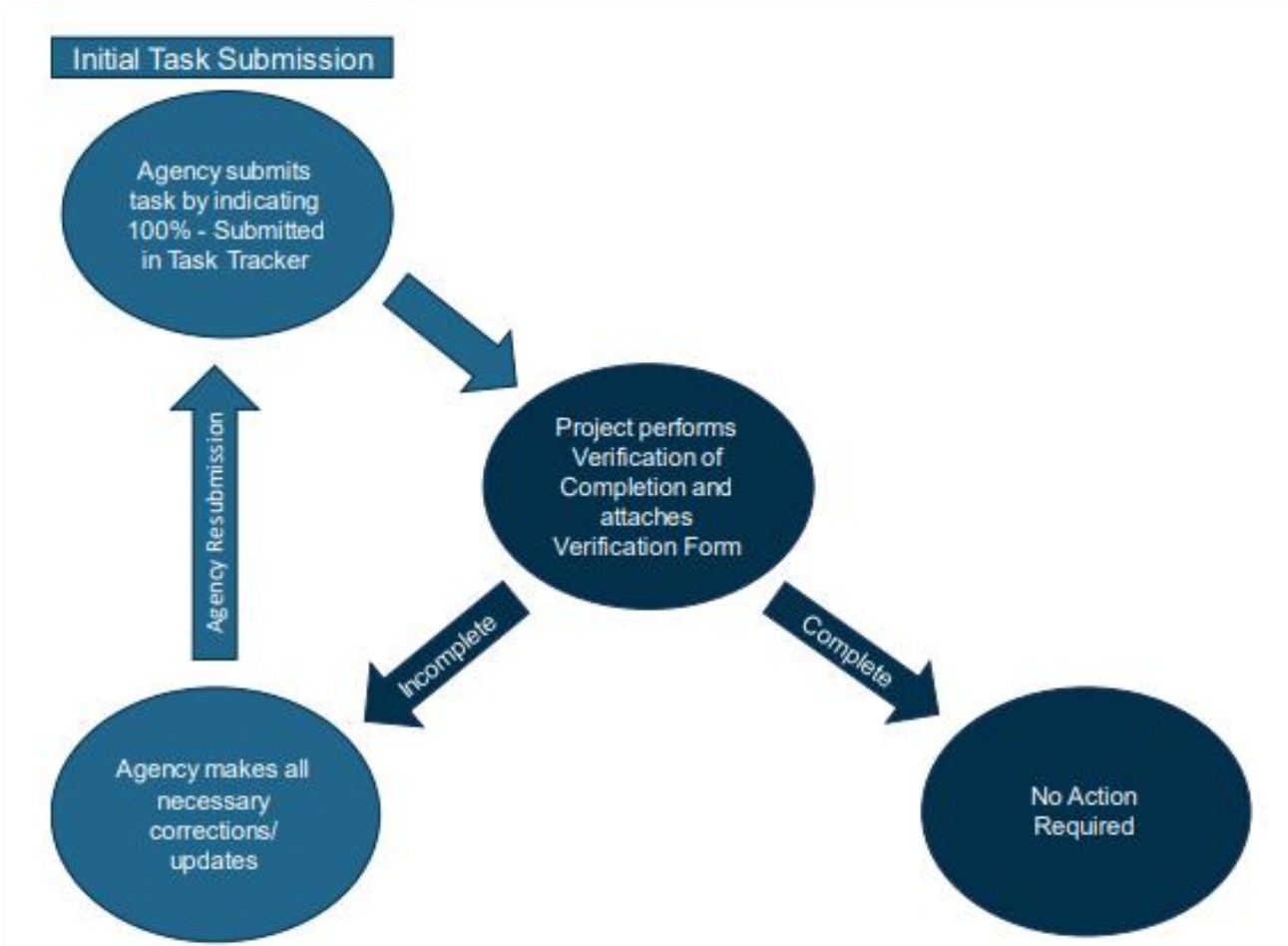
Task Completion Verification Process

1. Agency submits task
2. Project reviews task for completion based on Task Completion Rubric in the task instruction
3. RC indicates completion status and attaches verification form in agency's Task Tracker.
 - a) If complete – no further action
 - b) If incomplete, Agency Reported Task Progress is changed to Pending Submission – continue to next steps
4. Agency reviews the Verification Form to identify items that need to be updated for task completion
5. Agency updates task and resubmits task for verification

Note: The process continues until agency reaches a complete status



Task Completion Verification Process & Form



Department of Financial Services
RW Task Completion Verification Form

Task ID: 514
Task Name: Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II
Task Start Date: 01/29/2024
Task Due Date: 04/12/2024

Agency:
Initial Submission Date:
Project Verification:

Table 1: Completion Verification

Task Completion Rubric	Complete	Comments
The Data Readiness Evaluation column status indicates either "Cleansing Needed", "Cleansing Not Needed" or "Not Applicable".	<input type="checkbox"/>	
The Data Cleansing Plan column status indicates either "Not Applicable", if the Conversion Needed is "No", or "Complete", if the Conversion Needed is "Yes".	<input type="checkbox"/>	
The Current-State Data Readiness Status column indicates status of either "Not Applicable", if the Conversion Needed is "No", or "Data Clean Up Complete and Being Monitored for Conversion", if the Conversion Needed is "Yes".	<input type="checkbox"/>	

Overall Comments:

Reviewer:
Verification Date:



Task Completion Verification – Impact to Your Dashboard

- ▶ Determines score for your RW Task Completeness Dial
- ▶ 100% score received if task is complete upon initial submission
- ▶ If incomplete, the score is reduced 10 points every 5 business days until complete
- ▶ Dial Calculations
 - Green = 100% - 80%
 - Yellow = 79% - 50%
 - Red = 49% - 0%

RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 84.28%

- Submitted Complete = 5
- Submitted Incomplete = 1
- Completed After Submission = 1



Tasks Due Tomorrow – Friday, April 12

- ▶ 514 - Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II
- ▶ 515 - Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II
- ▶ 516 - Update Agency Business System Documentation for Segment II
- ▶ 517 - Update Florida PALM Conversion Inventory for Segment II
- ▶ 518 - Update Florida PALM Interface Inventory for Segment II



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