

**Business
Process Standardization
Level 2 Payroll Process Model
and Requirements Review
Workshop Summary Report
(I-OCM20)**

Revision History

Date	Author, Organization	Version	Change Reference
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Executive Summary

The Florida PALM Project's Business Process Standardization (BPS) Track, supported by the Organizational Change Management (OCM) Track, held Level 2 Payroll Process Model and Requirements Review Workshops during June 2016, with the objective of introducing the Florida PALM payroll process to State agencies. The Level 2 Payroll Process Model and Requirements Review Workshops ("Workshops") also provided an overview of the agency review and feedback process for business requirements and process models. In addition, the Workshops promoted collaboration with State agencies through information sharing, along with the opportunity for agencies to ask clarifying questions in-person of the Florida PALM Project Team.

All 34 State agencies using the Florida Accounting Information Resource (FLAIR) and/or Cash Management System (CMS) were invited to attend. The Workshops were offered two times during the first week of June 2016. Overall, there were 47 Workshop attendees. Although all State agencies were invited to attend, 21 of 34 (62 percent) were represented at the Workshops. The following sections provide more detailed information about the background leading to the Workshops, additional discussion of the Workshop objectives, and concludes with event logistics information including high-level attendance statistics. Data tables, Workshop supporting materials, survey summary, and Level 2 Payroll Process Model and Requirements Review Workshops Report are included as appendices to this report.

Background and Objectives

The Florida PALM Project Team, in collaboration with the Department of Financial Services' (DFS) Division of Accounting and Auditing (A&A), Bureau of State Payrolls (BOSP), developed draft Payroll Business Requirements and an updated draft Payroll Process Model that were shared in the Level 2 Payroll Process Model and Requirements Review Workshops.

In early summer of 2016, the Florida PALM Project's BPS Team conducted two of Workshops by convening subject matter experts from multiple State agencies who contributed to the development of the process models. After concluding the Workshops, a survey tool was distributed to all participating State agencies to collect further information including an opportunity for agency feedback. An analysis of the survey responses is provided in a separate report, Appendix C.

The Workshops provided an overview of the planned business requirements agency review process and expectations of State agency reviewers. DFS Auditing and Accounting (A&A), the Bureau of State Payroll and the People First Team supported the Project Team by participating in the first workshop. Individuals from Agencies responsible for payroll functions, including posting to FLAIR, were asked to review the documents prior to the Workshop dates. These documents included a narrative description of the State's proposed payroll future financial management processes along with flow diagrams that would depict the State's proposed payroll future financial management processes. Using a provided feedback template Agencies were asked to provide feedback for the business requirements and process models by June 15, 2016. The documents shared with the agencies prior to the meeting, along with the presentation used can be found in Appendix B.

Event Logistics

The BPS Level 2 Payroll Process Model and Requirements Review Workshops were conducted on June 1 and June 2, 2016. Each Workshop was scheduled once a day for an alternating morning and afternoon session. Multiple Workshop offerings expanded the opportunities for State agencies to choose times that best fit their schedule. All attendees were asked to complete an online survey via SurveyMonkey to evaluate the event.

Overall, there were 49 registrants for the Workshops and 47 attendees. The groups of registrants and groups of attendees are not mutually inclusive; i.e., some registrants did not attend the Workshop, while some attendees did not register prior to the Workshop. In addition, 62 percent (21/34) of agencies using FLAIR and/or CMS were present at the Workshops. Agencies with the largest representation of attendees were: The Department of Financial Services (6), the Department of Juvenile Justice (5), and the Department of Highway Safety and Motor Vehicles (5). Please see Appendix A for additional event logistics attendance data, Appendix B for the Level 2 Payroll Process Model and Requirements Review Workshops supporting materials, and Appendix C for the BPS Cycle 3 Payroll Workshop Survey Summary Report.

Appendix A: Event Logistics Data

Table 1: PALM 400 Dates, Times and Attendance Counts

PALM 400: Level 2 Payroll Process Model and Requirements Review Workshop			
Date	Time	Registered	Attended
Wednesday, June 1, 2016	9:00 – 11:00 a.m.	17	21
Thursday, June 2, 2016	1:30 – 3:30 p.m.	32	26
	Total	49	47

Table 2: PALM 400 Attendance by Agencies Using FLAIR and/or CMS

Agency Using FLAIR and/or CMS	Count
Agency for Health Care Administration (AHCA)	2
Agency for Persons with Disabilities (APD)	0
Agency for State Technology (AST)	2
Department of Business and Professional Regulation (DBPR)	0
Department of Children and Families (DCF)	0
Department of Citrus (FDOC)	0
Department of Economic Opportunity (DEO)	2
Department of Education (DOE)	2
Department of Elder Affairs (DOEA)	1
Department of Financial Services (DFS)	6
Department of Health (DOH)	1
Department of Highway Safety and Motor Vehicles (DHSMV)	0
Department of Juvenile Justice (DJJ)	5
Department of Legal Affairs (DLA)	0
Department of Management Services (DMS)	2
Department of Military Affairs (DMA)	1
Department of Revenue (DOR)	5
Department of State (DOS)	1
Department of the Lottery (DOL)	0
Department of Transportation (FDOT)	3
Department of Veterans' Affairs (FDVA)	0
Executive Office of the Governor (EOG)	0
EOG - Office of Policy and Budget (EOG-OPB)	0
EOG - Legislative Appropriations System/Planning and Budgeting Subsystem (LAS-PBS)	0

Agency Using FLAIR and/or CMS	Count
Florida Fish and Wildlife Conservation Commission (FWC)	2
Florida Department of Agriculture and Consumer Services (DACS)	1
Florida Department of Corrections (DC)	0
Florida Department of Environmental Protection (DEP)	0
Florida Department of Law Enforcement (FDLE)	2
Florida Commission on Offender Review (Formally: Florida Parole Commission) (FCOR)	2
Florida School for the Deaf and the Blind (FSDB)	0
Justice Administrative Commission (JAC)	1
Legislature (LEG)	0
Legislature-House (LEG-House)	0
Legislature-Senate (LEG-Senate)	0
Legislature-Auditor General (LEG-AG)	0
Public Service Commission (PSC)	0
State Courts System (SC)	4
Division of Administrative Hearings (DOAH)	0
Total	47

Appendix B: Level 2 Payroll Process Model and Requirements Review Workshops Supporting Materials

[Level 2 Payroll Process Model and Requirements Review Workshops Presentation](#)

[Cycle 3 Payroll Requirements – Agency Review](#)

[Draft Payroll Level 2 Process Model – Version 2.0 \(05-17-2016\)](#)

[Draft Payroll Level 2 Process Flows – Version 2.0 \(05-17-2016\)](#)

Appendix C: BPS Level 2 Payroll Process Model and Requirements Review Workshop Survey Summary Report

[BPS Level 2 Payroll Process Model and Requirements Review Workshop Survey Summary Report](#)