

FLORIDA PALM UPDATE

FASAASD MEETING
DECEMBER 10, 2021



Florida PALM Project

Production Support

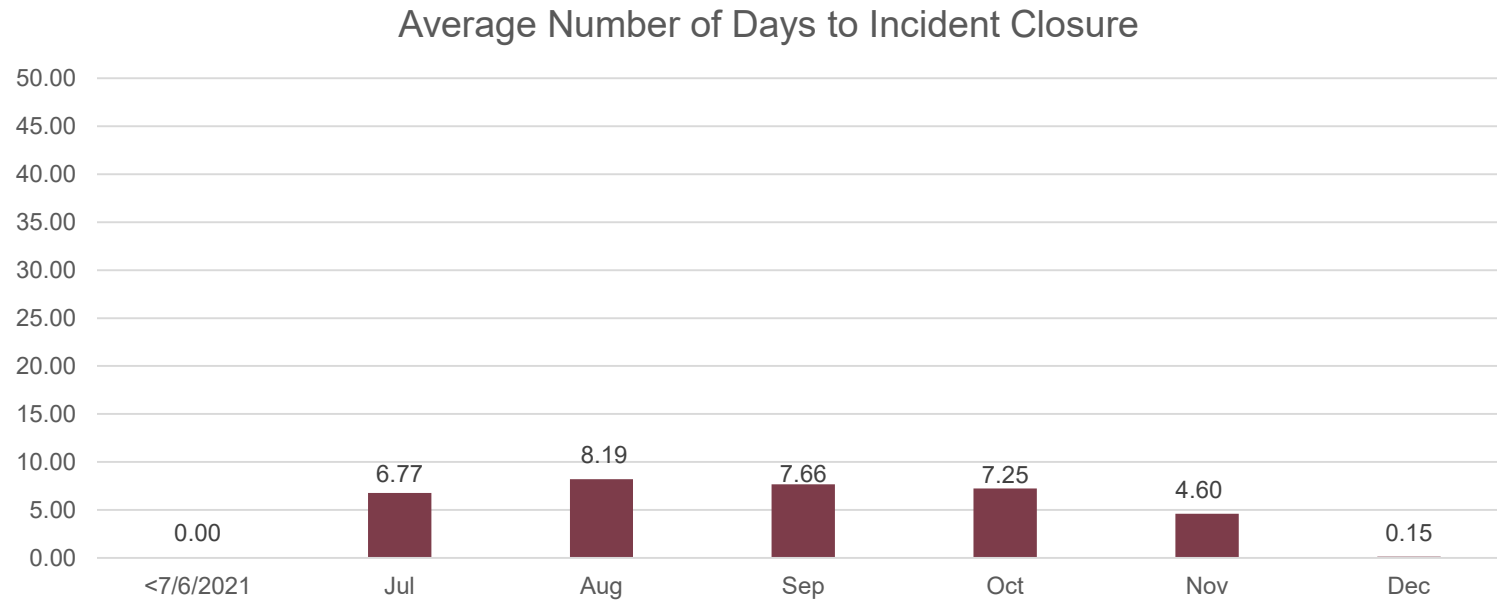
- ▶ Production Support Round Table
 - 129 attendees, 31 of 34 agencies represented
 - Next Round Table is scheduled for December 15; 61 registrants
- ▶ Query Writing PALMcast
- ▶ New Learning Opportunity
 - Collaboration with DFS Office of Florida Financial Education (OFFE)
 - First session will be December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

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