

Task Instructions

Task ID: SPON58

Wave: Financials

Audience: All Agencies

Task Name: Complete and Submit List of Agency Specific Lessons Learned from CMS Transition

Task Type: Sponsor

Task Due Date: August 20, 2021

Task Overview

Following the Florida PALM implementation for the CMS Wave, it is beneficial to conduct a Lessons Learned exercise. Lessons Learned provides individuals or teams an opportunity to reflect on past activities and identify useful information that can be used to improve inefficiencies in the future.

The following three questions should be discussed together with your agency's team members that were involved with completing tasks related to the CMS Wave transition. The goal of asking these questions is to develop conclusions that may lead to agency specific process improvement and will aid future Florida PALM implementations.

- **What worked well** or is something we should continue? When asking this question you should focus on accomplishments. This is an opportunity to recognize the value of your agency's effort during the CMS Wave transition. Focus on the positive outcomes of the activity. Items that worked well are actions your agency will want to repeat in future waves.
- **What did not work so well** or is something we should avoid? The purpose of asking this question is to facilitate discussion on areas of improvement. Reflect on the performance of those involved with completing tasks related to the CMS Wave transition. Focus on deficiencies that can lead to future solutions. Items that did not work well should be avoided or improved for future waves.
- **What should have been done that was not**, or something we should consider doing for the next wave? When asking this question, think about how you can adjust, enhance, or increase desired outcomes in the future implementations. You want to identify what opportunities were missed. These items are the actions to implement in future waves.

To help you answer these questions, reflect on the previous MRW tasks and internal agency activities your agency completed to prepare for the CMS Wave transition, such as:

- CCN roles – assigning the right people to a CCN and Super User role.
- Communication – sharing timely, clear, and accurate communications to the right people.
- Interface Development – building connections to Florida PALM (if applicable).
- Workforce Transition Activities – managing transition impacts:
 - Change Impact
 - Role Mapping
 - Model Office for Super Users
 - Leading Change Discussions
- Training – preparing end users to use Florida PALM.

It is up to you on how to best to conduct a Lesson Learned exercise. You may determine to hold one or several sessions. During your Lesson Learned exercise, document the observations on the provided Lessons Learned Template. Your Readiness Coordinator is available to facilitate a Lessons Learned session at your agency, if desired.

What will Florida PALM Team do with this Information?

The Florida PALM Team will review your Lessons Learned submission to identify activities that should be replicated or added to the MRW for the Financials Wave.

Task Instructions

Work within your CCN and Super Users to complete the following items involved with this task.

Instructions	
1)	Facilitate Lessons Learned Session with the CCN, Super Users, and those involved with completing tasks related to the CMS Wave transition.
2)	Review CMS Wave MRW tasks and internal agency activities completed to prepare for the CMS Wave transition.
3)	Document the Lessons Learned in the Lessons Learned Template; a. Document what went well, b. Document what did not work well, and c. Document what should have been done that was not.
4)	Complete and submit one template per agency by emailing FloridaPALM@myfloridacfo.com by 8/20/2021

Supporting Materials and Resources:

- [Master Readiness Workplan \(MRW\)](#)
- [Lessons Learned Template](#)