

Task Instructions

Task ID: 323

Wave: Financials Wave

Task Name: Complete Projects and Grants Survey

Task Type: Business Processes

Task Due Date: November 04, 2022

Task Overview

In accordance with Proviso language for Fiscal Year 2022-2023, the Project is required to confirm requirements for Florida PALM functionality.

“The Department of Financial Services shall review and update all functional and technical system requirements for the replacement of FLAIR functionality, to ensure that all requirements needed to replace FLAIR functionality are included in the PALM system. PALM staff shall reassess and document all custom programming necessary to implement the functionality requirements in PALM.” – Chapter 2022-256, Laws of Florida – GAA – Section 6.

The Project team is currently meeting with each agency during Personalized Agency Working Sessions to understand agency unique business processes and their potential impact on system requirements. These meetings will continue through December. In addition, the Project is gathering feedback specific to how agencies use projects and grants today in order to inform design options for Florida PALM. A Projects and Grants Survey has been developed to gather your feedback.

Review your agency’s current projects and grants processes. Then, provide information by completing the Projects and Grants Survey. Your participation and information provided is a critical component of the requirements confirmation.

Projects and Grants Survey

Complete **one** survey for your agency. The survey responses should represent a collective response of your agency’s needs. [Survey questions](#) are provided to facilitate your collaboration with your team members throughout all program areas. Survey responses should be consolidated and provided using the Smartsheet form: <https://app.smartsheet.com/b/form/4ce83bd98004438a9a4b977bb2941bf0>

What will Florida PALM Team do with this information?

The Florida PALM team will review the survey results and identify options for project and grant functionality in Florida PALM. The options will be provided to the Advisory Council for discussion and feedback, which will be shared with the Executive Steering Committee for decision(s). The decision(s) related to projects and grants will impact requirements for Financials Wave implementation.

Task Instructions

Please work with your Change Champion Network and team familiar with current projects and grants processes to coordinate who will be completing each of the items involved with this task.

Instructions

- 1) Complete one survey in Smartsheet to share your agency’s current projects and grants processes by November 04, 2022.**
- 2) If you have questions regarding the Projects and Grants Survey, participate or review the Tuesday Task Talk on Tuesday, October 25, 2022, or contact your Readiness Coordinator.**

Supporting Materials & Resources:

- [Projects and Grants Survey](#)
- [Projects and Grants Survey Questions](#)
- [Tuesday Task Talk 10/25/2022](#)