Task Instructions

Task ID: *329*
Task Name: *Update CCN and Project Contacts*
Task Start Date: *May 22, 2023*
Task Due Date: *June 2, 2023*

Task Description

Review and update Change Champion Network (CCN) primary and backup liaisons, Subject Matter Experts (SMEs), and production support contacts.

Task Overview

The Florida PALM Project is a business transformation project requiring teams of agency experts to lead the implementation and adoption of the state's new financial management solution within each agency. The most effective way to ensure the successful transition to Florida PALM at your agency is to assign roles to staff with the right expertise, skills and relationships within the agency. It it critical to have your agency's experts lead the Florida PALM implementation of Financials, Payroll, and Data Warehouse and to support current Florida PALM activity.

For this task, Agency Sponsors should review and confirm the make-up of your Florida PALM contacts including:
- Change Champion Network
    - Agency Sponsor and backup
    - Liaisons
        i. Agency Liaison and backup
        ii. Project Management Liaison and backup
        iii. Change Management Liaison and backup
        iv. Business Liaison and backup
        v. Technical Liaison and backup
        vi. Training Liaison and backup
    - Subject Matter Experts (SMEs) (Previously called Super Users)

- Florida PALM Production Support Contacts
    - Identity Provider (IDP) SME(s)
    - Security Access Managers (SAM)
    - Batch Error Contact(s)
    - File Manager(s)

Change Champion Network
The CCN is a collaborative, working group of experts charged with leading the agency's business transformation and readying the agency to implement Florida PALM. An active and effective CCN is crucial for the success of your agency. Given the magnitude of change, your agency should have a fully formed team and obtain separate resources for each individual role, including backup roles. To be ready for the next major implementation of Florida PALM, agencies need to assign different individuals to different CCN roles. The volume and complexity of the CCN tasks will be too high for the same individuals to fill multiple roles, and may also require that some CCN positions be assigned full-time. Figure 1 shows the structure of the CCN.
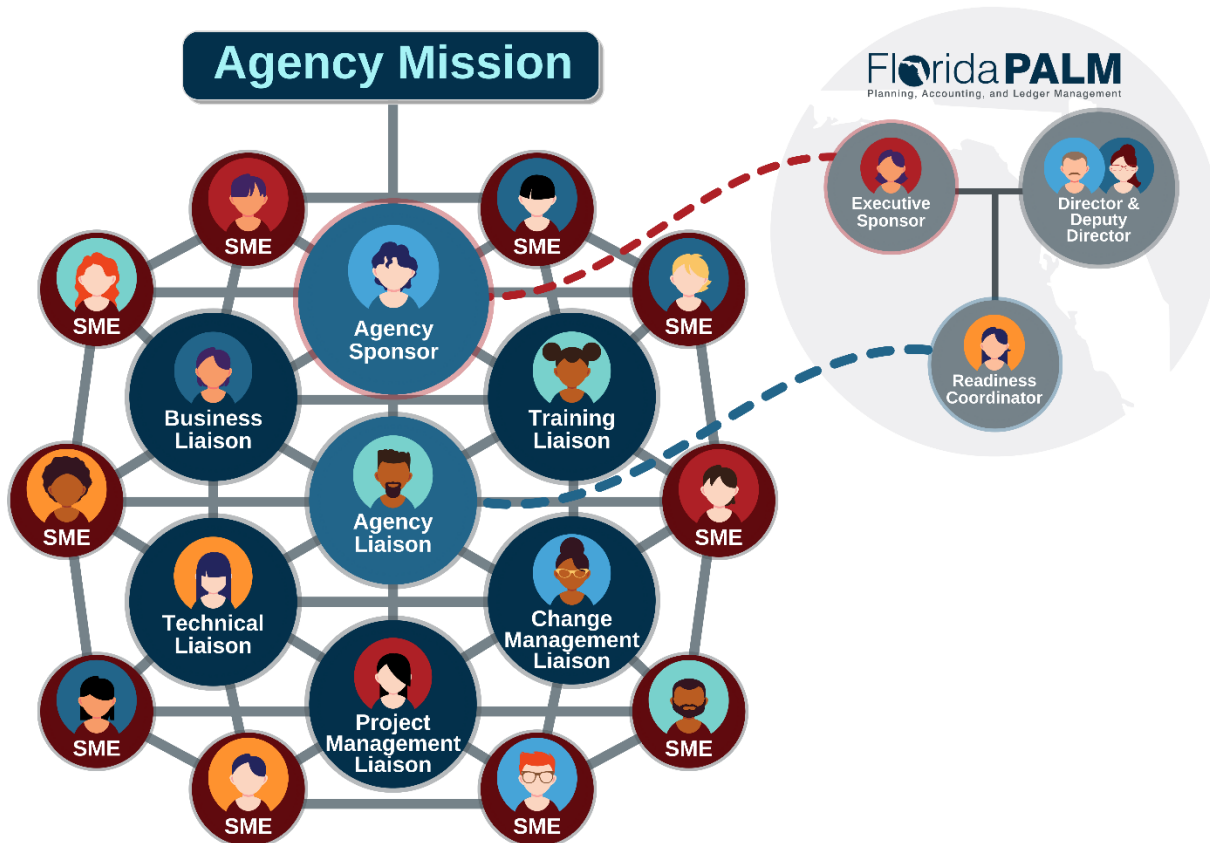
Figure 1: CCN Structure

The CCN Roles and Responsibilities document provides detail about the knowledge and skills needed, and the expectations for each role. Use this document when evaluating or selecting staff to fill CCN roles. At a high level, the agency's CCN is expected to:

- Champion the implementation of Florida PALM
- Work together
- Actively promote and support transformation and readiness efforts
- Coordinate and complete Readiness Workplan (RW) tasks
  - Beginning with upcoming RW task 330, the following agency CCN roles will be responsible and expected to manage agency access to Smartsheet resources provided by the Project:
    - Agency Liaison (primary and backup)
    - Project Management Liaison (primary and backup).
- Develop and complete agency specific readiness tasks
- Communicate agency transformation progress including risks and successes

Production Support Contacts

Florida PALM Cash Management functionality was released in July 2021. Every agency has end users that currently use Florida PALM, so it is important to maintain your internal support team for those end users to include the following roles:

- IDP SME – This is the person(s) who manages your Identity Provider within your agency and is responsible for identity management and authentication controls (e.g., password policies) for your users, as well as for configuring and maintaining your IDP interface with Florida PALM, as described in the Identity Management Approach.

- SAM – This is the person(s) at your agency with responsibilities to manage end user security within Florida PALM. This includes adding and removing roles and inactivating end user profiles. Agencies are assigned a primary and backup SAM to manage security role access for their agency's end users. For more information, visit the Florida PALM Security Access Management User Manual.
  Note: Although your agency can change the individuals listed in this role in Smartsheet, all SAM changes require A&A approval of a completed SAM Access Request and Acknowledgement Form and will be verified by the Florida PALM Solution Center.

- Batch Error Contacts – This is the person(s) that is contacted in the event of a critical batch error or change in batch process timing (e.g., holidays).
  Note: This role is only required for agencies with CMS Wave interfaces (i.e., DACS, DCF, DEO, DEP, DFS, DOH, DOR, HSMV).

- File Managers – This is the person who has the ability to access the Florida PALM Managed File Transfer (MFT).
  Note: This role is only required for agencies with CMS Wave interfaces (i.e., DACS, DCF, DEO, DEP, DFS, DOH, DOR, HSMV).

How can agencies use this information?

Agencies will use this information to strengthen their CCN and to ensure they have the appropriate resources assigned for production-related functions. The consolidated list can also be leveraged as a key stakeholder management tool to help with communication planning and internal collaboration. Agencies will have the ability to update contacts in Smartsheet at any time and a notification email will be sent to both Agency Liaisons and Project Management Liaisons when any change occurs.

How can Florida PALM use this information?

The Florida PALM Team will use this information to coordinate communications and activities with your agency. In addition, CCN listings will be automatically updated on the Florida PALM website as agencies update CCN role assignments.

Task Instructions

Coordinate with your Agency Sponsor to complete this task. Plan accordingly to allow adequate time to review and update assigned roles by the due date of June 2, 2023.

Your agency's Inventory Workbook in Smartsheet has been renamed to Florida PALM Workbook for <Agency Acronym>, and restructured as shown in the example below.
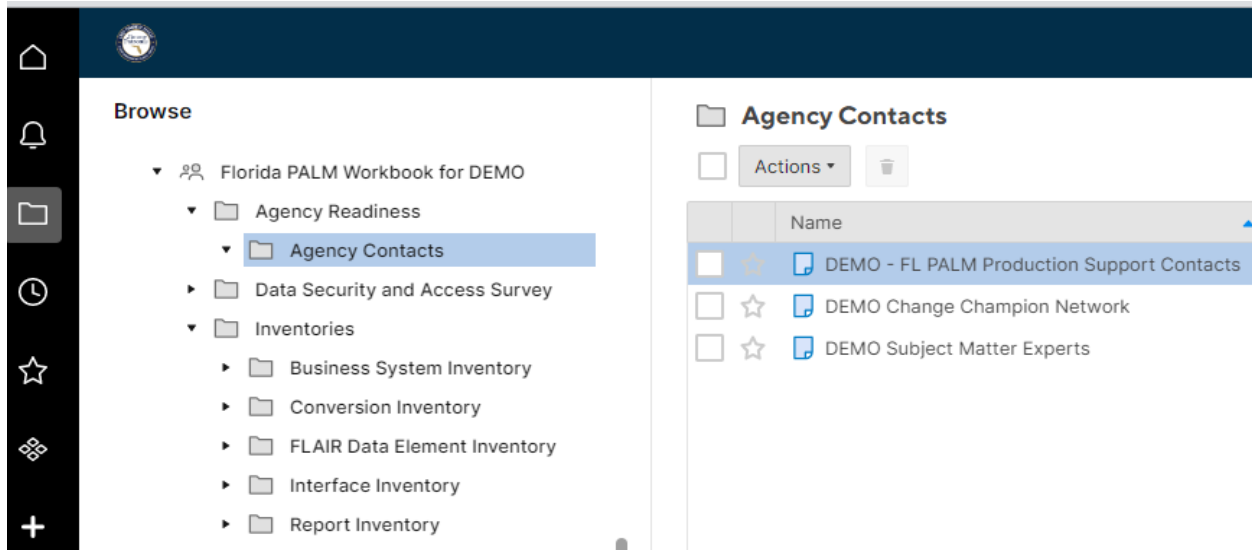
Additionally, the new Agency Contacts folder within your agency's Florida PALM Workbook contains three worksheets:

1. Change Champion Network (Sponsor and Liaison roles)
2. Subject Matter Experts
3. Florida PALM Production Support Contacts (IDP SME's, SAM's, Batch Error Contacts, and File Managers)

Each of these worksheets have been pre-populated with the most recent assignment information provided by your agency. Review and update, where necessary, the identified agency resources and their associated information to ensure alignment with the CCN Roles and Responsibilities. From now through Florida PALM go live, agency's will be responsible for maintaining and updating the information held within the Agency Contacts folder in Smartsheet ensuring it is current and correct.

As a reminder, your Smartsheet Workbook is a protected series of worksheets and can only be updated by staff you have designated for Smartsheet updates. Smartsheet resources are linked below, which can provide a refresher for how to access and use the tool. Feel free to export your worksheet to Excel to support your Sponsor(s) review and update of team assignments. Update your Smartsheets by the requested due date.

Instructions
1) *Work with your Agency Sponsor to review the CCN Roles and Responsibilities document and current CCN primary and backup liaisons, SMEs and production support contacts.*
2) *Update agency resource assignments listed within the Agency Contacts folder of your agency's Florida PALM Workbook in Smartsheet as deemed necessary by your Agency Sponsor.*
3) *Send an email confirming completion of your sponsor's review and update of Implementation and Production Support Team assignments to your agency's Readiness Coordinator (RC), backup RC, and the Florida PALM inbox: FloridaPALM@myfloridacfo.com by June 2, 2023.*
4) *If you have questions regarding this task, listen to the Tuesday Task Talk on Tuesday, May 23, 2023, or contact your Readiness Coordinator.*

> **5)** *Prepare to discuss your agency's progress on this task during monthly touchpoint meetings with your RC.*

Supporting Materials & Resources:

CCN Roles and Responsiblities

Smartsheet User Materials: Access Link, Agency Access Form, Job Aid and User Guide

Identity Management Approach

SAM Request and Acknowledgement Form

Security Access Management User Manual