

Task Instructions

Task ID: 564

Task Name: *Update Future Florida PALM End Users*

Task Start Date: December 9, 2024

Task Due Date: January 10, 2025

Project Impact: *Indirect*

Task Description

Update list of all agency end users who will need access to Florida PALM at implementation.

Task Overview

Florida PALM is a statewide business transformation that requires each agency to plan and execute activities necessary to ready their agency across four critical operational elements: people, processes, technology, and data. This task (Task 564) focuses on people, specifically your future Florida PALM end users. Proper identification of your end users is critical to support end user role mapping, communication of change impacts and identification of end user training needs.

You previously documented your agency stakeholders by identifying future Florida PALM end users (Task 512) and updating your CCN and Project contacts (Task 534). You have surveyed your future end users and analyzed their awareness of Florida PALM (Task 524), and recently you have updated your Workforce Readiness Plan (Task 535), which includes your agency's key stakeholders.

This task (Task 564) requires you to update your list of all end users that are expected to use Florida PALM at go-live.

Task Elements

Review and update the *Implementation End Users* worksheet in your agency's Florida PALM Workbook in Smartsheet to ensure that all future end users have been documented. This task requires you to look beyond current FLAIR users. Agency staff who are not current FLAIR users may be future Florida PALM users due to changes related to automated workflow within the system (increased need for processors and/or approvers), payroll process changes, agency business system retirement, etc. You should also consider Florida PALM design and changes to your internal processes that may create the need for additional users in Florida PALM.

A new column titled 'Topic' has been added to your *Implementation End Users* worksheet. The Topic column contains a predefined, multi-select drop-down list of activity topics identified in the [Florida PALM Topics and Activities list](#). The purpose of this column is to further refine the functions of the end user to support future role mapping, testing, and training activities.

In the *Implementation End Users* worksheet, review and update (as needed) the following items for each end user that will need access to Florida PALM:

- [Business Process Grouping\(s\)](#) – Select the grouping(s) to which access is anticipated to be needed based on the end user's job functions.

- Topic(s) – Select the Topic(s) based on the end user’s job function to support upcoming role mapping, testing and training activities.
 - Review the Florida PALM Topics and Activities list to understand the topics that are available based on the selected Business Process Grouping.
- Office / Bureau / Section – Insert the title of the area within your agency that this position exists (ex., Office of Finance & Accounting/Disbursements/Travel).
- Position # – Insert the position number of this position to account for both vacancies and turnover between now and go live.
- Position Title – Insert the corresponding title of this position.
- First and Last Name – Insert the first and last name of the individual who currently holds this position.
 - If the position is currently vacant, indicate so by adding Vacant in both columns.
- Email – Insert the email address of the individual who currently holds this position.
 - If the position is currently vacant, indicate so by adding Vacant in the cell.
- Headquarters / Primary Office Location / City – Insert the primary office location for this position.
- Other Information (Optional) – Insert any additional information regarding this position that you feel may be helpful to your agency or the Project.

NOTE: All columns are required for each row of data except the Other Information column. Yellow cells indicate that additional information is needed.

NOTE: You have had and will continue to have the opportunity to maintain and update this worksheet beyond the task duration. It is highly recommended that agencies maintain this worksheet by updating regularly.

How will agencies use this information?

This list will inform agencies about the magnitude of the change management efforts needed to ready their people for Florida PALM. In Smartsheet, agencies will be able to update their lists of future end users whenever needed, including removing and adding end users when turnover occurs. Agencies will also be required to update this list during each workforce readiness plan update task. Maintaining an accurate list will support the completion of future tasks that are dependent to this list including:

- Plan for UAT and Training (RW Tasks 536 and 568)
- Assign End User Roles (RW Task 573 and 630)
- Prepare Participants for UAT (RW Task 579)
- Update Workforce Readiness Plan (RW Tasks 585 and 608)
- Survey future end users (RW Task 595)

What will the Florida PALM Team do with this information?

The successful transition to Florida PALM relies heavily on accurate and timely information about the individuals who will be using the system within your agency. Florida PALM will use this information to understand the magnitude of planned end users.

Table 1: Task Completion Rubric

Task Completion Rubric

All cells are complete for each row of data.
Note: Only the Other Information column is optional, all other columns are required.
 Task tracker has been marked as 100% complete.

Task Instructions

Review and update your list of future Florida PALM end users and the related information in the *Implementation End Users* worksheet, located within your agency's Florida PALM Workbook in Smartsheet.

Business Process Grouping(s) - Based on Job Functi	Topic	Office/Bureau/S...	Position #	Position Title	First Name	Last Name	Email	Headquarters / Primary Office Location / City
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Figure 2: Implementation End Users Sheet

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts > Agency Implementation End Users

Table 2: Summary of Task Completion Steps

Instructions
1) Collaborate with your Change Champion Network and FLAIR Access Control Custodian to update the Implementation End User Sheet.
2) Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.
3) Complete task by January 10, 2025 .
4) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.
5) If you have questions regarding this task, participate in Thursday Task Talks or contact your Readiness Coordinator.

Supporting Materials & Resources:

- [Business Process Grouping Descriptions](#)
- [Florida PALM Topics and Activities List](#)