

Task Instruction Addendum

Task Addendum Release: November 13, 2023

Task ID: 504

Task Name: Update Agency Business System Documentation for Segment I

Task Start Date: October 30, 2023

Task Due Date: January 12, 2024

Task ID: 505

Task Name: Update Florida PALM Interface Inventory for Segment I

Task Start Date: October 30, 2023

Task Checkpoint: December 1, 2023

Task Due Date: January 12, 2024

Task Instruction Update

The initial release of this task requires agencies to begin planning for how your systems will integrate with Florida PALM. Based on your understanding of the future design of Florida PALM, you are required to select the interfaces needed to support your business needs and update related agency business system documentation.

As Florida PALM is being designed, it is critical for the Project to understand how agencies plan to integrate their agency business systems with Florida PALM as well as be able to identify possible trends and areas for process improvement across agencies with business system usage or function. In an effort to better understand the status of agency business system documentation updates based on Segment I functionality and to further assist agency planning efforts, additional information about agency documentation status is being requested.

Implementation Interfaces & Documentation Worksheet Update

The Implementation Interfaces & Documentation worksheet in Smartsheet has been updated to include additional drop-down values in the “ABS Documentation Status based on Segment I” column. Agencies should update this status regularly as work for Readiness Workplan (RW) *Task 504* is started, progresses, and is completed, using the values described below:

Column Name: ABS Documentation Status based on Segment I

- Not Started
- Evaluation In Progress
- Evaluation Complete
- Documentation Update Not Needed
- Documentation Update Not Started (previously: Updates Not Started)
- Documentation Update In Progress (previously: Updates In Progress)
- Documentation Update Complete (previously: Updates Complete)

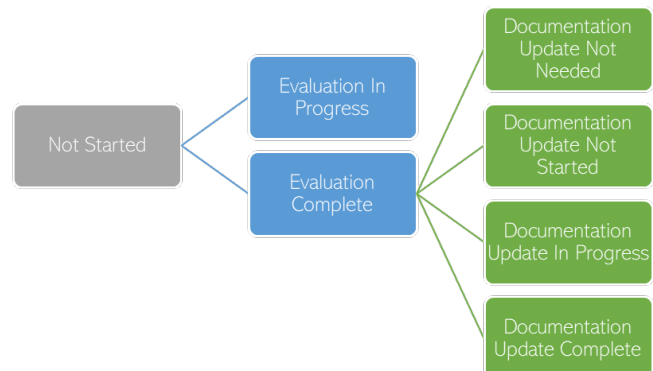


Figure 1: ABS Documentation Status Values

Based on your review and evaluation of Project-provided Segment I design resources, you will determine if there are impacts to any of your agency business systems and therefore if there are

no updates needed or updates needed to your agency business system documentation. Throughout your review and evaluation process, the Documentation Status selection should indicate the progress of your work from *Not Started* to *Evaluation In Progress* and ultimately *Evaluation Complete*.

You are required to attach documentation for all business systems listed in the Implementation Interfaces & Documentation worksheet in Smartsheet, including for those that are impacted by Segment I and those that are not. Current state documentation was required to be completed through RW [Task 326 – Update Current-State Agency Business System Inventory and Documentation](#) and is what agencies will update and complete with the release of each design segment (RW Tasks 504, 516, 528, 544, 558).

If you determine that no updates are needed to a business system, you should attach the completed current state documentation for that system and note the Documentation Status of *Documentation Update Not Needed*. By providing this documentation, you are creating a repository of documentation to support your agency and Project team access.

If you determine that updates are needed to a business system, then you should make the needed documentation updates and attach the updated documentation. As the update to the documentation is progressing, be sure the status is updated from *Documentation Update Not Started* through to *Documentation Update Complete* upon completion.

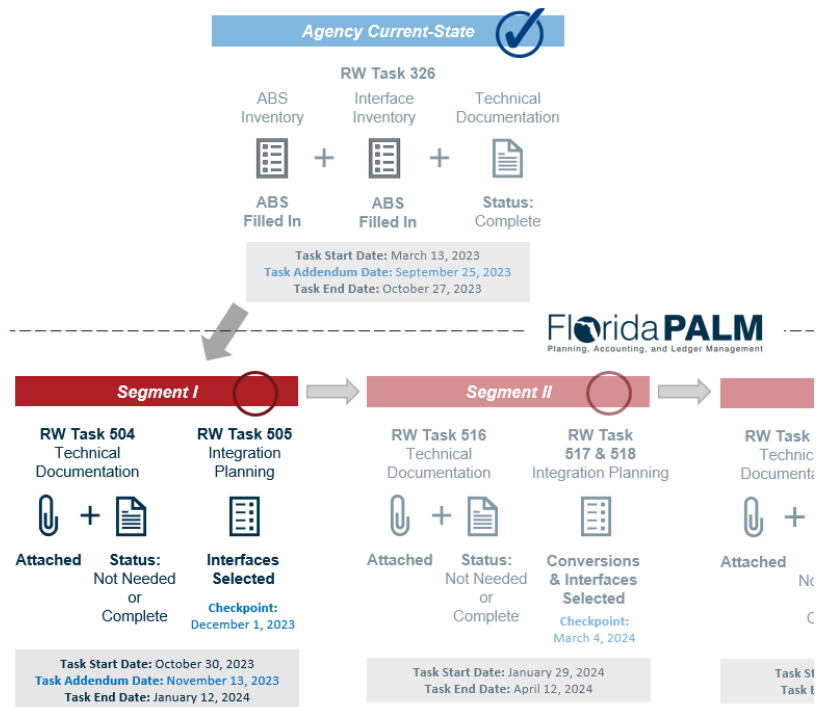


Figure 2: Task Completion Criteria

As shown in Figure 2, the criteria for these tasks to be considered complete and updated to 100% in your RW Task Tracker in Smartsheet includes:

RW Task 504:

All agency business systems listed within your Implementation Interfaces & Documentation worksheet:

- (a) are **required** to have documentation attached; and
- (b) are **required** to have a status of “Documentation Update Not Needed” or “Documentation Update Complete” in the “ABS Documentation Status based on Segment I” column.

RW Task 505:

All agency business systems with a Planned Integration status of “interfacing” are **required** to either:

- (a) have the known Segment I interface needs selected in the “Florida PALM Interface Selection(s)” column; or
- (b) have the status of “Documentation Update Not Needed” in the “ABS Documentation Status based on Segment I” column if no Segment I interfaces are needed at this time.

Note: Segment I interfaces will continue to be available for selection as future design segments are released.

Please include any additional information in the Comment field, as appropriate.

Instructions
<i>1) Continue progress on these combined tasks, per the original task instructions. Collaborate with your CCN and functional and technical SMEs to understand the designs for Segment I and integration needs to support your agency business functions.</i>
<i>2) Complete initial Florida PALM Interface selections in the Implementation Interfaces & Documentation worksheet in Smartsheet by December 1, 2023.</i>
<i>3) Be prepared to discuss interface selections with the Project team in December, if needed. Agencies may choose to make changes to interface selections after discussions with the Project team.</i>
<i>4) Update Agency Business System documentation to reflect integration changes.</i>
<i>5) 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.</i>
<i>6) Finalize interface selections and updates to agency business system documentation by January 12, 2024.</i>
<i>7) Attach updated agency business system documentation to the related row in the Implementation Interfaces & Documentation worksheet in Smartsheet.</i>
<i>8) When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
<i>9) If you have questions, participate in or review the Tuesday Task Talk recording to be released on Tuesday, November 14, 2023, or contact your Readiness Coordinator.</i>