

## Task Instructions

**Task ID:** 508

**Task Name:** *Review Payroll Wave Business Process Models*

**Task Start Date:** *November 6, 2023*

**Task Due Date:** *January 26, 2024*

### Task Description

Share and review business process models for the Payroll Wave.

### Task Overview

Business Process Models (BPMs) document the standardized, end-state business processes that will be implemented in Florida PALM. Using process flows and narratives, the BPMs describe the steps to completing processes in Florida PALM. In September, the Project published the draft Payroll BPMs and facilitated review sessions with the Advisory Council and agencies. The Payroll BPMs were subsequently approved by the Executive Steering Committee (ESC) during their September meeting.

The BPMs lay the foundation for the functional design, which describe **how** payroll management requirements will be met by system functionality and any needed customizations. Agencies will receive details about payroll management functional designs with the release of Segment IV design materials and design workshops planned for Summer of 2024.

The transition of payroll management from FLAIR PYRL to Florida PALM is significant and will impact people, processes, technology and data in both finance and accounting (F&A) and human resources (HR). Agencies should use the Payroll BPMs to consider and begin planning for payroll management related changes.

### Elements of the Task

For this task you should:

1. Identify your payroll management Subject Matter Experts (SMEs) and update your Change Champion Network (CCN) SME list, as needed
2. Review Payroll BPMs with the payroll management SMEs
3. Document the results of the review by the payroll management SMEs

### Identify Payroll Management SMEs

Payroll management, for most agencies, is a shared responsibility between F&A and HR. You are currently working on RW Task 328, creating an inventory of business processes and ensuring that each process and related subprocesses are fully documented; this should include your payroll management processes. Your current state analysis effort will help you identify who the key players are for your agency's payroll management functions, including the key players in F&A and HR.

Review your CCN SME list in Smartsheet to ensure that you have your payroll management SMEs identified. It is crucial that you bring the right people along to prepare for the work of understanding how payroll management in Florida PALM will meet your agency's business needs. As you identify more SMEs, be sure to update your SMEs list in Smartsheet.

## Review Payroll Business Process Models with the SMEs

The following resources have been published and shared with agencies.

- [Business Process Models](#) – Payroll Management
  - 100.1 Set Up and Maintain Positions
  - 100.2 Set Up and Maintain Employees
  - 100.3 On Cycle Payroll Run
  - 100.4 Off Cycle Payroll Run
  - 100.5 Ad Hoc Payroll
  - 100.6 Payroll Adjustments
  - 100.7 Payroll Accounting Distributions
  - 100.8 End of Period Processing
- Payroll Wave Business Process Models [Review Sessions Materials](#)
  - How to Read a Business Process Model Video
  - Payroll BPM Relationships
  - Payroll Processing Timeline Example
  - Meeting recordings

Together, your payroll management SMEs should review the Payroll BPMs and the related resources. During the review, using information from your Task 326 and 328 activities as well as from your agency's Personalized Agency Working Session (PAWS) preparation, your SMEs should consider:

- Agency business systems:
  - Integration points and systems (e.g., People First, PYRL)
  - Information needed or exchanged
  - Users of the system and the information
- Agency business processes (standard and unique):
  - Position funding / allocation
  - Roles and responsibilities (people and positions)
  - Special deductions or collections
  - Tax reporting
  - On-demand / off-cycle
  - Accounting information and reporting needs

## Document Your Findings

As your SMEs review and gain understanding of Florida PALM's payroll management functionality, begin documenting potential change impacts for your agency. Documenting this information now will provide a framework for future Segment IV related RW tasks.

Make note of your questions now. The Project Team may not be able to answer your questions now since the payroll management design is not complete, but the Project Team will be able to answer your "how will it work" questions in future Segment IV engagements.

Discuss any new risks, issues or assumptions related to payroll management. As they are identified, log them in your agency's status reporting worksheets in Smartsheet. You should also document any payroll management readiness activities completed with your payroll management SMEs in your Agency-Specific Readiness Activities worksheet in Smartsheet. Any payroll management related

risks, issues, assumptions or related readiness activities logged in your status reporting sheets in Smartsheet gain visibility on your agency's Status Report Dashboard.

## How will agencies use this information?

This task will prepare agencies for the work ahead related to Segment IV design. Readiness Workplan (RW) tasks that will be released in July 2024 will require agencies to analyze the functional designs, including payroll management, and:

- Identify any needed interfaces or conversions;
- update applicable agency business system documentation and remediate systems;
- identify and document process changes;
- confirm applicable configuration values; and
- analyze data readiness and complete data clean-up.

In addition to preparing for the Segment IV functional design analysis, this task will benefit agencies by:

- engaging a team of SMEs to help lead the payroll management change effort;
- beginning to understand agency impacts related to payroll management, including any risks, issues or assumptions; and
- raising awareness of changes related to payroll management within the agency.

## What will the Florida PALM Team do with this information?

The Florida PALM Team will review Agency Bimonthly Readiness Status Reports for inclusion of any newly identified payroll management related risks, issues, assumptions or readiness activities. The Project will publish your Dashboard to the Florida PALM website and share with the ESC and other key stakeholders.

## Task Instructions

Collaborate with your CCN and functional and technical SMEs to identify your payroll management SMEs. Update your CCN SMEs listing in Smartsheet, if needed. The payroll management SMEs should collaborate and complete a review of all payroll management BPMs and related resources to gain understanding of the planned payroll management functionality in Florida PALM. The payroll management SMEs should document the results of their review to include any newly identified risks, issues or assumptions.

During your regular monthly touchpoints, your Readiness Coordinator will be asking for progress updates. Be prepared to share:

- changes to your payroll management SMEs (e.g., adding additional HR and F&A SMEs);
- an update on how your SMEs are collaborating and reviewing the payroll related resources; and
- any preliminary results of the review and how the SMEs are documenting.

Track progress in your Readiness Workplan Task Tracker. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%, when all elements of the task are done.

<b>Instructions</b>
<i>1) Identify and confirm your payroll management SMEs. Update the CCN SMEs listing in Smartsheet, if needed.</i>
<i>2) Payroll Management SMEs collaboratively review the Payroll BPMs and related resources and document results of the review to include potential change impact and questions, as well as any new risks, issues or assumptions.</i>
<i>3) Report any newly identified risk, issues or assumptions and any payroll management readiness activities completed in the status reporting sheets in Smartsheet.</i>
<i>4) In Smartsheet, update the Readiness Workplan Task Tracker, Agency Reported Task Progress column, to 100% and save, when all elements of the task are complete. Be prepared to discuss progress with your RC in your monthly touchpoints.</i>
<i>5) If you have questions regarding the task, participate in or review the Tuesday Task Talk on Tuesday, November 7, 2023, or contact your Readiness Coordinator.</i>

### **Supporting Materials & Resources:**

- [Business Process Models](#) – Payroll Management
- Payroll Wave Business Process Models [Review Sessions Materials](#)
- How to Read a Business Process Model [Video](#)
- [Process Models Key](#)
- [HRO Presentation](#) from 10/18/2023 by Project Director, Jimmy Cox