Task Instructions

Task ID: 511
Task Name: *Update CCN and Project Contacts*
Task Start Date: *January 8, 2024*
Task Due Date: *January 26, 2024*

Task Description

Review, update and confirm Change Champion Network (primary and back-up liaisons and Subject Matter Experts) 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 is 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 support network including:

Table 1: Agency Florida PALM Contacts

Change Champion Network	Production Support Contacts
Agency Sponsor and backup	Identity Provider (IDP) SME and backup
Agency Liaison and backup	Security Access Manager (SAM) and backup
Business Liaison and backup	Batch Error Contact and backup
Change Management Liaison and backup	File Manager and backup
Project Management Liaison and backup	
Technical Liaison and backup	
Training Liaison and backup	
Subject Mater Experts (SMEs)	

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.
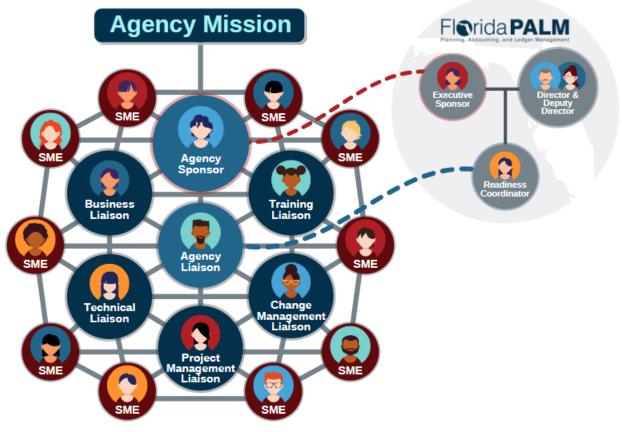
Figure 1: CCN Structure

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
- Develop and complete agency specific readiness tasks
- Communicate agency transformation progress including risks and successes

Agencies are expected to assign one person for each individual CCN role and not rely on the 'one person does it all' approach. This may require identifying people from various agency departments and not relying solely on finance and accounting or technical resources. By doing so, agencies will have a wider range of points of contact to complete tasks, share knowledgeable information and ask questions.

Having one person per role gives an agency the benefit of:
- Each person focusing on their assigned role,
- Less workload per individual, and

- More ideas, skills and expertise in the CCN.

Having one person in multiple roles risks the agency of:
- Missing deadlines due to compounding responsibilities,
- Completing tasks incorrectly or submitting incomplete tasks, and
- Not having the right knowledgeable person for the role.

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:

Table 2: Production Support Contacts and Responsibilities

Contact	Responsibility
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 responsibility 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 Security Access Manager (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: You can view your current SAM(s), but you cannot change the individuals listed in this role in Smartsheet. The Florida PALM Solution Center manages this list. All SAM changes require A&A approval of a completed SAM Request and Acknowledgement Form and will be verified by the Florida PALM Solution Center.*
Batch Error Contact	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) between your agency and Florida PALM. *Note: This role is only required for the following agencies with CMS Wave interfaces: COM, DACS, DCF, DEP, DFS, DOH, DOR, HSMV*
File Manager	This is the person who has the ability to access the Florida PALM Managed File Transfer (MFT) site to send and receive files between your agency and Florida PALM. *Note: This role is only required for the following agencies with CMS Wave interfaces: COM, DACS, DCF, DEP, DFS, DOH, DOR, HSMV*

Task Elements

With knowledge of the agency readiness roadmap and the Readiness Workplan tasks from now until go live, the recent completion of project management tasks (Tasks 500, 501, 502, 503) and ongoing project management processes, you should understand the activities that will need to be

completed for the Financials, Payroll and Data Warehouse implementation and the knowledge, skills, and abilities (KSAs) of the individuals needed to support those activities. Based on this understanding, **Agency Sponsors** should confirm or update your agency's CCN (primary and backup liaisons and SMEs) and production support contacts. While reviewing and updating your current SMEs, you must ensure that at least one SME is assigned to each business process grouping. The Business Process Grouping column in your Agency Subject Matter Experts worksheet has been updated to align with the Florida PALM business process groupings.

How will agencies use this information?

Agencies will use this task to either confirm appropriate assignment or to fully staff / strengthen their CCN and to ensure they have the appropriate people assigned for production-related functions. 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.

The consolidated list can be leveraged as a key stakeholder management tool to help with communication planning and internal collaboration.

What will the Florida PALM Team do with this information?

Florida PALM will use this information to confirm point of contacts to share information with relating to Florida PALM (implementation and production).

The Project team will be looking for the following items to confirm task completion:

1. All CCN and production support contacts primary and backup roles have been filled
2. All SMEs are assigned to at least one Business Process Grouping
3. Each Business Process Grouping has at least one SME
4. All columns are filled out with correct information (e.g., emails, phone numbers)

Task Instructions

Review your current CCN and production support contacts and consider what changes may be appropriate, if any. Update, if necessary, the information in the following four worksheets, located within your agency's Florida PALM Workbook in Smartsheet:

1. (Agency) Change Champion Network
2. (Agency) Production Support Contacts
3. (Agency) Security Access Managers*
4. (Agency) Subject Matter Experts

Smartsheet Navigation:
Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts

* You can view your current SAM(s), but you cannot change the individuals listed in this role in Smartsheet. The Florida PALM Solution Center manages this list. All SAM changes require A&A approval of a completed SAM Request and Acknowledgement Form and will be verified by the Florida PALM Solution Center.

Each of these worksheets contains your most recent assignment information. Review and update, where necessary, the identified agency individuals and their associated information to ensure alignment with the assigned role.

Instructions
1) *Work with your Agency Sponsor to review and update the current primary and backup CCN, SMEs, and Production Support Contacts.*
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 (RC).*
3) *Complete task by January 26, 2024.*
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, review the recorded Tuesday Task Talk, or contact your RC.*

Supporting Materials & Resources:

- Agency Contacts Folder (Smartsheet > Florida PALM Workbook for (Agency) > Agency Readiness)
- Agency Implementation Road Map
- Business Process Grouping Descriptions
- Change Champion Network Roles and Responsibilities
- Readiness Workplan