Task Instructions
Task ID: 534
Task Name: *Update CCN and Project Contacts*
Task Start Date: *June 3, 2024*
Task Due Date: *June 14, 2024*
Project Impact: *N/A*

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	File Manager and backup
Business Liaison and backup	Batch Error Contact and backup
Change Management Liaison and backup	Security Access Manager (SAM) and backup
Project Management Liaison and backup	
Technical Liaison and backup	
Training Liaison and backup	
Subject Matter 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 the different CCN roles. The volume and complexity of the CCN tasks is 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.
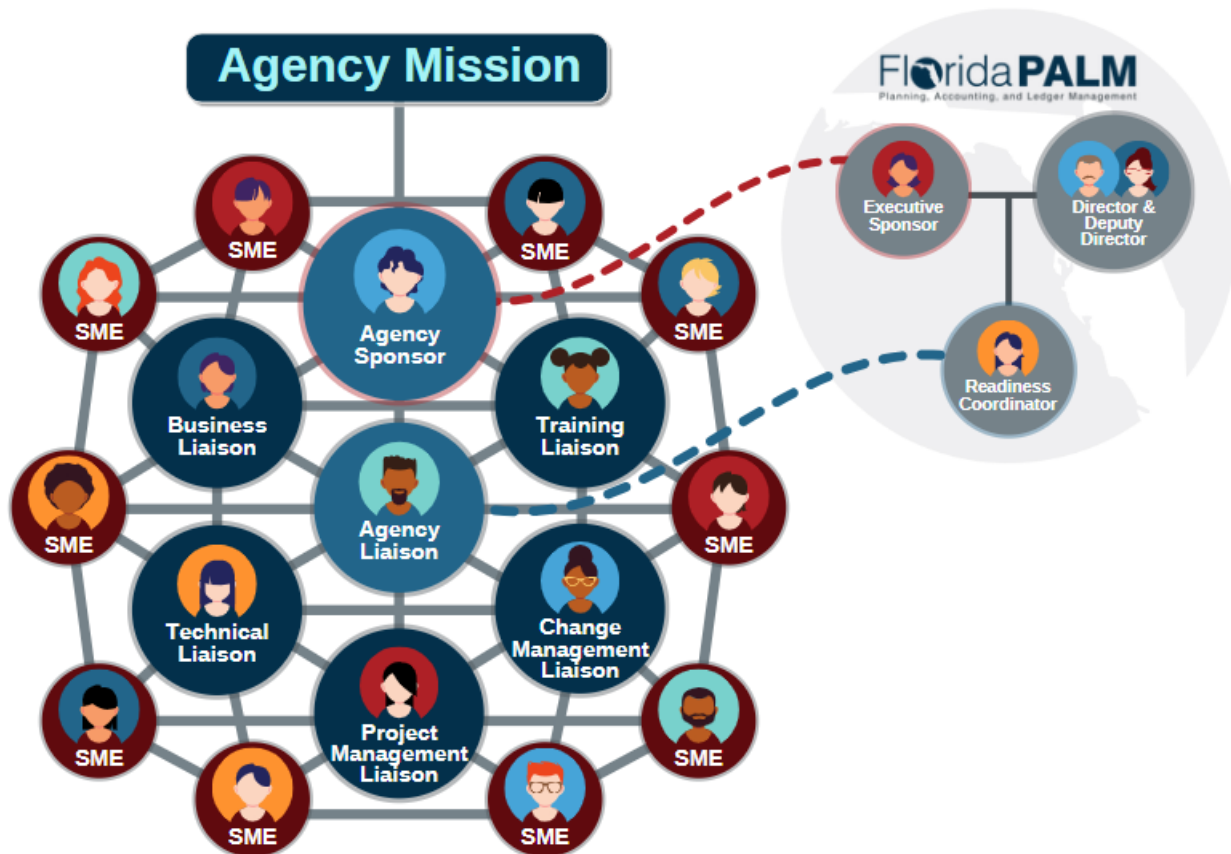
Figure 1: CCN Structure

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 can do 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 more comprehensive and wider range of contacts to complete tasks, share 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 creates increased risk to 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 in the CMS Wave. 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 (IDP) within your agency and is responsible for identity management and authentication controls (e.g., password policies) for your end users, as well as for configuring and maintaining your IDP interface with Florida PALM, as described in the Identity Management Approach.

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., due to 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*

Security Access Manager

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.

Your current production support contacts are supporting limited activity and few end users in Florida PALM today. As we journey to the next implementation, your production support contacts will support significantly more end users and functions in Florida PALM when we begin testing and after go-live. Agency IDP SMEs, SAMs, Batch Error Contacts and File Managers will require an active role in testing activities, including interface testing and user acceptance testing. Preparations for testing activities begin this fall, so it is important to have the right people identified and engaged in these roles.

Task Elements

With knowledge of the Agency Implementation Roadmap, the Readiness Workplan tasks from now until go live, and ongoing project management processes, you should understand the nature of the activities that will need to be completed for the Financials, Payroll and Data Warehouse / Business Intelligence (DW/BI) implementation and the knowledge, skills, and abilities of the individuals needed to support those activities. Based on this understanding, **Agency Sponsors** should confirm or update their agency's primary and backup CCN and production support contacts.

While reviewing and updating your CCN and production support contacts, you must ensure that all required columns shown in Figures 2, 3, 4 and 5 below are complete and contain the most current information. You must also ensure that <u>all SMEs are assigned a business process grouping</u>, and that <u>each business process grouping has at least one SME</u>. The Business Process Grouping column in your Agency Subject Matter Experts worksheet has been updated to align with the Florida PALM Business Process Groupings.

You can view your current SAM(s), via the Smartsheet shown in Figure 5, but you cannot change the individuals listed in this role in Smartsheet. The Florida PALM Solution Center manages this list. All SAM changes require DFS A&A approval of a completed SAM Request and Acknowledgement Form and will be verified by the Florida PALM Solution Center.

Figure 2: CCN Worksheet in Smartsheet

Figure 3: SME Worksheet in Smartsheet

Figure 4: Production Support Contacts Worksheet in Smartsheet

Figure 5: SAM Worksheet in Smartsheet

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 relating to Florida PALM (implementation and production). The lists are the basis for the communications that are distributed to your CCN related to tasks, updates, and general Project information. In addition, the Headquarters Location will be helpful to identify the work locations for CCN and SMEs throughout the state for future engagement activities (e.g., testing, training).

The Project team will review your task submission based on the following criteria to confirm completion:

Table 3: Task Completion Rubric

Task Completion Rubric
All CCN and production support contact primary and backup roles have been filled by an individual (i.e., not "TBD" or "Vacant").

Task Completion Rubric
All required columns are filled out and all rows contain a checkmark in the *Current as of June 2024* column, for each of the following worksheets: 1. (Agency) Change Champion Network 2. (Agency) Subject Matter Experts 3. (Agency) Production Support Contacts ***NOTE:*** *Required fields are conditionally formatted to turn yellow if left blank.*
All SMEs are assigned to at least one business process grouping.
Each business process grouping included in your agency's Current State Inventory worksheet, has at least one SME assigned within the *Applicable Business Process Grouping* column. ***NOTE:*** For any business process groupings not assigned to a SME, it will appear within the *Non-applicable Business Process Groupings* column, in the row containing the agency acronym, indicating that the business process grouping is not utilized by the agency.
If changes are required to the (Agency) Security Access Managers worksheet, a completed *SAM Request and Acknowledgement Form* has been submitted to DFS A&A for approval, and a notification email has been sent to your agency Readiness Coordinator. If changes are not needed to the (Agency) Security Access Managers worksheet, a notification email has been sent to your agency Readiness Coordinator.
The Task Tracker has been marked 100% submitted for this task.

Task Instructions

Review your current CCN and production support contacts and consider what changes may be appropriate. 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) Subject Matter Experts
3. (Agency) Production Support Contacts
4. (Agency) Security Access Managers

For SAMs only: To add, inactivate or change individuals listed in this role in Smartsheet, submit a completed *SAM Request and Acknowledgement Form* to DFS A&A for approval. The Florida PALM Solution Center will verify the request and make the change.

As you are working, track progress in your RW Task Tracker. Indicate task completion by updating the RW Task Tracker to 100% only when you have completed the rubric included in Table 3 above.

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

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.

Table 4: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Work with your Agency Sponsor to review and update your current CCN 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.*
3) *Complete task by* **June 14, 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, participate in the Thursday Task Talk on Thursday, June 6, or contact your Readiness Coordinator.*

Supporting Materials & Resources:

- Agency Contacts Folder (Smartsheet > Florida PALM Workbook for (Agency) > Agency Readiness > Agency Contacts)
- Agency Implementation Roadmap
- Business Process Grouping Descriptions
- Change Champion Network Roles and Responsibilities
- Readiness Workplan
- SAM Request and Acknowledgement Form