

## Overview

The Readiness Workplan (RW) is a list of tasks an agency must complete to transition to Florida PALM, including tasks necessary to ready their people, processes, technology, and data. The Agency Readiness Workplan Task Tracker (Task Tracker) is made available to agencies to monitor and report progress and submit or note completion of RW tasks. The purpose of this job aid is to provide instructions on how to use the RW and the Task Tracker.

## The Readiness Workplan

The RW is published to the Project’s website, via Smartsheet, with the ability to export to Excel, and includes the following columns:

- **Date Released** indicates when a task was initially released in the RW or when an existing task was re-released or updated in the RW.
- **Task ID** is the unique ID assigned to each task comprised of a three-digit task sequence number.
- **Critical Operational Element** indicates which element (people, process, technology, data) the task is most closely related to and how the task will be reported in Agency Status Report Dashboards. N/A is used to identify project management type tasks that do not align to an operational element.
- **Task Name** is the name of the task.
- **Task Description** is a brief explanation of the task and what is being asked of the agencies.
- **Task Planned Start Date** is the date an agency should begin working on a task. A communication and task instruction will be sent by the indicated planned start date.
- **Task Planned End Date** is the date by which the task needs to be completed.

Agencies have the ability to sort and filter the RW to identify tasks based on various criteria. This can assist with internal planning, identifying needed resources and engagement activities.

## The Agency Readiness Workplan Task Tracker

The Task Tracker mirrors the RW and includes all required RW tasks. The Task Tracker is located in the Agency Workspace, Agency Readiness Folder in Smartsheet. Access to the Task Tracker is restricted and maintained by the Agency Liaison and Project Management Liaisons.

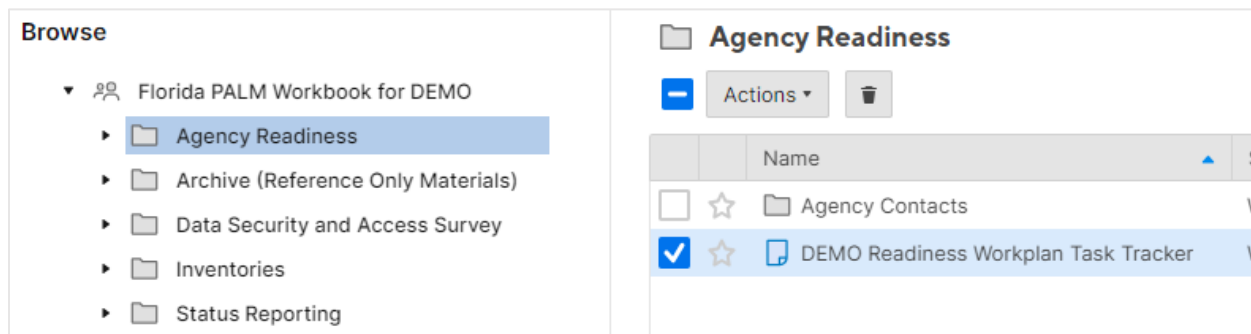


Figure 1: Task Tracker Navigation

The tasks in the Task Tracker are fed directly from the RW. Agencies can only edit the Agency Reported Task Progress and the Agency Comments columns; all other columns are locked from editing.

Agencies will record progress of current tasks in the Agency Reported Task Progress column by using the following drop-down options:

- **25%** indicates that the agency has begun the task (e.g., initial internal meetings and informational gathering to start the task).
- **50%** indicates that the task is in progress and well underway.
- **75%** indicates that information is being reviewed, consolidated, and input into the appropriate format for submission.
- **100%** indicates that task is completed and submitted in the format requested by the Project.

When a task has marked 100% and the sheet is saved, the Agency Completion Date column will populate with the date and lock the task row from further editing. If you mark a task as 100% complete and click save in error, contact your Readiness Coordinator to correct.

The Agency Comments column is for agency internal use to communicate additional task information to agency stakeholders.

Task ID	Task Name	Task Description	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Agency Comments
324	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting which FLAIR data elements your agency currently uses and how they are being used.	12/09/22	03/31/23			
325	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform the Project about how you currently manage data security and end user access.	01/23/23	02/03/23			
326	Update Current State Agency Business System Inventory and Documentation	Review and update the list of current Agency Business Systems. Review and confirm documentation of current state technical design for each system.	03/13/23	10/27/23			
327	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency reports that contain FLAIR data.	04/03/23	07/28/23			
329	Update OCN and Project Contacts	Review, update and confirm Change Champion Network (primary and back-up liaisons and Subject Matter Experts) and production support contacts.	06/22/23	08/02/23			
330	Update Authorized Smartsheet Users	Review, update and confirm authorized users' access to all Florida PALM Smartsheet resources.	06/12/23	08/23/23			
328	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, including the people and any agency business systems engaged in the processes.	07/31/23	12/15/23			
331	Submit Bimonthly Agency Status Report	Agency Sponsor to confirm and submit bimonthly status report, in the format provided by the Project, on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of Florida PALM.	09/01/23	09/11/23			
500	Create Agency Specific Project Charter	Create or update an agency-specific Florida PALM Project Charter identifying your agency's objectives, scope, stakeholders	10/02/23	12/15/23			

Figure 2: Task Tracker

Agency task progress updates made to the Task Tracker will populate metrics on the Status Report Dashboard: Completed, Submitted Late, and Pending Submission.

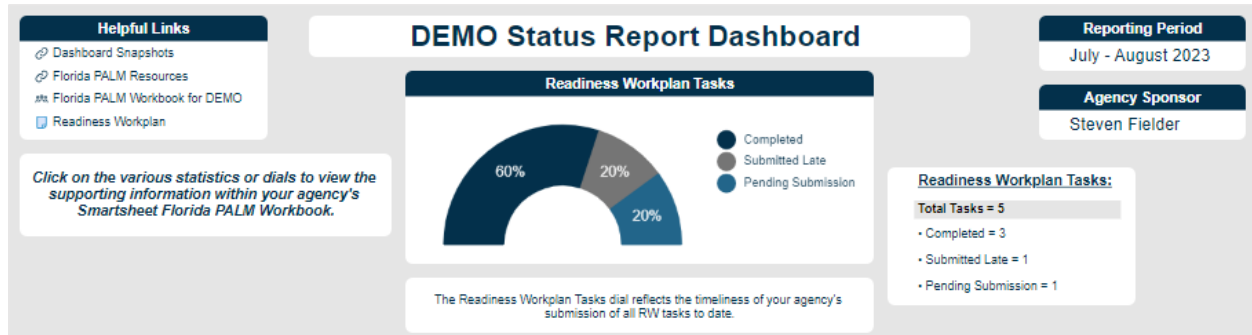


Figure 3: Agency Status Report Dashboard

Agency Liaisons and Project Management Liaisons currently have share and edit access to all resources in the Agency Workspace in Smartsheet, including the Task Tracker. Agency Change Champion Networks should consider roles and responsibilities for view and edit access to the Task Tracker as it can affect the status reporting metrics of completed tasks for your agency.

If you have any additional questions about how to use Smartsheet, the RW or the Task Tracker, refer to the [Smartsheet User Guide](#) or contact your Readiness Coordinator or the [Florida PALM Inbox](#).