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:

- **Change History** is a brief explanation of the most recent change made to the task, if any.
- **Date Released** indicates when a task was initially released in the RW or when an existing task was changed in the RW.
- **Project Impact** indicates if the task submission has a direct or indirect impact to the progress of the Florida PALM Project.
    - Direct – Agency readiness activity or information provided will be used by the Project to complete implementation or cutover activities.
    - Indirect – Agency readiness activity impacts future Project activity or will be used in future agency readiness activity or to produce information that will be used by the Project to complete implementation activities.
    - N/A – No impact
- **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 Type** indicates the general purpose or nature of the task (e.g., Conversion / Configuration, UAT, Training, Status Reporting).
- **Agency Readiness Certification #** indicates if the task is included as a related RW Task for a Readiness Certification task.
- **Reporting Topics** provides the anticipated topics agencies will be required to provide progress updates on, relevant only to Status Report or Progress Report tasks.
- **Task ID** is the unique ID assigned to each task comprised of a three-digit task sequence number.
- **Task Name** is the title / short 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 managed by the agency.

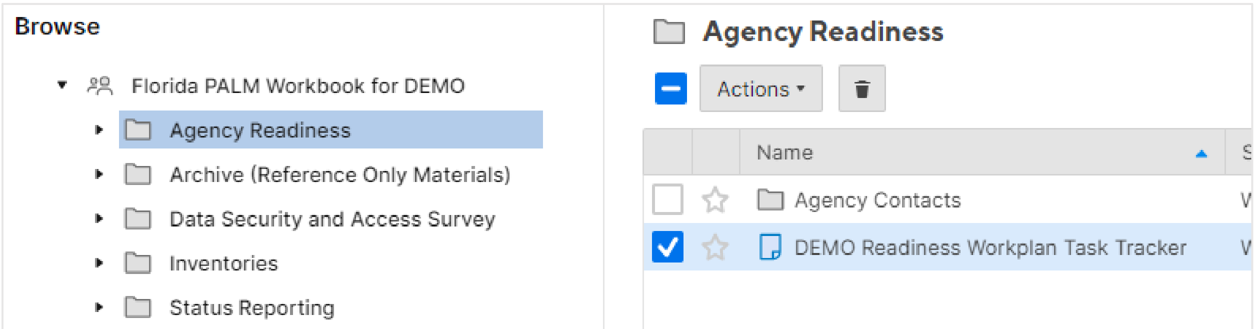


Figure 1: Task Tracker Navigation

The Task Tracker includes the following columns directly from the RW:

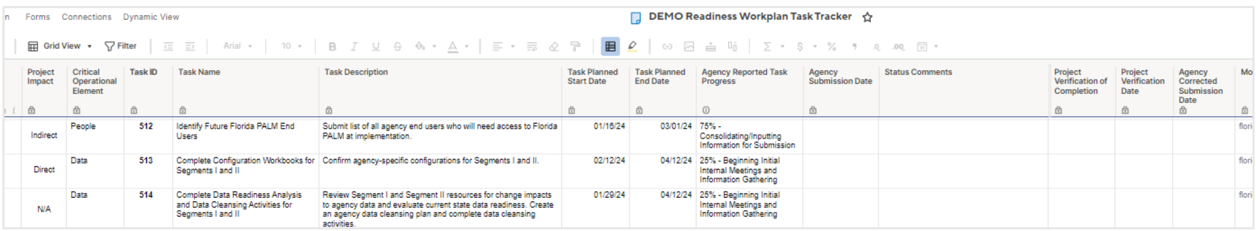
- **Project Impact**
- **Critical Operational Element**
- **Task ID**
- **Task Name**
- **Task Description**
- **Task Planned Start Date**
- **Task Planned End Date**

Task progress and completion is tracked by the following columns in the Task Tracker:

- **Agency Reported Task Progress** is managed by the agency to report task progress through submission. Agencies may choose from these 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 submitted in the format requested by the Project.
  - ***Note:*** *An additional drop-down option of **Pending Resubmission** is available but should **not** be selected by agencies. This option indicates that the Project has determined that a task is incomplete and requires additional action from the agency.*
- **Agency Submission Date** is the date your agency makes the initial selection of 100% - Submitted and clicks save. This field is auto populated.
- **Status Comments** is for agency use to communicate additional task progress information to stakeholders.
- **Project Verification of Completion** is managed by the Project and indicates task completion based on the review of the submitted task per the task completion criteria provided in the associated task instructions. Valid values include:
  - **Submission Complete**
  - **Submission Incomplete**

- ○ **N/A** – Used for tasks that will not receive a completeness verification from the Project (i.e., RW tasks prior to 512, the Bimonthly Agency Readiness Status Reports, and the Manage Agency-specific Implementation Schedule, Risks, and Issues tasks).
- **Project Verification Date** is the date the Project completed their review and verification of completion of the submitted task based on the task completion criteria in the associated task instructions.
- **Agency Corrected Submission Date** is the date of the most recent corrected resubmission.

Agencies can only edit the Agency Reported Task Progress and the Status Comments columns; all other columns are locked from editing.



Project Impact	Critical Operational Element	Task ID	Task Name	Task Description	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comments	Project Verification of Completion	Project Verification Date	Agency Corrected Submission Date	Mo
Indirect	People	512	Identify Future Florida PALM End Users	Submit list of all agency end users who will need access to Florida PALM at implementation.	01/16/24	03/01/24	75% - Consolidating/Inputting Information for Submission						flori
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	Confirm agency-specific configurations for Segments I and II.	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering						flori
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	Review Segment I and Segment II resources for change impacts to agency data and evaluate current state data readiness. Create an agency data cleansing plan and complete data cleansing activities.	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering						flori

Figure 2: Task Tracker

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

Within 5 business days after submitting your task, your Agency Liaison and Project Management Liaison will receive an email notification via Smartsheet indicating the task submission has been verified as complete or incomplete (according to the task's completion criteria). A Task Verification Form will be attached to the corresponding row in the Task Tracker for the agency's review. The Task Verification Form will provide the task completion criteria and details as to why the task is verified as complete or incomplete.

If the task is verified complete, no additional action is required of the agency. If the task is deemed incomplete, the following changes will be reflected within the Task Tracker:

- The corresponding task row will be unlocked.
- The Agency Reported Task Progress will change from *100% - Submitted* to *Pending Resubmission*.

To complete the task, your agency is required to view the Task Verification Form, make all necessary corrections/updates, and then resubmit the task by going to the Agency Reported Task Progress column and reselecting *100% - Submitted.* Figure 3 provides a visual representation of the task submission and verification process.

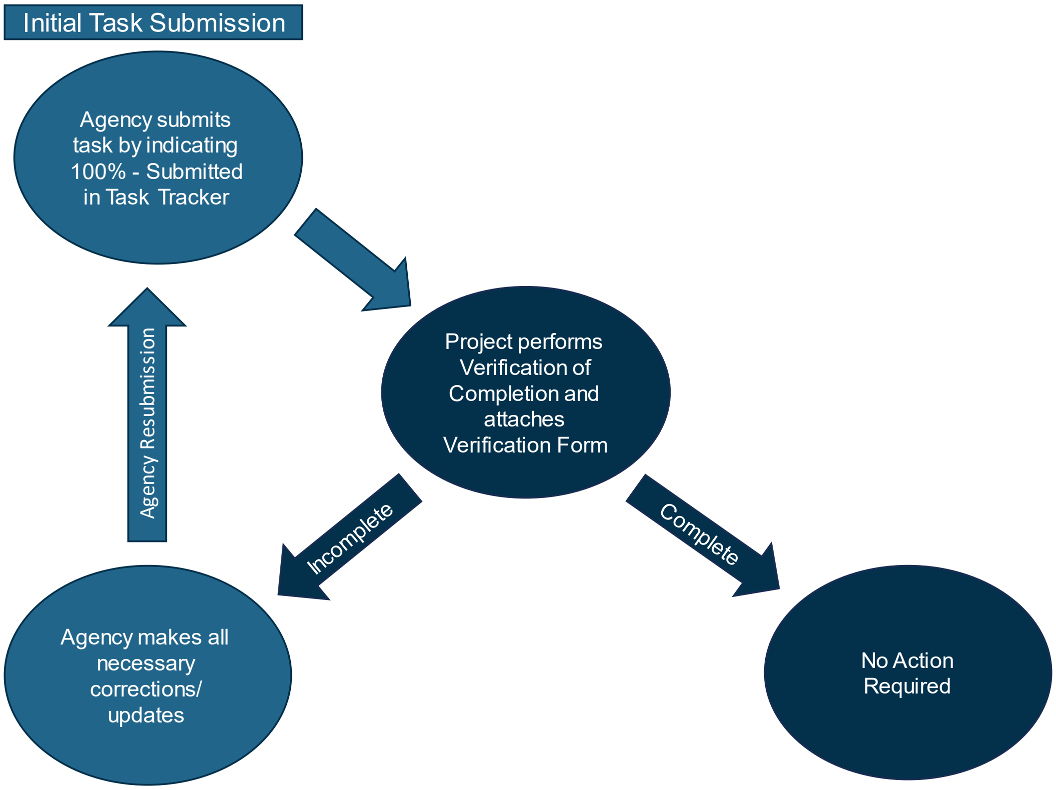


Figure 3: Task Submission and Verification Process

Agency task progress updates made to the Task Tracker will populate metrics on the Status Report Dashboard: RW Task Completeness and RW Task Timeliness, as shown in Figure 4.

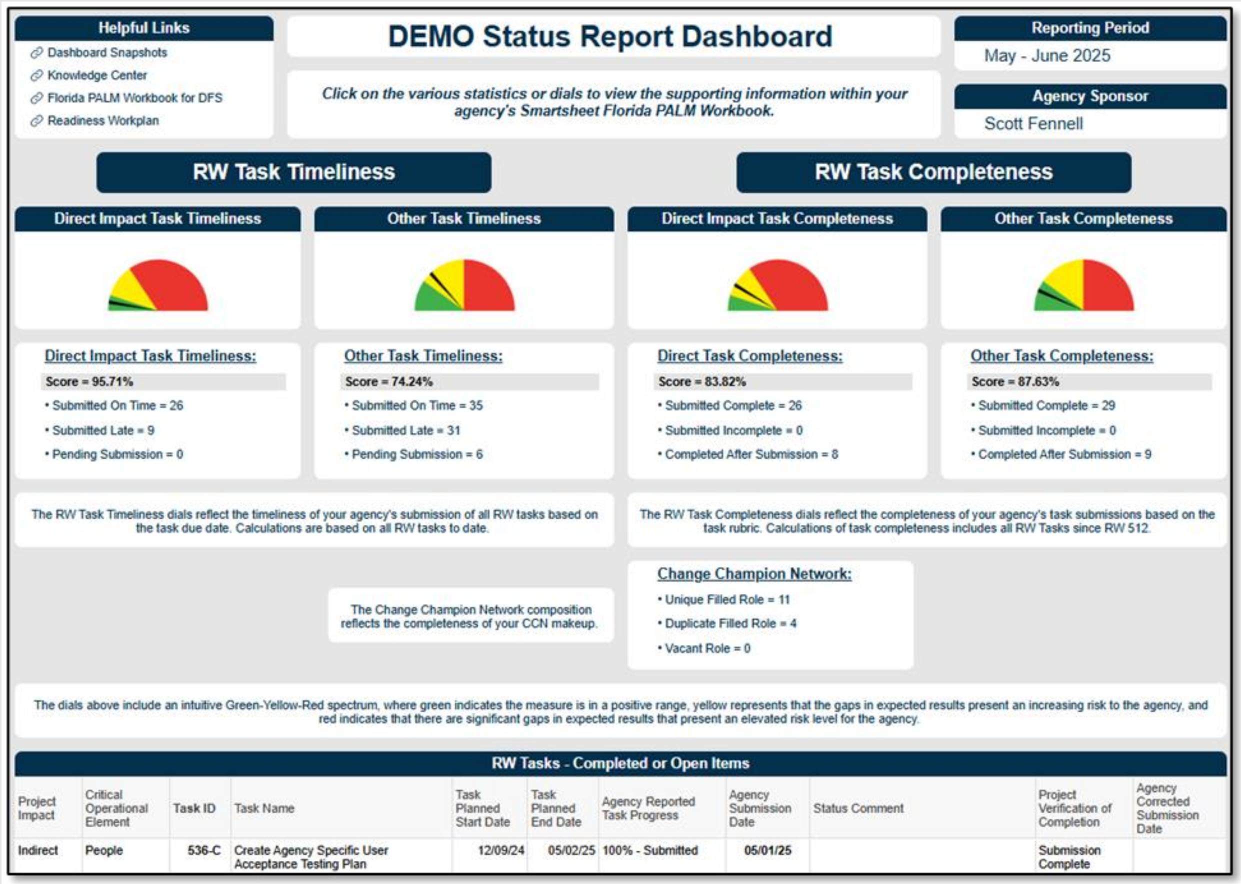


Figure 4: Agency Status Report Dashboard

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.