

## Filtering the Readiness Workplan

The Readiness Workplan (RW) is a list of the tasks an agency will need to complete to transition to Florida PALM, including tasks necessary to remediate business systems impacted by Florida PALM. The purpose of this document is to understand how agencies can use Microsoft Excel's filter functionality to identify specific RW tasks.

Columns and details are available to assist agency internal planning and engagement. Agencies can filter the RW to identify tasks based on various criteria.

- To filter tasks by **recent updates**, use 'Date Released' column and 'Change History' column;
- To filter tasks by **implementation wave**, use 'Applicable Wave' column;
- To filter tasks by **topic** (e.g. Interface, Conversion, Training), use 'Task Type' column;
- To filter tasks by **category**, use 'Task ID' column; or
- To filter tasks by **timeframe**, use 'Task Planned Start Date' column and/or 'Task Planned End Date' column.

## Filtering Example for Agency or Enterprise Partner

Not all tasks in the RW are applicable to each agency and Enterprise Partner. To identify applicable tasks to your agency or Enterprise program, multiple filters will need to be added to the 'Applicable Audience' column. To start, click the filter drop down on the 'Applicable Audience' column and click into the search field.

B	C	D	E	F	G
Date released	Applicable Wave	Applicable Audience	Task Type	Task ID	Task Name
Fri, 3/27/2020	CMS		Security	TECH68	Conduct Identity Provider Questionnaire
Fri, 3/27/2020	CMS		Interfaces	TECH69	Share and Review Interface Layouts
Fri, 3/27/2020	CMS		Readiness	RDNS200	Provide Update on Agency Readiness Activities
Fri, 3/27/2020	CMS		Chart of Accounts	FUNC26	Share and Review COA Overview
Fri, 3/27/2020	CMS		Business Processes	FUNC27	Share and Review CMS Wave Business Process Models
Fri, 3/27/2020	CMS		Readiness	RDNS201	Participate in the Change Champion Network Town Hall
Fri, 3/27/2020	CMS		Interfaces	TECH70	Review and Identify Available Outbound Interface Layouts
Fri, 3/27/2020	CMS		Configurations	FUNC29	Share, Review, and Submit Configuration Workbooks
Fri, 3/27/2020	CMS		Business Processes	FUNC28	Participate in CMS Wave Office Hours
Fri, 3/27/2020	CMS		Interfaces	TECH71	Complete and Submit Interface Connection Inventory
Fri, 3/27/2020	CMS		Readiness	RDNS204	Provide Update on Agency Readiness Activities

1. Within the search field, enter the following:
  - If you represent an agency (listed in the 'Agencies' table on the 'Key' tab), then enter 'All Agencies'.
  - If you represent an Enterprise Partner (listed in the 'Enterprise Partners' table on the 'Key' tab), then enter 'All Enterprise Partners'.
  - Then click the 'OK' button.
2. Within the same filter dropdown search field:
  - Enter the acronym that was associated with your agency or Enterprise program on the 'Key' tab.
  - Check the 'Add current selection to filter' box,
  - Then click the 'OK' button
  - *Note: If there are no specific tasks identified for your specific agency, there may not be any tasks to select.*

## Additional Filtering Options

There are several other filter options that may be helpful using similar steps to above example. Using the Department of Financial Services (DFS) as an example agency, the RW can be filtered using the following:

To view DFS tasks to be completed during the CMS Wave, a filtering option could be:

- **CMS** for the '*Applicable Wave*' column; and
- **All Agencies** and **DFS** for the '*Applicable Audience*' column.

To view DFS tasks related to training that will be completed during the CMS Wave, a filtering option could be:

- **CMS** for the '*Applicable Wave*' column;
- **All Agencies** and **DFS** for the '*Applicable Audience*' column; and
- **Training** for the '*Task Type*' column.

To view DFS tasks that will end a month around 19-20 Fiscal Year End, a filtering option could be:

- **All Agencies** and **DFS** for the '*Applicable Audience*' column; and
- **June, July, August** in **2020** for the '*Task Planned End Date*' column.

If you have any questions about how to identify the tasks specific to your agency on the RW, please contact your Readiness Coordinator or email the [Florida PALM Inbox](#).