

Change Request Information *(completed by PCR Requestor)*

Requestor		Owner	
Name	Deana Metcalf	Name	Stacey Terry
Phone	850.410.9023	Phone	512.350.6460
Email	deana.metcalf@myfloridacfo.com	Email	stacey.terry@myfloridacfo.com
Title	Florida PALM Functional Architect	Title	Accenture Functional Lead
Requesting Department Name <i>(Use if requested from outside the Project)</i>	Department of Financial Services	Date Requested	6/19/2024
PCR Need Description <i>(Include description of change, why it is needed, how it was discovered)</i>	<p>After execution of Amendment 8 and as a result of Financials, Payroll and Data Warehouse solution design conversations, the Department of Financial Services (DFS) has requested the following changes to Attachment 5.1 – Business Requirements.</p> <p>Attachment 5.1 – Business Requirements:</p> <p>As the Project team completed Solution Design activities for Segment IV, requirement changes were identified to either; 1) cancel requirements, 2) move requirements to Optional Services, or 3) move requirements from Optional Services to the Financials Wave.</p> <p>The PCR-119 Cancellation and Optional Services Requirement Changes spreadsheet provides a comprehensive list of the requirement changes by requirement action to include rationale. The following provides the details for the requirement action and rationale details documented within the correlating PCR-119 Cancellation and Optional Services Requirement Changes spreadsheet:</p> <ol style="list-style-type: none"> The Requirement Action (column J) denotes the type of change. The following includes the applicable values: <ul style="list-style-type: none"> Cancel (16 requirements) Move to Optional Services (26 requirements) Move from Optional Services to the Financials Wave (19 requirements) The Rationale (column K) provides details regarding the requested requirement change. 		
Business Benefit/Justification <i>(Provide the tangible/intangible value(s) that support the Project's goals)</i>	The requested requirement changes enable Florida PALM to design the appropriate solution for the Financials and Payroll Waves, to include the Data Warehouse.		
Implications of Not Making the Change <i>(If we do nothing, what is our "Impact Prediction" to the project in terms of risk or issue)</i>	Failure to implement the requested business requirement changes would require solutions to be designed that are not applicable to the defined Financials and Payroll Wave business processes and Data Warehouse solution.		
Project Goals <i>(Please choose all that apply)</i>	Goal		
	<input checked="" type="checkbox"/>	Reduce the State's risk exposure by harnessing modern financial management technology built on the premises of scalability, flexibility, and maintainability,	
	<input checked="" type="checkbox"/>	Improve state and agency specific decision making by capturing a consistent and an expandable set of data,	
	<input type="checkbox"/>	Improve the State's financial management capabilities to enable more accurate oversight of budget and cash demands today and, in the future,	
	<input type="checkbox"/>	Increase internal controls by enabling standardization and automation of business processes within and between DFS and agencies,	

Initial Review *(completed by PMO Team)*

PCR Title	Cancellation and Optional Services Related Requirement Changes
PCR ID	119

Initial Review *(completed by PMO Team)*

PCR Historical Information <i>Please enter the following IDs from the Project SharePoint logs (when applicable)</i>			
Decision ID	Enter Decision ID	Decision Name	Enter Decision Name
Risk ID	Enter Risk ID	Risk Name	Enter Risk Name
Issue ID	Enter Issue ID	Issue Name	Enter Issue Name

Impact Analysis *(completed by Florida PALM Project team members)*

PCR Analysis Resources	Name		Role	
	Deana Metcalf		State Functional Architect	
	Stacey Terry		Accenture Functional Lead	
	Enter Name		Enter Role	
	Enter Name		Enter Role	
Enter Name		Enter Role		
		<input type="checkbox"/> Tier 1 (Project Director Approval)	<input checked="" type="checkbox"/> Tier 2 (ESC Approval)	
Identify Approval Tier <i>(Select Tier 2 if one or more of cost, scope, and schedule meet the criteria of Tier 2)</i>	Cost	Changes that do not relate to additions or deletion of Business Requirements		Addition or deletion of Business Requirements
	Scope	Changes not associated with Major Project Deliverables or Stage Gate Decision due dates		Changes to Major Project Deliverables or Stage Gate Decision due dates
	Schedule	Changes within the budgeted spend plan categories, provided it does not result in overall Project cost overruns		Changes resulting in request for funds from the Legislative Budget Committee (LBC) or in the cost of a deliverable over \$250,000
Alternatives to Making the Change <i>(Describe solution options to fulfilling the change request)</i>	Viable	N/A		
	Not Viable	N/A		
Risk(s) Associated with Making the Change	Risk Category		N/A	
	Cost	<input type="checkbox"/>		
	Scope	<input type="checkbox"/>		
	Schedule	<input type="checkbox"/>		
Is the SSI Contract Impacted?	<input checked="" type="radio"/> Yes <input type="radio"/> No		Updates to Attachment 5.1 – Business Requirements	
Project Cost Impact		N/A		
Low - No impact to Cost				
Project Schedule Impact		N/A		
Low - No impact to Stage Gate Decisions				
Project Scope Impact		1) Cancelled 16 business requirements.		
Critical - Adjustment requiring ESC acceptance		2) Moved 26 business requirements to Optional Services requirement.		
		3) Moved 19 business requirements from Optional Services to the Financials Wave.		
Additional Resource Requirements <i>(insert rows as needed)</i>		Hours Effort	Hours Cost	Cost
Functional Analyst				
Totals		Enter Total Number of Hours	Enter Total Cost Per Hour	N/A

Implementation Plan *(Completed by Florida PALM team member(s))*

The following implementation plan activities will be completed per the business requirement changes noted in the **Cancellation and Optional Services Related Requirement Changes** spreadsheet:

- 1) Update Attachment 5.1 – Business Requirements Working (to be completed by Stacey Terry):
 - Cancel the applicable business requirements.
 - Revise the Implementation Period to Optional Services for the applicable business requirements.
 - Revise the Implementation Period to Financials Wave for the applicable business requirements.

- 2) Requirements Traceability Matrix (RTM) Working (to be completed by Stacey Terry):
 - Cancel the applicable business requirements.
 - Revise the Implementation Period to Optional Services for the applicable business requirements.
 - Revise the Implementation Period to Financials Wave for the applicable business requirements.

- 3) Complete the following updates to the WP402 Requirements Traceability Matrix for Segment IV (to be completed by Stacey Terry):
 - Cancel the applicable business requirements.
 - Revise the Implementation Period to Optional Services for the applicable business requirements.
 - Revise the Implementation Period to Financials Wave for the applicable business requirements.

Additional Reviewers

(Use this table only if needed)

Reviewer	Complete Date	Notes
<input checked="" type="checkbox"/> SSI Contract Manager	6/20/2024	Approve
<input type="checkbox"/> Production Support Manager	N/A	N/A
<input checked="" type="checkbox"/> Project Management Office	6/21/2024	Approve
<input type="checkbox"/> Other	Choose a Date	

CCB Review

CCB Members	Member Recommendation	Member Recommendation Date
<input checked="" type="checkbox"/> Deputy Project Director	Approve	6/20/2024
<input checked="" type="checkbox"/> Financial Architect	Approve	6/20/2024
<input checked="" type="checkbox"/> Learning Architect	Approve	6/20/2024
<input checked="" type="checkbox"/> Readiness Architect	Approve	6/20/2024
<input checked="" type="checkbox"/> Reporting Architect	Approve	6/20/2024
<input checked="" type="checkbox"/> Technical Architect	Approve	6/20/2024
<input checked="" type="checkbox"/> Payroll Architect	Approve	6/20/2024

Authorization

This PROJECT CHANGE REQUEST is bound to the signed Project Charter and/or Contract Statement of Work and the PCR approval date. The following signatures authorize work described herein to be performed.

Determination Choose an Item

TIER 1 *(when applicable)*

TIER 2 *(when applicable)*

Signature

Date

Signature

Date

Jimmy Cox, CPA, PMP, FCCM, FCCN
 Florida PALM Project Director

Steven Fielder, Chair
 Florida PALM Executive Steering Committee