

<b>Change Request Information</b> <i>(completed by PCR Requestor)</i>			
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><b><u>Attachment 5.1 – Business Requirements:</u></b></p> <p>As the Project team completed Solution Design activities for Segment IV, requirement changes were identified to either; 1) revise the requirement text, 2) associate requirements to Attachment 5.2 customizations, or 3) disassociate requirements from Attachment 5.2 customizations.</p> <p>The <b>PCR-120 Requirement Text and Customization Alignment Changes</b> spreadsheet provides a comprehensive list of the requirement changes by requirement action to include rationale. The following provides the details for the requirement action, revised text and rationale details documented within the correlating PCR-120 Requirement Text and Customization Alignment Changes spreadsheet:</p> <ol style="list-style-type: none"> <li>The <b>Requirement Action</b> (column J) denotes the type of change. The following includes the applicable values:                             <ul style="list-style-type: none"> <li>Revise Requirement Text (42 requirements).</li> <li>Associate to Attachment 5.2 Customization (31 requirements).</li> <li>Disassociate from Attachment 5.2 Customization (4 requirements).</li> </ul> </li> <li>The <b>Revised Requirement Text</b> (column K) is populated for requirements that reference a “Revise Requirement Text” requirement action.</li> <li>The <b>Rationale</b> (column L) provides details regarding the requested requirement change.</li> </ol>		
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>	<b>Goal</b>		
	<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.	

<b>Initial Review</b> <i>(completed by PMO Team)</i>			
PCR Title	Requirement Text and Customization Alignment Changes		
PCR ID	120		
<b>PCR Historical Information</b> <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

<b>Impact Analysis</b> <i>(completed by Florida PALM Project team members)</i>			
PCR Analysis Resources	Name		Role
	Deana Metcalf		Florida PALM Functional Architect
	Stacey Terry		Accenture Functional Lead
	Enter Name		Enter Role
	Enter Name		Enter Role
Enter Name		Enter Role	
		<input checked="" type="checkbox"/> Tier 1 (Project Director Approval)	<input 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) Revise the text for 41 business requirements, 2) Associate 32 business requirements to Attachment 5.2 Customizations, and 3) Disassociate 4 business requirements from Attachment 5.2 Customizations.		
Critical - Adjustment requiring ESC acceptance			
Additional Resource Requirements <i>(insert rows as needed)</i>		Hours Effort	Hours 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 **Requirement Text and Customization Alignment Changes** spreadsheet:

- 1) Attachment 5.1 – Business Requirements Working (to be completed by Stacey Terry):
  - Revise the text for applicable business requirements.
  - Associate Attachment 5.2 Customizations for the applicable business requirements.
  - Disassociate Attachment 5.2 Customizations for the applicable business requirements.
- 2) Attachment 5.2 – Customizations Working (to be completed by Stacey Terry):
  - Revise the text for applicable business requirements.
  - Associate business requirements with the applicable customizations.
  - Disassociate business requirements from the applicable customizations.
- 3) Requirements Traceability Matrix (RTM) Working (to be completed by Stacey Terry):
  - Revise the text for applicable business requirements.
  - Associate Attachment 5.2 Customizations for the applicable business requirements.
  - Disassociate Attachment 5.2 Customizations for the applicable business requirements.
- 4) WP402 Requirements Traceability Matrix for Segment IV (to be completed by Stacey Terry):
  - Revise the text for applicable business requirements.
  - Associate Attachment 5.2 Customizations for the applicable business requirements.
  - Disassociate Attachment 5.2 Customizations for the applicable business requirements.
- 5) D644 – Completion of Solution Design (Requirements) Segment IV (to be completed by Stacey Terry):
  - Update requirements on functional designs, as applicable.
  - Update the requirements referenced on functional designs as noted in the D644 Summary document.

**Additional Reviewers**

*(Use this table only if needed)*

Reviewer	Complete Date	Notes
<input checked="" type="checkbox"/> SSI Contract Manager	6/21/2024	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	6/21/2024
<input type="checkbox"/> Reporting Architect	Choose an Item	
<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

**Authorization**

**TIER 1** *(when applicable)*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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

**TIER 2** *(when applicable)*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Steven Fielder, Chair  
Florida PALM Executive Steering Committee