

# FloridaPALM

Planning, Accounting, and Ledger Management



Task ID	Critical Operational Element	Task Name	Task Description
324	Data	Complete FLAIR Data Elements Inventory	Complete and submit the FLAIR Data Elements Inventory documenting data elements your agency currently uses and how they are being u
325	Processes	Complete Data Security and Access Survey	Complete and submit the Data Security and Access Survey to inform how you currently manage data security and user access.
326	Technology	Update Current Agency Business Systems	Review and update the current Agency Business Systems. Re document each of current systems technical design for each system.
327	Data	Complete Reports Inventory	Complete and submit the Reports Inventory documenting all agency FLAIR reports.
328	Processes	Document Current Agency Business Processes	Document and submit current agency fiscal and payroll processes, and any agency business systems engaged in the processes.
329	People	Update CCN and Project Contacts	Review, update and confirm Change Champion Network (primary and Subject Matter Experts) and other support contacts.
330	People	Update Authorized Sheet Users	Review, update and confirm authorized users access to all Florida T resources.
331	N/A	Submit Monthly Agency Report	Agency Sponsor to confirm a monthly report, in the Project, to the Agency to provide a summary of the Agency's impact on the project for the month.
332	N/A	Create Agency Specific Risk and Issues Management Plan	Create or update a plan to identify and manage agency specific risk Florida PALM implementation.
333	People	Create Workforce Readiness Plan	Create a plan to identify and assess impacted stakeholders within the agency that includes agency specific tasks to successfully implement your agency.

# THURSDAY Task Talk

*Hosted by your favorite Florida PALM RC's*

JANUARY 16, 2025



# Agenda

- Agency Risk and Issues Management
- Task Spotlight: 560 Submit Change Analysis Tool
  - **Change Analysis Reports**
- Reminders
- Questions





# Department of Financial Services Risks and Issues Management

January 16, 2025

# Formation of Team

Initiated by Florida PALM

Concept - Ideation

Incorporation in Risks and Issues Plan

Execution of Idea

# Kickoff Meeting & Beyond

Kickoff Meeting

Identification of Risks from five divisions/offices

Outreach to other divisions

## Post Risks Identification

Recurring biweekly  
meetings

Monitoring of existing risks  
and issues

Presentation of new risks

# Categorization of Risks & Beyond

Voting

Risks Logging/CCN review

Wash, rinse, and repeat!



# Risks and Issues Management Team



CCN  
Risks and Issues  
Management Team



Brittany Pittman  
Division of Risk  
Management



Catherine Sauls  
Office of Finance  
and Budget



Don Hurst  
Accounting and  
Auditing



Mireia Vidal  
Treasury

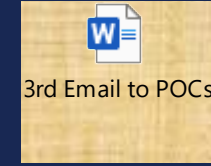
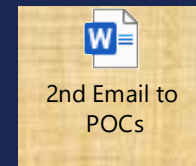
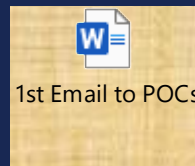
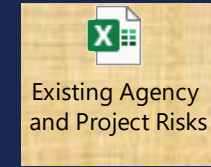
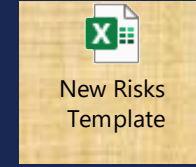
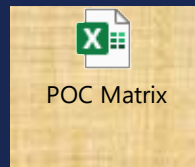
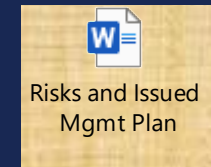
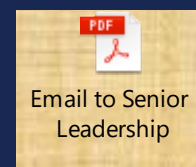
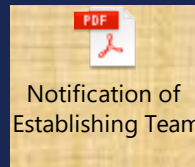
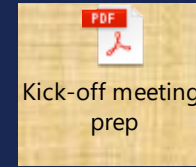
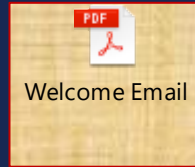
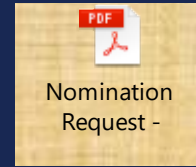


Asif Sahaf  
Project Management  
Liaison



Nancy B Anderson  
Office of Information  
Technology

# Reference Materials of Risks and Issues Process - Samples



Questions /  
Guidance  
request for  
establishing this  
in your Agency

Feel free to reach out to us!

[Alexandra.Weimorts@myfloridacfo.com](mailto:Alexandra.Weimorts@myfloridacfo.com)

[Asif.Sahaf@myfloridacfo.com](mailto:Asif.Sahaf@myfloridacfo.com)

# 560 – Submit Change Analysis Tool **Due January 31**

## Change Analysis Reports

**BPG/Change Analysis Report** – This report provides a cross reference between your Current State Business Processes Inventory and your Change Analysis Tool. Error messages are provided to indicate gaps identified.

Forms Connections Dynamic View

DFS BPG/Change Analysis Cross Reference ☆

Grid View Filter Off Arial 10 B I U

Business Process Grouping	Business Process Count within BPG	Change Analysis Selected Activities	Error Message (if applicable)
GM	0		Current-State Business Processes sheet contains GM Activities not selected in GM Change Analysis sheet
IU	0		Current-State Business Processes sheet contains IU Activities not selected in IU Change Analysis sheet
PR	97	Approving or Denying a Non-Cash Adjustment Request, Approving or Denying a Paper Warrant Reversal Request, Approving or Denying a Worker's Comp Retirement Adjustment Request, Approving or Denying the Paysheet Change Request, Assigning Garnishment Deduction, Auditing Loaded	



# 560 – Submit Change Analysis Tool **Due January 31**

## Change Analysis Reports

**End User/BPG Report** – This report provides a cross reference between your Implementation End Users worksheet and your Change Analysis Tool. Error messages are provided to indicate gaps identified.

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Grid View Filter Off Arial 10 B I U

Business Process Grouping	Business Process Grouping Topic	Implementation End User Count	Implementation End User Name(s)	Error Message (if applicable)
AR	Managing AR Deposits Managing Direct Journal Deposits	0		Topic in Change Analysis AR sheet has no associated Implementation End User(s)
AR	Managing Direct Journal Deposits	100	Adam Selvidge (Project Management Specialist IV), Alexandra Weimorts (Chief of Financial Support)	



# Reminder: Upcoming Due Dates

## January 17

- ✓ 567-J – Distribution Code
- ✓ 567-K – Consolidated Revolving Account
- ✓ 567-P – SpeedKey

## January 31

- ✓ 536-C – Create Agency Specific User Acceptance Testing Plan
- ✓ 560 – Submit Change Analysis Tool
- ✓ 658-A – Submit Data Field Mapping (Org)
- ✓ 658-B – Submit Data Field Mapping (OCA)
- ✓ 658-C – Submit Data Field Mapping (Grant ID)
- ✓ 582 – *Share Florida PALM Updates – releases 1/21/2025*



# Questions?



*Lulu Kitty*

CONTACT US

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