

Legend: Projects Completed Projects Anticipated to be Complete within 30 days

Area	Project	Status
Planning, Coordination, and Oversight	Strategic Planning Office (SPO)	In progress and on schedule.
	Oversight (IV&V)	In progress and on schedule.
	System and Software Integration (SSI)	In progress and on schedule. Closeout pending. See System and Software Integration Operational Work Plan.
Software	Adjudication Workflow Management	In progress and on schedule. Development is ongoing. See Adjudication Workflow Management Operational Work Plan.
	ChatBot	In progress and on schedule. A soft launch is anticipated in the next reporting period. See ChatBot Operational Work Plan.
	Rules Catalog	In progress and on schedule. A change request was approved to expand the scope. See Rules Catalog Operational Work Plan.
	Appeals Workflow Management	In progress and on schedule. 58% of the tickets have been completed. See Appeals Workflow Management Operational Work Plan.
	Incremental CX/UX Mobile-Responsive Transformation	In progress and on schedule. Development to complete the initial claim application. See CX/UX Operational Work Plan.
	Communications	In progress and on schedule. See Communications Operational Work Plan.
	Document Imaging System	In progress and on schedule. See Document Imaging System Operational Work Plan.
Data and Analytics	Reporting	In progress and on schedule. 46% of in-scope reports have been completed or retired. See Reporting Operational Work Plan.
	Product and Data Management	Project complete. See Product and Data Management Operational Work Plan.

Are there any scope changes?

There were two scope changes this reporting period.

- For this reporting period, modifications were made to the Reports project scope to remove any scope that was projected to be complete after the June 30, 2024, deadline, including more than 300 reports that will be prioritized in the next fiscal year.
- Additionally, the Rules Catalog project scope was expanded to account for additional work that was completed to ensure that the business rules are categorized by business processes and promote traceability of the business rules that support operations.

Is the project currently within budget?

The project is currently under budget.

Do you expect the project to remain within budget?

Yes

If the project is not on schedule, briefly explain why and what the agency is doing to bring the project back on schedule.

The Program is on schedule.

Major Project Tasks and Activities Accepted or In Progress this Reporting Period

- [Planning, Coordination, and Oversight] System and Software Integration: This project includes leveraging the expertise of a third-party services provider with experience in strategic planning, system design, system development, and system integration for large multi-component system modernization efforts to ensure the Department's various modernization projects work as intended to deliver an enhanced user experience.
 - The project team is preparing for project closure as the final deliverables, including monthly reports, are drafted and routed for approval.
- [Software] Adjudication Workflow Management: This project will help automate the assignment of adjudication cases to adjudicators and eliminate a manual process. This project addresses one of the recommendations made during the Business Process Optimization project that was closed during the two-year Reemployment Assistance Modernization Program Roadmap.
 - For this reporting period, development of the integration (communication) points between the adjudication case management system and Reconnect continued, along with screen development.
- [Software] ChatBot: This project includes providing Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim-specific information without requiring a call to the Reemployment Assistance Contact Center. This allows more time for Contact Center agents to assist individuals with more complex issues, including those with barriers such as access to a computer.
 - For this reporting period, testing of the bot in Haitian-Creole continued as testing for English and Spanish has been completed. Also in this reporting period, the self-service tools, which include the ability to update contact information and correspondence preferences and change the payment method and tax withholding option, moved from development to testing.
 - A soft launch of the ChatBot is anticipated in the next reporting period, provided all testing passes.
- [Software] Rules Catalog: This project is designed to further enhance the Department's documentation for Reconnect by capturing all the rules that govern the administration of the Reemployment Assistance program. This project will add information about the complexity of each business rule, which will aid the Department in forecasting the need for implementing a Business Rules Engine as Reconnect is further modularized.
 - All 12,591 business rules that govern the Reemployment Assistance program have been analyzed; however, the Department determined it would be beneficial to extend this project through April 30, 2024, to ensure that the business rules are categorized by business processes and promote traceability of the business rules that support operations. A formal change request documenting the change in scope was routed for signature and should be approved within the next reporting period.
- [Software] Appeals Workflow Management: This project is designed to implement new features and address functionality that is not currently working to streamline the Appeals workflow that is used by Department staff to conduct Appeals hearings and issue determinations. This will eliminate manual processes and expedite the Appeals process.
 - For this reporting period, of the 67 tickets in-scope for this project, 39 are complete, 14 are being developed and tested, and 14 have not yet been started.
- [Software] Incremental CX/UX Mobile Responsive Software Transformation: This project includes optimizing the existing System and developing a user-friendly front-end for Reemployment Assistance claimants that is also mobile-friendly. The transformation will occur incrementally to ensure all System users benefit from System optimization, with a focus on enhancing the claimant experience first.
 - For this reporting period, the team continued development and testing of the remaining fact-finding questionnaires that will provide a complete user experience to new claimants applying for Reemployment Assistance.
- [Software] Document Imaging System: This project is designed to remove the manual processes that are required for the Department to process physical mail and faxed documents claimants and employers submit for their

Reemployment Assistance claim by automatically attaching these documents, once scanned, to the correct claim in Reconnect so that claims can be processed efficiently and accurately.

- For this reporting period, configuration of the workflows continued, which maps the process that documents will follow from the scanner to Reconnect.
- [Data and Analytics] Reporting: This project includes migrating, developing, and validating all internal Reemployment Assistance performance reports from Reconnect to the Data. The data warehouse provides the Department with standardized data and reduces the need for staff intervention for future reporting activities.
 - For this reporting period, of the 379 reports in-scope for this project, 68 are complete, 28 are being developed and tested (56 reports were de-duplicated and have been merged into 25 reports), 108 will be retired, and 175 have not yet been started.
 - Also in this reporting period, two change requests were approved to modify the scope. This included the removal of reports that were slated for retirement and removing any reports from scope that were projected to be complete post June 30, 2024, due to resource and schedule constraints. Any reports removed from the scope of the project will follow the normal prioritization process for regularly scheduled system maintenance builds in the next fiscal year.
 - This project is anticipated to be closed in the next reporting period.
- [Data and Analytics] Product and Data Management: This project is designed to mature the Department's data management, planning, and governance processes for Reemployment Assistance data to promote data sharing, interoperability, and reduce both the size of and costs affiliated with Reemployment Assistance's data.
 - The Department's existing data catalog and data dictionary have been updated to include all databases and other data repositories that store Reemployment Assistance data and use it for data and analytics. This project was closed in this reporting period.



OPERATIONAL WORK PLAN FOR CHATBOT

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON 3/26/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

FloridaCommerce is enhancing the claimant experience by launching a ChatBot solution.

The ChatBot solution provides Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim specific information. This technology will help deflect calls to the Reemployment Assistance Contact Center, so that agents are more available to the callers who truly need agent assistance.

A. Scope Statement

FloridaCommerce's existing contact center vendor will deploy one AI conversational bot to the floridajobs.org website to help Reemployment Assistance end users obtain answers to frequently asked questions and claim-specific information related their claims to help increase self-service opportunities and deflect calls from the Reemployment Assistance Contact Center. If the ChatBot cannot answer the end user's question, an opportunity to escalate to one of three Contact Center agent queues will be provided.

In Scope

- The existing contact center vendor's professional services team will develop a custom chat provider for escalation to Customer's Genesys CX account. Translation will be provided within the AI Chatbot account for English, Spanish, and Haitian-Creole. Escalation to Genesys CX will be provided for each language. Training will be provided for AI administrators, content creators and reporting analysts.
- FloridaCommerce will administer ChatBot content within a single knowledge base, specifically, English. The knowledge base articles will reside in the AI ChatBot solution. The translation solution will translate the English knowledge base content into Spanish or Haitian-Creole. Customer responses will be translated from Spanish or Haitian-Creole to English for solution consumption and processing.

Out of Scope

- Languages besides English, Spanish, or Haitian-Creole

B. Project Objectives and Business Benefits

The ChatBot solution provides Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim-specific information. This technology will help deflect calls to the Reemployment Assistance Contact Center, so that agents are more available to the callers who truly need agent assistance.

C. Critical Success Factors

The following factors are necessary for success.

- FloridaCommerce staffing resources are available to work on the project.
- Performance of the solution meets FloridaCommerce requirements.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
November 2, 2023	Project Kick off with Vendor
January 14, 2024	FAQ User Acceptance Testing
January 28, 2024	IVR Development complete
March 9, 2024	FAQ and IVR ready for production
May 30, 2024	Development complete for Agent Escalation

E. Major Deliverables

Project Deliverables will benefit Reemployment Assistance claimants by providing an additional self-service option to find answers to frequently asked questions and claim-specific information.

Major Deliverable	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Project Schedule	The PM will work with the vendor to create the project schedule
Test Plan	Vendor will work on the develop a testing plan and strategy to be used during User Acceptance Testing.
User Accepting Testing	User Acceptance Testing will commence once the development has been completed by the vendor. The result of User Acceptance Testing will be the sign off on the executed test plan.
Go Live	Deployment of the solution into production

F. Major Milestones

The project cannot be completed without the milestones listed below. Transparency and inclusion in all major milestones and deliverables will help build and maintain an accurate schedule.

Major Milestone	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail of the scope of the project
Project Closeout Report	The PM provides the Project Closeout Report

G. Key Stakeholders

The stakeholders listed below are critical in providing direction, especially with a project that will have a large amount of discovery. The project sponsors will be valuable when issues that require executive decisions are needed, and when there may be negotiations for keeping and purging older data based on its value.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer
Tisha Womack	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Warren Lenfant	RA Modernization Acting Project Sponsor
Sherry Crist	RA Modernization Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernizations IT Program Manager - IT
David Sinclair	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. ChatBot solution will be available in English, Spanish and Haitian-Creole.
2. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
3. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
4. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
5. The Project Sponsor will be responsive and prepared to make decisions regarding the project cost and scope.
6. The solution must be FedRamp compliant.

Project Constraints

1. Limited Knowledge of FloridaCommerce claims processing could slow the project down.
2. Hardware that needs to be provided by FloridaCommerce could be slower due to staffing constraints.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	01-Chatbot

WBS	Task Name
1.1	Initiation
1.1.1	Risk and Complexity Assessment
1.1.2	PM Deliverable: Project Charter
1.1.3	Project Charter complete
1.1.4	Stakeholders Register
1.1.5	Project Kickoff Meeting
1.1.6	Conduct Lessons Learned Meeting
1.2	Initiation Phase complete
1.3	Planning
1.3.1	PM Deliverable: Resource Plan
1.3.2	Resource Plan Complete
1.3.3	PM Deliverable: Project Schedule
1.3.4	Project Schedule complete
1.3.5	PM Deliverable: Project Management Plan
1.3.6	Project Management Plan complete
1.3.7	PM Deliverable: Project Budget
1.3.8	Project Budget complete
1.3.9	PM Deliverable: Project Spending Plan
1.3.10	MILESTONE: Project Spending Plan complete
1.3.11	Complete Impact Analysis
1.3.12	Requirements:
1.3.13	Complete the Planning Gate R&C Assessment
1.3.14	Conduct Lessons Learned Meeting
1.4	MILESTONE: Planning Phase complete
1.5	Execution
1.5.4	Record Level Detail Requirements Gathering Completed
1.5.5	Approve Requirements
1.5.6	Conduct Lessons Learned Meeting
1.5.7	Transition to Operations
1.6	Execution Phase complete
1.7	Monitoring and Controlling
1.7.1	Manage Project Schedule
1.7.2	Manage Project Costs
1.7.3	Manage Project Scope
1.7.4	Manage Project Risks
1.7.5	Manage Project Issues
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity
1.7.9	Conduct Regularly scheduled Status Meetings

WBS	Task Name
1.7.10	Prepare Regularly scheduled Status Reports
1.8	Monitoring and Controlling Phase Complete
1.9	Project Closeout
1.9.1	PM Deliverable: Project Closeout Report
1.9.2	Project Closeout Report complete
1.9.3	Conduct Lessons Learned Meeting
1.1	Closeout Phase complete

III. *Resource Loaded Project Schedule*

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

WBS	Task Name	% Complete	Duration	Start	Finish
1	01 ChatBot				
1.1	Initiation	100		7/15/23	7/30/23
1.1.1	Risk and Complexity Assessment	100		7/26/23	7/30/23
1.1.2	PM Deliverable: Project Charter	100		7/26/23	7/30/23
1.1.3	Project Charter complete	100		7/26/23	7/30/23
1.1.4	Stakeholders Register	100		7/26/23	7/30/23
1.1.5	Project Kickoff Meeting	100		7/26/23	7/30/23
1.1.6	Conduct Lessons Learned Meeting	100		7/26/23	7/30/23
1.2	Initiation Phase complete			7/26/23	7/30/23
1.3	Vendor Contract is Executed	100		10/23/23	10/23/23
1.6	Execution Begins	100		11/2/23	1/25/24
1.6.1	User Acceptance Testing FAQ	95		1/14/24	3/08/24
1.6.2	Self-service Testing	50		2/26/24	3/29/24
1.8	Monitoring and Controlling	50		1/29/24	6/28/24

IV. Project Spending Plan

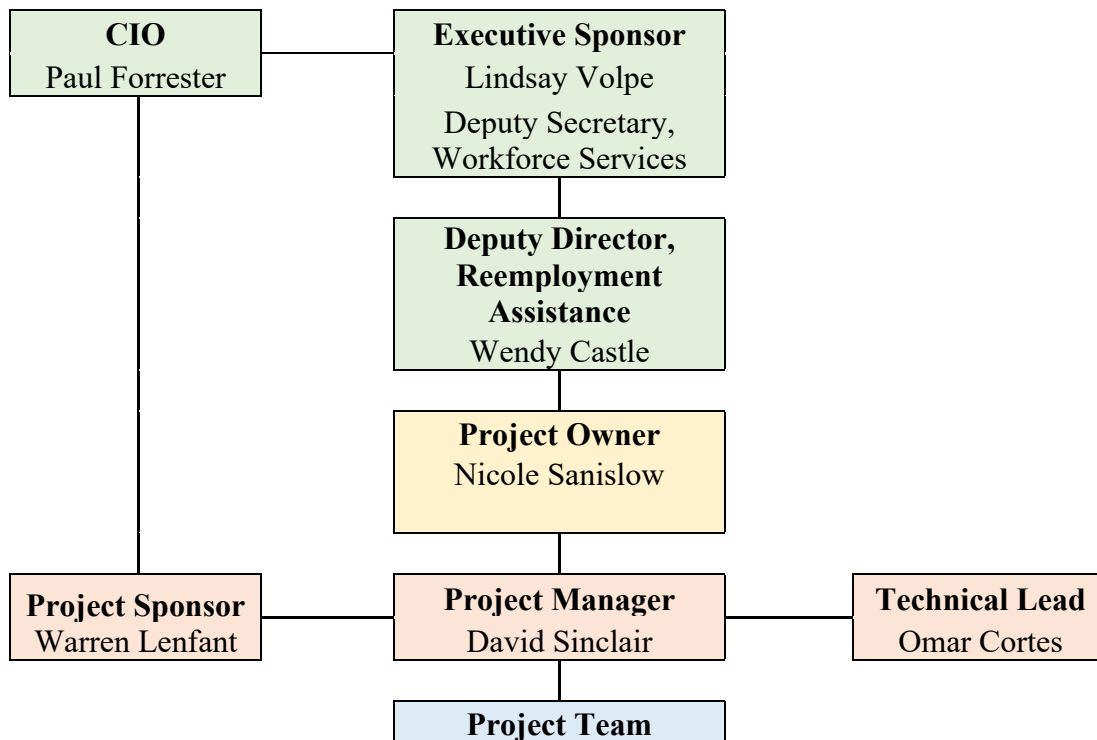
The ChatBot project has existing resources assigned, therefore, there is no spend for this project.

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: \$,000	Software: \$532,848
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$0.00
Other CapEx: \$0.00	Other CapEx: \$0. 76200

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together.



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	<ul style="list-style-type: none"> • Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Wendy Castle	Project Sponsor/Director Reemployment Assistance	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project
Nicole Sanislow	Project Owner	<ul style="list-style-type: none"> • Represents the interests of the stakeholders • Monitors project progress • Approves project definition • Approves plans and schedules • Validates project deliverables meet expectations • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
David Sinclair	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Completes all documents related to the project • Identifies and manages risks according to the project plan
Omar Cortes	Technical Lead	<ul style="list-style-type: none"> • Responsible for assisting the team(s) in coordinating the most appropriate solution • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team. • Has historical knowledge of the Contact Center for Reconnect
Warren Lenfant	Business Sponsor	<ul style="list-style-type: none"> • Responsible for the support for the PM as it is related to the business need and impact of the project • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team. • Has years of historical knowledge of the Contact Center Solutions for Reconnect

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result

of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project may need Organizational Change Management. This will be determined as the scope and vendor are determined. Once determined we will build a plan related to Change Management.

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department’s tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				

VIII. Capacity Plan

This project capacity plan will be built with the vendor to determine the best way to measure capacity load of the ChatBot solution.



OPERATIONAL WORK PLAN FOR RULES CATALOG

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON 03/05/2024

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VIII. CAPACITY PLAN 12

SECTION 1 — OVERALL PROJECT PLAN

I. *Project Charter*

As a part of the Florida Department of Commerce’s (FloridaCommerce) Continuous Modernization Program, the FloridaCommerce Rules Catalog will be updated to capture additional business rules within the Reconnect system (the System). The completion of the Rules Catalog project will document rules to allow ease of tracking, reviewing, and identifying changes within the System.

A. **Scope Statement**

The Rules Catalog Project will enable FloridaCommerce to identify and document System rules to develop a Business Rules Catalog. A completed rules catalog will allow FloridaCommerce to track and maintain system rules in one central location.

In Scope

- Update the Rules Catalog to incorporate all rules that govern the Reemployment Assistance program within Reconnect, excluding CX/UX business rules.
 - Include the type of rule and number of System users impacted by the rule, if applicable.
 - Maintain the catalog within the Central Repository.
 - Include the complexity of each business rule, as low, medium, or high.
 - Order rules by frequency of change, from highest to lowest.

Out of Scope

- Migrate rules into a Rules Engine product.
- Identify CX/UX business rules.

B. **Project Objectives and Business Benefits**

The Rules Catalog project was developed following the completion of the Rules Engine project to complete the development of a Business Rules Catalog. The Rules Catalog documents business rules within the System and allows business rules to be tracked and maintained in one central location.

Project Objective	Business Benefit
Inventory business rules.	<ul style="list-style-type: none">• FloridaCommerce will have a complete catalog of System business rules.

C. **Critical Success Factors**

The success of the Rules Catalog project hinges on the creation of the no use case document business rules catalogs.

- Timely and high-quality achievement of major milestones/deliverables.
- Usable Business Rules Catalogs.

D. Key Dates

The Rules Catalog project is very straightforward. The relevant key dates relate primarily to the execution work being done by the Commerce SMEs and the Technical Change Control Committee.

Key Dates	Importance and Relevance to the Project
August 2023	Project starts, confirm project scope and identify project team members.
September 2023 – March 2024	Identification and prioritization of business systems rules, and creation of catalogs.
April 2024	Finalize and approve catalogs.
April 2024	Closeout Phase complete; project complete.

E. Major Deliverables

The deliverables for the Rules Catalog project are outlined below and include the creation of the usable business rules catalogs.

Major Deliverable	Deliverable Description
Project Charter	Complete and submit a detailed project charter to FloridaCommerce.
Project Management Plan	Create and approve Project Management Plan.
Bi-Weekly Status Meetings	Host bi-weekly status meetings with project team to gather updates on catalog development status.
Identification of Business Rules	Project team identifies business system rules for incorporation into the Rules Catalog.
Business Rules Catalog	The project team shall update and create additional Business Rules Catalogs to incorporate all business rules maintained within the System.
Project Schedule	Complete and submit a detailed project schedule for baselining and update the schedule in ServiceNow on a weekly basis.
Project Closeout Report	Create and Approve the Project Closeout Report.

F. Major Milestones

Given the straightforward nature of the Rules Catalog project the major milestones focus primarily on the execution phase and the creation of the business rules catalogs.

Major Milestone	Milestone Description
Identification and prioritization of business systems rules	Identify and prioritize business systems rules to documented within the Business Rules Catalog.
Creation of Business Rules Catalog	System rules will be reviewed and documented to develop a Business Rules Catalog.
Project Closeout Report	Develop and approve the Project Closeout Report.

G. Key Stakeholders

The Rules Catalog project relies primarily on the project manager interacting with the Commerce SMEs to ensure the catalogs are being created and shared with the Committee for review before finalization.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer, Program Owner- Information Technology
Tisha Womack	Chief Financial Officer
Wendy Castle	Continuous Modernization Program Owner – Business
Nicole Sanislow	Continuous Modernization Program Manager – Business
Sherry Crist	Continuous Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	Continuous Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Continuous Modernization Program Manager – Information Technology
Nicholas Lent	Project Owner
Daniel Swaisgood	Project Manager

H. Significant Project Assumptions and Constraints

The only underlying assumptions and constraints to the Rules Catalog project focus heavily on resource availability and readiness to conduct the tasks at hand.

Project Assumptions

1. System documentation detailing current business rules are readily available and accessible.
2. Technical support and Subject Matter Expert resources will be available as needed, to support the project as needed.

Project Constraints

1. Limited time and capacity of individuals assigned to assist.

II. Work Breakdown Structure

The Work Breakdown Structure depicted below includes all deliverables forecasted for completion in April 2024. The project is presently in the Execution phase.

WBS	Task Name
1	Comms
1.1	Initiation
1.2	Initiation Phase begins
1.2.1	Deliverable: Pre-Charter RCA
1.2.2	Deliverable: Stakeholder Registry
1.2.3	Deliverable: Charter
1.3	Initiation Phase complete
2.1	Planning
2.2	Planning Phase begins
2.2.1	Deliverable: Planning RCA
2.2.2	Deliverable: Project Schedule
2.2.3	Deliverable: PMP
2.3	Planning Phase complete
3.1	Execution
3.2	Execution Phase begins
3.2.1	Deliverables: Vendor deliverables executed and integrated in the Reconnect system
3.3	Execution Phase complete
4.1	Closeout
4.2	Closeout Phase begins
4.2.1	Gather Lessons Learned
4.2.2	Deliverable: Conduct Lessons Learned Meeting
4.2.3	Deliverable: Closeout Report
4.3	Closeout Phase complete

III. Resource Loaded Project Schedule

The project schedule depicted below demonstrates the planned timetable for all project-related work and estimates the appropriate staffing levels necessary to accomplish each task, to produce each deliverable, and to achieve each milestone. The most up to date version of the project schedule is available on [SharePoint](#).

		Task Name	Duration	Start	Finish	% Complete	Predecessors
1		Rules Catalog	196 days	Tue 8/1/23	Tue 4/30/24	67%	
2		Rules Catalog Project Start	0 days	Tue 8/1/23	Tue 8/1/23	100%	
3		▸ Initiation	22 days	Wed 8/2/23	Fri 9/1/23	100%	
21		▸ Planning	18 days	Tue 8/29/23	Thu 9/21/23	100%	
39		▸ Execution	189 days	Tue 8/1/23	Fri 4/19/24	51%	
40		▸ Required Project Development	185 days	Tue 8/1/23	Mon 4/15/24	51%	
41		▸ Create No Use Case Rules Catalogs	185 days	Tue 8/1/23	Mon 4/15/24	51%	
42		▸ SME Review	154 days	Tue 8/1/23	Fri 3/1/24	36%	
122		▸ Technical Change Control Committee Review	150 days	Wed 8/2/23	Wed 2/28/24	78%	
176		▸ Approve RC Catalogs	59 days	Wed 1/24/24	Mon 4/15/24	0%	
182		Catalog Development Complete	0 days	Mon 4/15/24	Mon 4/15/24	0%	
183		▸ Conduct Lessons Learned Meeting	4 days	Tue 4/16/24	Fri 4/19/24	0%	
187		Execution Phase complete	0 days	Fri 4/19/24	Fri 4/19/24	0%	186
188		▸ Monitoring and Controlling	196 days	Tue 8/1/23	Tue 4/30/24	70%	
189		Manage Project Schedule	196 days	Tue 8/1/23	Tue 4/30/24	70%	
190		Manage Project Scope	196 days	Tue 8/1/23	Tue 4/30/24	70%	
191		Manage Project Risks	196 days	Tue 8/1/23	Tue 4/30/24	70%	
192		Manage Project Issues	196 days	Tue 8/1/23	Tue 4/30/24	70%	
193		Manage Decisions	196 days	Tue 8/1/23	Tue 4/30/24	70%	
194		Manage Action Items	196 days	Tue 8/1/23	Tue 4/30/24	70%	
195		Update RTM	196 days	Tue 8/1/23	Tue 4/30/24	70%	
196		Record Lessons Learned	196 days	Tue 8/1/23	Tue 4/30/24	70%	
197		Prepare Regularly scheduled Status Reports	196 days	Tue 8/1/23	Tue 4/30/24	70%	
198		Conduct Regularly scheduled Status Meetings	196 days	Tue 8/1/23	Tue 4/30/24	70%	
199		Monitoring and Controlling Phase Complete	0 days	Tue 4/30/24	Tue 4/30/24	70%	
200		▸ Project Closeout	9 days	Tue 4/16/24	Fri 4/26/24	0%	
209		Closeout Phase complete	0 days	Tue 4/30/24	Tue 4/30/24	0%	

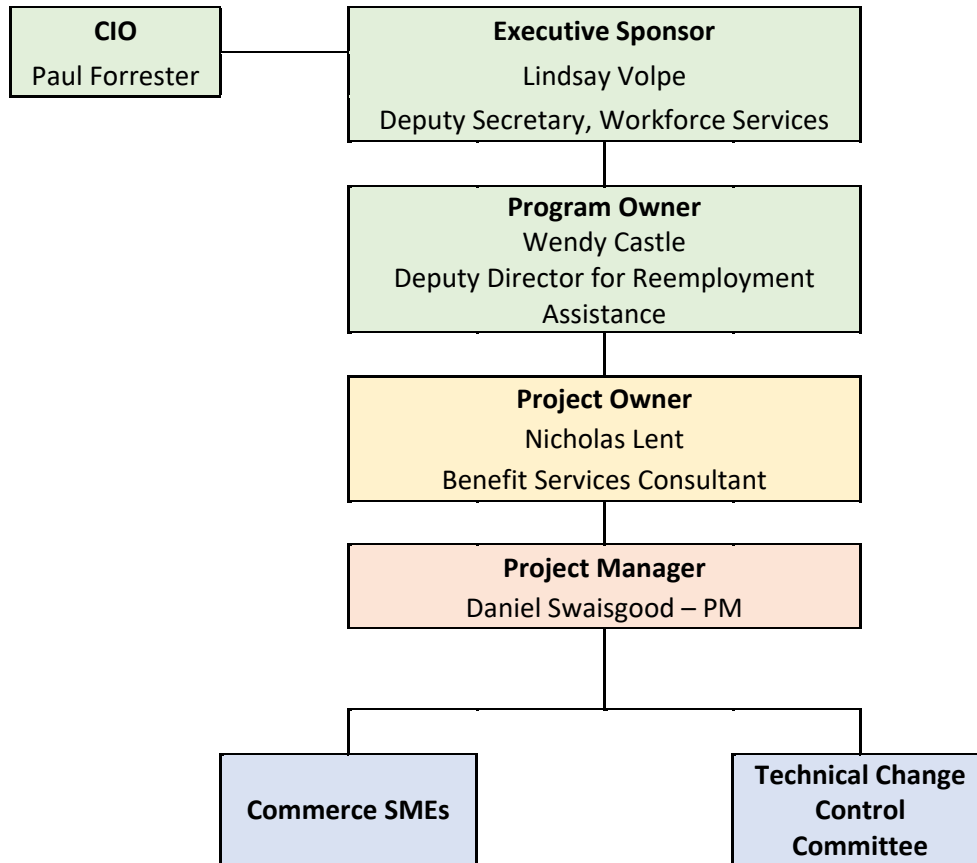
IV. Project Spending Plan

The Rules Catalog project is being completed entirely in house and has no spending plan.

V. Project Organization and Methodology

A. Project Organizational Chart

The purpose of the Project Organizational Chart is to identify the project team, executive governance, and project sponsorship.



B. Project Roles and Responsibilities

The purpose of the Project Roles and Responsibilities is to identify the major roles and responsibilities, required skills and experience levels, and interactions with other project personnel, as well as address the expected role of the project’s executive steering committee.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> Provide guidance on overall strategic direction Advising the Strategic Planning Office and project manager of risks that may impact the project Facilitate resolution of significant issues in the project

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	<ul style="list-style-type: none"> Provide guidance on overall strategic direction Advising the Strategic Planning Office and project manager of risks that may impact the project Facilitate resolution of significant issues in the project Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner	<ul style="list-style-type: none"> Responsible for the Strategy of FloridaCommerce IT Responsible for Staffing and Support plans Responsible for day-to-day operations Responsible for working closely with programs on technology needs
Nicholas Lent	Project Owner/Benefits Services Consultant	<ul style="list-style-type: none"> Contributes subject matter expertise Assists the Project Managers in responding to risks and issues Assists the Project Manager in evaluating change requests Reviews deliverables and project documents, identifying any deficiencies Reviews and approves deliverables
Daniel Swaisgood	Project Manager	<ul style="list-style-type: none"> Manages all aspects of the project and ensure compliance with project plan Monitors project progress and schedule adherence Completes all documents related to the project Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> Process development tasks Contributes subject matter expertise Complete assigned project tasks in accordance with the Project Schedule Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP Assists the Project Manager in responding to risks and issues Assists the Project Manager in evaluating change requests

Name	Project Role	Responsibility
Technical Committee	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Contributes technical expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager is evaluating change requests
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> • Monitors project progress • Facilitates FloridaCommerce Leadership Team Governance meetings • Provides guidance and support to project manager and project team members

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- FloridaCommerce’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce’s lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

This project will follow the Program Risk Management Plan captured within the Continuous Modernization Program Management Plan. The Continuous Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
The current work complete percentage is slightly lagging behind the time elapsed and if standard operational work keeps project resources from meeting their planned project work hours then the	Medium	Medium	To mitigate this risk, the project team has an agreed-upon, daily block of time set on their calendars to conduct catalog review work.	Daniel Swaisgood

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
project deadline of 4/30 may not be met.				

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for Continuous Modernization, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.



OPERATIONAL WORK PLAN FOR SYSTEM AND SOFTWARE INTEGRATION

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON -3/1/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Reemployment Assistance Claims and Benefits Information System's (System) current architecture is not modular. Lack of modularity requires extensive regression testing for all system enhancements and updates. The current System has a high level of technical debt. This technical debt increases the cost of maintenance as well as the risk of unintended effects elsewhere in the System. To assist in software transformation, FloridaCommerce has procured the services of a System software integrator, under contract C3272, to provide analysis, oversight, monitoring, and testing, and to assume the responsibilities for the foundational technical platform and systems and software integration services necessary to develop and implement the System's current and future infrastructure for modernization. These integration efforts will allow FloridaCommerce to secure services which can interoperate and communicate without relying on a common platform or technology. Connecting services, systems, and infrastructures and developing integration standards are the next steps for advancing the System's maturity and System modularity for modernization. This will ensure that an optimized cloud service and delivery model is utilized to deliver business process improvements, functional enhancements, a mobile-responsive application, and modernized architectural efficiencies.

Integration services include documenting the existing technical requirements and specifications of the System and an analysis of the existing technical requirements and specifications. The analysis will determine what technical requirements and specifications need to be improved to increase the effectiveness and efficiency of the System and assist FloridaCommerce with acquiring software and hardware solutions that support the Reemployment Assistance Modernization Program. This shall include a full evaluation of the Reemployment Assistance Information Technology program that relates to the System.

A. Scope Statement

The C3272 contract for integration services defined 22 deliverables to create a modular system architecture. Thirteen were completed in Fiscal Year 2022-2023 and nine deliverables will be completed in Fiscal Year 2023-2024.

In Scope

- A modern System that integrates the infrastructure, software, data, analytics, and security components of the RA Continuous Modernization program.

Out of Scope

- Software Development
- Individual testing at the project level within the Continuous Modernization projects
- Projects not specifically identified in C3272.
- Organizational Change Management

B. Project Objectives and Business Benefits

The project objectives and business benefits are listed in the table below.

Project Objective	Business Benefit
Improved delivery of RA Benefits	Improved delivery of RA Benefits
Improved functionality	Increased customer satisfaction and self-service alleviates dependencies on staffing
Improved system performance	System availability is improved Less regression testing Faster code delivery to production
A secure and scalable system with a sustainable system architecture	Reduction in capital expenditures

C. Critical Success Factors

The project critical success factors to consider this project successful are the following:

- Improved customer experience/user experience (CX/UX).
- Implementation of a model that will serve Florida’s Reemployment Assistance needs for many years.
- Preservation of continuity of FloridaCommerce operations and minimization of demands on FloridaCommerce staff.
- Implementation of an operations model that will serve the Reemployment Assistance program for the long term.
- Compliance with state and federal standards.

D. Key Dates

The project key dates for the deliverables are listed in the table below.

Key Delivery Date	Importance and Relevance to the Project
07/01/2023	Project Kick-Off Meeting
10/02/2023	Design Documentation
9/15/2023	Infrastructure Performance Requirements
12/28/2023	Performance Benchmarks
06/30/2024	Oversight and Monitoring of RA Projects
06/30/2024	Integration Testing
06/30/2024	Integration Services
06/30/2024	Testing Team
06/30/2024	Project Closure

E. Major Deliverables

The project’s major deliverables are the following deliverables listed below that were not completed in Fiscal year 2022-2023.

Major Deliverable	Deliverable Description	Status
Deliverable 7	Design Documentation	Delivered
Deliverable 8	Infrastructure Performance Requirements	Delivered

Major Deliverable	Deliverable Description	Status
Deliverable 11	Performance Benchmarks	Delivered
Deliverable 13	Oversight and Monitoring of RA Projects	Delivered
Deliverable 14	Integration Testing	Not Started
Deliverable 15	Integration Services (Production Readiness Checklist)	Delivered
Deliverable 20	Testing Team	In Progress
Deliverable 21	Information Security and Regulatory Compliance	In Progress
Deliverable 22	Business Strategy Development	In Progress

F. Major Milestones

The project’s major milestones are the 5 phases of the FL Rule 60-GG Deliverables.

Major Milestone	Milestone Description
Initiation Phase Complete	All initiation activities completed
Planning Phase Complete	All planning activities completed
Execution Phase Complete	All execution activities completed
Monitor and Controlling Phase Complete	All monitoring and controlling activities completed
Closing Phase Complete	Project is completed

G. Key Stakeholders

These are the FloridaCommerce and vendor key stakeholders for the project.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Division of Workforce Services
Paul Forrester	Chief Information Officer
Tisha Womack	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner - Business
Nicole Sanislow	RA Modernization Program Manager - Business
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Nicole Sanislow/ Karmyn Hill	Bureau of RA Operations, Project Owner
Ernie Sanders	Peraton Account Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

Vendor will create/recommend solutions that promote useability, product innovation, and scalability by using innovative concepts and that are suitable for a government environment with funding constraints.

Project Constraints

Design may be materially constrained by:

1. Governing provisions of federal or state laws and regulations.
2. Requirement to reduce operating costs.

3. A schedule constraint of June 2024

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) shown in the table below represents the primary work items to be completed within this project.

WBS	Task Name
1	Modernization Program
1.1	Program start
1.2	Contract Amendment #4 - Approval
1.3	Program Deliverables
1.3.1	Deliverable 7 - Design Documentation
1.3.2	Deliverable 8 - Infrastructure Performance Requirements
1.3.3	Deliverable 11 - Performance Benchmarks
1.3.4	Deliverable 13 – Oversight and Monitoring of Modernization Projects
1.3.5	Deliverable 14 - Integration Testing
1.3.6	Deliverable 15 - Production Readiness Checklist
1.3.7	Deliverable 20 - User Acceptance Testing
1.3.8	Deliverable 21 – Information Security and Regulatory Compliance
1.3.9	Deliverable 22 – Business Strategy Development
1.5	Program Delivery Complete
1.6	Project Close and Transition to FloridaCommerce
1.6.1	Mutually Agreed on Transition Date
1.6.2	Execute Transition
1.7	Program Closed

III. Resource Loaded Project Schedule

The Resource Loaded Project Schedule represents a detailed view of the overall project schedule for this project. These details illustrate work to be completed by specified dates and who is assigned to complete the work.

ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
1	1	Initiation	86 days	Wed 7/5/23	Wed 11/1/23			
2	1.1	Risk and Complexity Assessment	1.94 days	Wed 7/5/23	Thu 7/6/23			
3	1.1.1	Complete Pre-Charter Risk&Complexity Assessment and determine Project Level	0.94 days	Wed 7/5/23	Wed 7/5/23		4,6	
4	1.1.2	Complete Initiation Gate Risk&Complexity Assessment	0.94 days	Thu 7/6/23	Thu 7/6/23	3		
5	1.2	Deliverable: Project Charter	85 days	Thu 7/6/23	Wed 11/1/23			
6	1.2.1	Develop Project Charter	1 day	Thu 7/6/23	Thu 7/6/23	11,3	7	Monique Emmanuel
7	1.2.2	Review/Update Project Charter	1 day	Fri 7/7/23	Fri 7/7/23	6	8	
8	1.2.3	Approve Project Charter	23 days	Mon 10/2/23	Wed 11/1/23	7	9	
9	1.3	Project Charter complete	0 days	Wed 11/1/23	Wed 11/1/23	8		
10	1.4	Stakeholders Register	1 day	Mon 10/2/23	Mon 10/2/23			
11	1.4.1	Identify Project Stakeholders	1 day	Mon 10/2/23	Mon 10/2/23		6	Monique Emmanuel
12	1.4.2	Identify OCM Stakeholders	1 day	Mon 10/2/23	Mon 10/2/23			Monique Emmanuel
13	1.5	Initiation Phase complete	23 days	Mon 10/2/23	Wed 11/1/23		16	
14	2	Planning	23.53 days	Mon 11/6/23	Thu 12/7/23			
15	2.1	Deliverable: Resource Plan	2.81 days	Mon 11/6/23	Wed 11/8/23			
16	2.1.1	Develop Resource Plan	0.94 days	Mon 11/6/23	Mon 11/6/23	13	17	
17	2.1.2	Review/Update Resource Plan	0.94 days	Mon 11/6/23	Tue 11/7/23	16	18,21	
18	2.1.3	Approve Resource Plan	0.94 days	Tue 11/7/23	Wed 11/8/23	17	19	
19	2.2	Resource Plan Complete	0 days	Wed 11/8/23	Wed 11/8/23	18		Monique Emmanuel
20	2.3	Deliverable: Project Schedule	4.27 days	Fri 11/17/23	Thu 11/23/23			
21	2.3.1	Prepare Work Breakdown Structure	3 days	Fri 11/17/23	Tue 11/21/23	17	22	Monique Emmanuel
22	2.3.2	Develop Project Schedule	2 days	Fri 11/17/23	Mon 11/20/23	21	23	Monique Emmanuel
23	2.3.3	Review/Update Project Schedule	1.33 days	Tue 11/21/23	Wed 11/22/23	22	24	Monique Emmanuel

Project: System Integrator Date: Tue 12/5/23	Task		Inactive Summary		External Tasks
	Split		Manual Task		External Milestone
	Milestone		Duration-only		Deadline
	Summary		Manual Summary Rollup		Progress
	Project Summary		Manual Summary		Manual Progress
	Inactive Task		Start-only		
	Inactive Milestone		Finish-only		

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ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
24	2.3.4	Approve Project Schedule	0.94 days	Wed 11/22/23	Thu 11/23/23	25,27		
25	2.4	Project Schedule complete	0 days	Thu 11/23/23	Thu 11/23/24			
26	2.5	Deliverable: Project Management Plan	2.81 days	Wed 11/22/23	Mon 11/27/23			
27	2.5.1	Develop Project Management Plan	0.94 days	Wed 11/22/23	Thu 11/23/24		28	Monique Emmanuel
28	2.5.2	Review/Update Project Management Plan	0.94 days	Thu 11/23/23	Fri 11/24/23	27	29,32	
29	2.5.3	Approve Project Management Plan	0.94 days	Fri 11/24/23	Mon 11/27/23	28	30	
30	2.5.4	Project Management Plan complete	0 days	Mon 11/27/23	Mon 11/27/23			
31	2.6	Deliverable: Project Budget	4.25 days	Mon 11/27/23	Mon 12/4/23			
32	2.6.1	Prepare Project Budget	0.94 days	Mon 11/27/23	Tue 11/28/23		33	Monique Emmanuel
33	2.6.2	Review/Update Project Budget	1.16 days	Tue 11/28/23	Wed 11/29/23	32	34	
34	2.6.3	Approve Project Budget	1.16 days	Wed 11/29/23	Fri 12/1/23	33	35,37	Monique Emmanuel
35	2.6.4	Project Budget complete	0 days	Mon 12/4/23	Mon 12/4/23	34		Monique Emmanuel
36	2.7	Deliverable: Project Spending Plan	3.47 days	Mon 12/4/23	Thu 12/7/23			
37	2.7.1	Prepare a Project Spending Plan	1.16 days	Mon 12/4/23	Tue 12/5/23	34	38	Monique Emmanuel
38	2.7.2	Review/Update Project Spending Plan	1.16 days	Tue 12/5/23	Wed 12/6/23	37	39	
39	2.7.3	Approve Project Spending Plan	1.16 days	Wed 12/6/23	Thu 12/7/23	38	40	
40	2.8	Project Spending Plan complete	0 days	Wed 12/6/23	Wed 12/6/23	39		Monique Emmanuel
41	2.9	Complete Impact Analysis	0.94 days	Mon 12/4/23	Mon 12/4/23			Monique Emmanuel
42	2.10	Complete the Planning Gate R&C Assessment	0.94 days	Mon 12/4/23	Mon 12/4/23			
43	3	Execution	373.94 days	Mon 1/2/23	Thu 6/6/24			
44	3.1	Modernization Program	373.94 days	Mon 1/2/23	Thu 6/6/24			
45	3.1.1	Program start	0.94 days	Mon 7/3/23	Mon 7/3/23			
46	3.1.2	Contract Amendment #4- Approval	16.88 days	Wed 11/1/23	Thu 11/23/23			

Project: System Integrator
Date: Tue 12/5/23

<p>Task </p> <p>Split </p> <p>Milestone </p> <p>Summary </p> <p>Project Summary </p> <p>Inactive Task </p> <p>Inactive Milestone </p>	<p>Inactive Summary </p> <p>Manual Task </p> <p>Duration-only </p> <p>Manual Summary Rollup </p> <p>Manual Summary </p> <p>Start-only </p> <p>Finish-only </p>	<p>External Tasks </p> <p>External Milestone </p> <p>Deadline </p> <p>Progress </p> <p>Manual Progress </p>
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ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
47	3.1.3	Program Deliverables	368 days	Mon 1/2/23	Wed 5/29/24			
190	3.1.4	Program Delivery Complete	0 days	Wed 5/1/24	Wed 5/1/24			
191	3.1.5	Project Close and Transition to DEO	59.94 days	Fri 3/15/24	Thu 6/6/24			
219	3.2	Prepare Operations and Maintenance Plan (only required for Level 2-4 projects)	0.94 days	Mon 5/6/24	Mon 5/6/24			
220	4	Monitoring and Controlling	272.33 days	Wed 7/5/23	Fri 7/19/24			
221	4.1	Manage Project Schedule	224.69 days	Mon 7/24/23	Fri 5/31/24			Monique Emmanuel
222	4.2	Manage Project Costs	171.75 days	Mon 7/31/23	Tue 3/26/24			Monique Emmanuel
223	4.3	Manage Project Scope	224.69 days	Mon 7/24/23	Fri 5/31/24			Monique Emmanuel
224	4.4	Manage Project Risks	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
225	4.5	Manage Project Issues	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
226	4.6	Manage Decisions	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
227	4.7	Manage Action Items	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
228	4.8	Manage Cybersecurity	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
229	4.9	Update RTM	53.33 days	Mon 5/6/24	Fri 7/19/24			Monique Emmanuel
230	4.10	Record Lessons Learned	13.33 days	Mon 5/6/24	Fri 5/24/24			Monique Emmanuel
231	4.11	Prepare Regularly scheduled Status Reports	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
232	4.12	Conduct Regularly scheduled Status Meetings	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
233	4.13	Conduct Lessons Learned Meeting	11.33 days	Mon 6/10/24	Tue 6/25/24			
234	4.13.1	Schedule Lessons Learned meeting	1.33 days	Mon 6/10/24	Tue 6/11/24			Monique Emmanuel
235	4.13.2	Conduct Lessons Learned meeting	1.33 days	Mon 6/24/24	Tue 6/25/24			Monique Emmanuel
236	4.13.3	Record Lessons Learned	1.33 days	Mon 6/24/24	Tue 6/25/24			Monique Emmanuel
237	4.14	Monitoring and Controlling Phase Complete	0 days	Mon 6/24/24	Mon 6/24/24		239	
238	5	Project Closeout	20 days	Mon 6/3/24	Fri 6/28/24			

Project: System Integrator Date: Tue 12/5/23	Task		Inactive Summary		External Tasks	
	Split		Manual Task		External Milestone	
	Milestone		Duration-only		Deadline	
	Summary		Manual Summary Rollup		Progress	
	Project Summary		Manual Summary		Manual Progress	
	Inactive Task		Start-only			
	Inactive Milestone		Finish-only			

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ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
239	5.1	Schedule Project Closeout Meeting	1.33 days	Mon 6/3/24	Tue 6/4/24	237	241	Monique Emmanuel
240	5.2	Deliverable: Project Closeout Report	2.94 days	Tue 6/25/24	Thu 6/27/24			
241	5.2.1	Develop Project Closeout Report	1.33 days	Tue 6/25/24	Wed 6/26/24	239	242	Monique Emmanuel
242	5.2.2	Review/Update Project Closeout Report	0.94 days	Wed 6/26/24	Wed 6/26/24	241	243	
243	5.2.3	Approve Project Closeout Report	0.94 days	Thu 6/27/24	Thu 6/27/24	242	245	
244	5.3	Project Closeout Report complete	0 days	Fri 6/21/24	Fri 6/21/24			Monique Emmanuel
245	5.4	Conduct Knowledge Transfer	14.06 days	Mon 6/3/24	Fri 6/21/24	243	246	
246	5.5	Conduct Project Closeout meeting	1.33 days	Mon 6/24/24	Tue 6/25/24	245	248	Monique Emmanuel
247	5.6	Conduct Lessons Learned Meeting	18.33 days	Mon 6/3/24	Thu 6/27/24			
248	5.6.1	Schedule Lessons Learned meeting	1.33 days	Mon 6/3/24	Tue 6/4/24	246	249	Monique Emmanuel
249	5.6.2	Conduct Lessons Learned meeting	1.33 days	Wed 6/26/24	Thu 6/27/24	248	250	Monique Emmanuel
250	5.6.3	Record Lessons Learned	1.33 days	Tue 6/25/24	Wed 6/26/24	249	251	Monique Emmanuel
251	5.7	Closeout Phase complete	0 days	Fri 6/28/24	Fri 6/28/24	250		

Project: System Integrator Date: Tue 12/5/23	Task		Inactive Summary		External Tasks	
	Split		Manual Task		External Milestone	
	Milestone		Duration-only		Deadline	
	Summary		Manual Summary Rollup		Progress	
	Project Summary		Manual Summary		Manual Progress	
	Inactive Task		Start-only			
Inactive Milestone		Finish-only				

Page 4

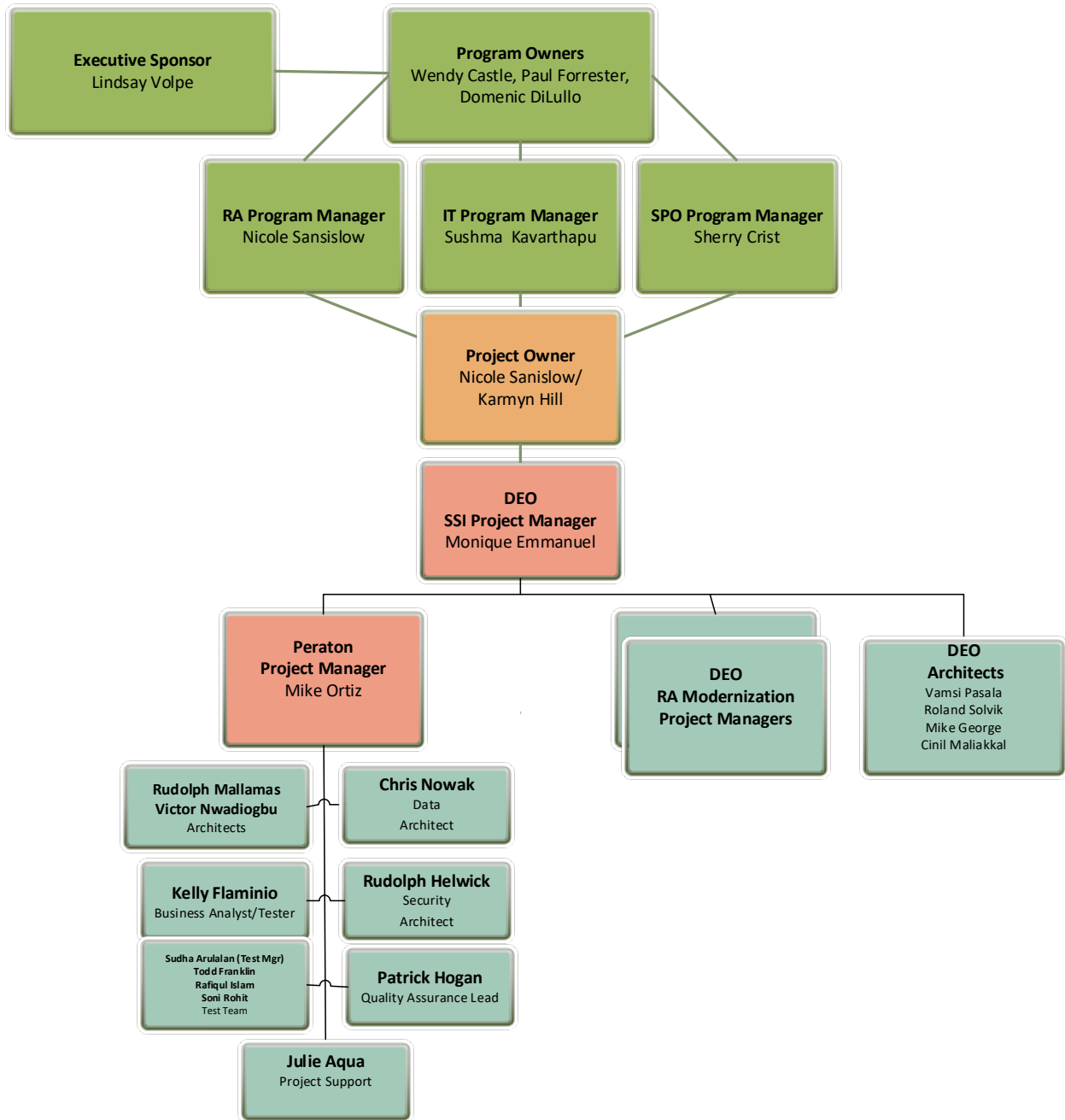
IV. Project Spending Plan

The total expenditures across FY 2021-22 to FY 2023-2024 are listed in the table below.

FY 2021-22 Expenditures	FY 2022-23 Expenditures	FY 2023-24 Expenditures
Software: \$0	Software: \$0	Software: \$0
OpEx: \$33,737.60	OpEx: \$1,748,687.40	OpEx: \$5,390,630.33

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

The roles and responsibilities below comprise the project team members of this project.

Project Role	Resource Name	Responsibilities
Executive Sponsor	Lindsay Volpe	<ul style="list-style-type: none"> - Provides resources and support for the program to enable its success
Program Owners	Wendy Castle Paul Forrester	<ul style="list-style-type: none"> - Provide guidance on overall strategic direction - Advise the Strategic Planning Office and project manager of risks that may impact the project - Facilitate resolution of significant issues in the project
Program Managers	Sushma Kavarthapu Sherry Crist Nicole Sanislow	<ul style="list-style-type: none"> - Provide guidance on overall strategic direction - Advise the Strategic Planning Office and project manager of risks that may impact the project - Facilitate resolution of significant issues in the project - Review and sign off on key milestones
Project Manager	Monique Emmanuel	<ul style="list-style-type: none"> - Manage all aspects of the project and ensure compliance with PMP - Monitor project progress and schedule adherence - Complete all documents related to the project - Identify and manage risks according to the PMP
Project Owner	Nicole Sanislow/ Karmyn Hill	<ul style="list-style-type: none"> - Review deliverables and project documents, identifying any deficiencies - Review and approve deliverables - Review and approve RFCs

<p>FloridaCommerce Enterprise Architects</p>	<p>Vamsi Pasala Roland Solvik Mike George Cinil Maliak</p>	<ul style="list-style-type: none"> - Contribute subject matter expertise - Complete assigned project tasks in accordance with the Project Schedule - Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this PMP - Assist the Project Manager in responding to risks and issues - Assist the Project Manager in evaluating change requests
<p>SSI Delivery Team Lead</p>	<p>Mike Ortiz</p>	<ul style="list-style-type: none"> - Responsible for managing System integration and modernization program operations. - Develops the program strategy, supporting business case and various enterprise-wide high-level project plans. - Ensures integration of projects and adjusts project scope, timing, and budgets as needed, based on the needs of the Department. - Communicates with Peraton and Department leadership, business leadership and IT Business Consultants to communicate program strategy, direction, and changes. - Responsible for delivering all projects contained in the System modernization portfolio of projects on time, within budget and meeting the strategic and business requirements of the Department. - Responsible for tracking key program milestones and implementing adjustments to achieve Department objectives. - Partners with Departmental senior leadership to identify and prioritize opportunities for using IT to achieve the goals of the enterprise. - Develops and maintains the program management plans and schedule. - Serves as the single point of accountability for contract delivery and execution and Peraton staff.
<p>Solutions Architect</p>	<p>Rudolph Mallamas</p>	<ul style="list-style-type: none"> - Responsible for providing senior level expertise on decision recommendations and priorities regarding the Department’s overall modernization initiative’s architecture.

	Victor Nwadiogbu	<ul style="list-style-type: none"> - Facilitates the establishment and implementation of standards and guidelines that guide the design of technology solutions including architecting and implementing solutions requiring integration of multiple platforms, operating systems, and applications across the program. - Reviews, advises, and designs standard software and hardware builds, system options, risks, costs vs. benefits and impact on the Department’s business process and goals. - Develops and documents the framework for integration and implementation for changes to technical standards. - Assists in the development of and manages an architecture governance process. Provides technical guidance to project team areas as appropriate. - Contributes to the development of requirements for the Department’s statements of work, reviews and evaluates vendor technical proposals, participates in source selection. - Tracks industry trends and maintains knowledge of new technologies to better serve the Department’s architecture needs.
Data Architect	Chris Nowak	<ul style="list-style-type: none"> - Responsible for program-wide data design, balancing optimization of data access with batch loading and resource utilization factors. - Designs and oversees the construction of data architectures, operational data stores, and data marts. - Focuses on program-wide data modeling and database design. - Provides significant input in the design of program data architecture standards, policies and procedures for the modernization program, structure, attributes, and nomenclature of data elements, and applies accepted data content standards to technology projects. - Contributes to business analysis, data acquisition and access analysis and design, Database Management Systems optimization, recovery strategy, and load strategy design and implementation.
Business Analyst & Tester	Kelly Flaminio	<ul style="list-style-type: none"> - Performs as the subject matter expert in unemployment compensation/insurance for the team. - Works closely with the Department, business analysts, and team members to understand business

		<p>requirements that drive the analysis and design of quality technical solutions.</p> <ul style="list-style-type: none"> - Involved in the full program life cycle and is responsible for designing, testing, implementing, maintaining, and supporting applications software that is delivered on time and within budget. - Participates in component and data architecture design, performance monitoring, product evaluation and buy vs. build recommendations. - Contributes to program procurement activities to include statement of work requirements, proposal evaluation, and source selection. - Performs systems analysis and design. - Applies understanding of development, quality assurance and integration methodologies in overseeing the technical implementation of program requirements.
Transition & Quality Manager	Patrick Hogan	<ul style="list-style-type: none"> - Leads the program transition activities for Peraton, planning and coordinating the transition on to and off of the Department. - Responsible for establishing and implementing Peraton’s quality assurance and compliance processes for the Department. - Works closely with Department and vendor project IT leaders to develop and implement an overall quality maturity roadmap and plan for each project. - Reviews progress toward the plan regularly with program IT and vendor leaders, technical teams to make modifications as necessary. - Establishes program IT service quality control standards, policies, and procedures. Monitors, evaluates, manages, and executes audit processes to ensure compliance. - Provides guidance and subject matter expertise to IT teams on QA methodologies and processes, educates them on their responsibilities/accountabilities for the purpose of achieving on-time and quality deliverables. - Makes recommendations and directs improvements to the software development lifecycle process. - Documents non-compliance to policies, process and standards and assists in their resolution.
Security Architect	Rudolph Helwick	<ul style="list-style-type: none"> - Manages the development and delivery of security standards, best practices, architecture, and systems to ensure information system security across the program.

		<ul style="list-style-type: none"> - Implements processes and methods for auditing and addressing non-compliance to information security standards; facilitates migration of non-compliant environments to compliant environments. - Ensures compliance with standards and currency with State and Federal security requirements. - Manages and participates in the planning and implementation of security administration for all program projects. - Contributes to the evaluation and selection of security applications and systems. - Makes recommendations and assists in the implementation of changes to work methods and procedures to make them more effective or to strengthen security measures.
Program Integration Testers	Sudha Arulalan, Jonathan T. Franklin, Rafiqul Islam, Soni Rohit	<ul style="list-style-type: none"> - Prepares and plans for program integration testing. - Coordinates with project teams and communicates integration testing standards and requirements to them. - Documents program level integration test plans and scripts. - Conducts program level integration tests, identifies, and communicates test results to project teams, and conducts program level regression testing.
Project Support	Julia Aqua	<ul style="list-style-type: none"> - Assist SSI Delivery Team Lead with meeting agendas and minutes. - Provide project schedule updates
RA Modernization Project Managers	Nicholas Kaoudis James Sparks David Sinclair Clara Kendrick Daniel Swasigood	<ul style="list-style-type: none"> - Contribute subject matter expertise - Complete assigned project tasks in accordance with the Project Schedule - Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this OWP - Assist the Project Manager in responding to risks and issues - Assist the Project Manager in evaluating change requests

B. Project Management Methodology

The Department will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure the Department's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. The Department believes strong project management is critical throughout the life of any successful project.

For this project, the Department's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from the Department within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the Department Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- The Department's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

The Department believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. *Business Process Organizational Change Management Plan*

This project intends to improve the delivery, execution, security, or convenience of the Department's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan

- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Project level Risk and Issue Management activities occur within the FloridaCommerce System of Record (SOR) referenced as ‘ServiceNow.’ Within ServiceNow (SNOW), Project Managers Manage their project’s Risks and Issues within the ‘Risks, Actions, Issues and Decisions (RAID)’ Log. As such, current project specific information can be found there.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
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VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for Modernization projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.



**OPERATIONAL WORK PLAN
FOR
CUSTOMER EXPERIENCE / USER
EXPERIENCE (CX/UX)**

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2023-2024
QUARTER 4
PREPARED ON 3/01/2024**

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Incremental Customer Experience/User Experience (CX/UX) Mobile-Responsive Transformation project will provide a mobile-responsive user interface for employers and Reemployment Assistance claimants across all external-facing screens. The CX/UX project will help the Department achieve the following goals:

1. Improve access and equity in the delivery of Reemployment Assistance benefits.
2. Improve information flow with claimants, employers, and TPAs to make quicker decisions.
3. Leverage new technologies to improve claimants, employers, and TPAs' overall experience with the Reemployment Assistance program, including reducing the amount of time it takes to file a claim for benefits.
4. Enhance System usability including accessibility.
5. Reduce maintenance and support time and costs.

A. Scope Statement

In October 2023, FloridaCommerce terminated its contract with its Technology Tool Vendor and amended an existing agreement with one of its current vendors to modify and enhance an existing initial claims application (mobile-responsive user interface). The existing mobile-responsive user interface was originally created in 2020 to help support the influx of claims received as a result of the economic downturn. The scope of this project is to add missing claimant questions to the existing mobile-responsive user interface, and to address errors that exist when transmitting (ingestion) the data to Reconnect. Furthermore, the project will introduce dynamic fact-finding questionnaires.

In Scope:

- Addressing known data ingestion errors.
- Implementing dynamic fact-finding questionnaires associated with the initial claims application. These have been prioritized based on how often they populate in Reconnect today.
- Adding initial claims application questions from Reconnect to complete the application flow in the new mobile-responsive user interface. These questions in the previously plain language will be added in Reconnect.

Out of Scope:

- Application of full plain language to the existing initial claims application.
- Reconnect code changes.
- API development.

B. Project Objectives and Business Benefits

The CX/UX Project will provide the following business benefits and objectives for the CX/UX Project:

Project Objective	Business Benefit
An agile and incremental approach will be utilized to ensure that business process optimization (BPO) is incorporated into the transformation activities for the CX/UX project.	<ol style="list-style-type: none"> 1. Increased System up-time. 2. The time to file an Initial Claim for Reemployment Assistance benefits will be reduced. 3. A mobile-responsive user interface is installed, configured, and tested. 4. Improved stability, reliability, and maintainability of the System. 5. Improved Reemployment Assistance service to Floridians. 6. Predictable maintenance cost for the application.

C. Critical Success Factors

The CX/UX Project has several critical factors that must be met for the project to be considered successful. These items include:

- Resolve known data ingestion issues.
- Add missing claimant questions.
- Add fact-finding questionnaires.
- Availability of key business, technology, and vendor resources.
- Access to user-friendly mobile responsive claim intake application.

D. Key Dates

This project is aggressively scheduled to meet the delivery dates listed below. These dates cannot move and must be realized for the project to be successful.

Key Dates (anticipated)	Importance and Relevance to the Project
01/2024	Implement the new mobile-responsive user interface
06/2024	Complete Delivery of Fact-Finding Questionnaires (FFQs)

E. Major Deliverables

Project Deliverables will benefit Floridians by easing the filing of new claims. Other deliverables include the resolution of existing claims ingestion issues as well as providing fact finding questionnaires in three different languages (English/Spanish/Haitian Creole).

By 01/2024	Phase 1 – Implement the new mobile-responsive user interface. Vendor will design, develop, and implement the solution which meets the Department’s requirements and constraints.
By 06/2024	Phase 2 – Fact Finding Questionnaires 31-60 Phase 3 – Remaining Fact Finding Questionnaires

F. Major Milestones

This project is aggressively scheduled to meet FloridaCommerce requirements. The major milestones are as follows:

Major Milestone	Milestone Description
Procurement Phase Complete	Complete
Initiation Phase Complete	Phase 1 – Complete; Phase 2 – In progress
Planning Phase Complete	Phase 1 – Complete; Phase 2 – In progress
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

Given the broad and extensive impact of the project, there are several key stakeholders that will require communication and approval of project deliverables.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Florida Department of Commerce
Lindsay Volpe	Deputy Secretary, Division of Workforce Services/Work Group
Paul Forrester	Chief Information Officer/Work Group
Tisha Womack	Chief Financial Officer/Work Group
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Sherry Crist	Modernization Program Manager – Strategic Planning Office
Nicole Sanislow	Project Owner
Nicholas Kaoudis	Project Manager (Core)
Jim Sparks	Project Manager (Core)
Todd Dzicek	Project Manager Specialist
Daniel Swaisgood	Project Manager Specialist
Thomas Hoverman	Organizational Change Management Lead
Sushma Kavarthapu	Modernization Program Manager - IT
Rose Hebert	Public Relations Manager
Karmyn Hill	Office of Accountability and Transparency
Samantha Caban	Manager, Self Service Team
Jamie Dattoli	Chief of RA Appeals
Johnathan Hill	Chief of RA Adjudication

H. Significant Project Assumptions and Constraints

The CX/UX Project carries **several** assumptions and constraints, given its broad spectrum of scope and impacts to Floridians writ large.

Project Assumptions

- Vendor and FloridaCommerce can address ingestion errors in transmission from the mobile-responsive user interface to FloridaCommerce.
- No real-time interface from the mobile-responsive user interface to Reconnect for a claimant application.
- Vendor will provide post go-live support of its front-end intake screens.
- Current language does not need to be reviewed and is acceptable as-is.

Project Constraints

- The CX/UX project Phase 1 end date of 01/09/2024 cannot be moved.
- Timeframe limits the implementation to the first 28 fact-finding applications prioritized by the Reemployment Assistance program.
- Based on the rate of production for Phase 1, it is anticipated that FFQs 31 – 60 will be completed in Phase 2, with the remaining questionnaires completed in Phase 3 by 6/2024.

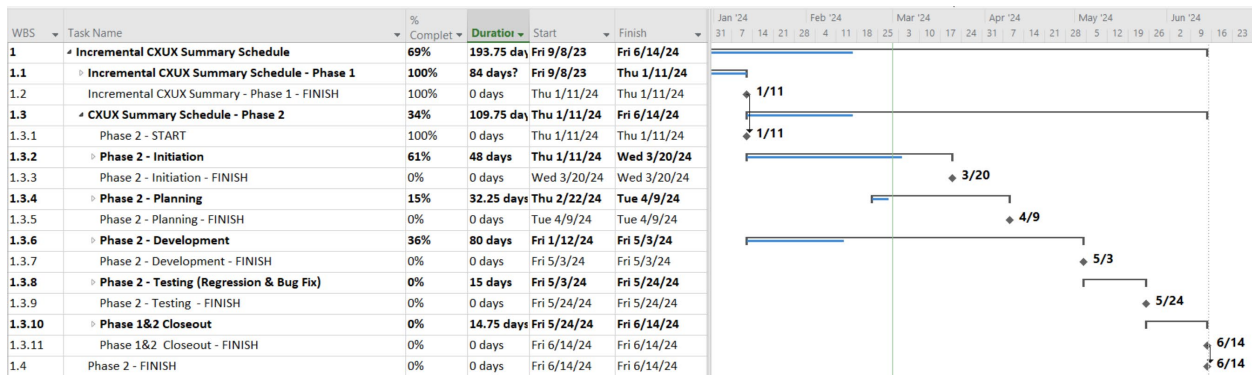
II. Work Breakdown Structure

The WBS shown below indicates a second phase with a revised forecast for completion in June 2024. Planning is ongoing to *detail* the scope of this new phase.

WBS	Task Name
1	Incremental CXUX Summary Schedule
1.1	Incremental CXUX Summary Schedule - Phase 1
1.2	Incremental CXUX Summary - Phase 1 - FINISH
1.3	CXUX Summary Schedule - Phase 2
1.3.1	Phase 2 - START
1.3.2	Phase 2 - Initiation
1.3.3	Phase 2 - Initiation - FINISH
1.3.4	Phase 2 - Planning
1.3.5	Phase 2 - Planning - FINISH
1.3.6	Phase 2 - Development
1.3.7	Phase 2 - Development - FINISH
1.3.8	Phase 2 - Testing (Regression & Bug Fix)
1.3.9	Phase 2 - Testing - FINISH
1.3.10	Phase 1&2 Closeout
1.3.11	Phase 1&2 Closeout - FINISH
1.4	Phase 2 - FINISH

III. Resource Loaded Project Schedule

The Resource Loaded Project schedule delineates the project end date of 6/2024.



IV. Project Spending Plan

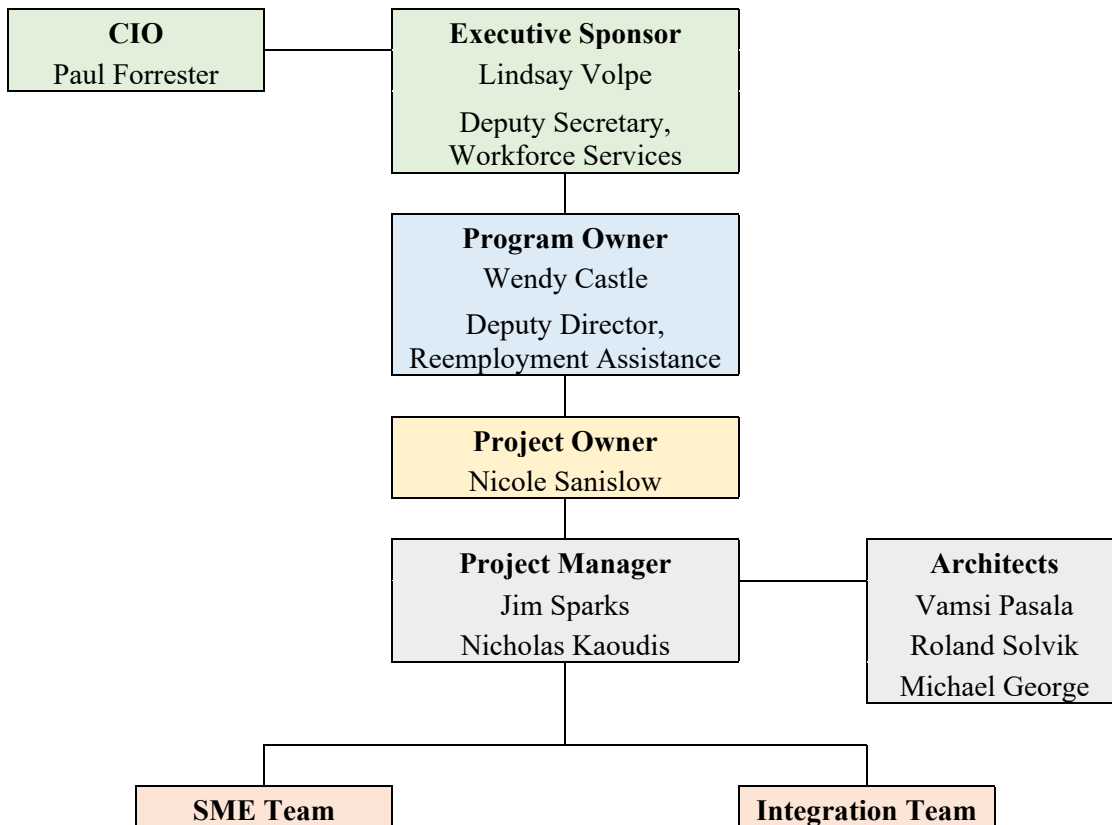
Budget and corresponding cost plans will be revised once the difference between Technology Tool Vendors is known.

FY 2023-24 Expenditures
Software: \$0.00
Other OpEx (Vendor Deliverables): \$8,990,430.83
Other CapEx: \$0.00

V. Project Organization and Methodology

A. Project Organizational Chart

The purpose of the Project Organizational Chart is to identify the project team, executive governance, and project sponsorship.



B. Project Roles and Responsibilities

The purpose of the Project Roles and Responsibilities is to identify the major roles and responsibilities, required skills and experience levels, and interactions with other project personnel, as well as address the expected role of the project’s executive steering committee.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Paul Forrester	CIO / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Tisha Womack	CFO / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Nicole Sanislow	Project Owner/ Administrator, Reemployment Assistance Quality Assurance	<ul style="list-style-type: none"> • Contributes subject matter expertise. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests. • Reviews deliverables and project documents, identifying any deficiencies. • Reviews and approves deliverables. • Reviews and approves RFCs.
Jim Sparks	Lead Project Manager (Core) Project Manager (Core)	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan.
Vamsi Pasala Roland Solvik	Architect and Technical Lead	<ul style="list-style-type: none"> • Responsible for assisting the team in finding solutions to issues elevated to him.

Name	Project Role	Responsibility
Michael George		<ul style="list-style-type: none"> • Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects. • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
Todd Dzicek Daniel Swaisgood	Project Manager Specialists	<ul style="list-style-type: none"> • Facilitates the documentation and transfer of information between the vendor and business unit. • Organizes documentation and information for review and reporting. • Assists the project manager in maintaining schedules and deliverables. • Communicates with business units and SMEs to ensure timeliness and completeness of deliverables.
SME Team (Core)	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Process development tasks. • Contributes subject matter expertise. • Complete assigned project tasks in accordance with the Project Schedule. • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests..
Review Team (Core)	Documentation Reviewers	<ul style="list-style-type: none"> • Reviews documentation when submitted by Vendor • Contributes subject matter expertise. • Completes assigned project tasks in accordance with the Project Schedule. • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests.
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> • Monitors project progress. • Facilitates DEO Leadership Team Governance meetings. • Provides guidance and support to project manager and project team members.
Vendor	User Interface Experts	<ul style="list-style-type: none"> • Provides expertise with creating/customizing UI screens for CX/UX application.
Lindsay Volpe	Accountability and	<ul style="list-style-type: none"> • Provide expertise with project management and guidance.

Name	Project Role	Responsibility
Karmyn Hill	Transparency Experts	<ul style="list-style-type: none"> Provide expertise with public accountability and transparency.
Rose Hebert	Communications Expert	<ul style="list-style-type: none"> Provides expertise with public communications.
Vendor	Oversight	<ul style="list-style-type: none"> Provides expertise with the scope of the project as it applies to Florida law.

C. Project Management Methodology

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- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce’s lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment
- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

VII. Project Risk Management Plan

The CX/UX Project carries the following risks and mitigation strategies accordingly:

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Hurricane impacting the state delays the schedule	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementation Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding	SME Team, Owner
Resource requirements for execution of roadmap	Medium	Medium	Prioritize highest-risk access flows, adjust	PM/SME

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
are beyond original expectations.			schedule, plan additional phases.	

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Prioritize Projects: Which projects are most important, and which can be put aside for the time being? You can't do everything at once.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Too Much Capacity: Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).



OPERATIONAL WORK PLAN FOR COMMS

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON 03/05/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. *Project Charter*

The Comms project will provide usability improvements to the Reemployment Assistance Claims and Benefits Information System (Reconnect). Due to the very public nature of the Reconnect system and the difficulties it experienced during the COVID-19 pandemic, Comms is a very high-visibility project that, when completed, will be of great benefit to Floridians and a significant “win” for FloridaCommerce. The Comms project will help FloridaCommerce achieve the following goals:

1. Streamlined claimant workflow.
2. Simplified UI text, guides, forms, and other information.
3. New branding materials, including PR materials and a new outreach campaign.

A. **Scope Statement**

The Comms project will run the existing Reconnect system information through a plain language simplification process, as well as translate the simplified information into Spanish and Haitian Creole before implementation and integration into Reconnect.

In Scope

- All appropriated, budgeted, and approved tasks necessary to implement the Comms solution.
- Subsequent transition to Application maintenance & Support.
- Specifics:
 - o Plain Language simplification through the point of approval by FloridaCommerce Subject Matter Experts (SMEs).
 - Plain Language Batch 6.
 - Plain Language Batch 7.
 - The rationales spreadsheet, which was originally part of Batch 3, but was substantial enough that we could not finish it by 6/30/2023. After Change Request 18, it was moved to the Continuous Modernization Program (Cont. Mod.) on 7/6/2023 and was completed through the point of SME approval.
 - Plain Language of the existing Reconnect software. This is described in contract amendment #2 as Deliverable 8, Plain Language for Existing System and is characterized as Plain Language Batches 8-11. It includes UI text that was not simplified through the Plain Language process in Batches 1-7, however, the bulk of the work is not new Plain Language transformation, but instead reformatting the existing Plain Language files into a new format that will make integration into Reconnect easier.
 - Data mapping. This is described in contract amendment #2 as Deliverable 7. It was meant to create a data map between Reconnect and the CX/UX software. As of this OWP, FloridaCommerce has decided to remove the data mapping exercise from the scope of the Comms project. A new contract amendment has not yet been completed but is expected soon.

- Integration of the entire scope of Plain Language files (batches 1-11) into the new CX/UX software. Within Continuous Mod:
 - Phase POST-1a = Batches 1-4.
 - Phase 1b = Batch 5.
 - Phase 1c = Batch 6 and 7 and, presumably, Batches 8-11.
 - Pega Systems is responsible for the Plain Language integration. Peraton is responsible for testing the result.
- Review, Approval, and Translation of the integrated CX/UX software.
 - FloridaCommerce subject matter experts (SMEs), the Office of General Counsel (OGC), and the Office of Communications and External Affairs (OCEA) combine to approve the final Plain Language.
 - The approved English is translated from English to Spanish and Haitian Creole. Pega implements the Spanish and Haitian Creole versions, and a final review and approval step completes the project.
 - Integration of the entire scope of Plain Language files (batches 1-11) into the Reconnect software, with a similar process for review, approval, and translation.

NOTE: all of these in-scope tasks and deliverables are repeated with each of the deployment cycles in the CX/UX project and Reconnect deployment.

Out of Scope

- Any work that is not specifically listed as “in scope.”
- Any work that is not appropriated, budgeted, and approved.
- Any work that is already addressed by the Incremental CX/UX Comms project, which ended with RA Modernization on 6/30/2023.

B. Project Objectives and Business Benefits

The benefits accruing to the Department will center on having a simplified and streamlined user workflow for claimants, employers, and third-party administrators, as well as an improved service overall which will reduce the burden on the Help Center staff.

Project Objective	Business Benefit
An agile and incremental approach will ensure the current UI information is simplified through the plain language process and integrated into the Reconnect system and the CX/UX system.	<ol style="list-style-type: none"> 1. Streamlined claimant workflow. 2. Simplified UI text, guides, forms, and other information. 3. Improved Reemployment Assistance service to Florida Citizens.

C. Critical Success Factors

The success of the Comms project hinges on having the current system information simplified through the plain language process, as well as having the simplified information translated into Spanish and Haitian Creole. Further, once the information is simplified and translated, the project will be complete upon integrating the new information into the Reconnect system.

- The information from the original Connect system will be simplified through a plain-

language process that involves two vendors (Beacon and KPMG) and varied teams of SMEs from FloridaCommerce. This collaboration must be managed closely to achieve the highest-quality output and to meet scheduled deadlines.

- The output of the plain language process will be delivered to not just FloridaCommerce IT for integration into Reconnect, but to a third vendor: Pega Systems, which is providing the commercial off-the-shelf (COTS) software solution that, with customizations, will provide a new mobile-responsive user interface for the CX/UX project. Pega must integrate the simplified information into the CX/UX software. This integration must achieve the highest-quality results and meet scheduled deadlines. Because Pega’s mobile-responsive user interface is part of the CX/UX project – *not part of the Comms project* – this is an interdependency that must be managed very closely.

D. Key Dates

The Comms project is very straightforward. The relevant key dates relate primarily to the execution work being done by the vendor and the review work done by Commerce SMEs.

Key Dates (anticipated)	Importance and Relevance to the Project
July 2023	Project start.
July 2023 – May 2024	Development of deliverables including plain language simplification, translation, and implementation into Reconnect.
June 2024	Project end.

E. Major Deliverables

The deliverables for the Comms project include the branding materials created by the vendor, however the primary work of the project will be the plain language simplification and translation process identified in deliverables 6 and 8.

Deliverable	Start Date	End Date
Deliverable 1: Project Kick-Off Meeting	3/20/2023	3/20/2023
Deliverable 2: Project Management Plan & Transition Plan	3/1/2023	4/6/2023
Deliverable 3: Project Schedule	1/27/2023	4/6/2023
Deliverable 4: Content Design Sessions	1/27/2023	7/12/2023
Deliverable 5: System Brand Manual	2/14/2023	6/12/2023
Deliverable 6: Plain Language Development & Translation	2/20/2023	6/30/2024
Deliverable 7: Data Mapping	10/2/2023	6/1/2024
Deliverable 8: Plain Language for Existing System	10/2/2023	6/1/2024

F. Major Milestones

Given the straightforward nature of the Comms project the major milestones primarily focus on the execution phase where the work of simplification and translation will occur.

Major Milestone	Milestone Description
Procurement Phase Complete	Completed
Initiation Phase Complete	Completed
Planning Phase Complete	Completed
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

The Comms project relies primarily on the project manager and project owner interacting with the vendor and the Commerce SMEs to facilitate the transfer of the system information for simplification and translation. Additionally, the program manager for information technology is critical in handling the system integration.

Key Stakeholders	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Division of Workforce Services
Paul Forrester	Chief Information Officer, Program Owner – Information Technology
Tisha Womack	Chief Financial Officer
Wendy Castle	Continuous Modernization Program Owner – Business
Nicole Sanislow	Continuous Modernization Program Manager – Business
Sherry Crist	Continuous Modernization Lead Program Manager – Strategic Planning Office
Tom Holliday	Continuous Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Continuous Modernization Program Manager – Information Technology
Thomas Hoverman	Organizational Change Management Lead
Jamie Dattoli	Project Owner
Daniel Swaisgood	Project Manager

H. Significant Project Assumptions and Constraints

The only underlying assumptions to the Comms project focus heavily on resource availability and readiness to conduct the tasks at hand. The only constraint for the project is the project termination date.

Project Assumptions

- FloridaCommerce and Beacon will provide resources capable of completing the required simplification tasks at the highest quality. Those resources must be dedicated to the tasks at a level that enables them to complete those tasks at the scheduled deadlines.
- FloridaCommerce, Pega, and test vendor Peraton will provide resources capable of completing the required integration and testing tasks at the highest quality. Those

resources must be dedicated to the tasks at a level that enables them to complete those tasks at the scheduled deadlines.

Project Constraints

- End date of 6/30/2024 cannot be moved.

II. Work Breakdown Structure

The Work Breakdown Structure depicted below includes all deliverables forecasted for completion in June 2024. The project is presently in the Execution phase.

WBS	Task Name
1	Comms
1.1	Initiation
1.2	Initiation Phase begins
1.2.1	Deliverable: Pre-Charter RCA
1.2.2	Deliverable: Stakeholder Registry
1.2.3	Deliverable: Charter
1.3	Initiation Phase complete
2.1	Planning
2.2	Planning Phase begins
2.2.1	Deliverable: Planning RCA
2.2.2	Deliverable: Project Schedule
2.2.3	Deliverable: PMP
2.3	Planning Phase complete
3.1	Execution
3.2	Execution Phase begins
3.2.1	Deliverables: Vendor deliverables executed and integrated in the Reconnect system
3.3	Execution Phase complete
4.1	Closeout
4.2	Closeout Phase begins
4.2.1	Gather Lessons Learned
4.2.2	Deliverable: Conduct Lessons Learned Meeting
4.2.3	Deliverable: Closeout Report
4.3	Closeout Phase complete

III. Resource Loaded Project Schedule

The project schedule depicted below demonstrates the planned timetable for all project-related work and estimates the appropriate staffing levels necessary to accomplish each task, to produce each deliverable, and to achieve each milestone. The most up to date version of the project schedule is available on [SharePoint](#).

1	Comms Project	249 days	64%	Wed 7/5/23	Fri 6/28/24
✓ 1.1	Comms Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
✓ 1.2	Initiation	98.1 days	100%	Wed 7/5/23	Mon 11/27/23
✓ 1.2.1	Initiation Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
✓ 1.2.2	Risk and Complexity Assessment	62 days	100%	Wed 7/5/23	Fri 9/29/23
✓ 1.2.3	Stakeholders Register	5 days	100%	Fri 9/22/23	Fri 9/29/23
✓ 1.2.4	Project Charter	33 days	100%	Thu 9/28/23	Wed 11/15/23
✓ 1.2.5	Business Case	29 days	100%	Fri 10/6/23	Fri 11/17/23
✓ 1.2.6	Project Kickoff Meeting	2 days	100%	Fri 9/29/23	Tue 10/3/23
✓ 1.2.7	Conduct Lessons Learned Meeting	2.1 days	100%	Fri 11/17/23	Mon 11/27/23
✓ 1.2.8	Initiation Finish	0 days	100%	Mon 11/27/23	Mon 11/27/23
✓ 1.3	Planning	136 days	100%	Wed 7/5/23	Tue 1/23/24
✓ 1.3.1	Planning Start	0 days	100%	Fri 11/17/23	Fri 11/17/23
✓ 1.3.2	Deliverable: Human Resource Plan	11 days	100%	Fri 9/29/23	Mon 10/16/23
✓ 1.3.3	Deliverable: Communication Plan	11 days	100%	Fri 9/29/23	Mon 10/16/23
✓ 1.3.4	Deliverable: Project Schedule - First Full Draft + Baseline	134 days	100%	Wed 7/5/23	Fri 1/19/24
✓ 1.3.5	Deliverable: Project Management Plan	55 days	100%	Wed 7/5/23	Wed 9/20/23
✓ 1.3.6	Deliverable: Project Budget	11 days	100%	Fri 9/1/23	Tue 9/19/23
✓ 1.3.7	Deliverable: Project Spending Plan	11 days	100%	Fri 9/1/23	Tue 9/19/23
✓ 1.3.8	Risk and Complexity Assessment	1 day	100%	Fri 11/17/23	Mon 11/20/23
✓ 1.3.9	Planning Finish	0 days	100%	Mon 11/20/23	Mon 11/20/23
1.4	Execution	249 days	52%	Wed 7/5/23	Fri 6/28/24
1.4.1	Continuous Mod: Phase POST-1a	184 days	46%	Wed 7/5/23	Sun 3/31/24
1.4.2	Continuous Mod: Phase 1b Start	249 days	38%	Wed 7/5/23	Fri 6/28/24
1.4.3	Continuous Mod: Phase 1c Start	159 days	89%	Wed 7/5/23	Fri 2/23/24
1.4.4	Execution Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24
1.5	Monitoring & Controlling	249 days	58%	Wed 7/5/23	Fri 6/28/24
✓ 1.5.1	Monitoring & Controlling Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
1.5.2	Weekly Status Report	249 days	57%	Wed 7/5/23	Fri 6/28/24
1.5.3	Monthly Status Report (OWP)	228.5 days	54%	Fri 7/28/23	Tue 6/25/24
1.5.4	Status Meetings	181 days	99%	Wed 7/5/23	Wed 3/27/24
1.5.5	Monitoring & Controlling Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24
1.6	Closeout	5 days	0%	Mon 6/24/24	Fri 6/28/24
1.7	Comms Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24

IV. Project Spending Plan

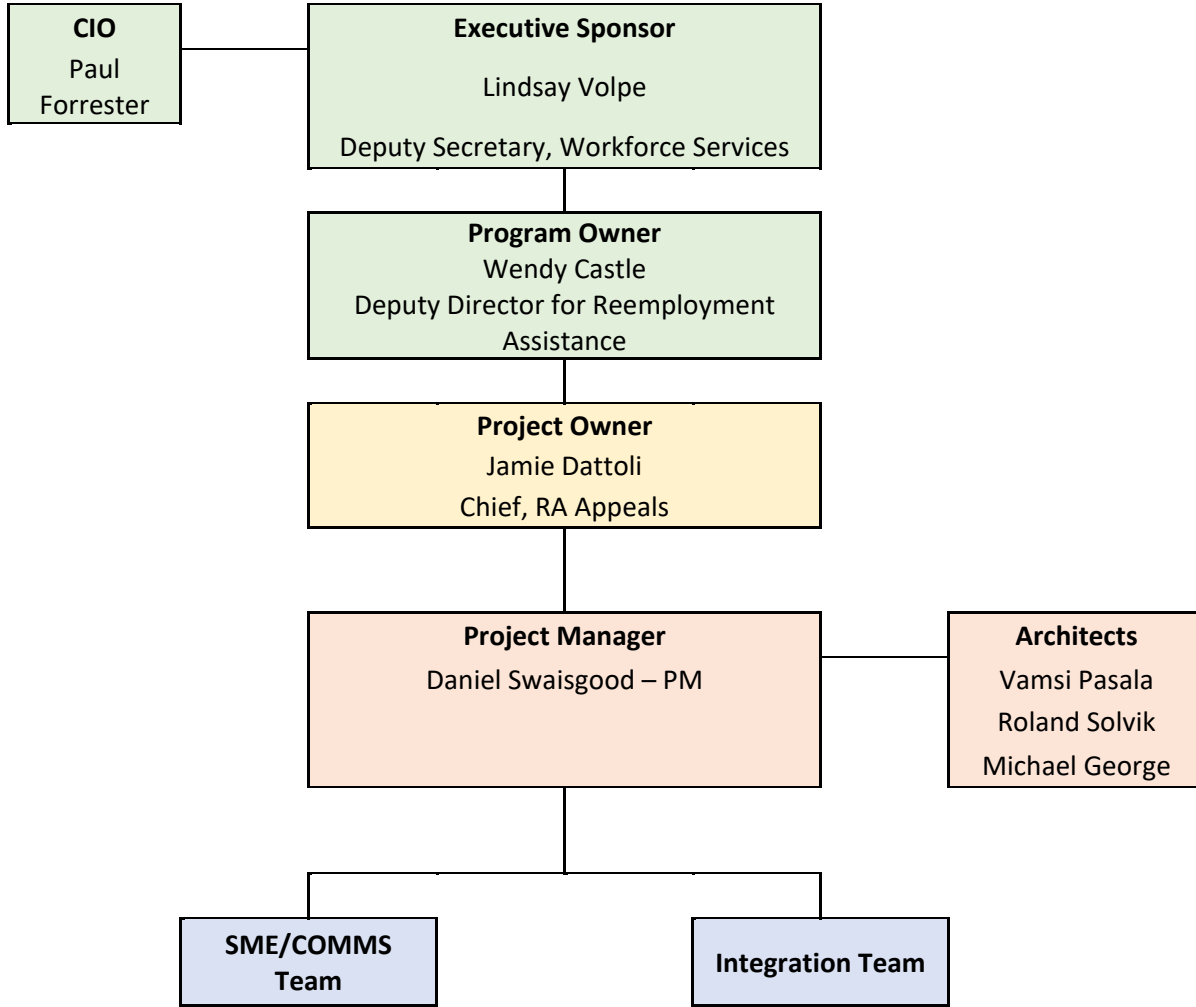
The project spending plan depicted below includes all procurement activities related to ensuring the vendor completes the requested tasks of plain language simplification and translation.

FY 2023-24 Expenditures
<i>Software: \$0.00</i>
<i>Other OpEx (Vendor Deliverables): \$986,540.28</i>
<i>Other CapEx: 0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart

The purpose of the Project Organizational Chart is to identify the project team, executive governance, and project sponsorship.



B. Project Roles and Responsibilities

The purpose of the Project Roles and Responsibilities is to identify the major roles and responsibilities, required skills and experience levels, and interactions with other project personnel, as well as address the expected role of the project’s executive steering committee.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor / Work Group	<ul style="list-style-type: none"> Provide guidance on overall strategic direction.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Paul Forrester	CIO / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Tisha Womack	CFO / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Jamie Dattoli	Project Owner / Chief, RA Appeals	<ul style="list-style-type: none"> • Contributes subject matter expertise. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests. • Reviews deliverables and project documents, identifying any deficiencies. • Reviews and approves deliverables. • Reviews and approves RFCs.

Name	Project Role	Responsibility
Daniel Swaisgood	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan. • Manages vendor deliverables and schedule adherence.
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> • Reviews documentation when submitted by Vendor • Contributes subject matter expertise • Completes assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests
Vendor: Varied	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> • Monitors project progress. • Facilitates Commerce Leadership Team Governance meetings. • Provides guidance and support to project manager and project team members.
Vendor: Beacon	Plain Language and Branding	<ul style="list-style-type: none"> • Provides expertise with simplifying all in-scope information via a “plain language” process. • Manages the translation of simplified information into Spanish and Haitian Creole.

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements, and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure satisfaction and project success. Successful project management must include active and visible leadership, multiple controls, and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. *Business Process Organizational Change Management Plan*

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment

- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

VII. Project Risk Management Plan

The Comms project carries the following risks and mitigation strategies as outlined in the table below.

Risk Description/ Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Hurricane impacting the state delays the schedule	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementat ion Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding	SME Team, Owner
Resource requirements for execution of roadmap are beyond original expectations.	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME
Procurement Delays for CX/UX	High	Medium	Communication with Senior Leadership and Procurement Team(s).	PM/ Project Owner/

Risk Description/ Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
				Senior Leadership

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Prioritize Projects: Which projects are most important, and which can be put aside for the time being? You can't do everything at once.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Too Much Capacity: Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).



OPERATIONAL WORK PLAN FOR REPORTS

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023 – 2024

QUARTER 4

PREPARED ON 03/06/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Reports Project objective is to eliminate the crystal reports server and move its reports to the data warehouse. This will remove the dependency of reports from the Reconnect database to a system built for efficient analysis and reporting. Moving the reports to the data warehouse leaves more processing power for claimants in the Reconnect system.

The project team will evaluate 311 Crystal Reports to determine:

1. Business Unit awareness of the existence of each report.
2. If the report will, or continues to provide, value to the business unit.
3. If the report can be retired.
4. Translating the report to use the analytical structure so it can be run from the data warehouse.

Although the schedule appears to end beyond the June 28, 2024, project end date, there are some reports that can and will be retired, which will help meet the project end date. The reports that appear after the June 28, 2024, date will move up in schedule as reports are retired.

In this Operational Workplan, the entire list of reports is provided. Future reports will only include those that will be completed by June 28, 2024. The project manager will move reports up in priority as others are retired via validation.

In the event there are reports to be completed beyond the June 28, 2024, date, a decision will be made in June 2024. This decision will be to complete the remainder of the reports via operational product delivery or create an additional project to complete the outstanding reports, if any.

A. Scope Statement

The Project Team will work with Workforce Services to evaluate 311 Crystal Reports to determine if they can be moved from the Crystal Reports Server to the FloridaCommerce's Data Warehouse by June 28, 2023. If the report no longer provides value, the report and any related batches will be retired.

The benefit of moving reports from using the Reconnect database to using the data warehouse makes the reports available regardless of the status of Reconnect availability. Removing the dependency from the Reconnect system provides more stability and efficiency for claimants.

In Scope

- 311 Crystal Reports – This includes the existing Crystal Reports on the Reports Server that have not been converted to the data warehouse.
- Minor adjustments and enhancements to existing crystal reports as part of the conversion to the data warehouse.
- Batches – Any batches that are used to generate Crystal Reports will be retired.

Out of Scope

- 20 Reports already converted to the data warehouse via operational product

delivery.

- Enhancements to reports already reviewed, approved, and pushed to production in the data warehouse.
- New “crystal” report requests.
- Building links to the data warehouse from Reconnect is out of scope for this project.
- 96 Reports deemed unnecessary by business units.
- Reports deemed out of scope due to dependency on Reconnect code inherent to the report’s functionality in the system.

B. Project Objectives and Business Benefits

The older an application, such as Crystal Reports, the more it costs to maintain its functionality—to the point where keeping it costs more than the value it provides.

Project Objective	Business Benefit
FloridaCommerce will have a modular foundation that enables continuous modernization	<ul style="list-style-type: none"> • Provides a more efficient tool for reporting/data for staff use. • Provides round-the-clock availability of reports and data. • Removes the dependency on the Reconnect system and improves the modularization of the Reconnect foundation.
Eliminates the Crystal Reports Server	<ul style="list-style-type: none"> • Allows FloridaCommerce to retire the legacy Crystal Reports server and software at the end of its useful life.
Removes batches (if any) from nightly batch processing	<ul style="list-style-type: none"> • Removing batches leaves more time for higher priority batch jobs.

C. Critical Success Factors

The list below represents target success factors that add value for FloridaCommerce.

- Validation of 311 Crystal Reports.
- Retirement of reports that no longer have value.
- Scheduled Retirement of the Crystal Reports Server
- Operational Reports Page in the data warehouse listing all ex-crystal reports that provide value to Workforce Services.

D. Key Dates

This project takes over an operational effort that started in January 2023. Therefore, a transition was necessary to separate the operational process from higher level project requirements.

The contents of each release represented below will vary greatly until measures for team velocity can be established. Also, the team continues to provide support for high priority production issues such as ETA reports and USDOL Population sample corrections.

Key Date	Importance and Relevance to the Project
September 22, 2023	Transition of operational project to Continuous Improvement Project completed
September 25 – October 16, 2023 Build 322	CRPT 213: Develop Deputy Clerk Productivity Report CRPT 280: Develop Appeals Weekly Time Lapse Report CRPT 236: Develop IP Address Search Report CRPT 281: Develop Wage Audit Predeterminations Report CRPT 188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly
October 16 – November 20, 2023 Build 323	CRPT 112: Develop UC Benefits Payment Register Report in Tableau CRPT 115: Develop Untimely First Payment Report CRPT 211/278: Develop Average Processing Time for Appeals Cases Report CRPT 217: Docketing Productivity Report CRPT 227: Develop Time Lapse Percentage CRPT 237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly CRPT 26: Develop Cumulative Totals Report CRPT 31: Develop Daily, Monthly SSA Statistics Report CRPT371 CanceledNonMonPending CRPT 95/98: Develop STC Summary Report
November 20 – December 18, 2023 Build 324	CRPT 357: Develop Long Term Dated Stops Report CRPT363 Auto Adjudicated JSR Report CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report CRPT 253/255: Develop Earnings Weekly, Monthly, Quarterly, Determinations by Examiner (3 Merged Reports) CRPT377AD DUA Activity - Applications Denied CRPT355 Automated Wage Update Workflow Report
December 8 – January 21, 2024 Build 325	CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner CRPT354 Automated Wage Update Detail Report CRPT283 Blocked Claims Issue CRPT334 Wage_Determination_Issues Report CRPT441 1099G Summary Report CRPT361 Earning Overpayments by Overpaid Weeks Report
January 21 – February 19, 2024 Build 326	CRPT02 Analysis of Overpayments by Cause CRPT359/360 Appeals Reversals Weekly & Monthly Report (2 Merged Reports) CRPT11 Claimant Repayment Summary CRPT116L LWA Voucher Payment Summary CRPT116F FPUC Voucher Payment Summary CRPT117 Waiver Status Report

Key Date	Importance and Relevance to the Project
February 19 – March 18, 2024 Build 327	CRPT13 Collection Agency Reconciliation Report CRPT33 Debtor Credit Balance Refund Report CRPT144 Released Special Voucher Payments CRPT139 Repayment Adjustment Detail Report CRPT91 Refund Status Report CRPT 1099g 1099G Detail Screen CRPT245 UCFE-UCX Pending Monetary After 13 Days CRPT247 FL CWC Reject CRPT251 UCX/UCFE Timely Payment Report
March 18 – April 15, 2024 Build 328	CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue CRPT377 DUA Activity - Applications Denied CRPT373 DUA Applications Report CRPT248 Out of State (Shell) Claims Reject CRPT249 UCFE AND UCX Reject CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims
April 15 – May 13, 2024 Build 329	CRPT259 Florida Paying CWC CRPT05 Benefit Payment Control Cash Offset Activity CRPT113 UC Liabilities Report CRPT161/61W Daily REA Productivity Report CRPT193/193F Overpayments Held for Review CRPT194 STC Plan Review Report
May 13 – June 10, 2024 Build 330	CRPT196 RETRO HOLD REPORT CRPT197 FALL THROUGH OVERPAYMENTS CRPT260 INBOUND IB6 Bill CRPT261 BPC Appeals Hearing CRPT262 Waiting Week Exemption Report CRPT274/274F Wage Audit Overpayment Repayment
June 10 – June 30, 2024 Build 331	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims CRPT29 Daily Deposit Report CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged) CRPT389F Supplemental Overpayment Report CRPT392 Certification Amounts and Counts
Reports ready for development	CRPT400 Effective Date Change (CWC-FE-X Claims) CRPT462/462W Daily SAVE Productivity Report CRPT450/451 1099G All Generated CSV CRPT99 Summary Detail Tax Withholding
June 30	CRPT152 Pre-Certification Details Report CRPT192 Payments Held for Review (HDEX) CSV CRPT195 Manual Payments Detail

Key Date	Importance and Relevance to the Project
Reports in Business Analysis	CRPT228 Time Lapse Statistics CRPT232 Agency New Hire Report CRPT233 On-demand EFT Deposit Report CRPT240 CHECK FOR NEW UI ELIGIBILITY CRPT243 Reimbursable Employer Monthly Charge CSV CRPT246 BAM Open Cases CRPT250 New Hire Late ADJ Fact-Finding Notifications CRPT257 Failed Document Status After Nightly Batch CRPT263 Unidentified Employer Protest Documents Queue CRPT264 Process Response to Notice of Claim Queue CRPT266 BTQ Universe CRPT269 FL DEBC Payments CRPT271 Disposed Appeals and Overpayment
Validating for Need vs Retire	CRPT100 Summary of Daily Disbursement Report CRPT116 Voucher Payment Summary - UB2152-UB215 CRPT183 ETA 9056 (Renee Grubb) CRPT185 ETA TAPR (Kenton Buggs, Yolanda Triplet) CRPT186 ETA TAPR Trade Activity Participant Report (Kenton Buggs, Yolanda Triplet) CRPT191 ETA 9128u - Reemployment Services and Reemployment and Eligibility Assessments for EUC Claimants (Erik Wood) CRPT239 Regional Workforce Breakdown of ETA 9129 (Erik Wood) CRPT258 QBC Report CSV (Part of Connect Workflow--OI: Sushma - Reporting function in Visual Studios .NET--Reconnect Change) CRPT267 FSDEB CSV (On Hold - Correct BU) CRPT270 Filed Appeals and Overpayment CRPT275S 13082 Sally DUA Appeals Disposed Report CRPT277 Straight DUA - UCFE, UCX, CWC Claims CRPT279 BIU-Wage Audit Adjudicator Workflow CRPT282 PRNC Closed Work Items (On Hold - by Business Unit - need reason) CRPT284 Release HDID Report CRPT285 IB6I BILL STATUS CRPT286 Detailed Untimely/Timely 1st Pay Report CRPT287 Claims That Become Unlocked CRPT288 Issues In-Progress Status Non-SOL Daily Report CRPT289 BIU Appeals Decisions Notices CRPT290 Debit Card Rejects Report CRPT291 Child Support Percentage CRPT294 Pending Monetary CSV

Key Date	Importance and Relevance to the Project
	<p>CRPT295 All UCO2 generated CRPT296 UC02 Not generated due to Locked Claimants or Claims list CRPT297 UCO2 Status Counts CRPT298 Employers or Agents having more than 100 UCO2s CRPT299 412s Stuck in Pend or Proc CRPT302 Auto-Adjudication Details CRPT303 Adjudicator Quality Nonmon Determinations CRPT304 Outstanding Workflow Items CRPT305 412 Pull Queue report CRPT308 TRA Quarter Activity Counts and Details CRPT309 FIRRE Employer Noncharge Report CRPT310 Reopen After Wait Week Report CRPT311 Collection Agency Exclusion list CRPT313 Work_Items_Closed - Terminated Daily Report CRPT314 EARN Issues Pending Report CSV CRPT315 ICON Matrix (UCX-UCFE) Report CRPT316 Equifax Inbound FED4 Electronic Responses CRPT317 Staff Handled Monetary Determination and Redeterminations CRPT318 Issue Creation Report CRPT319 Waived Overpayments Report CRPT321 CWAS Queue Month to Month Report CRPT323 New Work Items All Staff Counts Report CRPT327 Payments by County of Residence CRPT328 412 Employer Protest Pending Queue Items Report CRPT329 412 Employer Protest Worked Queue Items Report CRPT330 Appeals Metrics Report CRPT331 Earnings and Remuneration Stuck as Affirmed Report CRPT333 PRNC Priority Items Report CRPT335 Voucher Details CRPT337 Workflow Queue Report CRPT339 Taxes Paid on Locked Claims Report CRPT34 Claims Purged Report CRPT340 NDNH New Hire Fictitious Employers Report CRPT341 Wage report for claims requesting monetary reconsideration CRPT343 SIDES Failed Separation Posts CRPT344 SIDES Failed Earnings Verification Posts CRPT345 SIDES Earnings Verification Response Report CRPT347 Benefits by County of Residence Monthly</p>

Key Date	Importance and Relevance to the Project
	<p>CRPT348 Benefits by County of Residence Annually CRPT349 Civil Court Collections CRPT350 Deceased Claimant Report CRPT351 UCFE Claim Register Report (Aisha Bryson and Tiffany Cohee) CRPT352 UCX Claim Register Report (Aisha Bryson and Tiffany Cohee) CRPT364 Daily Reporting Requirement Issues Report CRPT365 SAVE Work authorization Report CRPT366 Lack of Work queue list Report CRPT367 Employer/TPA Login Counts Report CRPT370 CNCL_Adjudication_weekly CSV CRPT372 CNCL_Adjudication_Daily CSV CRPT373S 13082 Sally DUA Application Report CRPT374 DUA Federal Management Report CRPT375 DUA Adjudication Report CRPT375S 13082 Sally DUA Adjudication Report CRPT376 DUA Audit - Payments Report CRPT377S 13082 Sally DUA Activity Report CRPT379 All Cases Assigned by Staff Outside Batch 265 CRPT385 Adjudicator Data Determination Weekly CSV CRPT386 Adjudicator Void Weekly CSV CRPT387 Adjudicator Auto Adjudication Weekly CSV CRPT391S 13082 Sally DUA Appeals Filed Report CRPT393 Pre-Certification Amounts and Counts Pre-Certification Amounts and Counts CRPT395 Straight DUA Adjudication Timely Payment CRPT396 DUA Related Timely Payment CRPT397 Pending DUA Workload Items CRPT401 IB4Q Inbound Daily Report CRPT402 FL CWC Recoverable Overpayment Report CRPT403 Apply for PUA Link CRPT404 Expired Claims CRPT405 Exhausted Claims CRPT406 Annual Overpayments Established by Month CRPT407 1720A_Referred CRPT408 1720B_Not_Referred CRPT409 1720C_Written_Off_Waived CRPT40DD DUA Financial Daily - Straight DUA CRPT40DR DUA Financial Daily - Related DUA CRPT41 DUA-UI-ISSUES CRPT410 Corrected Earnings Report for Auto Requested Weeks CRPT411 Workflow SCIN Productivity CRPT412 Workflow SCIN New and In Progress</p>

Key Date	Importance and Relevance to the Project
	<p>CRPT413 Workflow SCIN Backlog CRPT414 Workflow Returned Mail Productivity CRPT415 Workflow Returned Mail New and In Progress CRPT416 Workflow Returned Mail Backlog CRPT417 Claimants_PEUC_NO_Weeks CSV CRPT418 Claimants_PUA_NO_Weeks CSV CRPT419 RA_Mon_Eligible_No_Weeks CSV CRPT420 Claim Counts by FIRRE State Montly Report CRPT423 Debit Card Payment Recovery CRPT424 State_And_Federal_Program_(RA, PEUC, EB, PUA)_Payments CSV CRPT424F Supplemental_(FPUC, LWA, MEUC, WW)_Payment CSV CRPT425 PEGA Unregistered Claim Count CRPT428 Open EIRP Workflow Items CSV CRPT429 Daily Report of Ingested Pega Claims to CONNECT CSV CRPT430 COVID-19 Adjudication report CSV CRPT431 COVID-19 Appeals Filed report CRPT432 COVID-19 Appeals Disposed report CRPT433 COVID-19 Applications report CSV CRPT437 Debit Card list for Communication CRPT438 Pending Monetary Management Workflow Queue CRPT439 Open and Pend CWAS Workflows CRPT444 UC_Benefit_Payments CSV CRPT452 1099G Amount For Each Claimant CSV CRPT453 49T All Generated CSV CRPT454 49T Status Counts Per Output Type CSV CRPT455 49T Amount Greater Than \$1 CSV CRPT457 SOL Wage Issues Report CSV CRPT458 Supplemental (FPUC, LWA, MEUC, WW) Payments Issued on Locked Claims CRPT459 Overpayments Eligible for Collection Agency Referral CRPT59 Manual Charge Relief Report CRPT72 NM QIP SATA - MONTHLY (Need Owner) CRPT79F Supplemental Overpayments Established for the Month CSV CRPT85 Processed Cancelled and Replacement Payments DATETIME CRPT874 ALM109874_RFI_ETA539 (Michael Craft) CRPT92 Reissue Payment -UB2681-RQLST CRPT93 Report of Good/Not Good Job Prospects SRR</p>

E. Major Deliverables

While the 60GG documents are important, the value is in the products delivered to the customer.

Major Deliverable	Deliverable Description
Project Management Plan	A Project management plan is a formal, approved document that defines how the project is executed, monitored, and controlled
Project Products (Reports)	Products are the value delivered to the customer during the project. They are the reason the project exists. These are listed according to date in Section D. Key Dates
Project Closeout Report	A project closure report is a document that summarizes the results of a project. It includes the team's accomplishments, lessons learned, and recommendations for improving upon future projects.

F. Major Milestones

The Key Dates section lists the major milestones for project delivery.

Major Milestone	Milestone Description
Operation to Project Transition – September 22, 2023	Closed all operational tasks and created project schedule for Reports Project.
Build 322 - October 16, 2023	Delivery of 5 Reports
Build 323 - November 20, 2023	Delivery of 6 Reports
Build 324 - December 18, 2023	Delivery of 6 Reports
Build 325 - January 21, 2024	Delivery of 6 Reports
Build 326 - February 18, 2024	Delivery of 6 Reports
Build 327 - March 17, 2024	Delivery of 6 Reports
Build 328 - April 15, 2024	Delivery of 6 Reports
Build 329 – May 12, 2024	Delivery of 6 Reports
Build 330 – June 10, 2024	Delivery of 6 Reports
Build 331 - June 30, 2024	Delivery of 6 Reports
June 30, 2024	Project Closure, Transition to Operations

G. Key Stakeholders

Business units in Workforce Services are stakeholders for this project.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Mark Miller	Reemployment Assistance Stakeholder
Nicole Sanislow	Modernization Program Manager – Business

Sherry Crist	Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicholas Kent and Matthew Mask	Project Owner
Linda Lawler	Project Manager

H. Significant Project Assumptions and Constraints

There are no significant assumptions or constraints.

Project Assumptions

1. Some functional design documents do not exist for some of the 331 reports and will have to be written.
2. Some reports may not be known to business units.
3. Some reports will no longer be needed.
4. Reports will exist in the data warehouse and all who need access will be given access rights.
5. Not all 311 reports will be transitioned to the data warehouse.

Project Constraints

1. The project must end by June 30, 2024, regardless of remaining reports.
2. Project Team availability is shared with other priorities, (production support for USDOL Audit Requests, ETA reports, existing crystal reports, USDOL Sample population validation, etc.)

II. Work Breakdown Structure

The work breakdown structure for the Reports project is shown below.

WBS	Task Name
0	Reports
1	Project Management
1.1	Discovery/Initiation
1.1.1	4.1 Project Charter Creation
1.1.2	13.1 Identification of Stakeholders
1.2	Planning
1.2.1	4.2 Develop Project Management Plan
1.2.2	5.1 Plan Scope Management
1.2.3	5.2 Collect Project Requirements
1.2.4	5.3 Define Scope
1.2.5	5.4 Create WBS
1.2.6	6.1 Plan Schedule Management
1.2.7	6.2 Define Activities
1.2.8	6.3 Sequence Activities
1.2.9	6.4 Estimate Activity Durations
1.2.10	6.5 Develop Schedule
1.2.11	8.1 Plan Quality Management
1.2.12	9.1 Plan Resource Management
1.2.13	9.2 Estimate Activity Resources
1.2.14	10.1 Plan Communications Management
1.2.15	13.2 Plan Stakeholder Engagement
1.3	Executing
1.3.1	4.3 Track Project Work
1.3.2	10.2 Manage Communications
1.3.3	13.3 Manage Stakeholder Engagement
1.4	Monitor & Control

WBS	Task Name
1.4.1	4.5 Monitor & Control Project Work
1.4.2	5.5 Validate Scope
1.4.3	5.6 Control Scope
1.4.4	6.6 Control Schedule
1.4.5	10.3 Monitor Communications
1.4.6	11.7 Monitor Risks
1.4.7	13.4 Manage Stakeholder Engagement
1.5	Closing
1.5.1	4.7 Close Project or Phase
2	Benefits Identification and Measures
2.1	Evaluate Sources of Crystal Reports and Related Batches
2.2	Collect Infrastructure Related Crystal Report budget costs
2.3	Identify Measures for Maximizing Work Not Done
2.3.1	Calculate Average Pipeline Length - Start of Requirements to Push to Prod
2.3.2	Calculate Maximized Work Not Done (Formula to use)
2.4	Collect Snowflake Costs for Crystal Reports (if possible)
2.5	Create/Maintain Crystal to Snowflake Comparison Report
3	Reports Process Operational Support
3.1	Integrate RAD Reporting Requests into Service Now
3.2	Create/Discover Process for Reports Access
4	Product Delivery
4.1	Operational Project Transition Completed
4.2	CRPT07 Child Support Options
4.3	CRPT111 UC Bank Payment Processing Exceptions-PROD
4.4	CRPT114 UC Payment Summary-PROD
4.5	CRPT12 Claims Filed (By Process Date)-PROD
4.6	CRPT151 Weely Hearing Results-PROD
4.7	CRPT210 Appeals Case Decisions-PROD
4.8	CRPT212 Case Aging Report-PROD

WBS	Task Name
4.9	CRPT214 Disposition Corrected Decisions-PROD
4.1	CRPT216 Docketed Disposed Pending with Time Lapse-PROD
4.11	CRPT219 Hearing Officer Postponements-PROD
4.12	CRPT224 Referee Productivity Report-PROD
4.13	CRPT226 Statewide Docketed Disposed Pending Report-PROD
4.14	CRPT229 TRA - Trade Readjustment Act Appeals Report-PROD
4.15	CRPT275 DUA Appeals Disposed-PROD
4.16	CRPT28 Daily Claims Entry Totals-PROD
4.17	CRPT306 Claimants with Out of State Benefits-PROD
4.18	CRPT358 STC Claims with Pending ADJ Issues Weekly-PROD
4.19	CRPT369 First Pay Due Report-PROD
4.2	CRPT391 DUA Appeals Filed-PROD
4.21	Release 322 - 10/15/2023
4.21.1	CRPT213: Develop Deputy Clerk Productivity Report (322)
4.21.2	CRPT280: Develop Appeals Weekly Time Lapse Report (322)
4.21.3	CRPT236: Develop IP Address Search Report (322)
4.21.4	CRPT281: Develop Wage Audit Predeterminations Report (322)
4.21.5	CRPT188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly (322)
4.22	Release - 323 - 11/19/2023
4.22.1	CRPT112: Develop UC Benefits Payment Register Report in Tableau (323)
4.22.2	CRPT115: Develop Untimely First Payment Report (323)
4.22.3	CRPT211/278: Develop Average Processing Time for Appeals Cases Report (323)
4.22.4	CRPT217: Develop Docketing Productivity Report (323)
4.22.5	CRPT227: Develop Time Lapse Percentage (323)
4.22.6	CRPT237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly (323)
4.22.7	CRPT26: Develop Cumulative Totals Report (323)
4.22.8	CRPT31: Develop Daily, Monthly SSA Statistics Report (323)
4.22.9	CRPT371 CanceledNonMonPending (323)
4.22.10	CRPT95/98: Develop STC Summary Report (323)

WBS	Task Name
4.23	Release - 324 - 12/17/2023 (CodeCutOff-12/15)
4.23.1	CRPT357: Develop Long Term Dated Stops Report (324)
4.23.2	CRPT363 Auto Adjudicated JSR Report (324)
4.23.3	CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report (324)
4.23.4	CRPT253/255: Develop Earnings Weekly, Monthly Determinations by Examiner (Merged Weekly/Monthly/Quarterly) (324)
4.23.5	CRPT377AD DUA Activity - Applications Denied (324)
4.23.6	CRPT355 Automated Wage Update Workflow Report (324)
4.24	Release - 325 - 01/21/2024 (CodeCutOff-01/19)
4.24.1	CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner (325)
4.24.2	CRPT354 Automated Wage Update Detail Report (325)
4.24.3	CRPT283 Blocked Claims Issue (325)
4.24.4	CRPT334 Wage_Determination_Issues Report (325)
4.24.5	CRPT441 1099G Summary Report (325)
4.24.6	CRPT361 Earning Overpayments by Overpaid Weeks Report (325)
4.25	Release - 326 - 02/18/2024 (CodeCutOff - 02/16)
4.25.1	CRPT02 Analysis of Overpayments by Cause (326)
4.25.2	CRPT117 Waiver Status Report (326)
4.25.3	CRPT13 Collection Agency Reconciliation Report (326)
4.25.4	CRPT359/360: Appeals Reversals Weekly Report (Merged Weekly/Monthly) (326)
4.25.5	CRPT116L LWA Voucher Payment Summary (326)
4.25.6	CRPT116F FPUC Voucher Payment Summary (326)
4.25.7	CRPT11 Claimant Repayment Summary (326)
4.26	Ready for Release - 327 - 03/17/2024 (CodeCutOff - 03/15)
4.26.1	CRPT33 Debtor Credit Balance Refund Report (327)
4.26.2	CRPT144 Released Special Voucher Payments (327)
4.26.3	CRPT139 Repayment Adjustment Detail Report (327)
4.26.4	CRPT91 Refund Status Report (327)
4.27	Ready for Release - 328 - 04/14/2024 (CodeCutOff - 04/12)

WBS	Task Name
4.28	Ready for Release - 329 - 05/12/2024) (CodeCutOff - 05/11)
4.29	Ready for Release - 330 - 06/09/2024) (CodeCutOff - 06/07)
4.3	Ready for Release - 331 - 06/30/2024) (CodeCutOff - 06/28)
4.31	UAT
4.32	In Development/Unit Testing
4.32.1	CRPT245 UCFE-UCX Pending Monetary After 13 Days (327)
4.32.2	CRPT247 FL CWC Reject (327)
4.32.3	CRPT1099g 1099G Detail Screen (327)
4.32.4	CRPT251 UCX/UCFE Timely Payment Report (327)
4.32.5	CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue (328)
4.32.6	CRPT377 DUA Activity - Applications Denied (328)
4.32.7	CRPT373 DUA Applications Report (328)
4.32.8	CRPT248 Out of State (Shell) Claims Reject (328)
4.32.9	CRPT249 UCFE AND UCX Reject (328)
4.32.10	CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims (328)
4.32.11	CRPT259 Florida Paying CWC (329)
4.33	PBI Refinement (Product Backlog)
4.33.1	CRPT05 Benefit Payment Control Cash Offset Activity (329)
4.33.2	CRPT113 UC Liabilities Report (329)
4.33.3	CRPT161/161W Daily REA Productivity Report (329)
4.33.4	CRPT193/193F Overpayments Held for Review-(Operations) (329)
4.33.5	CRPT194 STC Plan Review Report (329)
4.33.6	CRPT196 RETRO HOLD REPORT (330)
4.33.7	CRPT197 FALL THROUGH OVERPAYMENTS (Operations) (330)
4.33.8	CRPT260 INBOUND IB6 Bill (330)
4.33.9	CRPT261 BPC Appeals Hearing (330)
4.33.10	CRPT262 Waiting Week Exemption Report (330)
4.33.11	CRPT274/274F Wage Audit Overpayment Repayment (330)
4.33.12	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims (331)

WBS	Task Name
4.33.13	CRPT29 Daily Deposit Report (331)
4.33.14	CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) (331)
4.33.15	CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged)(331)
4.33.16	CRPT389F Supplemental Overpayment Report (331)
4.33.17	CRPT392 Certification Amounts and Counts (331)
4.33.18	CRPT400 Effective Date Change (CWC-FE-X Claims)
4.33.19	CRPT450/451 1099G All Generated CSV
4.33.20	CRPT462/462W Daily SAVE Productivity Report
4.33.21	CRPT99 Summary Detail Tax Withholding
4.34	In Requirements Phase
4.34.1	CRPT152 Pre-Certification Details Report
4.34.2	CRPT192 Payments Held for Review (HDEX)
4.34.3	CRPT195 Manual Payments Detail
4.34.4	CRPT228 Time Lapse Statistics (RAAC)
4.34.5	CRPT232 Agency New Hire Report
4.34.6	CRPT233 On-demand EFT Deposit Report
4.34.7	CRPT240 Check for New UI Eligibility
4.34.8	CRPT243 Reimbursable Employer Monthly Charge
4.34.9	CRPT246 BAM Open Cases (332)
4.34.10	CRPT250 New Hire Late ADJ Fact-Finding Notifications
4.34.11	CRPT257 Failed Document Status After Nightly Batch
4.34.12	CRPT263 Unidentified Employer Protest Documents Queue
4.34.13	CRPT264 Process Response to Notice of Claim Queue
4.34.14	CRPT266 BTQ Universe (332)
4.34.15	CRPT269 FL DEBC Payments
4.34.16	CRPT271 Disposed Appeals and Overpayment
5	Not Needed
5.1	CRPT01 Agent Residence Summary Report (Not needed)
5.2	CRPT09 Claim Method (No Touch) Percentages (Not needed)

WBS	Task Name
5.3	CRPT104 Total Unresolved Issues (Not needed)
5.4	CRPT107 TRA Recipient Report (Not needed)
5.5	CRPT110 Twelve Month Old Cancellation Claims and Benefits - UBXFIND2605
5.5.1	Validation of Business Need Completed
5.5.2	Requirements Gathering, Documenting and Approval
5.6	CRPT118 Weekly Internet Claims Statistics (Not needed)
5.7	CRPT132 Weekly DARIS Report (Not needed)
5.8	CRPT451 1099G Status Counts Per Output Type CSV
5.8.1	Validation of Business Need Completed
5.9	CRPT142 Monthly Hearing Results (Not needed)
5.1	CRPT143 Initial Skills Review Statistics Report (Not needed)
5.11	CRPT159 ETA 207 - Overpayment Detection and Recovery Activities (MC) (Not needed)
5.12	CRPT161W Weekly REA Productivity Report (32X)
5.12.1	Validation of Business Need Completed
5.12.2	Requirements Gathering, Documenting and Approval
5.12.3	Approved Requirements Refined to Product Backlog Items
5.13	CRPT163 ETA 227 - Overpayment Detection and Recovery Activities (MC) (Not needed)
5.14	CRPT187 LexisNexis Usage Metrics Report (Not needed)
5.15	CRPT189 EUC-RES - No Show Report (Not needed)
5.16	CRPT190 EUC-RES - Completed Services Report (Not needed)
5.17	CRPT193F Supplemental Overpayments Held for Review (Not needed)
5.18	CRPT201 Full Succession Report (Not needed)
5.19	CRPT202 Leasing Companies Added to Claims Report (Not needed)
5.2	CRPT215 Dispositions Favorable to Appellant (Not needed)
5.21	CRPT218 Hearing Held Timely, Prepared Untimely (Not needed)
5.22	CRPT220 Hearing Officer Scheduled Hearing Contacts (Not needed)
5.23	CRPT221 Hearing Times by Issue (Not needed)
5.24	CRPT222 Number and Reason for Special Deputy Appeals (Not needed)
5.25	CRPT223 Percentage of Appeals Filed by Method (Not needed)

WBS	Task Name
5.26	CRPT225 Special Deputy Monthly Report (Not needed)
5.27	CRPT230 BTQ Case History Report (Not needed)
5.28	CRPT231 BAM Case History Report (Not needed)
5.29	CRPT238 COLA Pension Report (Not needed)
5.3	CRPT241 Overpayment Aging Report (Not needed)
5.31	CRPT241F Supplemental Overpayment Aging Report (Not needed)
5.32	CRPT242 Manually Trigger Retroactive Payment (Not Needed)
5.33	CRPT244 DUA Terminated
5.34	CRPT255 Earnings Monthly Determinations by Examiner (Merged with 253/256) Not needed
5.35	CRPT256 Earnings Monthly Redeterminations by Examiner (Merged with 253/255) Not needed
5.36	CRPT265D Protest Benefit Charges Workflow Queue Daily
5.36.1	Validation of Business Need Completed
5.37	CRPT265M Protest Benefit Charges Workflow Queue Monthly
5.37.1	Validation of Business Need Completed
5.38	CRPT265W Protest Benefit Charges Workflow Queue Weekly
5.38.1	Validation of Business Need Completed
5.39	CRPT268 Adjudicator Productivity Summary Report (Not needed)
5.4	CRPT270F Supplemental Filed Appeals and Overpayment (Not needed)
5.41	CRPT272 DUA Irma Payment Detail By Claimant And Week
5.41.1	Validation of Business Need Completed
5.42	CRPT273 DUA Irma Payment Totals By Claimant And Week
5.42.1	Validation of Business Need Completed
5.43	CRPT30 Daily REA Nonmon Report (Not needed)
5.44	CRPT300 Determination Status - 9:00 AM (Not needed)
5.45	CRPT301 Determination Status - 3:30 PM (Not needed)
5.46	CRPT301S Determination Status Report
5.46.1	Validation of Business Need Completed
5.47	CRPT307 Over - Under Counts Report - (Not needed)
5.47.1	Validation of Business Need Completed

WBS	Task Name
5.48	CRPT319F Supplemental Waived Overpayments (Not needed)
5.49	CRPT320 REA Non-monetary Issues Report (Not needed)
5.5	CRPT322 New Hire Fictitious Employers - DOR (Not Needed)
5.51	CRPT325 Reconciliation Daily
5.51.1	Validation of Business Need Completed
5.52	CRPT325W Reconciliation Weekly
5.52.1	Validation of Business Need Completed
5.53	CRPT326 Initial and Continued Claims by County of Residence (Monthly) (Merged into 324)
5.53.1	Validation of Business Need Completed
5.54	CRPT332 Pending LexisNexis Auth Issues (Not needed)
5.55	CRPT336 ETA-207 Report (Not needed)
5.56	CRPT338 Overlapping Eligible Claims Report (Not needed)
5.57	CRPT342 SIDES Separation Response Report (Not needed)
5.58	CRPT346 Aging Report-Issue Details Continued Claims Report (Not needed)
5.59	CRPT351 UCFE Claim Register Report (Not needed)
5.6	CRPT352 UCX Claim Register Report (Not needed)
5.61	CRPT353 Aging Report-Issue Details-NonInitial Continued Claims Report (Not needed)
5.62	CRPT356 FCCC Daily In Out Report (Not needed)
5.63	CRPT35D Deposit Detail Daily Report (Merged with 35)
5.63.1	Validation of Business Need Completed
5.64	CRPT360 Appeals Reversals Monthly Report (Merged with 359 Weekly/Monthly) (Not Needed)
5.65	CRPT361F Supplemental Earning Overpayments by Overpaid Weeks Report (Not needed)
5.66	CRPT362 Aging_Report-Issue_Details-InitialClaims (Not needed)
5.67	CRPT377PW DUA Activity - Paid Week (Not needed)
5.68	CRPT388 DUA_LA_Call_Center_counts (Not needed)
5.69	CRPT399 ETA 207 Validation Report (Not needed)
5.7	CRPT40MD DUA Financial Monthly - Straight DUA
5.70.1	Validation of Business Need Completed
5.71	CRPT40MR DUA Financial Monthly - Related DUA

WBS	Task Name
5.71.1	Validation of Business Need Completed
5.72	CRPT40QD DUA Financial Quarterly - Straight DUA
5.72.1	Validation of Business Need Completed
5.73	CRPT40QR DUA Financial Quarterly - Related DUA
5.73.1	Validation of Business Need Completed
5.74	CRPT40WR DUA Financial Weekly - Related DUA (336)
5.74.1	Validation of Business Need Completed
5.75	CRPT426 ALM99228_RFI_First Payments_Prod (Not needed)
5.76	CRPT427 RFI_ALM99322_Pega_Claims_Count (Not needed)
5.77	CRPT434 TFS94377_firre_rfi (Not needed)
5.78	CRPT462W Weekly SAVE Productivity Report
5.78.1	Validation of Business Need Completed
5.79	CRPT874 ALM109874_RFI_ETA539 (Not needed)
5.8	CRPT95 SSA UIQ Statistical Report (Not needed)
5.81	CRPT101 TAA TRA Waivers to Exhaust in 14 days
5.81.1	Validation of Business Need Completed
5.81.2	Requirements Gathering, Documenting and Approval
5.82	CRPT108 TRA Waivers Issued and Revoked Report
5.82.1	Validation of Business Need Completed
5.83	CRPT193F Overpayments Held for Review (Not Needed)
5.83.1	Validation of Business Need Completed
5.83.2	Requirements Gathering, Documenting and Approval
5.83.3	Approved Requirements Refined to Product Backlog Items
5.84	Not Needed and Not in Smart Sheet
5.84.1	CRPT150 TRA-Trade Readjustment Act Appeals Report (Merged with 229)
5.84.2	CRPT278 Average Processing Time for Appeals Cases EXCEL (Merged with 211)
5.84.3	CRPT406F Supplemental Annual Overpayments Established by Month EXCEL (Merged with 406)
5.84.4	CRPT79 Overpayments Established for the Month EXCEL (Merged with 406 and 406F)
5.84.5	CRPT380 DUA Withdrawn Claims and Overpayments Report EXCEL (Merged with 40XX)

WBS	Task Name
5.84.6	CRPT381 DUA Overpayments Repayments Report EXCEL (Merged with 40XX)
5.84.7	CRPT382 Adjudicator Data Determination Daily EXCEL (Merged with 385)
5.84.8	CRPT383 Adjudicator Void Daily EXCEL (Merged with 386)
5.84.9	CRPT384 Adjudicator Auto Adjudication Daily EXCEL (Merged with 387)
5.84.10	CRPT40 DUA Financial Report. (Merged with 40XX DUA reports)
5.84.11	CRPT40WD DUA Financial Weekly - Straight DUA EXCEL (Merged with 40XX DUA Reports)
5.84.12	CRPT389 DUA Overpayment Report EXCEL (Merged with 40XX DUA Reports)
5.84.13	CRPT421 Claim Counts by FIRRE State Weekly Report (Merged with 420)
5.84.14	CRPT422 Claim Counts by FIRRE State Daily Report (Merged with 420)
5.84.15	CRPT50 Initial Claims by County of Residence (Merged with 324)
5.85	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV
5.85.1	Validation of Business Need Completed
5.85.2	Requirements Gathering, Documenting and Approval

III. Resource Loaded Project Schedule

The RAD Data Warehouse Team are assigned to every report development task. In accordance with their product development best practices, team members are not limited to performing specific roles. This allows for anyone on the team to “fill in” where needed so that risk of not achieving a commitment is eliminated.

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
0	Reports-03.01.2024	68%	273 days	Wed 7/5/23	Thu 7/18/24	
1	Project Management	76%	258 days	Wed 7/5/23	Fri 6/28/24	
1.1	Discovery/Initiation	100%	107 days	Wed 7/5/23	Thu 11/30/23	
1.1.1	4.1 Project Charter Creation	100%	104 days	Wed 7/5/23	Mon 11/27/23	
1.1.2	13.1 Identification of Stakeholders	100%	3 days	Tue 11/28/23	Thu 11/30/23	
1.2	Planning	95%	166 days	Tue 8/29/23	Tue 4/16/24	
1.2.1	4.2 Develop Project Management Plan	46%	58 days	Fri 1/26/24	Tue 4/16/24	
1.2.2	5.1 Plan Scope Management	100%	10 days	Tue 11/14/23	Mon 11/27/23	6FF
1.2.3	5.2 Collect Project Requirements	100%	10 days	Tue 11/14/23	Mon 11/27/23	6FF

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
1.2.4	5.3 Define Scope	100%	65 days	Tue 8/29/23	Mon 11/27/23	6FF
1.2.5	5.4 Create WBS	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.6	6.1 Plan Schedule Management	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.7	6.2 Define Activities	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.8	6.3 Sequence Activities	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.9	6.4 Estimate Activity Durations	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.10	6.5 Develop Schedule	100%	61 days	Mon 9/4/23	Mon 11/27/23	6FF
1.2.11	8.1 Plan Quality Management	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.12	9.1 Plan Resource Management	100%	60 days	Tue 9/5/23	Mon 11/27/23	6FF
1.2.13	9.2 Estimate Activity Resources	100%	10 days	Tue 11/14/23	Mon 11/27/23	6FF
1.2.14	10.1 Plan Communications Management	100%	10 days	Tue 11/14/23	Mon 11/27/23	6FF
1.2.15	13.2 Plan Stakeholder Engagement	100%	10 days	Tue 11/14/23	Mon 11/27/23	6FF
1.3	Executing	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.3.1	4.3 Track Project Work	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.3.2	10.2 Manage Communications	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.3.3	13.3 Manage Stakeholder Engagement	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4	Monitor & Control	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.1	4.5 Monitor & Control Project Work	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.2	5.5 Validate Scope	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.3	5.6 Control Scope	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.4	6.6 Control Schedule	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.5	10.3 Monitor Communications	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.6	11.7 Monitor Risks	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.4.7	13.4 Manage Stakeholder Engagement	70%	250 days	Wed 7/5/23	Tue 6/18/24	
1.5	Closing	0%	8 days	Wed 6/19/24	Fri 6/28/24	
1.5.1	4.7 Close Project or Phase	0%	8 days	Wed 6/19/24	Fri 6/28/24	41
2	Benefits Identification and Measures	90%	250 days	Wed 7/5/23	Tue 6/18/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
2.1	Evaluate Sources of Crystal Reports and Related Batches	70%	250 days	Wed 7/5/23	Tue 6/18/24	
2.2	Collect Infrastructure Related Crystal Report budget costs	100%	250 days	Wed 7/5/23	Tue 6/18/24	
2.3	Identify Measures for Maximizing Work Not Done	100%	120 days	Wed 7/5/23	Tue 12/19/23	
2.3.1	Calculate Average Pipeline Length - Start of Requirements to Push to Prod	100%	60 days	Wed 7/5/23	Tue 9/26/23	
2.3.2	Calculate Maximized Work Not Done (Formula to use)	100%	120 days	Wed 7/5/23	Tue 12/19/23	
2.4	Collect Snowflake Costs for Crystal Reports (if possible)	100%	20 days	Mon 2/5/24	Fri 3/1/24	48FS+93 days
2.5	Create/Maintain Crystal to Snowflake Comparison Report	100%	20 days	Wed 12/20/23	Tue 1/16/24	50
3	Reports Process Operational Support	100%	5 days	Mon 10/9/23	Fri 10/13/23	
3.1	Integrate RAD Reporting Requests into Service Now	100%	5 days	Mon 10/9/23	Fri 10/13/23	10
3.2	Create/Discover Process for Reports Access	100%	5 days	Mon 10/9/23	Fri 10/13/23	53SS
4	Product Delivery	58%	273 days?	Wed 7/5/23	Thu 7/18/24	
4.1	Operational Project Transition Completed	100%	60 days	Wed 7/5/23	Tue 9/26/23	
4.2	CRPT07 Child Support Options	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.3	CRPT111 UC Bank Payment Processing Exceptions-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.4	CRPT114 UC Payment Summary-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.5	CRPT12 Claims Filed (By Process Date)-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.6	CRPT151 Weely Hearing Results-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.7	CRPT210 Appeals Case Decisions-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.8	CRPT212 Case Aging Report-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.9	CRPT214 Disposition Corrected Decisions-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.1	CRPT216 Docketed Disposed Pending with Time Lapse-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.11	CRPT219 Hearing Officer Postponements-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.12	CRPT224 Referee Productivity Report-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.13	CRPT226 Statewide Docketed Disposed Pending Report-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.14	CRPT229 TRA - Trade Readjustment Act Appeals Report-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.15	CRPT275 DUA Appeals Disposed-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.16	CRPT28 Daily Claims Entry Totals-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.17	CRPT306 Claimants with Out of State Benefits-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.18	CRPT358 STC Claims with Pending ADJ Issues Weekly-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.19	CRPT369 First Pay Due Report-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.2	CRPT391 DUA Appeals Filed-PROD	100%	0 days	Wed 7/5/23	Wed 7/5/23	
4.21	Release 322 - 10/15/2023	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.21.1	CRPT213: Develop Deputy Clerk Productivity Report (322)	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.21.2	CRPT280: Develop Appeals Weekly Time Lapse Report (322)	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.21.3	CRPT236: Develop IP Address Search Report (322)	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.21.4	CRPT281: Develop Wage Audit Predeterminations Report (322)	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.21.5	CRPT188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly (322)	100%	16 days	Mon 9/25/23	Mon 10/16/23	
4.22	Release - 323 - 11/19/2023	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.1	CRPT112: Develop UC Benefits Payment Register Report in Tableau (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.2	CRPT115: Develop Untimely First Payment Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.22.3	CRPT211/278: Develop Average Processing Time for Appeals Cases Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.4	CRPT217: Develop Docketing Productivity Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.5	CRPT227: Develop Time Lapse Percentage (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.6	CRPT237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.7	CRPT26: Develop Cumulative Totals Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.8	CRPT31: Develop Daily, Monthly SSA Statistics Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.22.9	CRPT371 CanceledNonMonPending (323)	100%	16 days	Mon 10/30/23	Mon 11/20/23	
4.22.10	CRPT95/98: Develop STC Summary Report (323)	100%	41 days	Mon 9/25/23	Mon 11/20/23	
4.23	Release - 324 - 12/17/2023 (CodeCutOff-12/15)	100%	61 days	Mon 9/25/23	Mon 12/18/23	
4.23.1	CRPT357: Develop Long Term Dated Stops Report (324)	100%	36 days	Mon 10/30/23	Mon 12/18/23	
4.23.2	CRPT363 Auto Adjudicated JSR Report (324)	100%	36 days	Mon 10/30/23	Mon 12/18/23	
4.23.3	CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report (324)	100%	36 days	Mon 10/30/23	Mon 12/18/23	
4.23.4	CRPT253/255: Develop Earnings Weekly, Monthly Determinations by Examiner (Merged Weekly/Monthly/Quarterly) (324)	100%	61 days	Mon 9/25/23	Mon 12/18/23	
4.23.5	CRPT377AD DUA Activity - Applications Denied (324)	100%	37 days	Fri 10/27/23	Mon 12/18/23	
4.23.6	CRPT355 Automated Wage Update Workflow Report (324)	100%	36 days	Mon 10/30/23	Mon 12/18/23	
4.24	Release - 325 - 01/21/2024 (CodeCutOff-01/19)	100%	86 days	Mon 9/25/23	Mon 1/22/24	
4.24.1	CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner (325)	100%	84 days	Wed 9/27/23	Mon 1/22/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.24.2	CRPT354 Automated Wage Update Detail Report (325)	100%	61 days	Mon 10/30/23	Mon 1/22/24	
4.24.3	CRPT283 Blocked Claims Issue (325)	100%	61 days	Mon 10/30/23	Mon 1/22/24	
4.24.4	CRPT334 Wage_Determination_Issues Report (325)	100%	61 days	Mon 10/30/23	Mon 1/22/24	
4.24.5	CRPT441 1099G Summary Report (325)	100%	86 days	Mon 9/25/23	Mon 1/22/24	
4.24.6	CRPT361 Earning Overpayments by Overpaid Weeks Report (325)	100%	61 days	Mon 10/30/23	Mon 1/22/24	
4.25	Release - 326 - 02/18/2024 (CodeCutOff - 02/16)	100%	127 days	Fri 8/25/23	Mon 2/19/24	
4.25.1	CRPT02 Analysis of Overpayments by Cause (326)	100%	127 days	Fri 8/25/23	Mon 2/19/24	
4.25.2	CRPT117 Waiver Status Report (326)	100%	81 days	Mon 10/30/23	Mon 2/19/24	
4.25.3	CRPT13 Collection Agency Reconciliation Report (326)	100%	86 days	Mon 10/23/23	Mon 2/19/24	
4.25.4	CRPT359/360: Appeals Reversals Weekly Report (Merged Weekly/Monthly) (326)	100%	81 days	Mon 10/30/23	Mon 2/19/24	
4.25.5	CRPT116L LWA Voucher Payment Summary (326)	100%	81 days	Mon 10/30/23	Mon 2/19/24	
4.25.6	CRPT116F FPUC Voucher Payment Summary (326)	100%	81 days	Mon 10/30/23	Mon 2/19/24	
4.25.7	CRPT11 Claimant Repayment Summary (326)	100%	81 days	Mon 10/30/23	Mon 2/19/24	
4.26	Ready for Release - 327 - 03/17/2024 (CodeCutOff - 03/15)	99%	101 days	Mon 10/30/23	Mon 3/18/24	
4.26.1	CRPT33 Debtor Credit Balance Refund Report (327)	99%	100 days	Tue 10/31/23	Mon 3/18/24	
4.26.2	CRPT144 Released Special Voucher Payments (327)	99%	101 days	Mon 10/30/23	Mon 3/18/24	
4.26.3	CRPT139 Repayment Adjustment Detail Report (327)	99%	101 days	Mon 10/30/23	Mon 3/18/24	
4.26.4	CRPT91 Refund Status Report (327)	99%	100 days	Tue 10/31/23	Mon 3/18/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.27	Ready for Release - 328 - 04/14/2024) (CodeCutOff - 04/12)	0%	0 days	Mon 4/15/24	Mon 4/15/24	
4.28	Ready for Release - 329 - 05/12/2024) (CodeCutOff - 05/11)	0%	0 days	Mon 5/13/24	Mon 5/13/24	
4.29	Ready for Release - 330 - 06/09/2024) (CodeCutOff - 06/07)	0%	0 days	Mon 6/10/24	Mon 6/10/24	
4.3	Ready for Release - 331 - 06/30/2024) (CodeCutOff - 06/28)	0%	0 days	Sun 6/30/24	Sun 6/30/24	
4.31	UAT	100%	0 days	Fri 8/25/23	Fri 8/25/23	
4.32	In Development/Unit Testing	43%	142 days	Fri 10/27/23	Mon 5/13/24	
4.32.1	CRPT245 UCFE-UCX Pending Monetary After 13 Days (327)	38%	43 days	Thu 1/18/24	Mon 3/18/24	
4.32.2	CRPT247 FL CWC Reject (327)	39%	43 days	Thu 1/18/24	Mon 3/18/24	
4.32.3	CRPT1099g 1099G Detail Screen (327)	56%	46 days	Mon 1/15/24	Mon 3/18/24	
4.32.4	CRPT251 UCX/UCFE Timely Payment Report (327)	44%	43 days	Thu 1/18/24	Mon 3/18/24	
4.32.5	CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue (328)	47%	121 days	Mon 10/30/23	Mon 4/15/24	
4.32.6	CRPT377 DUA Activity - Applications Denied (328)	58%	121 days	Mon 10/30/23	Mon 4/15/24	
4.32.7	CRPT373 DUA Applications Report (328)	62%	122 days	Fri 10/27/23	Mon 4/15/24	
4.32.8	CRPT248 Out of State (Shell) Claims Reject (328)	22%	63 days	Thu 1/18/24	Mon 4/15/24	
4.32.9	CRPT249 UCFE AND UCX Reject (328)	24%	63 days	Thu 1/18/24	Mon 4/15/24	
4.32.10	CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims (328)	21%	63 days	Thu 1/18/24	Mon 4/15/24	
4.32.11	CRPT259 Florida Paying CWC (329)	18%	83 days	Thu 1/18/24	Mon 5/13/24	
4.33	PBI Refinement (Product Backlog)	28%	190 days	Mon 10/30/23	Thu 7/18/24	
4.33.1	CRPT05 Benefit Payment Control Cash Offset Activity (329)	42%	141 days	Mon 10/30/23	Mon 5/13/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.33.2	CRPT113 UC Liabilities Report (329)	36%	141 days	Mon 10/30/23	Mon 5/13/24	
4.33.3	CRPT161/161W Daily REA Productivity Report (329)	29%	141 days	Mon 10/30/23	Mon 5/13/24	
4.33.4	CRPT193/193F Overpayments Held for Review-(Operations) (329)	15%	80 days	Tue 1/23/24	Mon 5/13/24	
4.33.5	CRPT194 STC Plan Review Report (329)	19%	131 days	Mon 11/13/23	Mon 5/13/24	
4.33.6	CRPT196 RETRO HOLD REPORT (330)	17%	100 days	Tue 1/23/24	Mon 6/10/24	
4.33.7	CRPT197 FALL THROUGH OVERPAYMENTS (Operations) (330)	15%	132 days	Fri 12/8/23	Mon 6/10/24	
4.33.8	CRPT260 INBOUND IB6 Bill (330)	18%	103 days	Thu 1/18/24	Mon 6/10/24	
4.33.9	CRPT261 BPC Appeals Hearing (330)	13%	100 days	Tue 1/23/24	Mon 6/10/24	
4.33.10	CRPT262 Waiting Week Exemption Report (330)	37%	151 days	Mon 11/13/23	Mon 6/10/24	
4.33.11	CRPT274/274F Wage Audit Overpayment Repayment (330)	15%	96 days	Mon 1/29/24	Mon 6/10/24	
4.33.12	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims (331)	35%	166 days	Mon 11/13/23	Sun 6/30/24	
4.33.13	CRPT29 Daily Deposit Report (331)	40%	175 days	Tue 10/31/23	Sun 6/30/24	
4.33.14	CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) (331)	38%	166 days	Mon 11/13/23	Sun 6/30/24	
4.33.15	CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged)(331)	46%	175 days	Tue 10/31/23	Sun 6/30/24	
4.33.16	CRPT389F Supplemental Overpayment Report (331)	15%	111 days	Mon 1/29/24	Sun 6/30/24	
4.33.17	CRPT392 Certification Amounts and Counts (331)	26%	166 days	Mon 11/13/23	Sun 6/30/24	
4.33.18	CRPT400 Effective Date Change (CWC-FE-X Claims)	21%	166 days	Mon 11/13/23	Sun 6/30/24	
4.33.19	CRPT450/451 1099G All Generated CSV	27%	125 days	Mon 1/29/24	Thu 7/18/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
4.33.20	CRPT462/462W Daily SAVE Productivity Report	35%	166 days	Mon 11/13/23	Sun 6/30/24	
4.33.21	CRPT99 Summary Detail Tax Withholding	38%	176 days	Mon 10/30/23	Sun 6/30/24	
4.34	In Requirements Phase	18%	125 days	Fri 1/26/24	Wed 7/17/24	
4.34.1	CRPT152 Pre-Certification Details Report	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.2	CRPT192 Payments Held for Review (HDEX)	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.3	CRPT195 Manual Payments Detail	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.4	CRPT228 Time Lapse Statistics (RAAC)	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.5	CRPT232 Agency New Hire Report	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.6	CRPT233 On-demand EFT Deposit Report	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.7	CRPT240 Check for New UI Eligibility	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.8	CRPT243 Reimbursable Employer Monthly Charge	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.9	CRPT246 BAM Open Cases (332)	26%	124 days?	Mon 1/29/24	Wed 7/17/24	
4.34.10	CRPT250 New Hire Late ADJ Fact-Finding Notifications	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.11	CRPT257 Failed Document Status After Nightly Batch	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.12	CRPT263 Unidentified Employer Protest Documents Queue	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.13	CRPT264 Process Response to Notice of Claim Queue	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.14	CRPT266 BTQ Universe (332)	24%	112 days	Fri 1/26/24	Sun 6/30/24	
4.34.15	CRPT269 FL DEBC Payments	9%	11 days	Fri 3/1/24	Fri 3/15/24	
4.34.16	CRPT271 Disposed Appeals and Overpayment	9%	11 days	Fri 3/1/24	Fri 3/15/24	
5	Not Needed	99%	257 days	Wed 7/5/23	Fri 6/28/24	
5.1	CRPT01 Agent Residence Summary Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.2	CRPT09 Claim Method (No Touch) Percentages (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.3	CRPT104 Total Unresolved Issues (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.4	CRPT107 TRA Recipient Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.5	CRPT110 Twelve Month Old Cancellation Claims and Benefits - UBXFIND2605	100%	49 days	Mon 10/30/23	Thu 1/4/24	
5.5.1	Validation of Business Need Completed	100%	1 day	Mon 10/30/23	Mon 10/30/23	148FS-1 day
5.5.2	Requirements Gathering, Documenting and Approval	100%	29 days	Mon 11/27/23	Thu 1/4/24	589FS+19 days
5.6	CRPT118 Weekly Internet Claims Statistics (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.7	CRPT132 Weekly DARIS Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.8	CRPT451 1099G Status Counts Per Output Type CSV	100%	1 day	Mon 1/29/24	Mon 1/29/24	
5.8.1	Validation of Business Need Completed	100%	1 day	Mon 1/29/24	Mon 1/29/24	570
5.9	CRPT142 Monthly Hearing Results (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.1	CRPT143 Initial Skills Review Statistics Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.11	CRPT159 ETA 207 - Overpayment Detection and Recovery Activities (MC) (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.12	CRPT161W Weekly REA Productivity Report (32X)	100%	15 days	Mon 10/30/23	Fri 11/17/23	
5.12.1	Validation of Business Need Completed	100%	1 day	Mon 10/30/23	Mon 10/30/23	148FS-1 day
5.12.2	Requirements Gathering, Documenting and Approval	100%	1 day	Tue 10/31/23	Tue 10/31/23	599
5.12.3	Approved Requirements Refined to Product Backlog Items	100%	13 days	Wed 11/1/23	Fri 11/17/23	600
5.13	CRPT163 ETA 227 - Overpayment Detection and Recovery Activities (MC) (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.14	CRPT187 LexisNexis Usage Metrics Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.15	CRPT189 EUC-RES - No Show Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.16	CRPT190 EUC-RES - Completed Services Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.17	CRPT193F Supplemental Overpayments Held for Review (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.18	CRPT201 Full Succession Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.19	CRPT202 Leasing Companies Added to Claims Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.2	CRPT215 Dispositions Favorable to Appellant (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.21	CRPT218 Hearing Held Timely, Prepared Untimely (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.22	CRPT220 Hearing Officer Scheduled Hearing Contacts (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.23	CRPT221 Hearing Times by Issue (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.24	CRPT222 Number and Reason for Special Deputy Appeals (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.25	CRPT223 Percentage of Appeals Filed by Method (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.26	CRPT225 Special Deputy Monthly Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.27	CRPT230 BTQ Case History Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.28	CRPT231 BAM Case History Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.29	CRPT238 COLA Pension Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.3	CRPT241 Overpayment Aging Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.31	CRPT241F Supplemental Overpayment Aging Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.32	CRPT242 Manually Trigger Retroactive Payment (Not Needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.33	CRPT244 DUA Terminated	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.34	CRPT255 Earnings Monthly Determinations by Examiner (Merged with 253/256) Not needed	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.35	CRPT256 Earnings Monthly Redeterminations by Examiner (Merged with 253/255) Not needed	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.36	CRPT265D Protest Benefit Charges Workflow Queue Daily	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.36.1	Validation of Business Need Completed	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.37	CRPT265M Protest Benefit Charges Workflow Queue Monthly	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.37.1	Validation of Business Need Completed	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.38	CRPT265W Protest Benefit Charges Workflow Queue Weekly	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.38.1	Validation of Business Need Completed	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.39	CRPT268 Adjudicator Productivity Summary Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.4	CRPT270F Supplemental Filed Appeals and Overpayment (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.41	CRPT272 DUA Irma Payment Detail By Claimant And Week	100%	1 day	Mon 11/13/23	Mon 11/13/23	
5.41.1	Validation of Business Need Completed	100%	1 day	Mon 11/13/23	Mon 11/13/23	440SS
5.42	CRPT273 DUA Irma Payment Totals By Claimant And Week	100%	1 day	Mon 11/13/23	Mon 11/13/23	
5.42.1	Validation of Business Need Completed	100%	1 day	Mon 11/13/23	Mon 11/13/23	634SS
5.43	CRPT30 Daily REA Nonmon Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.44	CRPT300 Determination Status - 9:00 AM (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.45	CRPT301 Determination Status - 3:30 PM (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.46	CRPT301S Determination Status Report	100%	1 day	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.46.1	Validation of Business Need Completed	100%	1 day	Wed 7/5/23	Wed 7/5/23	
5.47	CRPT307 Over - Under Counts Report - (Not needed)	100%	1 day	Tue 10/31/23	Tue 10/31/23	
5.47.1	Validation of Business Need Completed	100%	1 day	Tue 10/31/23	Tue 10/31/23	461SS
5.48	CRPT319F Supplemental Waived Overpayments (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.49	CRPT320 REA Non-monetary Issues Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.5	CRPT322 New Hire Fictitious Employers - DOR (Not Needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.51	CRPT325 Reconciliation Daily	100%	1 day	Thu 11/16/23	Thu 11/16/23	
5.51.1	Validation of Business Need Completed	100%	1 day	Thu 11/16/23	Thu 11/16/23	
5.52	CRPT325W Reconciliation Weekly	100%	1 day	Thu 11/16/23	Thu 11/16/23	
5.52.1	Validation of Business Need Completed	100%	1 day	Thu 11/16/23	Thu 11/16/23	648FF
5.53	CRPT326 Initial and Continued Claims by County of Residence (Monthly) (Merged into 324)	100%	1 day	Fri 7/14/23	Fri 7/14/23	
5.53.1	Validation of Business Need Completed	100%	1 day	Fri 7/14/23	Fri 7/14/23	469FF
5.54	CRPT332 Pending LexisNexis Auth Issues (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.55	CRPT336 ETA-207 Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.56	CRPT338 Overlapping Eligible Claims Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.57	CRPT342 SIDES Separation Response Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.58	CRPT346 Aging Report-Issue Details Continued Claims Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.59	CRPT351 UCFE Claim Register Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.6	CRPT352 UCX Claim Register Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.61	CRPT353 Aging Report-Issue Details-NonInitial Continued Claims Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.62	CRPT356 FCCC Daily In Out Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.63	CRPT35D Deposit Detail Daily Report (Merged with 35)	100%	1 day	Tue 10/31/23	Tue 10/31/23	
5.63.1	Validation of Business Need Completed	100%	1 day	Tue 10/31/23	Tue 10/31/23	477SS
5.64	CRPT360 Appeals Reversals Monthly Report (Merged with 359 Weekly/Monthly) (Not Needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.65	CRPT361F Supplemental Earning Overpayments by Overpaid Weeks Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.66	CRPT362 Aging_Report-Issue_Details-InitialClaims (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.67	CRPT377PW DUA Activity - Paid Week (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.68	CRPT388 DUA_LA_Call_Center_counts (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.69	CRPT399 ETA 207 Validation Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.7	CRPT40MD DUA Financial Monthly - Straight DUA	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.70.1	Validation of Business Need Completed	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.71	CRPT40MR DUA Financial Monthly - Related DUA	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.71.1	Validation of Business Need Completed	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.72	CRPT40QD DUA Financial Quarterly - Straight DUA	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.72.1	Validation of Business Need Completed	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.73	CRPT40QR DUA Financial Quarterly - Related DUA	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.73.1	Validation of Business Need Completed	100%	1 day	Fri 11/17/23	Fri 11/17/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.74	CRPT40WR DUA Financial Weekly - Related DUA (336)	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.74.1	Validation of Business Need Completed	100%	1 day	Fri 11/17/23	Fri 11/17/23	
5.75	CRPT426 ALM99228_RFI_First Payments_Prod (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.76	CRPT427 RFI_ALM99322_Pega_Claims_Count (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.77	CRPT434 TFS94377_firre_rfi (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.78	CRPT462W Weekly SAVE Productivity Report	100%	1 day	Mon 11/13/23	Mon 11/13/23	
5.78.1	Validation of Business Need Completed	100%	1 day	Mon 11/13/23	Mon 11/13/23	512FF
5.79	CRPT874 ALM109874_RFI_ETA539 (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.8	CRPT95 SSA UIQ Statistical Report (Not needed)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.81	CRPT101 TAA TRA Waivers to Exhaust in 14 days	100%	31 days	Mon 10/30/23	Mon 12/11/23	
5.81.1	Validation of Business Need Completed	100%	1 day	Mon 10/30/23	Mon 10/30/23	148FS-1 day
5.81.2	Requirements Gathering, Documenting and Approval	100%	30 days	Tue 10/31/23	Mon 12/11/23	688
5.82	CRPT108 TRA Waivers Issued and Revoked Report	100%	0 days	Mon 12/11/23	Mon 12/11/23	
5.82.1	Validation of Business Need Completed	100%	0 days	Mon 12/11/23	Mon 12/11/23	
5.83	CRPT193F Overpayments Held for Review (Not Needed)	100%	12 days	Fri 12/8/23	Mon 12/25/23	
5.83.1	Validation of Business Need Completed	100%	1 day	Fri 12/8/23	Fri 12/8/23	
5.83.2	Requirements Gathering, Documenting and Approval	100%	10 days	Mon 12/11/23	Fri 12/22/23	693
5.83.3	Approved Requirements Refined to Product Backlog Items	100%	1 day	Mon 12/25/23	Mon 12/25/23	694
5.84	Not Needed and Not in Smart Sheet	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.84.1	CRPT150 TRA-Trade Readjustment Act Appeals Report (Merged with 229)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.2	CRPT278 Average Processing Time for Appeals Cases EXCEL (Merged with 211)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.3	CRPT406F Supplemental Annual Overpayments Established by Month EXCEL (Merged with 406)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.4	CRPT79 Overpayments Established for the Month EXCEL (Merged with 406 an d406F)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.5	CRPT380 DUA Withdrawn Claims and Overpayments Report EXCEL (Merged with 40XX)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.6	CRPT381 DUA Overpayments Repayments Report EXCEL (Merged with 40XX)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.7	CRPT382 Adjudicator Data Determination Daily EXCEL (Merged with 385)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.8	CRPT383 Adjudicator Void Daily EXCEL (Merged with 386)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.9	CRPT384 Adjudicator Auto Adjudication Daily EXCEL (Merged with 387)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.10	CRPT40 DUA Financial Report. (Merged with 40XX DUA reports)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.11	CRPT40WD DUA Financial Weekly - Straight DUA EXCEL (Merged with 40XX DUA Reports)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.12	CRPT389 DUA Overpayment Report EXCEL (Merged with 40XX DUA Reports)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.13	CRPT421 Claim Counts by FIRRE State Weekly Report (Merged with 420)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.14	CRPT422 Claim Counts by FIRRE State Daily Report (Merged with 420)	100%	0 days	Wed 7/5/23	Wed 7/5/23	
5.84.15	CRPT50 Initial Claims by County of Residence (Merged with 324)	100%	0 days	Wed 7/5/23	Wed 7/5/23	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
5.85	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV	100%	10 days	Mon 1/29/24	Fri 2/9/24	
5.85.1	Validation of Business Need Completed	100%	1 day	Mon 1/29/24	Mon 1/29/24	570
5.85.2	Requirements Gathering, Documenting and Approval	100%	9 days	Tue 1/30/24	Fri 2/9/24	713

IV. Project Spending Plan

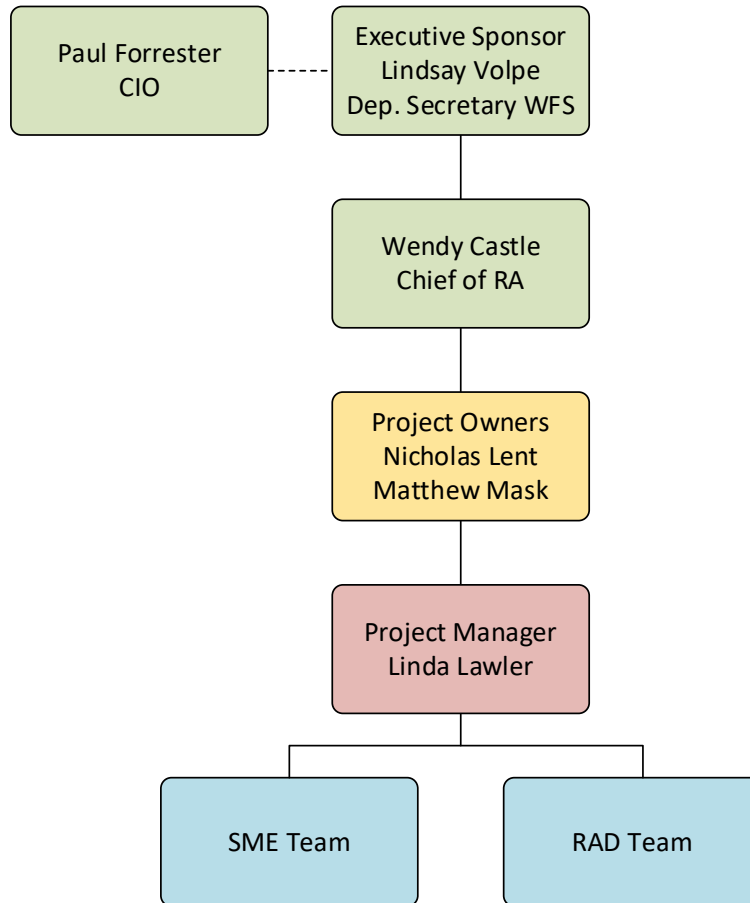
The Reports Project uses existing operational resources, therefore there is no project spend.

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software: 0.00	Software: 0.00
Other OpEx (Vendor Deliverables): 0.00	Other OpEx (Vendor Deliverables): 0.00
Other CapEx: \$0.00	Other CapEx: 0.00

V. Project Organization and Methodology

A. Project Organizational Chart

The organizational chart for the reporting project is shown below.



B. Project Roles and Responsibilities

The table below shows those assigned to roles on this project.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner Work Group	<ul style="list-style-type: none"> • Responsible for the Strategy of the Department IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicolas Lent, Matthew Mask	Project Owners	<ul style="list-style-type: none"> • Contributes subject matter expertise • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables • Reviews and approves RFCs
Linda Lawler	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Evaluates the business need for reports • Contributes subject matter expertise • Prioritizes reports
RAD Team	Data Engineers	<ul style="list-style-type: none"> • Breaks requirements documents into product backlog items • Redesigns reports for the data warehouse

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Converts crystal reports to data warehouse reports

C. Project Management Methodology

The project manager is using the adaptive project management approach noted in version 7 of the Project Management Institute Body of Knowledge (PMBOK). This is appropriate for managing work with a mature, well-established team using product development best practices for incremental delivery.

The Department will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure the Department’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. The Department believes strong project management is critical throughout the life of any successful project.

For this project, the Department’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- The Department’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

The Department believes successful project management hinges on the following:

- Clearly established project goals and requirements based on the products, services, or results to be delivered.
- Ongoing assessment of quality against defined quality measures
- An established cadence of iterative validation of success based on stakeholder approval of deliverables that add value, and the deliverable approach.
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

While this project does not change organizational processes, it does represent a shift for stakeholders where reports are now located in a separate, accessible system.

The Organizational Change Management group is assisting in communicating to staff the new location of reports.

This project intends to improve the delivery, execution, security, or convenience of the Department’s lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Risks are evaluated and handled in weekly RAID meeting for socialization and, if necessary, resolution.

NOTE: This section will align with the Program Management Plan’s RMP and should be updated every month as risks change and are updated. Risks are maintained on a regular basis within Service Now. Weekly RAID review meetings are held with senior leadership present.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.RSK0001490 - Is "Not Needed" really not needed?	Low	Low	Communication to staff of new location of operational reports	Linda Lawler
2.				
3.				

VIII. Capacity Plan

The Reports project uses an existing operational development team responsible for developing reports in a data warehouse.

Team capacity is measured at the start of each 2-week iteration so that the team has the confidence to commit to completing planned deliverables within the iteration. This form of capacity planning accounts for any loss of time due to holidays, team member leave, training days, etc.

The team will plan with a small buffer for unplanned work or new discoveries. If there are none, members of the team will pull work from the existing product backlog to fill the time.

Team supervisors are responsible for overseeing the product team.

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- **Establish Cross-Functional Team:** To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- **Calculate Resource Capacity:** Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- **Determine Resource Requirements:** For each project, look at the scope and what resources are required to do the task for the project.
- **Project Prioritization:** Via a weighted scoring model used for Modernization projects within the program have been prioritized for the purpose of optimizing resources and time.
- **Allocate Resources Based on Project Priority:** Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- **Keep the Lines of Communications Open:** Communicate between executives, project management leaders and stakeholders.
- **Document Known Risks:** Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- **Plan for How to Handle Not enough Capacity:** Understand that obtaining new needed resources takes time and advance planning is imperative.



OPERATIONAL WORK PLAN FOR PRODUCT AND DATA MANAGEMENT

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023 – 2024

QUARTER 4

PREPARED ON 03/06/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The objective of Product & Data Management is to discover and document with Workforce Services all databases, repositories, solutions--all places that include RA data. The deliverables are a data dictionary and data catalog for Reconnect and FIRRE (Fraud System) that conform to Florida Digital Services standards. A list of applications and data stores will also be created and includes data coming from other organizations, and data that is sent to other organizations, and a point of contact for each item.

This information is considered a building block for future projects that include archiving & purging, data governance and sharing of information across state agencies.

A. Scope Statement

The scope and purpose of the Product & Data Management Project is to provide transparency for where RA data resides and to identify sources of RA data. For example, data from hosted systems, other state agencies (Department of Revenue), vendors (Genesys), etc. and to identify the business unit point of contact for each source of information.

This will be done by providing a data dictionary and data catalog for Reconnect (and by inheritance the Data Warehouse), and for the FIRRE application. The data dictionary and data catalog will conform to Florida Digital Services standards. This will complete the inventory for in-house data.

Also included in scope is the discovery of sources of RA data and where it is stored (if not in Reconnect or FIRRE), whether incoming or outgoing. The list of sources will be delivered by June 30th, 2024, by the project team.

In Scope

- Reconnect Data Dictionary & Data Catalog – Delivery of a data Dictionary and data Catalog for the Reconnect database that conforms to state standards.
- FIRRE Data Dictionary & Data Catalog – Delivery of a data dictionary and data catalog for the FIRRE database that conforms to state standards.
- Identification of data sources, whether inbound or outbound that contain RA data not stored in the Reconnect database or the FIRRE database, including identification of the person who provided the team the source of data.

Out of Scope

- Data Cleanup
- Requirements for Archiving & Purging
- Archiving and Purging of Data
- Enterprise Data Governance
- Performance tracking and measuring of report runs or integrity/quality of contents.
- Data mapping of fields to screens or reports
- Descriptions of the contents of each field in each table and the locations (in applications or other locations) of where the fields are being used.
- Any dependencies other than primary and foreign key fields in the data dictionary

- and data catalogs
- De-duplication of data
- Tools, resources, funding for keeping the information up to date with changes to Reconnect or FIRRE databases or updating the list of data sources not included in those.

B. Project Objectives and Business Benefits

This initiative identifies information necessary in support of products and services provided to the Department’s customers so that the lifecycle of data can be managed.

Project Objective	Business Benefit
Delivery of a data Dictionary and data Catalog for the Reconnect database that conforms to state standards	<ul style="list-style-type: none"> • Provides a central document for critical business data and its usage.
Delivery of a data dictionary and data catalog for the FIRRE database that conforms to state standards	<ul style="list-style-type: none"> • Provides a central document for critical business data and its usage.
Identification of data sources, whether inbound or outbound that contain RA data not stored in the Reconnect database or the FIRRE database, including identification of the person who provided the team the source of data.	<ul style="list-style-type: none"> • Provides a source of record of an inventory of places where RA data is sourced, sent or stored outside of Reconnect, the Data Warehouse, or FIRRE • Reduces risk of negative impact on future projects where archiving or purging data is part of scope or where data is shared (or not allowed to be shared) across organizations.

C. Critical Success Factors

The deliverables below represent a completed project when delivered.

- Delivery of the Reconnect Data Dictionary and Data Catalog
- Delivery of the FIRRE Data Dictionary and Data Catalog
- Delivery of the list of data sources and the point of contact for each item listed.

D. Key Dates

The key dates listed below represent the process of delivering scope items for the project.

Key Date	Importance and Relevance to the Project
07/03/23 - 04/16/24	Discovery & Product Delivery
12/20/23 – 04/16/24	Identify and Deliver Project Deliverables
12/08/23 – 02/01/24	IT Data Dictionary Delivery
01/31/24 – 04/16/24	Complete Business Unit Data Sources List
04/14/24 - 05/01/24	Final List Cleanup and Delivery
05/02/24	Close Project

E. Major Deliverables

Major project deliverables are listed below.

Major Deliverable	Deliverable Description
Project Management Plan	Collection of documents related to scope, schedule, and cost.
Project Workgroup Meetings	Project workgroup meetings are designed to hash out technical requirements/solutions to meet business needs. There will also be business workgroup meetings for requirements gathering and refinement. These meetings exclude executive management so the project team can freely discuss issues and risks.
Project Status Meetings	Usually less than 15-minutes, these meetings are for executive management to update them on project progress and to answer any questions.
SharePoint site for Project Information	Requests for access should be submitted to the Project Manager
Products	<ul style="list-style-type: none"> • Reconnect Data Dictionary and Data Catalog • FIRRE Data Dictionary/Data Catalog • List of Agencies where contracts or agreements are in place for data sharing
Project Closeout Report	Documentation of completion of project deliverables and accomplishments.
Reconnect Data Dictionary and Data Catalog	Identifies the tables, columns and relevant information from the Reconnect database.
FIRRE Data Dictionary and Data Catalog	Identifies the tables, columns and relevant information from the FIRRE database.
Data Sharing List	A list of data shared with external agencies

F. Major Milestones

The major milestones for the project are the same as the key dates listed below.

Key Date	Importance and Relevance to the Project
07/03/23 - 04/16/24	Discovery & Product Delivery
12/20/23 – 04/16/24	Identify and Deliver Project Deliverables
12/08/23 – 02/01/24	IT Data Dictionary Delivery
01/31/24 – 04/16/24	Complete Business Unit Data Sources List
04/14/24 - 05/01/24	Final List Cleanup and Delivery
05/02/24	Close Project

G. Key Stakeholders

The product deliverables in this initiative are critical to the people listed below.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Vamsi Pasala	Enterprise Architect
Wendy Castle	Modernization Program Owner – Business
Jamie Dattoli	Project Owner - Business
Matthew Mask	Project Owner - WSER
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Linda Lawler	Project Manager

H. Significant Project Assumptions and Constraints

This initiative requires a high level of business knowledge:

- Knowledge and experience in Workforce Services business practices
- Knowledge and experience of USDOL business rules and requirements for maintaining the Reemployment Assistance Federal Program
- Knowledge of the data used to measure Florida’s data quality and timeliness.
- Knowledge of best practices in data management and governance

Therefore, the lists below are not to be considered comprehensive.

Project Assumptions

1. All relevant stakeholders will attend required status and workgroup meetings. However, there may be instances where some stakeholders are unavailable to attend.
2. The project sponsor will be responsive and prepared to make decisions regarding the project cost and scope.
3. Discoveries related to data sources, integrity and other concerns will be communicated to the program workgroup for discussion and next steps as soon as possible after discovery.
4. Business units are familiar with their own area’s data, where it is sourced, how it is used and by whom.

Project Constraints

1. Limited human resources available with institutional knowledge of the reemployment assistance program
2. The project must be completed no later than June 28, 2024, with the expectation that it will be completed sooner.

II. Work Breakdown Structure

The work breakdown structure for Product and Data Management is shown below.

WBS	Task Name
0	Product and Data Management
1	Project Management
1.1	Discovery/Initiation
1.1.1	4.1 Project Charter Creation
1.1.2	13.1 Identification of Stakeholders
1.2	Planning
1.2.1	5.1 Plan Scope Management
1.2.2	5.2 Collect Project Requirements
1.2.3	5.3 Define Scope
1.2.4	5.4 Create WBS
1.2.5	6.1 Plan Schedule Management
1.2.6	6.2 Define Activities
1.2.7	6.3 Sequence Activities
1.2.8	6.4 Estimate Activity Durations
1.2.9	6.5 Develop Schedule
1.2.10	7.1 Plan Cost Management
1.2.11	7.2 Estimate Costs
1.2.12	7.3 Determine Budget
1.2.13	8.1 Plan Quality Management
1.2.14	9.1 Plan Resource Management
1.2.15	9.2 Estimate Activity Resources
1.2.16	10.1 Plan Communications Management
1.2.17	11.1 Plan Risk Management
1.2.18	11.2 Identify Risks
1.2.19	11.3 Perform Qualitative Risk Analysis
1.2.20	11.4 Perform Quantitative Risk Analysis
1.2.21	11.5 Perform Risk Responses
1.2.22	12.1 Plan Procurement Management
1.2.23	13.2 Plan Stakeholder Engagement
1.3	Executing
1.3.1	4.3 Direct and Manage Project Work
1.3.2	4.4 Manage Project Knowledge
1.3.3	8.2 Manage Quality
1.3.4	9.3 Acquire Resources
1.3.5	9.4 Develop Team
1.3.6	9.5 Manage Team
1.3.7	10.2 Manage Communications
1.3.8	11.6 Implement Risk Response
1.3.9	12.2 Conduct Procurements
1.3.10	13.3 Manage Stakeholder Engagement

WBS	Task Name
1.4	Monitor & Control
1.4.1	4.5 Monitor & Control Project Work
1.4.2	4.6 Perform Integrated Change Control
1.4.3	5.5 Validate Scope
1.4.4	5.6 Control Scope
1.4.5	6.6 Control Schedule
1.4.6	7.4 Control Costs
1.4.7	8.3 Control Quality
1.4.8	9.6 Control Resources
1.4.9	10.3 Monitor Communications
1.4.10	11.7 Monitor Risks
1.4.11	12.3 Control Procurements
1.4.12	13.4 Manage Stakeholder Engagement
1.5	Closing
1.5.1	4.7 Control Project or Phase
2	Discovery & Product Delivery
2.1	Identify and Deliver Project Deliverables
2.1.1	Review new Scope, Deliverables with CI Workgroup
2.1.2	Adjust Scope as needed for Approval
2.1.3	Identify Project Benefits and Measures
2.1.4	IT Existing Data Dictionaries/Data Catalogs - Decisions
2.1.5	Complete BU Data Sources List
2.2	IT Data Dictionary Delivery
2.2.1	Identify IT Data Dictionary Availability
2.2.2	Deliver Reconnect Data Dictionary and Data Catalog
2.2.3	MILESTONE: Reconnect Data Dictionary and Data Catalog Delivered
2.2.4	Deliver FIRRE Data Dictionary and Data Catalog
2.2.5	MILESTONE: FIRRE Data Dictionary and Data Catalog Delivered
2.3	Create Reemployment Assistance Data Catalog Documentation
2.3.1	Review Data Catalog Example from WSER
2.4	Review Contracts for Data Sharing
2.4.1	Define Deliverable
2.4.2	Create Review Team
2.4.3	Review Contracts
2.4.4	Complete Deliverable
2.4.5	Send Deliverable for Review
2.4.6	Adjust Deliverable
2.4.7	Complete DocuSign of Deliverable

WBS	Task Name
2.4.8	MILESTONE: Contract Data Sharing Review Completed
3	Close Project
3.1	Create Project Closeout Document
3.2	MILESTONE: Project Closed

III. *Resource Loaded Project Schedule*

Resources were not assigned tasks in the project schedule. The deliverables were readily available in IT or were collected in earlier projects. Most all tasks were completed by the project manager.

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
0	Product and Data Management	98%	260 days	Mon 7/3/23	Fri 6/28/24	
1	Project Management	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.1	Discovery/Initiation	100%	170 days	Mon 7/3/23	Fri 2/23/24	
1.1.1	4.1 Project Charter Creation	100%	170 days	Mon 7/3/23	Fri 2/23/24	
1.1.2	13.1 Identification of Stakeholders	100%	48 days	Thu 11/2/23	Mon 1/8/24	
1.2	Planning	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.1	5.1 Plan Scope Management	100%	1 day	Mon 1/29/24	Mon 1/29/24	
1.2.2	5.2 Collect Project Requirements	100%	155 days	Mon 7/3/23	Fri 2/2/24	
1.2.3	5.3 Define Scope	100%	153 days	Mon 7/3/23	Wed 1/31/24	
1.2.4	5.4 Create WBS	100%	60 days	Mon 7/3/23	Fri 9/22/23	
1.2.5	6.1 Plan Schedule Management	100%	110 days	Mon 7/3/23	Fri 12/1/23	
1.2.6	6.2 Define Activities	100%	110 days	Mon 7/3/23	Fri 12/1/23	
1.2.7	6.3 Sequence Activities	100%	110 days	Mon 7/3/23	Fri 12/1/23	
1.2.8	6.4 Estimate Activity Durations	100%	110 days	Mon 7/3/23	Fri 12/1/23	
1.2.9	6.5 Develop Schedule	100%	155 days	Mon 7/3/23	Fri 2/2/24	
1.2.10	7.1 Plan Cost Management	100%	154 days	Mon 7/3/23	Thu 2/1/24	

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
1.2.11	7.2 Estimate Costs	100%	153 days	Mon 7/3/23	Wed 1/31/24	
1.2.12	7.3 Determine Budget	100%	153 days	Mon 7/3/23	Wed 1/31/24	
1.2.13	8.1 Plan Quality Management	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.14	9.1 Plan Resource Management	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.15	9.2 Estimate Activity Resources	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.16	10.1 Plan Communications Management	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.17	11.1 Plan Risk Management	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.18	11.2 Identify Risks	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.19	11.3 Perform Qualitative Risk Analysis	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.20	11.4 Perform Quantitative Risk Analysis	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.21	11.5 Perform Risk Responses	100%	174 days	Mon 7/3/23	Thu 2/29/24	
1.2.22	12.1 Plan Procurement Management	100%	0 days	Mon 7/3/23	Mon 7/3/23	
1.2.23	13.2 Plan Stakeholder Engagement	100%	155 days	Mon 7/3/23	Fri 2/2/24	
1.3	Executing	100%	19 days	Mon 2/5/24	Thu 2/29/24	
1.3.1	4.3 Direct and Manage Project Work	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.2	4.4 Manage Project Knowledge	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.3	8.2 Manage Quality	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.4	9.3 Acquire Resources	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.5	9.4 Develop Team	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.6	9.5 Manage Team	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.7	10.2 Manage Communications	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.8	11.6 Implement Risk Response	100%	19 days	Mon 2/5/24	Thu 2/29/24	36

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
1.3.9	12.2 Conduct Procurements	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.3.10	13.3 Manage Stakeholder Engagement	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4	Monitor & Control	100%	19 days	Mon 2/5/24	Thu 2/29/24	
1.4.1	4.5 Monitor & Control Project Work	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.2	4.6 Perform Integrated Change Control	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.3	5.5 Validate Scope	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.4	5.6 Control Scope	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.5	6.6 Control Schedule	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.6	7.4 Control Costs	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.7	8.3 Control Quality	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.8	9.6 Control Resources	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.9	10.3 Monitor Communications	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.10	11.7 Monitor Risks	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.11	12.3 Control Procurements	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.4.12	13.4 Manage Stakeholder Engagement	100%	19 days	Mon 2/5/24	Thu 2/29/24	36
1.5	Closing	100%	5 days	Fri 2/23/24	Thu 2/29/24	
1.5.1	4.7 Control Project or Phase	100%	5 days	Fri 2/23/24	Thu 2/29/24	60FS-5 days
2	Discovery & Product Delivery	49%	141 days	Fri 12/8/23	Fri 6/21/24	
2.1	Identify and Deliver Project Deliverables	100%	52 days	Wed 12/20/23	Thu 2/29/24	
2.1.1	Review new Scope, Deliverables with CI Workgroup	100%	29 days	Wed 12/20/23	Mon 1/29/24	8FF
2.1.2	Adjust Scope as needed for Approval	100%	1 day	Tue 1/30/24	Tue 1/30/24	65
2.1.3	Identify Project Benefits and Measures	100%	9 days	Mon 2/19/24	Thu 2/29/24	66FS+13 days

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
2.1.4	IT Existing Data Dictionaries/Data Catalogs - Decisions	100%	8 days	Wed 1/17/24	Mon 1/29/24	
2.1.5	Complete BU Data Sources List	100%	22 days	Wed 1/31/24	Thu 2/29/24	
2.2	IT Data Dictionary Delivery	100%	40 days	Fri 12/8/23	Thu 2/1/24	
2.2.1	Identify IT Data Dictionary Availability	100%	1 day	Fri 12/8/23	Fri 12/8/23	
2.2.2	Deliver Reconnect Data Dictionary and Data Catalog	100%	14 days	Mon 12/11/23	Thu 12/28/23	77
2.2.3	MILESTONE: Reconnect Data Dictionary and Data Catalog Delivered	100%	0 days	Thu 12/28/23	Thu 12/28/23	78FF
2.2.4	Deliver FIRRE Data Dictionary and Data Catalog	100%	3 days	Tue 1/30/24	Thu 2/1/24	78FS+22 days
2.2.5	MILESTONE: FIRRE Data Dictionary and Data Catalog Delivered	100%	0 days	Thu 2/1/24	Thu 2/1/24	80FF
2.3	Create Reemployment Assistance Data Catalog Documentation	100%	4 days	Mon 12/18/23	Thu 12/21/23	
2.3.1	Review Data Catalog Example from WSER	100%	4 days	Mon 12/18/23	Thu 12/21/23	
2.4	Review Contracts for Data Sharing	0%	80 days	Mon 3/4/24	Fri 6/21/24	
2.4.1	Define Deliverable	0%	5 days	Mon 3/4/24	Fri 3/8/24	
2.4.2	Create Review Team	0%	5 days	Mon 3/11/24	Fri 3/15/24	85
2.4.3	Review Contracts	0%	50 days	Mon 3/18/24	Fri 5/24/24	86
2.4.4	Complete Deliverable	0%	5 days	Mon 5/27/24	Fri 5/31/24	87
2.4.5	Send Deliverable for Review	0%	5 days	Mon 6/3/24	Fri 6/7/24	88
2.4.6	Adjust Deliverable	0%	5 days	Mon 6/10/24	Fri 6/14/24	89
2.4.7	Complete Docusign of Deliverable	0%	5 days	Mon 6/17/24	Fri 6/21/24	90
2.4.8	MILESTONE: Contract Data Sharing Review Completed	0%	0 days	Fri 6/21/24	Fri 6/21/24	91
3	Close Project	0%	5 days	Mon 6/24/24	Fri 6/28/24	
3.1	Create Project Closeout Document	0%	5 days	Mon 6/24/24	Fri 6/28/24	91

WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
3.2	MILESTONE: Project Closed	0%	0 days	Fri 6/28/24	Fri 6/28/24	94

IV. Project Spending Plan

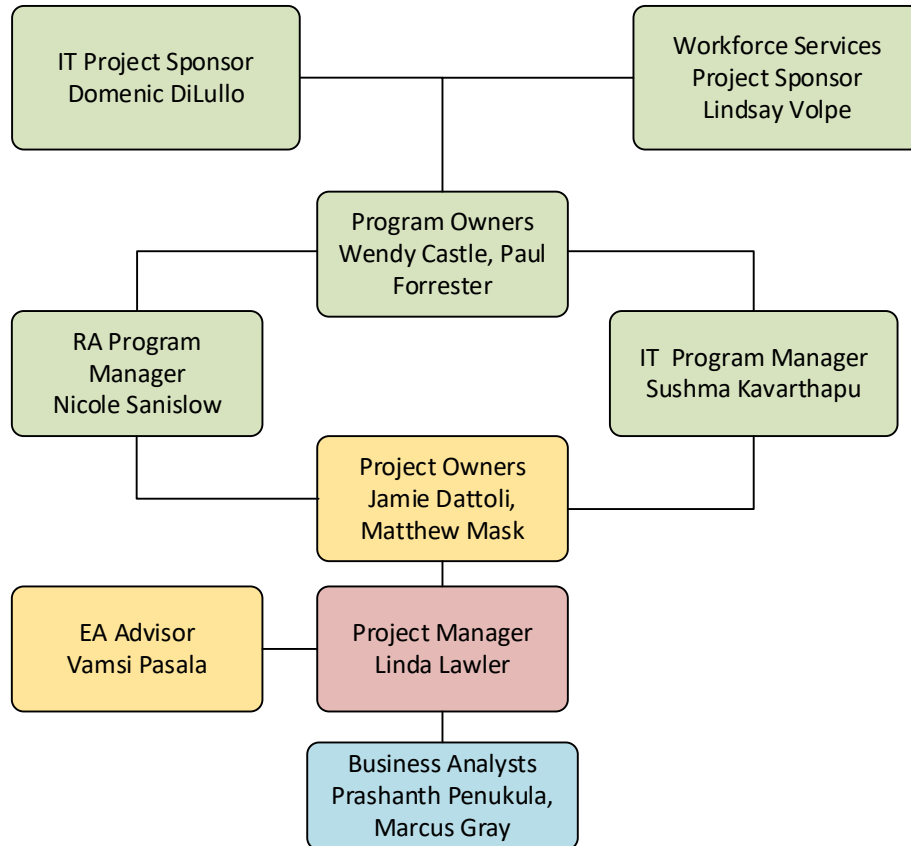
The project does not include purchases for resources or materials.

FY 2021-22 Expenditures	FY 2022-23 Expenditures
Software: \$99,123.45	Software: \$101,123.88
Other OpEx (Vendor Deliverables): \$161,579.83	Other OpEx (Vendor Deliverables): \$176,434.21
Other CapEx: \$0.00	Other CapEx: 0.00

V. Project Organization and Methodology

A. Project Organizational Chart

The chart below represents the roles & resources involved in the project.



B. Project Roles and Responsibilities

The resources listed below are necessary for success of this initiative.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner Work Group	<ul style="list-style-type: none"> • Responsible for the Strategy of the Department IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Wendy Castle	Chief of RA Program Owner	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Jamie Dattoli	Chief of RA Appeals Project Owner	<ul style="list-style-type: none"> • Contributes subject matter expertise and resources needed from each business unit • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables • Reviews and approves RFCs
Matthew Mask	WSER Project Owner	<ul style="list-style-type: none"> • Contributes subject matter expertise and resources needed from each business unit • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables • Reviews and approves RFCs
Linda Lawler	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Identifies and manages risks according to the project plan
Vamsi Pasala	Architect and Technical Lead	<ul style="list-style-type: none"> Responsible for assisting the team in finding solutions to issues elevated to him Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
Marcus Gray Prashanth Penukula	Business Analyst	<ul style="list-style-type: none"> Complete assigned project tasks in accordance with the Project Schedule Assists the project manager with meeting highlights and other documentation
Business Points of Contact	Subject Matter Expert(s) in Business Units	<ul style="list-style-type: none"> Contributes subject matter expertise. Complete assigned project tasks in accordance with the Project Schedule Identifies risks and issues to the Project Managers Assists the Project Managers in responding to risks and issues Assists the Project Manager in evaluating change requests

C. Project Management Methodology

The Department will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure the Department’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. The Department believes strong project management is critical throughout the life of any successful project.

For this project, the Department’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from the Department within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the Department Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- The Department’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability,

resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

The Department believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

The Product and Data Management Project did not impact existing business processes.

This project intends to improve the delivery, execution, security, or convenience of the Department’s lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Risks are evaluated and handled in weekly RAID meetings for socialization and, if necessary, resolution.

NOTE: This section will align with the Program Management Plan’s RMP and should be updated every month as risks change and are updated. Risks are maintained on a regular basis within Service Now. Weekly RAID review meetings are held with senior leadership present.

Risk Description/Impact	Probability of Occurrence (high, Medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				

VIII. Capacity Plan

While this project did not include software development, utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- **Establish Cross-Functional Team:** To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- **Calculate Resource Capacity:** Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- **Determine Resource Requirements:** For each project, look at the scope and what resources are required to do the task for the project.
- **Project Prioritization:** Via a weighted scoring model used for Modernization projects within the program have been prioritized for the purpose of optimizing resources and time.
- **Allocate Resources Based on Project Priority:** Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- **Keep the Lines of Communications Open:** Communicate between executives, project management leaders and stakeholders.
- **Document Known Risks:** Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- **Plan for How to Handle Not enough Capacity:** Understand that obtaining new needed resources takes time and advance planning is imperative.



**OPERATIONAL WORK PLAN
FOR
ADJUDICATION WORKFLOW
MANAGEMENT SYSTEM**

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

**FISCAL YEAR 2023-2024
QUARTER 4
PREPARED ON MARCH 5, 2024**

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SECTION 1 — OVERALL PROJECT PLAN

I. *Project Charter*

As a part of the FloridaCommerce Reemployment Assistance (RA) Modernization Program, the Claims Adjudication process for Reemployment Assistance will be modernized through implementation of an automated Workflow Management solution.

A. **Scope Statement**

The project will define the streamlined business process for adjudication, identify specific opportunities for automation, gather requirements, design the technical solution, and required interfaces, determine the best technical path forward (e.g., leveraging existing tool and/or custom software development), and implement the solution. The decision is to leverage the existing tool (Pega) to automate and create the Adjudication workflow management solution.

In Scope

- Determine problem statement and requirements.
- Streamline existing business processes & identify opportunities for automation.
- Design a technical solution, interfaces, and integration with Reconnect.
- Develop and test solution using agile software development methodology.
- Conduct integration and UAT testing.
- Conduct training, release planning, and operational turnover.
- Implement solution.

Out of a Scope

- Continuing to use Reconnect to perform adjudication workflow management functionality that is being replaced by the solution.

B. **Project Objectives and Business Benefits**

The Adjudication Workflow Management project contains many positive objectives and business benefits owing to the many problems currently facing Adjudications as they work within the existing Reconnect system of record.

Project Objective	Business Benefit
Integrate the new solution with Reconnect as the system of record transferring data back and forth between Reconnect and the new solution (e.g., Application Programming Interfaces, import/export, batch file transfer, etc.)	<ul style="list-style-type: none"> • Adjudication decisions will be determined more quickly. • Greater productivity due to improved workflow. • Improved quality measures. • Reduction of calls into the contact center due to faster adjudication decisions determined. • Ability to prioritize and rapidly change directions (e.g., economic downturns, pandemics, natural disasters, etc.).
Gather the requirements that define what the new solution should accomplish.	
Identify the impacts to Reconnect system of record when adjudication process is moved out of that system and identify how to fill any gaps.	

Project Objective	Business Benefit
<p>Create Interface Control Documents for each interface and create Service Level Agreements</p> <p>Determine infrastructure requirements and design where and how the solution will be implemented (e.g., cloud, servers, storage capacity, processing speed, internal memory, network, etc.)</p>	<ul style="list-style-type: none"> • Ability to harness opportunities for automation will decrease adjudication workloads, improve decision making, and create an increase in the number of claims that may be processed daily. • Reduction in appeals workload because adjudication process becomes accurate and timely. • Assist adjudication leadership with monitoring and reporting on adjudication performance. • Allow staff to focus on issuing timely determinations. • Consistency in making determination decisions based on all users reviewing the same intelligent content for guidance during determinations. • Metrics and dashboard for FC Leadership to measure adjudication process. • Improve information flow with claimants, employers, and Third-Party Administrators (TPA) to provide quicker resolutions.
<p>Automate the current manual workaround for assignment of work and quickly allow for redistribution of work.</p>	<ul style="list-style-type: none"> • Increased speed to first pay for claimants. • Ability to prioritize and rapidly change directions (e.g., economic downturns, pandemics, natural disasters, etc.). • Greater productivity for adjudicators and adjudication leadership. • Improved quality measures. • Allow staff to focus on issuing timely determinations vs manually assigning work.
<p>Review the current adjudication work flows to identify more efficient and streamlined ways to accomplish the work.</p>	<ul style="list-style-type: none"> • Increased speed to first pay for claimants. • Greater productivity for adjudicators and adjudication leadership. • Improved quality measures. • Less calls to the contact center because of increased accuracy during adjudication.
<p>Design wireframes that mimic the workflows.</p>	

Project Objective	Business Benefit
Locate the issues that are suitable for automation and define the steps and/or business rules required to automate those issues.	<ul style="list-style-type: none"> Ability to harness opportunities for automation will decrease adjudication workloads, improve decision making, and create an increase in the number of claims that may be processed daily. Allow staff to focus on issuing timely determinations.
Gather the websites, documents and reference materials required to make determinations and prepare them for implementation into content sensitive help.	<ul style="list-style-type: none"> Consistency in making determination decisions based on all users reviewing the same intelligent content for guidance during determinations. Reduction in appeals workload because adjudication process becomes accurate and timely.
Identify the reports required to meet FloridaCommerce management goals (dashboards, metrics, workload reports, assignment reports, priority reports, etc.)	<ul style="list-style-type: none"> Assist adjudication leadership with monitoring and reporting on adjudication performance. Metrics and dashboard for FL Commerce Leadership to measure adjudication process. Improved quality measures
Define the team and departmental performance metrics being used to measure and track efficiencies.	

C. Critical Success Factors

Sufficient FloridaCommerce architects and IT staff to create the interface with Reconnect (system of record) and integrate with the new Adjudication Workflow System.

D. Key Dates

The Adjudication Workflow Management team is meeting all key dates and is currently in project development scheduled to complete on 5/14/2024.

Key Date	Importance and Relevance to the Project
12/15/2023	Initiation Phase complete; Rule 60GG documents created and approved (Charter/Business Case)
1/10/2023	Complete the Planning Phase; Rule 60GG documents created and approved; Project Requirements defined/approved; Test Plan completed/approved
1/26/2024	Sprint Zero JADs to Develop Backlog; Definition of sprint roadmap and scope
5/14/2024	Project Development Completed
6/20/2024	Testing & Execution Phases Completed
6/28/2024	Project Closeout Completed

E. Major Deliverables

The Adjudication Workflow Management team has completed the Project Charter, Project Business Case, Schedule, Requirements, Project Management Plan, RTM, and Test Plan. Currently working on Product Backlog and Sprint artifacts.

Major Deliverable	Deliverable Description
Project Charter	Description of project with authority to move forward
Project Business Case	Description alternative analysis; business process to be modernized; success criteria; risks, costs; stakeholder impacts
Schedule	Timeline for project
Requirements	List of what the solution should accomplish
Project Management Plan	Description of how the project will be executed
Test Plan	High-level description of the project testing activities.
Solution Development/Testing Sprints; User Stories; Product Backlog; Test Plan; UAT Test Plan; Requirements Traceability Matrix	Create the solution and test to determine that it meets the requirements. This will be incremental by sprint using agile development methodology.
Solution Implementation Plan; Training Plan; Help Desk Support Plan	Develop release plan, train the users, prepare help desk for support of solution, move the solution to production, complete security artifacts, develop proper documentation
Solution Maintenance & Support	Monitor the solution and ensure updates are completed timely.
Project Close Out Report	A report of project closure using Center of Excellence template.

F. Major Milestones

The Adjudication Workflow Management project is currently in the execution phase.

Major Milestone	Milestone Description
Initiation Phase <ul style="list-style-type: none"> • Business Case • Charter • RCA Phase Gate Stakeholder Registry	Completion of Rule 60GG deliverables (i.e., charter, business case, stakeholder registry, etc.)
Planning Phase <ul style="list-style-type: none"> • Buy vs Build Decision • PMP • Schedule 	Completion of Project Management Plan, Schedule, Test Plan, RCA Phase Gate

Major Milestone	Milestone Description
<ul style="list-style-type: none"> Test Plan (High-Level) 	
RCA Phase Gate	
Execution Phase <ul style="list-style-type: none"> Design Completed Development/Unit Test Completed Integration/UAT Testing Completed Implementation Completed 	Completion of execution deliverables (i.e., design, development, implementation, maintenance & operations)
Transfer to Maintenance & Operations	
Close Out Phase <ul style="list-style-type: none"> Perform Close Out Activities 	Completion of the project
Close Out Report	

G. Key Stakeholders

The table below includes the key stakeholders in the Adjudication Workflow Management project.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer, Program Owner- Information Technology
Tisha Womack	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Johnathan Hill	Project Owner
Clara Kendrick	Project Manager

H. Significant Project Assumptions and Constraints

The Adjudication Workflow Management project contains the following project assumptions and constraints.

Project Assumptions

1. Completed: FloridaCommerce will make a buy vs build decision in a timely manner.
2. Completed: FloridaCommerce will conduct the procurement process efficiently and there will be no delays to obtaining a COTs product.
3. Completed: There will be qualified vendors responding to the procurement with a satisfactory COTS product that meets the ‘must have’ requirements if the decision is to buy a product.
4. There will be sufficient FloridaCommerce architects and IT staff to create the interface with Reconnect (system of record) and integrate with the new Adjudication Workflow System.

Project Constraints

1. The project budget and the timeline to implement the Adjudication Workflow Management system are major constraints to the project.
2. Available FloridaCommerce resources during specific phases of the project may constrain the project.
3. The ability and how to technically integrate with Reconnect (the system of record) constrains the project.

II. Work Breakdown Structure

The Adjudication Workflow Management project contains the standard project phases, deliverables, and high-level tasks specific to the project required to complete the project.

<ul style="list-style-type: none"> ▸ Adjudication Workflow Management System
<ul style="list-style-type: none"> ▸ Initiation
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Risk and Complexity Assessment
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Deliverable: Project Charter
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Charter complete
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Stakeholders Register
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Kickoff Meeting
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Deliverable: Business Case
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Initiation Phase complete
<ul style="list-style-type: none"> ▸ Planning
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Deliverable: Project Schedule
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Schedule complete
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Deliverable: Project Management Plan
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Management Plan complete
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Deliverable: Requirements
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Requirements complete
<ul style="list-style-type: none"> ▸ Deliverable: Build vs Leveraging Existing Tool Analysis & Decision
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Build Analysis & ROM
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Leveraging Existing Tool Analysis & ROM
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Analysis & Decision
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Decision complete
<ul style="list-style-type: none"> ▸ Planning based on Decision
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Complete the Planning Gate R&C Assessment
<ul style="list-style-type: none"> ▸ Execution
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Development
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Development Roadmap of Sprints
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Project Development Completed
<ul style="list-style-type: none"> ▸ RA Mod Testing Phases
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Integration Testing
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Testing Phases Complete
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Conduct Lessons Learned Meeting
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Execution Phase complete
<ul style="list-style-type: none"> ▸ Monitoring and Controlling
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Monitoring and Controlling Phase Complete
<ul style="list-style-type: none"> ▸ Project Closeout
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▸ Closeout Phase complete

III. *Resource Loaded Project Schedule*

The organization and timing of the Adjudication Workflow Management project is contained in the project schedule below.

ID	% Complete	Task Name	Duration	Start	Finish	Predecessors	Actual Finish
1	67%	Adjudication Workflow Management System	239 days?	Tue 8/1/23	Fri 6/28/24		NA
2	100%	Initiation	99 days?	Tue 8/1/23	Fri 12/15/23		Fri 12/15/23
25	100%	Planning	134 days?	Tue 8/1/23	Fri 2/2/24		Fri 2/2/24
68	54%	Execution	239.5 days?	Tue 8/1/23	Mon 7/1/24		NA
69	100%	Workload Distribution Execution	115 days	Tue 8/1/23	Mon 1/8/24		Mon 1/8/24
73	34%	Project Development	96.5 days	Wed 1/10/24	Thu 5/23/24		NA
74	34%	Development	96.5 days	Wed 1/10/24	Thu 5/23/24		NA
75	100%	Sprint Zero JADs to Develop Backlog	18 days	Wed 1/10/24	Fri 2/2/24		Fri 2/2/24
98	25%	Product Backlog Grooming - Priority Setting	39 days	Tue 2/6/24	Fri 3/29/24		NA
99	100%	Sprint Execution 1	10 days	Wed 2/7/24	Tue 2/20/24		Tue 2/20/24
104	100%	Sprint Demonstration	0.5 days	Wed 2/21/24	Wed 2/21/24	103	Wed 2/21/24
105	100%	Deploy to Test Env Sprint 1	3 days	Wed 2/21/24	Mon 2/26/24		Mon 2/26/24
108	5%	Sprint Execution 2	10 days	Wed 2/21/24	Wed 3/6/24		NA
109	100%	Sprint Planning	0.5 days	Wed 2/21/24	Wed 2/21/24	104	Wed 2/21/24
110	0%	Development	6 days	Thu 2/22/24	Thu 2/29/24	109	NA
111	0%	Unity/Component Testing	3 days	Fri 3/1/24	Tue 3/5/24	110	NA
112	0%	Retrospective	0.5 days	Wed 3/6/24	Wed 3/6/24	111	NA
113	0%	Sprint Demonstration	0.5 days	Wed 3/6/24	Wed 3/6/24	112	NA
114	0%	Deploy to Test Env Sprint 2	3 days	Thu 3/7/24	Mon 3/11/24		NA
115	0%	Deploy	1 day	Thu 3/7/24	Thu 3/7/24	113	NA
116	0%	Regression Testing/Security Vulnerability Testing	2 days	Fri 3/8/24	Mon 3/11/24	115	NA
117	0%	Product Backlog Grooming	0.5 days	Wed 3/6/24	Wed 3/6/24		NA
118	0%	Refine and/or develop user stories	0.25 days	Wed 3/6/24	Wed 3/6/24	112	NA

Project: DEO-Project Schedule P
Date: Wed 2/28/24

Task		Inactive Summary		External Tasks	
Split		Manual Task		External Milestone	
Milestone		Duration-only		Deadline	
Summary		Manual Summary Rollup		Progress	
Project Summary		Manual Summary		Manual Progress	
Inactive Task		Start-only			
Inactive Milestone		Finish-only			

Page 1

IV. Project Spending Plan

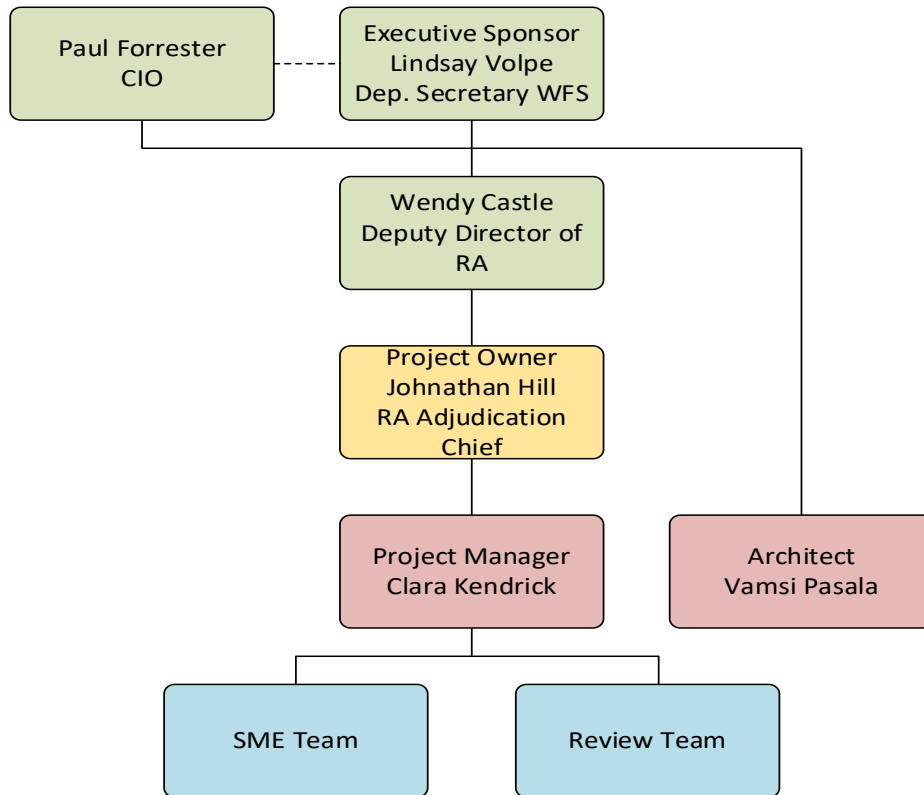
The breakdown of the expenditures is unknown. We are using the total budget within software category at this time.

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: \$779,714.50	Software: \$0.00
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$0.00
Other CapEx: \$0.00	Other CapEx: 0.00

V. Project Organization and Methodology

A. Project Organizational Chart

The Adjudication Workflow Management project is sponsored by Lindsay Volpe, with Johnathan Hill being the Product Owner and Clara Kendrick being the Project Manager.



B. Project Roles and Responsibilities

The Adjudication Workflow Management project key team members names, project role, and responsibilities is listed below.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Deputy Director of RA Program Owner	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones

Name	Project Role	Responsibility
Paul Forrester	CIO Program Owner	<ul style="list-style-type: none"> • Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Johnathan Hill	Project Owner/RA Adjudication Chief	<ul style="list-style-type: none"> • Contributes subject matter expertise • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables
Clara Kendrick	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
Vamsi Pasala	Architect and Technical Lead	<ul style="list-style-type: none"> • Responsible for assisting the team in finding solutions to issues elevated to him • Is available to project sponsors for technical questions regarding direction of the project and any dependencies/impacts of other projects • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Technical Team	Technical Support	<ul style="list-style-type: none"> • Process development tasks • Contributes technical expertise • Complete assigned project tasks in accordance with the Project Schedule

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> • Reviews documentation when submitted by Vendor • Contributes subject matter expertise • Completes assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

This project will follow the [Risk Management Plan](#), captured within the Reemployment Assistance Program Management Plan. The Reemployment Assistance Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for RA Mod, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.



**OPERATIONAL WORK PLAN
FOR
APPEALS WORKFLOW MANAGEMENT
SYSTEM**

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON 03/01/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Appeals Workflow Management System project is part of the Florida Department of Commerce’s Continuous Modernization Program, hereafter referred to as “Continuous Mod.”

In support of Continuous Mod, FloridaCommerce maintains the Reemployment Assistance Claims and Benefits Information System, commonly referred to as “Reconnect,” hereafter referred to as “the System.”

The System serves as the central repository to file, track, view, and process Reemployment Assistance claims. The System functions as the core benefits administration platform for FloridaCommerce staff, claimants, and employers and Third-Party Administrators (TPAs). The System provides online access to apply for benefits, view, and track claims, set up payment information, respond to fact-finding requests, and protest and appeal eligibility determinations.

For employers, the System allows access to respond to and protest inquiries regarding claimants receiving Reemployment Assistance benefits. The System also allows employers to grant TPAs access to perform specific administrative functions.

The current Appeals Workflow Management System (AWMS) supports a process facilitated by a collection of functions and features inside the System. Having been built over a decade ago, the System and the functions and features that comprise the AWMS need modernization.

A. Scope Statement

In Scope

- All appropriated, budgeted, and approved tasks necessary to implement the AWMS.
- Subsequent transition to application maintenance and support.
- New features, improvements to existing features, and fixes to non-working functionality comprise the project scope. Most of those items are already captured as Help Desk tickets in ServiceNow. A few others have already been established via information gather with appeals Subject Matter Experts (SMEs). The list of in-scope items is captured in the project charter and is not repeated here.

Out of Scope

- Any work that is not specifically listed as “in scope.”
- Any work that is not appropriated, budgeted, and approved.

B. Project Objectives and Business Benefits

The goals of this project are explicitly defined via the following list project objectives, of which there is one primary. In turn, this objective is linked to the business benefits that the agency plans to realize as the result of this project. The primary project objective and its associated business benefits in support of the Appeals WMS modernization are as follows.

Project Objective	Business Benefit
Improvements to the existing Appeals Workflow Management System	<ol style="list-style-type: none"> 1. Streamlined appeals workflow for both claimants and FloridaCommerce Appeals SMEs. 2. Increases in SME efficiency and the improved Appeals processing times that would result. 3. Better customer service and the increased goodwill that would result.

C. Critical Success Factors

The work to improve the existing AWMS will be performed by in-house software developers and testers, all of whom have expertise in working with the System. The Appeals SMEs – those who use the System every day in executing the job of the Appeals team – will guide development of the improvements and will review and approve the result. In both cases (developers/testers and SMEs), resource allocation will be critical to the success of the project. Resources are shared across multiple projects, so maintaining an accurate project schedule, accurately forecasting resource requirements, and accurately forecasting dates and durations is critical to correctly allocating resources.

D. Key Dates

Key dates are important internal or external dates that have the potential to affect the project. Their importance and relevance to the project are identified below.

Key Dates (anticipated)	Importance and Relevance to the Project
12/5/2023	Initiation Phase Ends
02/15/2024	Planning Phase Ends
12/18/2023	Execution Phase Starts
6/28/2024	Project Ends

E. Major Deliverables

Major deliverables represent important internal or external dates that have the potential to affect the project and are shown below.

8/25/2023	Deliverable 1: Project Kick-Off Meeting
12/5/2023	Deliverable 2: Project Management Plan & Transition Plan
9/29/2023	Deliverable 3: Project Schedule
6/30/2024	Deliverable 4: Project Closeout

F. Major Milestones

Major milestones represent key events with a zero duration and which indicate that a specific stage of a project has been reached. Major milestones for the Appeals WMS project are as follows.

Major Milestone	Milestone Description
Procurement Phase Complete	Completed
Initiation Phase Complete	Completed
Planning Phase Complete	Completed
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

A listing of key stakeholders identifies the specific people and groups that have a vested interest in this project. Key stakeholders for the Appeals WMS project are as follows.

Key Stakeholders	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Paul Forrester	Chief Information Officer / Work Group
Tisha Womack	Chief Financial Officer / Work Group
Lindsay Volpe	Deputy Secretary, Division of Workforce Services / Work Group
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Sherry Crist	SPO Lead
Jamie Dattoli	Project Owner
Thomas Hoverman	Organizational Change Management Lead
Nicholas Kaoudis	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

- FloridaCommerce will provide resources capable of completing the required analysis, development, testing, and review tasks at the highest quality. Those resources must be dedicated to the tasks at a level that enables them to complete those tasks at the scheduled deadlines.

Project Constraints

- Human resources are finite and, due to the complexity of the System, cannot be replaced with equivalent expertise in the time required.
- End date of 6/28/2024 cannot be moved.

II. Work Breakdown Structure

The work breakdown structure defines the overall layout of the project to improve the existing AWMS.

WBS	Task Name
1	Appeals WMS
1.1	Project Prework
1.2	Initiation
1.3	Initiation Phase - End

1.4	Planning
1.5	Planning Phase - End
1.6	Execution
1.6.1	Execution Phase Start
1.6.2	SDLC
1.6.3	SDLC - End
1.6.4	Requirements Traceability
1.6.5	Requirements Traceability - FINISH
1.7	Execution Phase - End
1.8	Monitoring and Controlling
1.9	Monitor & Control Phase - End
1.10	Closeout Phase
1.11	Closeout Phase - End
2	Appeals WMS ... - End

III. Resource Loaded Project Schedule

The project schedule indicates the planned timetable for all project-related work and estimates the appropriate staffing levels necessary to accomplish each task, to produce each deliverable, and to achieve each milestone.

WBS	Task Name	% Complete	Duration	Start	Finish	1st Quarter		2nd Quarter			3rd Quarter		4th Quarter			
						Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
1	Appeals WMS	64%	217.5 days	Mon 8/14/23	Fri 6/28/24											
1.1	Project Prework	100%	16 days	Mon 8/14/23	Mon 9/4/23											
1.2	Initiation	100%	88 days	Tue 9/5/23	Fri 1/19/24											
1.3	Initiation Phase - End	100%	0 days	Fri 1/19/24	Fri 1/19/24											
1.4	Planning	100%	115 days	Tue 9/5/23	Tue 2/27/24											
1.5	Planning Phase - End	0%	0 days	Tue 2/27/24	Tue 2/27/24											
1.6	Execution	45%	143 days	Mon 11/27/23	Fri 6/21/24											
1.6.1	Execution Phase Start	100%	0 days	Fri 2/9/24	Fri 2/9/24											
1.6.2	SDLC	45%	143 days	Mon 11/27/23	Fri 6/21/24											
1.6.3	SDLC - End	0%	0 days	Fri 6/21/24	Fri 6/21/24											
1.6.4	Requirements Traceability	48%	65.75 days	Fri 12/8/23	Tue 3/19/24											
1.6.5	Requirements Traceability - FINISH	0%	0 days	Tue 3/19/24	Tue 3/19/24											
1.7	Execution Phase - End	0%	0 days	Fri 6/21/24	Fri 6/21/24											
1.8	Monitoring and Controlling	72%	200 days	Wed 8/30/23	Fri 6/21/24											
1.9	Monitor & Control Phase - End	0%	0 days	Fri 6/21/24	Fri 6/21/24											
1.10	Closeout Phase	0%	14.5 days	Mon 6/10/24	Fri 6/28/24											
1.11	Closeout Phase - End	0%	0 days	Fri 6/28/24	Fri 6/28/24											
2	Appeals WMS ... - End	0%	0 days	Fri 6/28/24	Fri 6/28/24											

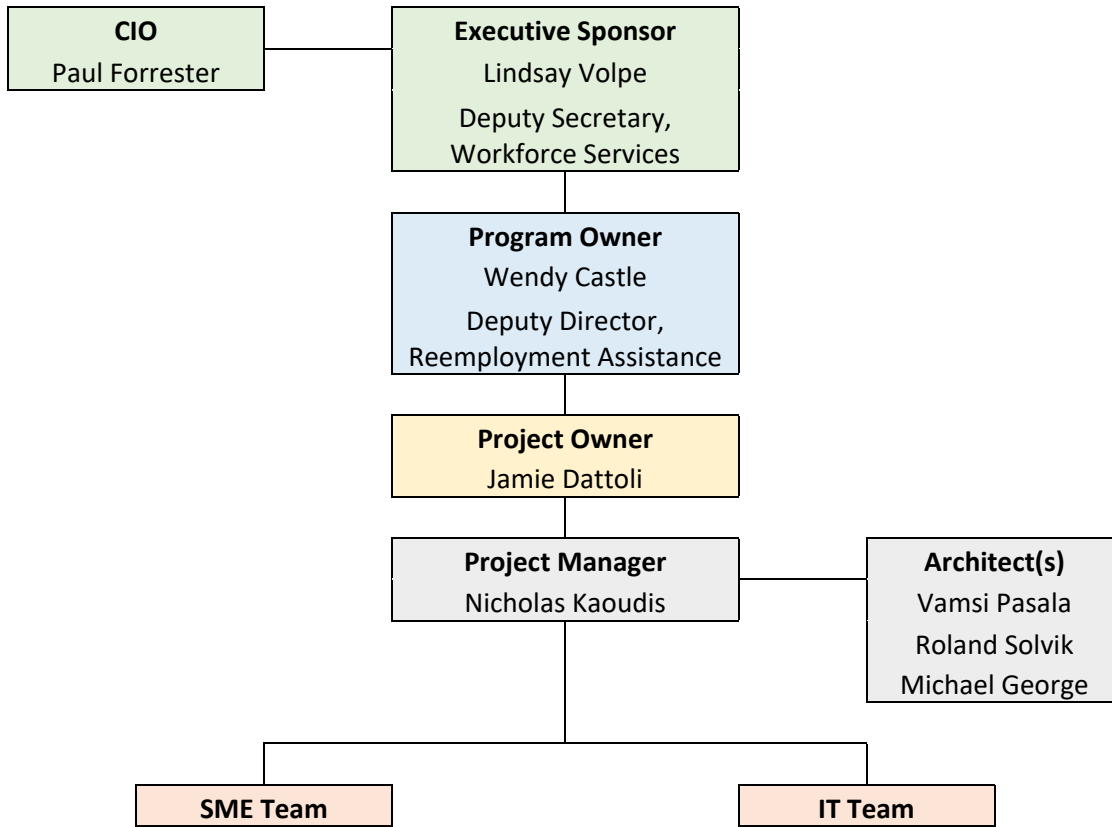
IV. Project Spending Plan

The project spending plan provides an indication of anticipated expenditures during the current fiscal year. It is important to note that these expenses exclude labor cost otherwise captured by Florida Commerce. The project spending plan for the Appeals WMS project is as follows.

FY 2023-24 Expenditures
<i>Software: \$0.00</i>
<i>Other OpEx (Vendor Deliverables): \$779,714.50</i>
<i>Other CapEx: 0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

The roles and responsibilities detailed below are in explanation of the preceding organizational chart. Project roles and responsibilities for the Appeals WMS project are as follows.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor / Work Group	<ul style="list-style-type: none"> Provide guidance on overall strategic direction. Advising the Strategic Planning Office and project manager of risks that may impact the project. Facilitate resolution of significant issues in the project. Reviewing and signing off on key milestones.
Paul Forrester	CIO / Work Group	<ul style="list-style-type: none"> Provide guidance on overall strategic direction. Advising the Strategic Planning Office and project manager of risks that may impact the project. Facilitate resolution of significant issues in the project. Reviewing and signing off on key milestones.

Name	Project Role	Responsibility
Tisha Womack	CFO / Work Group	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Jamie Dattoli	Project Owner / Chief, RA Appeals	<ul style="list-style-type: none"> • Contributes subject matter expertise. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests. • Reviews deliverables and project documents, identifying any deficiencies. • Reviews and approves deliverables. • Reviews and approves RFCs.
Nicholas Kaoudis	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan. • Manages vendor deliverables and schedule adherence.
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> • Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with Risk and Issue Management as described in the Project Management Plan • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests

C. Project Management Methodology

FloridaCommerce uses a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management includes the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors, if engaged:
 - will respond to inquiries or requests from FloridaCommerce within one business day from receipt;
 - will provide an estimate, in the case where additional time is needed for a task, which must be approved by the FloridaCommerce Project Manager;
 - will provide final copies of all reports in electronic format for archive purposes, at the end of the contract.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. *Business Process Organizational Change Management Plan*

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment

- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

VII. Project Risk Management Plan

See the Risk and Complexity Assessment that accompanies the Initiation phase documents for this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Hurricane impacting the state delays the schedule	Low	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementation Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding. As of this writing, procurement is not expected. This risk would therefore be not applicable.	SME Team, Owner

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Resource requirements for execution of roadmap are beyond original expectations.	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Prioritize Projects: Which projects are most important, and which can be put aside for the time being? You can't do everything at once.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Too Much Capacity: Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).



OPERATIONAL WORK PLAN FOR DOCUMENT IMAGING SYSTEM

**DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 4

PREPARED ON 02/29/2024

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SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

FloridaCommerce is looking to modernize the central intake physical mail process for the Reemployment Assistance program using a document management system that has API call functionality that could allow calls from Reconnect and its subcomponents to pull data from the cloud-based central intake document repository.

The document management system must have the ability to process the barcodes that are generated by Reconnect so that documents can be automatically linked to the document ID (bar code) associated with claimants, ingested, and so that Reemployment Assistance program staff can make decisions timely and accurately.

A. Scope Statement

The goal of this project is to streamline the process for central intake using a document management system that can process and read the documents upon ingestion and automatically categorize them based on the document type using the identifiers on the document using optical character recognition.

In Scope

- Procure necessary services and/or products to implement the automated and modernized central intake physical mail process.

Out of Scope

- Modernization of other ingestion workflows.

B. Project Objectives and Business Benefits

Reconnect generates thousands of correspondences and distributes correspondence based on the communications preference selected by each claimant. Reconnect defaults correspondence to physical mail if the claimant does not opt to receive electronic mail as their preference. Documents are handled in the Reemployment Assistance Central Intake Unit in two scenarios.

1. Scenario 1:

The Reemployment Assistance program requests additional information from claimants and employers to process benefits applications timely and accurately. There is no mandate to submit the documents in a specific way, and documents are submitted either electronically or physically. The central intake process is initiated when physical mail from the claimant or employer is received by the Central Intake Unit.

2. Scenario 2:

Mail sent by FloridaCommerce is returned due to a bad address or a change of address. Returned mail is also scanned and indexed to the appropriate claimant or employer file.

Current challenges associated with the central intake process cause delays across the Reemployment Assistance program and impact its ability to process reemployment assistance benefits timely and accurately.

C. Critical Success Factors

The following factors are being used as measurement for success:

- Scanners are installed and used to process physical mail.
- Scanners can read barcodes and associate mail with claimants in Reconnect.

D. Key Dates

Key Date	Importance and Relevance to the Project
August 15, 2023	Project Kick Off Meeting
October 20, 2023	Project Charter Approved
October 27, 2023	Requirements Approved
November 22, 2023	RFQ Created
December 8, 2023	Vendor Response
December 15, 2023	Request for Information Process Completed
December 28, 2023	Procurement of Vendor Completed
January 8, 2024	Project Kick-off with vendor
February 15, 2024	Design Complete
February 16, 2024	Infrastructure in place
February 29, 2024	Base Install Completed

E. Major Deliverables

This project is made up of multiple major deliverables and paths:

1. Procure necessary services and products to implement the automated and modernized central intake physical mail process.

Major Deliverable	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Technical Design Document	Vendor and FloridaCommerce create the technical design document for the solution
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the technical and process related business requirements.
Project Closeout Report	The PM provides the Project Closeout Report

F. Major Milestones

Major Milestone	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce.

Major Milestone	Deliverable Description
Technical Design Document	Vendor and FloridaCommerce create the technical design document for the solution
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the document imaging system processes and requirements.
Project Closeout Report	The PM provides the Project Closeout Report

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Florida Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Paul Forrester	Chief Information Officer
Tisha Womack	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
El Lise Bethel	RA Modernization Acting Project Owner
Karmyn Hill	RA Modernization Acting Project Owner
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
David Sinclair	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. This project will include a procurement for products and/or services.
2. Any modifications to existing records management policies and procedures or record retention rules will be handled outside the scope of the project by Reemployment Assistance and FloridaCommerce’s Office of the General Counsel.
3. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
4. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
5. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
6. The project sponsor will be responsive and prepared to make decisions regarding the project cost and scope.

Project Constraints

1. Staff availability to engage in the project throughout the lifecycle could be a risk.
2. Scanning capability to integrate with the scanning software.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	FloridaCommerce-Document Imaging System
1.1	Initiation
1.1.1	Risk and Complexity Assessment
1.1.2	PM Deliverable: Project Charter
1.1.3	Project Charter complete
1.1.4	Stakeholders Register
1.1.5	Project Kickoff Meeting
1.1.6	Conduct Lessons Learned Meeting
1.2	Initiation Phase complete
1.3	Planning
1.3.1	PM Deliverable: Resource Plan
1.3.2	Resource Plan Complete
1.3.3	PM Deliverable: Project Schedule
1.3.4	Project Schedule complete
1.3.5	PM Deliverable: Project Management Plan
1.3.6	Project Management Plan complete
1.3.7	PM Deliverable: Project Budget
1.3.8	Project Budget complete
1.3.9	PM Deliverable: Project Spending Plan
1.3.10	MILESTONE: Project Spending Plan complete
1.3.11	Complete Impact Analysis
1.3.12	Requirements:
1.3.13	Complete the Planning Gate R&C Assessment
1.3.14	Conduct Lessons Learned Meeting
1.4	MILESTONE: Planning Phase complete
1.5	Execution
1.5.1	Review RFQ
1.5.2	Approve RFQ
1.5.3	Purchasing Review and Adjustments
1.5.4	Record Level Detail Requirements Gathering Completed
1.5.5	Phase I: RFI Solution Evaluations
1.5.6	Conduct Lessons Learned Meeting
1.5.7	Transition to Operations
1.6	Execution Phase complete
1.7	Monitoring and Controlling
1.7.1	Manage Project Schedule

WBS	Task Name
1.7.2	Manage Project Costs
1.7.3	Manage Project Scope
1.7.4	Manage Project Risks
1.7.5	Manage Project Issues
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity
1.7.9	Conduct Regularly scheduled Status Meetings
1.7.10	Prepare Regularly scheduled Status Reports
1.8	Monitoring and Controlling Phase Complete
1.9	Project Closeout
1.9.1	PM Deliverable: Project Closeout Report
1.9.2	Project Closeout Report complete
1.9.3	Conduct Lessons Learned Meeting
1.1	Closeout Phase complete

III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

WBS	Task Name	% Complete	Duration	Start	Finish
1	22 FloridaCommerce-Document Imaging System	5%	325 days	Tues 8/01/23	Fri 6/28/24
1.1	Initiation	90%	45 days	Tues 8/1/23	Tue 9/26/23
1.1.1	Risk and Complexity Assessment	100%	1 days	Mon 8/15/23	Mon 8/15/23
1.1.2	PM Deliverable: Project Charter	90%	20 days	Mon 8/15/23	Tue 10/20/23
1.1.3	Project Charter complete	100%	1 days	Tue 10/20/23	Fri 1/17/23
1.1.4	Stakeholders Register	100%	1 day	Mon 8/22/23	Mon 8/22/23
1.1.5	Project Internal Kickoff Meeting	100%	1day	Mon 8/15/23	Mon 8/15/23
1.1.6	Conduct Lessons Learned Meeting	100 %	2 days	Mon 9/25/23	Tue 9/26/23
1.2	Initiation Phase complete	100%	0 days	Fri 9/29/23	Fri 10/20/23
1.3	Planning	0%	120 days	9/29/23	Mon 1/22/24

WBS	Task Name	% Complete	Duration	Start	Finish
1.3.1	RFQ Conducted	100%	35 days	Fri 11/3/23	Fri 12/28/23
1.3.2	Resource Plan Complete	100%	5 days	Fri 12/20/23	Fri 12/28/23
1.3.3	PM Deliverable: Project Schedule	100%	11 days	Mon 12/28/23	Fri 1/15/24
1.3.4	Project Schedule complete	100%	0 days	Mon 1/15/24	Mon 1/15/24
1.3.5	PM Deliverable: Project Management Plan	100%	59 days	Mon 1/8/24	Mon 1/8/24
1.3.6	Project Management Plan complete	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.7	PM Deliverable: Project Budget	100%	13 days	Mon 1/8/24	Mon 1/8/24
1.3.8	Project Budget complete	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.9	PM Deliverable: Project Spending Plan	100%	3 days	Mon 1/8/24	Mon 1/8/24
1.3.10	MILESTONE: Project Spending Plan complete	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.11	Complete Security Assessment Analysis	75%	1 day	Mon 1/8/24	Mon 1/8/24
1.3.12	Requirements:	100%	116 days	Mon 9/18/23	Mon 1/22/24
1.3.13	Complete the Planning Gate R&C Assessment	100%	1 day	Mon 1/8/24	Mon 1/8/24
1.3.14	Conduct Lessons Learned Meeting	100	2 days	Thus 1/11/24	Thus 1/11/24
1.4	MILESTONE: Planning Phase complete	0	0 days	Fri 1/12/24	Mon 1/22/24
1.5	Execution	0	156 days	Mon 1/15/24	Fri 6/28/24

IV. Project Spending Plan

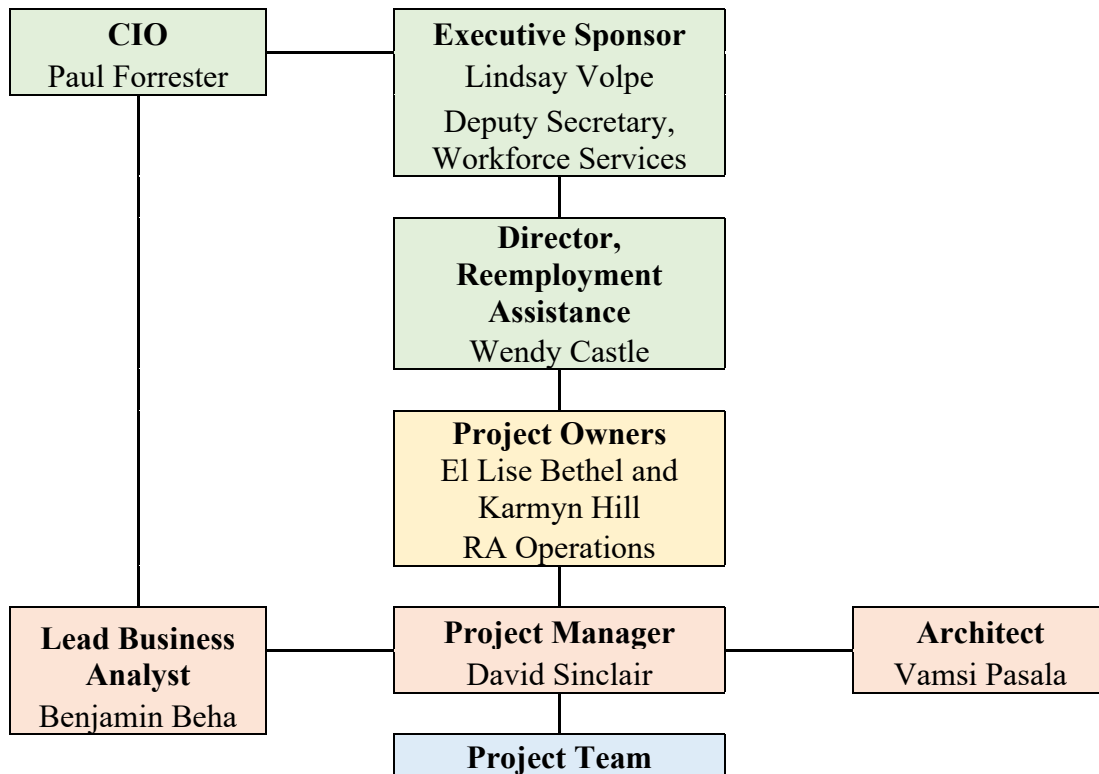
The Document Imaging System project has existing resources assigned, therefore, there is no current spend for this project. Expenditures are anticipated once a procurement is complete and a contract for products and/or services is executed.

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: \$0.00	Software: \$0.00
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$0.00
Other CapEx: \$0.00	Other CapEx: \$0.00

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on Request for Information, business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together.



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with Reemployment Assistance to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> Provide guidance on overall strategic direction.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	<ul style="list-style-type: none"> • Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Wendy Castle	Project Sponsor/Director of Reemployment Assistance	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project
El Lise Bethel and Karmyn Hill	Project Owner's	<ul style="list-style-type: none"> • Represents the interests of the stakeholders to the DW Team • Monitors project progress. • Approves project definition. • Approves plans and schedules. • Validates project deliverables meet expectations. • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
David Sinclair	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensure compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan
Vamsi Pasala	Architect and Technical Lead	<ul style="list-style-type: none"> • Responsible for assisting the team(s) in coordinating the most appropriate solution for Document Imaging

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Assists the team with identifying integration points with other projects and evaluating any risks. • Is available to executive management, the program team, and the project team for technical questions regarding direction of the project and any dependencies/impacts of other projects. • Assists the PM in coordinating additional technical resources/SMEs, if necessary, for the team. • Has historical knowledge of the Connect system since Go Live
Benjamin Beha	Business Analyst	<ul style="list-style-type: none"> • Responsible for assisting the Enterprise Solution Architect in coordinating the most appropriate solution. • Is available to executive management, the program team, and the project team for technical questions regarding direction of the project. • Assists the PM in coordinating additional technical resources/SMEs, if necessary, for the team. • Has years of historical knowledge of the Connect system

C. Project Management Methodology

The path to archiving and purging data requires transparency, excellent communication, and an overall process that supports both.

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce’s satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce’s project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.

- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce’s project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone’s role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project will need Organizational Change Management since the project is taking back scanning of physical mail from a third-party vendor back to FloridaCommerce staff.

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department’s tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description /Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				

VIII. Capacity Plan

This project will look at the volume of mail to determine the number of scanners that would be needed to keep up with the volume.

REEMPLOYMENT ASSISTANCE SYSTEM MODERNIZATION
Projected Spend Plan Summary SFY23-24
AS OF 2/29/2024

EXPENDITURE SUMMARY BY APPROPRIATION CATEGORY

100270 - UCMNT & UCMOD

		FY 2023 - 2024													
Category	Appropriation	Grant	July	August	September	October	November	December	January	February	March	April	May	June	Total
100270	\$ 3,504,402.00	UCMNT	PROJECTED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 65,054.90	\$ 65,054.90	\$ 65,054.90	\$ 65,054.90	\$ 260,219.58
			ACTUAL	\$ 558,920.00	\$ (376,649.40)	\$ 563,676.98	\$ -	\$ -	\$ 475,078.74	\$ 100,461.07	\$ 78,140.12	\$ -	\$ -	\$ -	\$ 1,399,627.51
Release	\$ 2,628,297.00	UCMOD	PROJECTED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			ACTUAL	\$ 420,793.49	\$ (105,080.82)	\$ 82,698.88	\$ 22,994.41	\$ 413,097.28	\$ (6,551.14)	\$ (349,501.57)	\$ (78,355.36)	\$ -	\$ -	\$ -	\$ 400,095.17
			ACTUAL TOTAL	\$ 979,713.49	\$ (481,730.22)	\$ 646,375.86	\$ 22,994.41	\$ 413,097.28	\$ 468,527.60	\$ (249,040.50)	\$ (215.24)	\$ -	\$ -	\$ -	\$ 1,799,722.68
			Appropriation Balance	\$ 2,524,688.51	\$ 3,006,418.73	\$ 2,360,042.87	\$ 2,337,048.46	\$ 1,923,951.18	\$ 1,455,423.58	\$ 1,704,464.08	\$ 1,704,679.32	\$ 1,704,679.32	\$ 1,704,679.32	\$ 1,704,679.32	\$ 1,704,679.32
			Release Balance	\$ 1,648,583.51	\$ 2,130,313.73	\$ 1,483,937.87	\$ 1,460,943.46	\$ 1,047,846.18	\$ 579,318.58	\$ 828,359.08	\$ 828,574.32	\$ 828,574.32	\$ 828,574.32	\$ 828,574.32	\$ 828,574.32

100778 - UCMNT & UCMOD

Category	Appropriation	Grant	July	August	September	October	November	December	January	February	March	April	May	June	Total
100778	\$ 16,066,221.00	UCMNT	PROJECTED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,206,427.62	\$ 1,206,427.62	\$ 1,206,427.62	\$ 1,206,607.62	\$ 4,825,890.47
			ACTUAL	\$ -	\$ 629,681.65	\$ -	\$ 62,338.50	\$ 31,476.75	\$ 825,295.48	\$ 867,578.82	\$ 5,757,286.57	\$ -	\$ -	\$ -	\$ 8,173,657.77
Release	\$ 12,049,646.00	UCMOD	PROJECTED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			ACTUAL	\$ -	\$ 775,223.98	\$ -	\$ -	\$ -	\$ (775,223.98)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
			ACTUAL TOTAL	\$ -	\$ 1,404,905.63	\$ -	\$ 62,338.50	\$ 31,476.75	\$ 50,071.50	\$ 867,578.82	\$ 5,757,286.57	\$ -	\$ -	\$ -	\$ 8,173,657.77
			Appropriation Balance	\$ 16,066,221.00	\$ 14,661,315.37	\$ 14,661,315.37	\$ 14,598,976.87	\$ 14,567,500.12	\$ 14,517,428.62	\$ 13,649,849.80	\$ 7,892,563.23	\$ 7,892,563.23	\$ 7,892,563.23	\$ 7,892,563.23	\$ 7,892,563.23
			Release Balance	\$ 12,049,646.00	\$ 10,644,740.37	\$ 10,644,740.37	\$ 10,582,401.87	\$ 10,550,925.12	\$ 10,500,853.62	\$ 9,633,274.80	\$ 3,875,988.23	\$ 3,875,988.23	\$ 3,875,988.23	\$ 3,875,988.23	\$ 3,875,988.23

105174 - FRR21

Category	Appropriation	Grant	July	August	September	October	November	December	January	February	March	April	May	June	Total
105174	\$ 42,010,971.00	FRR21	PROJECTED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,153,794.38	\$ 4,153,794.38	\$ 4,153,794.38	\$ 4,154,476.80	\$ 16,615,859.93
			ACTUAL	\$ 315,607.00	\$ 2,440,616.01	\$ 2,512,031.99	\$ 805,507.77	\$ 286,158.34	\$ 1,392,771.03	\$ 1,554,455.83	\$ 6,637,016.71	\$ -	\$ -	\$ -	\$ 15,944,164.68
Release	\$ 17,883,478.00		Appropriation Balance	\$ 41,695,364.00	\$ 39,254,747.99	\$ 36,742,716.00	\$ 35,937,208.23	\$ 35,651,049.89	\$ 34,258,278.86	\$ 32,703,823.03	\$ 26,066,806.32	\$ 26,066,806.32	\$ 26,066,806.32	\$ 26,066,806.32	\$ 26,066,806.32
			Release Balance	\$ 17,567,871.00	\$ 15,127,254.99	\$ 12,615,223.00	\$ 11,809,715.23	\$ 11,523,556.89	\$ 10,130,785.86	\$ 8,576,330.03	\$ 1,939,313.32	\$ 1,939,313.32	\$ 1,939,313.32	\$ 1,939,313.32	\$ 1,939,313.32

