



THE JAC EXPRESS



State of Florida - Justice Administrative Commission

Volume XIV Issue 4

A Word from JAC's Executive Director...



Rip Colvin
JAC Executive Director

The Justice Administrative Commission (JAC) recently held a meeting on November 14, 2023. The next Commission meeting will be held in Spring 2024. Meanwhile, this issue of the *JAC Express* provides updates on JAC training for Judicial-Related Offices (JROs); Messages from the Accounting Office; JAC Teamwork; CNC 2024; Florida PALM – Planning, Accounting, and Ledger Management; PCard Minute; Updates from the Budget Office; and many other items of interest.

Table of Contents

- JAC-Training for JROs –1
- Updates from Accounting – 2
- Florida PALM – 4
- Strategic Planning – 5
- Human Resources Updates – 6-8
- Updates from Budget – 8-10
- Staff Transitions – 11
- Staff Anniversaries – 12
- JAC in Brief – 13

COMMISSIONERS:

Diamond Litty, Chair
Public Defender
19th Judicial Circuit

~

Kathleen Smith
Public Defender
20th Judicial Circuit

~

Brian Haas
State Attorney
10th Judicial Circuit

~

Jack Campbell
State Attorney
2nd Judicial Circuit

JAC-TRAINING FOR THE JROS

To further assist offices with new staff, JAC has recently held in-person training to staff with various State Attorney's Offices. If an office is interested in scheduling in-person training, please contact Andy Snuggs at Andy.Snuggs@justiceadmin.org.

Save The Date! JAC's 2024 Connect and Collaborate Training Conference (aka: CNC 2024) will be held at the Embassy Suites Orlando Lake Buena Vista South on May 7-10, 2024. If you are interested in attending CNC 2024, please register online by visiting <https://www.surveymonkey.com/r/K9BXLJZ>.

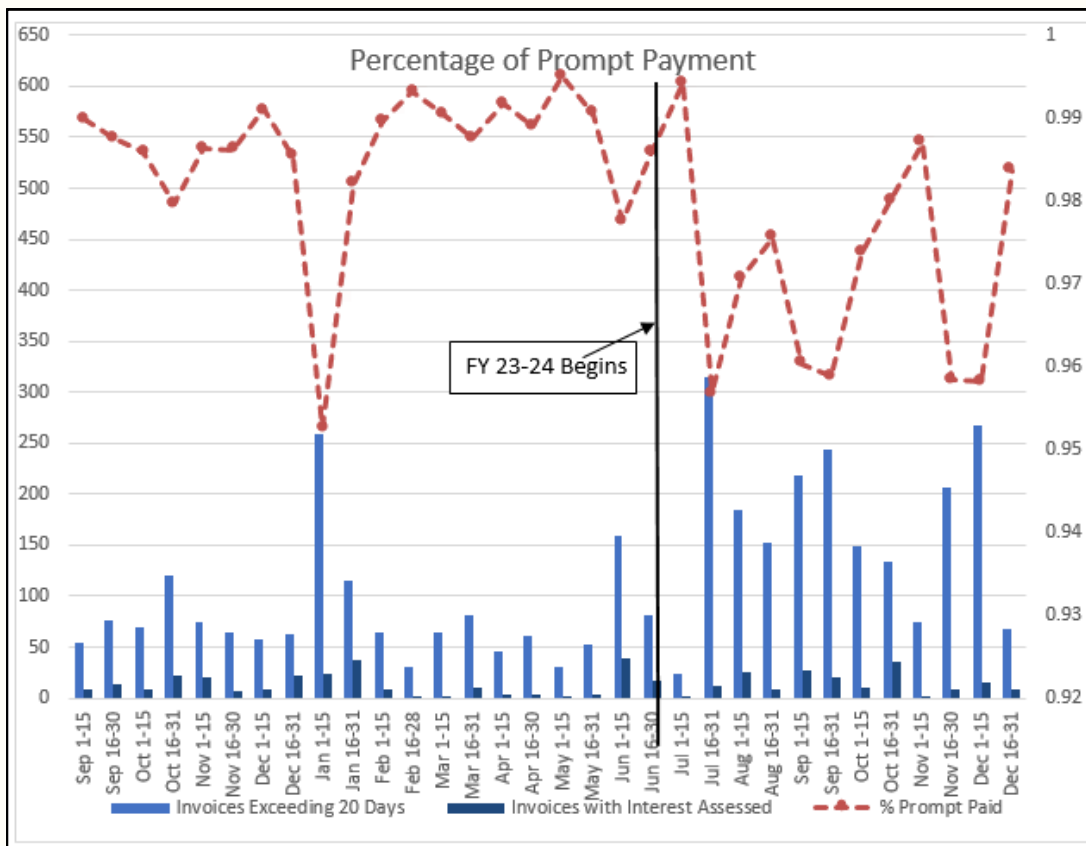
A Save-The-Date flyer is available with additional details. JAC staff are also developing the conference agenda, which will be available later this year.

UPDATES FROM THE ACCOUNTING SECTION

Prompt Pay Compliance

There has been a significant increase in compliance over the past 4 weeks. Currently, our compliance rate is at 98.37% for all invoices processed within the compliance rules of 20 days. JAC's Accounting Section is working with each JRO that has experienced multiple cycles under 90% compliance this fiscal year to help them identify process slowdowns. If you have any questions about the compliance rules, your office's specific compliance percentages, or ways to identify slowdowns, please let us know.

The chart below shows the total number of out-of-compliance invoices (Blue), the total number of invoices assessed interest (Red), and the percentage of invoices paid promptly within 20 days (Dotted Line) for each bi-weekly period through the end of the third quarter. There have been a total of 69,088 invoices processed, 2,038 were out of compliance (over 20 days old), and 175 were assessed interest penalties owed to the vendor (over 40 days old).



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UPDATES FROM THE ACCOUNTING SECTION

(Continued)

PCard Audits and Requirements

The Accounting Section has recently taken over the purchasing card post-audit process. During this process, we are reviewing all of the information and backup provided on 5% of the purchases each month. After completing the first two months of audits, we have identified a few key points of emphasis that need to be addressed. This will assist your offices in making sure that all of the required information is present and the invoice/backup is complete.

What backup documents should be uploaded into Works when clearing the PCard charge? The documentation included when sending batch payments to JAC should be the same as what you upload into Works for PCard charges. While Purchase Authorizations are not required, if your office creates them, it's a good idea to include them in the backup paperwork.

Purchase Authorizations often provide supporting information or explanations for purchases. Cardholders may need to add similar information or explanations on invoices or within the backup. It is important to provide a clear understanding of what was purchased or why a purchase was necessary. Vendor's descriptions can be very cryptic. Initially, adding a clarifying note will minimize questions in the future.

Please ensure PCard charges for unusual vendors/purchases or invoices with bad descriptions of what was purchased include clarifying information when clearing them in Works.

Invoice Requirements –

- Name of Vendor
- Breakdown of items purchased and unit cost
- Clear description of the product or service purchased
- Payment method, Receipt or Stamped (Paid by Pcard) showing the payment was made
- Justification for anything outside your normal scope of work

Travel Related Charges –

- Must have a sub-vendor (if travel is for a witness, please use the cardholder as the sub-vendor)
- Employee travel needs to have an STMS number in the description field

Special Requirements –

- If a purchase is made on behalf of multiple employees, the payment must be divided in Works to show each employee's portion separately
- If a credit is received, the TXN number for the original charge should be included in the description
- If you are refilling a postage meter, please include the meter number in the description field

Prohibited PCard Purchases –

- Memberships
- Fuel
- Everything else normally prohibited by DFS

FLORIDA PALM UPDATES

Planning, Accounting and Ledger Management

Recent Updates:

Florida PALM (PALM) is the ERP (Enterprise Resource Planning) System that will replace FLAIR. The Department of Financial Services (DFS) is spearheading this transition. Go-Live is January 2026.

JAC staff continue to work on numerous tasks assigned by the PALM team. In January, we will have six additional workshops as we move into the next stages of development. These tasks and workshops may be grouped into several areas, including how PALM will function, how our internal business systems will function and interface with PALM, the way staff will work in the future, assuring that data transferred from FLAIR to PALM is accurate and the readiness of our workforce to make this huge change.

JAC began working with the JROs in October 2023 to engage them in PALM activities. We met on December 14th to discuss how the Chart of Accounts will change. Our goal is to get JRO input on how we choose to use new data elements in PALM. In the new year, we will begin face-to-face meetings with JROs to discuss the direct impacts of PALM. We will also have discussions to learn about the JROs' internal processes and reporting to better understand their needs.



About Florida PALM:

Florida PALM (PALM) is the software platform that will replace FLAIR. The Department of Financial Services (DFS) is spearheading this transition. The Cash Management System (CMS) functions transitioned to PALM on July 6, 2021. Since then, JAC staff has been performing all CMS functions in PALM. DFS has started the next phase of meetings in design preparation for the Financial and Payroll functions within PALM (also referred to as "waves"). Go live is January 2026.

The Financials Wave includes Central and Departmental functions, such as state accounts, vendors, disbursements, and receipt processing. The Payroll Wave will replace the Bureau of State Payroll's system (PYRL module in FLAIR).

JRO Data and Public Records in PALM

JAC continues to communicate the necessity and importance of ensuring that individual JRO PALM access is limited to that JRO's information and not that of other JROs.

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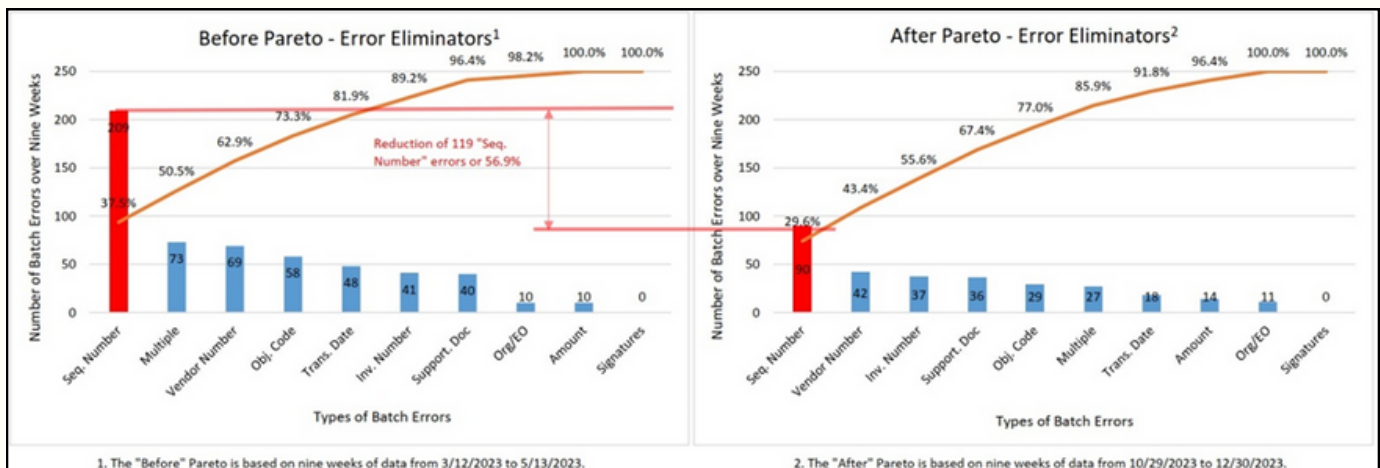
STRATEGIC PLANNING AND PERFORMANCE IMPROVEMENT

Implementing Our Strategic Plan with Documented Lean Six Sigma Results

JAC staff are actively engaged in the implementation of our Strategic Plan which includes the following three Strategic Priorities:

1. Provide exemplary services;
2. Cultivate engaged employees; and
3. Continue improving.

The following charts demonstrate the results of just one of numerous efforts initiated under our Strategic Plan.



The above results illustrate an over 50 percent reduction in sequence number errors for batches received by the JAC Accounting Section from the judicial-related offices (JROs). These results are from just one of the numerous Lean Six Sigma projects initiated at the JAC, and these results are a direct implementation of Strategic Objective 1.1.1 which is to reduce defects in JRO transactions.

Great work by JAC Accounting, JRO staff, and others to achieve these specific and documentable results moving us one step closer to our Vision of being the model of exemplary state government.

HUMAN RESOURCES UPDATES

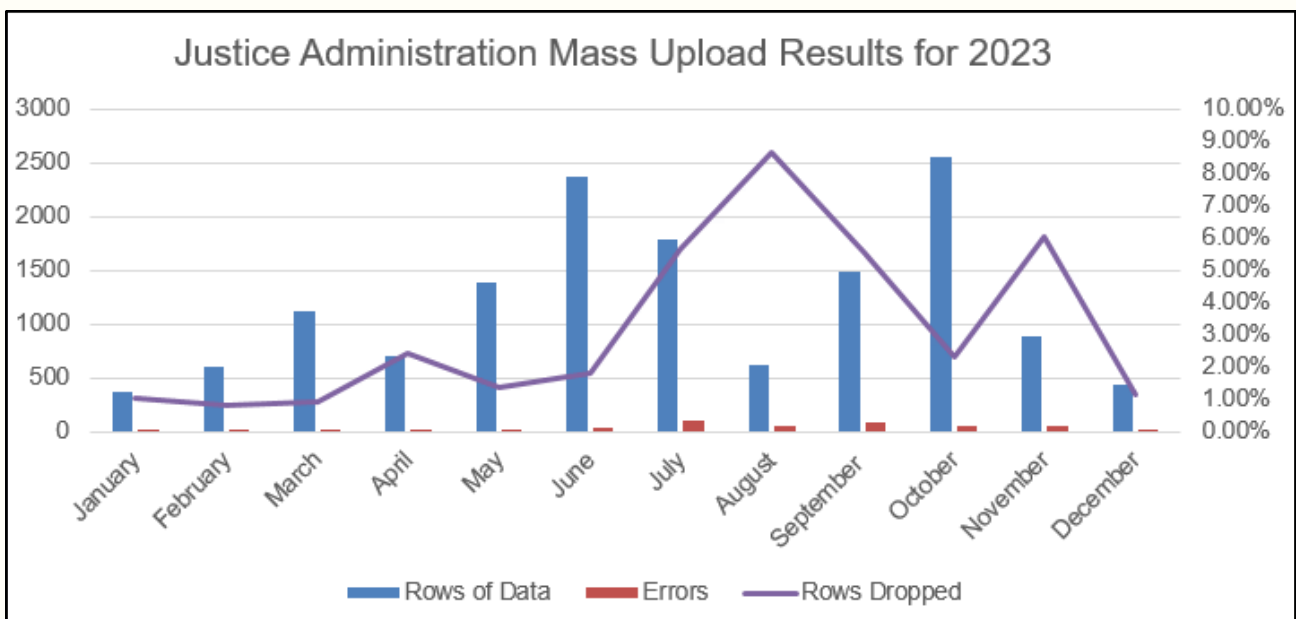
Using the Mass Upload Template for Salary Adjustments

When JAC has 100 or more salary adjustments, People First gives JROs the opportunity each month to submit a template to process them rather than via individual PARs. There are some nuances to this process; the two most critical focus on timing.

First, the People First deadline for template submission usually falls within the first seven to ten days of each month. That requires your Human Resources staff to know early in the month about your desired salary adjustments.

Second, due to the early deadline each month, there is the possibility of retroactively dating the effective date to no more than two pay periods. However, you must avoid “future-dated actions.” The increase (or decrease) must occur in a sequentially correct fashion. In other words, a salary change should not be placed on the template followed by a position change or other action you anticipate taking. For example: a name change was processed on August 3, 2023, and the effective date for the salary adjustment on the template is August 1, 2023. The salary adjustment will drop from the template because People First already has a “future dated action,” i.e., a name change. In that situation, the salary adjustment will drop from the template, and you must submit a PAR.

In 2023, we began charting the number for the mass upload template based on how many rows of data we received and the number of rows dropped after they were uploaded into People First. As you can see in the chart below, we have had a steady number of submissions, on average per month, 1,192 rows of data from the JROs, and of those, the percentage of rows dropped has been minimal, less than 3.1%. We have found this to be a time-saver for our Payroll Staff, and we hope it has been the same experience for your staff as well.



The instructions on how to use the template are on our [public website](#). If you have any questions regarding its use, please contact Andy Snuggs (Andy.snuggs@justiceadmin.org) or Jamie Johnson (Jamie.johnson@justiceadmin.org).

THE JAC EXPRESS

HUMAN RESOURCES UPDATES (Continued)

Administrative Health Insurance Assessment (AHIA) on Vacant Positions

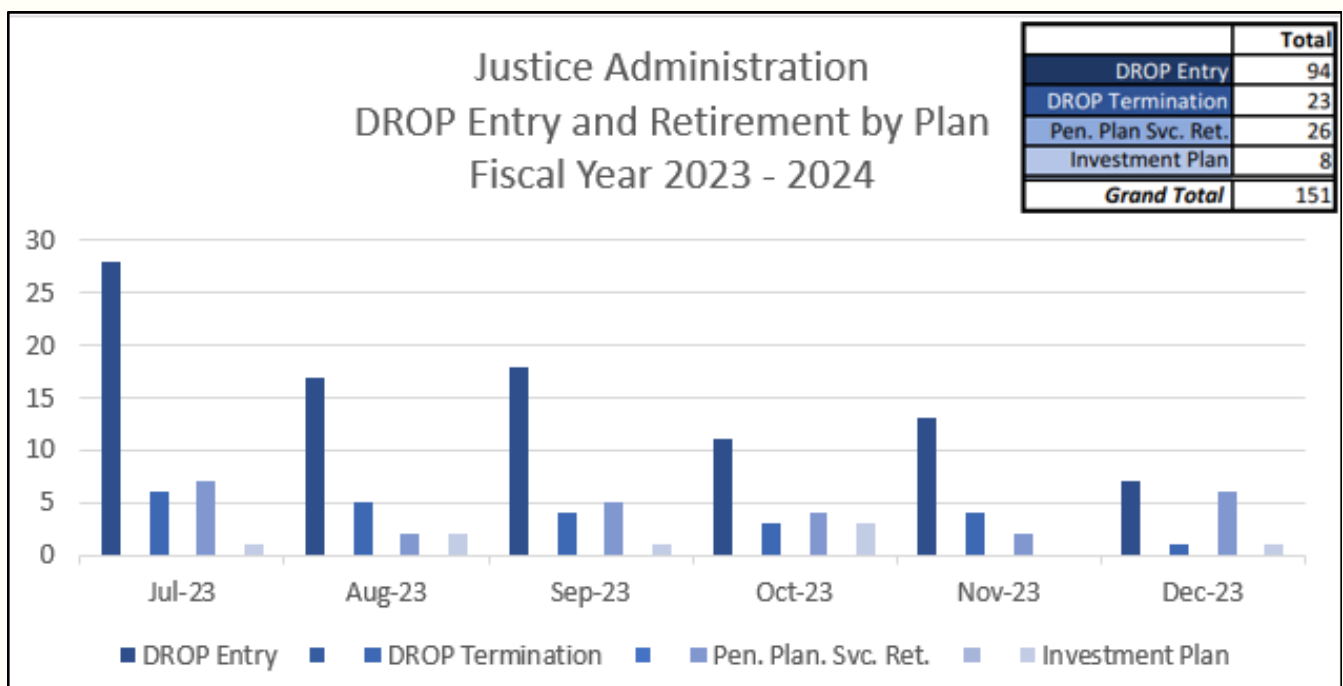
Senate Bill (SB) 2500, the FY 2023-24 General Appropriations Act, and SB 2502, Implementing the FY 2023-24 General Appropriations Act, require the Department of Management Services (DMS) to assess an Administrative Health Insurance Assessment (AHIA) to each state agency.

The AHIA is set at an amount equal to the employer's cost of individual employee health care coverage (at the Career Service rate), which will be \$763.46 for FY 2023-24. This amount will be assessed to each state agency based on that agency's number of salaried positions (non-OPS), eligible for health benefits that are vacant for the entire month. The AHIA does not apply to positions funded, wholly or partially, with federal funds.

Each month, DMS sends invoices to each state agency. JAC received one invoice for Justice Administration. We inform each JRO of their responsible amount and process it through journal transfers, we remit the monthly AHIA to the State Employees Health Insurance Trust Fund (ss. 110.123 and 110.1239, F.S.).

Retirement Statistics

During FY 23-24 JAC has processed a total of 94 DROP enrollments, 23 DROP terminations, 26 Pension Plan service retirements and 8 Investment Plan retirements



THE JAC EXPRESS

HUMAN RESOURCES UPDATES *Continued...*

DROP Continuation

SB 7024 increased DROP participation from five to eight years. The opportunity to continue participation in the program was extended to those employees who were enrolled in the program at the time the bill was passed. Of these employees, as of December 7th, JAC has processed 213 elections to continue participation in DROP. This number represents 44% of the employees enrolled in DROP prior to July 1st.

JROs	Optional DP-ELEs Filed
State Attorneys	159
Public Defenders	48
Regional Counsels	1
Capital Collateral Reg. Counsels	0
Guardian ad Litem	5
TOTAL	213

Governor’s Budget Recommendations – Florida Retirement System

The Governor recommends increasing pension benefits of former employees by three percent and increasing the employer contribution for employee FRS Investment accounts by an additional one percent of the member’s salary. Unlike many states, the FRS Pension Plan is funded at over 81 percent or \$184.2 billion in valued assets of the projected \$226.2 billion in liabilities. To continue to improve the plan’s financial position for the long haul, the Governor proposes a \$1.0 billion paydown of the Unfunded Actuarial Liability (UAL) for Fiscal Year 2024-25 – improving the plan’s funded status by an additional 0.4 percent.

UPDATES FROM THE JAC BUDGET OFFICE

The AFP3 3rd Quarter General Revenue release was posted to FLAIR on December 12, 2023. The EOG Memorandum #22-042, Original Approved Financial Plan Approved Annual Salary Rate and Annual Release Plan, details the release schedule and percentages. The document can be accessed on the Budget Office’s EOG Memorandums webpage [HERE](#).

For FY 2023-24, The Governor’s Office of Policy and Budget (OPB) requests state agencies and the judicial branch submit a salary rate analysis at the Budget Entity Level for each quarter of the fiscal year. EOG Memo #23-044, titled Salary Rate Analysis, is posted on the Budget Office webpage under EOG OPB Memorandums for complete details. The file can be accessed [HERE](#).

The 2nd Quarter Salary Rate Analysis was submitted on December 12, 2023. The 3rd Quarter Salary Rate Analysis is due March 12, 2024.

On December 5, 2023, Governor Ron DeSantis released his Fiscal Year 2024-2025 budget recommendation entitled “Focus on Florida’s Future.” An overview of the \$114.4 billion-dollar budget can be found at the following link: www.bolderbrighterbetterfuture.com.

UPDATES FROM THE JAC BUDGET OFFICE

A side-by-side comparison of agencies' FY 2024-2025 Legislative Budget Request (LBR) as submitted and posted to the Florida Fiscal Portal in September 2023 compared to the Governor's FY 2024-2025 Budget Recommendation were provided to the judicial related offices (JRO's) on December 6th.

This document is in the form of an Exhibit D-3A Report, which shows issue titles and codes, appropriation categories, fund codes, and amounts. It compares the agency request (Column A03, which is now Column A12) to the Governor's recommended budget in Column G01. Column G02 displays the non-recurring portion of the Governor's budget.

Issue codes starting in the 100XXXX series is the agency base budget. Issue codes 16XXXXX are re-approvals of FY2023-2024 recurring budget amendments, and 26XXXXX are annualization issues. All other issue codes represent newly requested items made by the agency.

On December 20th OPB notified agencies they could now amend their Fiscal Year 2024-2025 Legislative Budget Request (LBR) pursuant to s. 216.023(7), F.S.

Amendments should be used sparingly for dire consequences or unforeseen circumstances and in active communication with Legislative staff to ensure the change has their attention as they have already begun developing a preliminary draft of their budget based on the original LBR submissions in September 2023 and very selectively include issues submitted in an Amended LBR.

In order to streamline changes unsolicited by legislative staff, the JAC Budget Office will conduct only two 'Agency Initiated' postings for the Amended LBR.

1. The 2024 regular Legislative Session began Tuesday, January 9th; therefore, the first posting of the Amended LBR was uploaded to the Florida Fiscal Portal on Monday, January 8th. Draft issues received in the Budget Office by Friday, January 5th were included in the first posting.
1. The second posting of the Amended LBR will be uploaded to the Florida Fiscal Portal on Tuesday, January 23rd. Drafts should be submitted to the Budget Office by Wednesday, January 17th, to be included. Any further amended LBR postings would need a directive from legislative staff the issue is under further consideration and requires posting.

An Amended LBR is:

- Changing the current LBR by revising or deleting any issue narratives and amounts that were in the September 2023 submittal to the Florida Fiscal Portal. The amended narrative should conclude with 'Summary' followed by a brief explanation of the change in dollars, positions, and salary rate. Particular attention should be given to highlight the change to dollars, positions, and salary rate on an existing issue to avoid confusion on what was previously requested and the impact of the amended request.
- Adding completely new issues. The justification should conclude with the statement '*Summary: This is a new issue.*'

UPDATES FROM THE JAC BUDGET OFFICE

The template for the Amended LBR data entry form is posted on the Budget Office website and can be accessed [HERE](#). Please use one form for each issue code that you will be amending. If adding a new issue, refer to the Budget Office website, which can be accessed [HERE](#) for the Issue Code List for all codes or the Agency LBR Checklist for the most commonly used codes. If you cannot locate a suitable issue code, please let us know your suggested issue title, and we will generate a code for you. Submit the completed draft via either Pydio or Email:

- If using Pydio, please send an email notification to the Budget Office at Budget@justiceadmin.org.
- If submitting by email, send to Budget@justiceadmin.org. NOTE: PLEASE SAVE THE EXCEL FILE BEING SUBMITTED TO JAC BY EMAIL WITH AN XLSX ENTENSION. OTHERWISE IT WILL BE BLOCKED BY THE EMAIL SERVER.

If you don't receive a response within one business day, please confirm with us we did receive your file.

Also, if you wish to submit a transmittal letter on your agency letterhead, an Agency Amended LBR transmittal letter template is posted on the Budget Office website and can be accessed [HERE](#). Please use the date December 20, 2023, on the agency letterhead if submitting with the 'First Amended LBR.' As always, JAC will submit a departmental transmittal letter for all agencies so it is not necessary to submit your own letter.



JAC STAFF TRANSITIONS

JAC welcomed **Lateefa Peammon** to the Court-Appointed Section on November 6, 2023, as their newest Auditor I. Lateefa holds a degree in Criminal Justice and is currently in school for Paralegal studies. She has been working for the state Florida for almost nine years now. Her hobbies include hiking, photography and listening to music.

JAC said goodbye to **Kathy McCabe** (Professional Accountant I) on November 30th. We wish her a happy and fun-filled retirement!



Staff Anniversaries

October 2023:

- Shawna Metz - 9 years
- Cheryl Williams - 19 years
- Lorelei Welch - 19 years
- Caroline Goodner - 1 year
- Amy Maros - 19 years
- Bryce Burnett - 2 years
- Cynthia Sutton - 19 years
- Stephanie Hanks - 19 years
- Jamie Johnson - 16 years

November 2023

- Jennifer Sutton - 19 years
- Patricia Burt - 19 years
- Bryan McKeone 1 years
- Nicholas Piazza - 2 years
- Tim Tice - 11 years

December 2023

- Kenetta Epps - 2 years
- Christian Lake - 17 years
- Yuliya Boiko - 5 years
- Tracy Kessler - 1 year
- Theresae Usherwood - 19 years
- Loraine Cole - 18 years
- Velicia Johnson - 18 years
- Dina Kamen - 13 years



JAC IN BRIEF

Setting goals is the first step to turning the invisible into the visible. -Tony Robbins

State of Florida

Justice Administrative Commission

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Follow Us On:



The Justice Administrative Commission administratively serves 49 judicial-related offices (JROs): 20 Offices of State Attorney, 20 Offices of Public Defender, 5 Offices of Criminal Conflict and Civil Regional Counsel, 3 Offices of Capital Collateral Regional Counsel, and the Statewide Guardian ad Litem Program. Services provided are primarily in the areas of accounting, budget, financial services, and human resources. While the JAC administratively serves these JROs, the JAC does not supervise, direct, or control them.

The JAC also provides compliance and financial review of billings for services provided by private court-appointed attorneys representing indigent persons and associated due process vendors.

The membership of the Justice Administrative Commission consists of two State Attorneys, appointed by the President of the Florida Prosecuting Attorneys Association and two Public Defenders, appointed by the President of the Florida Public Defender Association.

Although members may be reappointed, each term spans a period of two years (s. 43.16, F.S.).

JAC's Vision: To be the model of exemplary state government.

JAC's Mission: To support the entities we serve and Florida's judicial system with fiscal controls, best practices, and exemplary service.

JAC's Values: We take great pride in exemplary service, adaptability, honesty, integrity, and diversity, as well as respectful and ethical conduct.

IF YOU SUSPECT FRAUD OR MISUSE OF STATE FUNDS INVOLVING PRIVATE COURT-APPOINTED OR INDIGENT FOR COSTS CASES, JAC WANTS TO HEAR FROM YOU. YOU MAY ANONYMOUSLY REPORT SUSPECTED FRAUD, WASTE, OR ABUSE [HERE](#).