

April – June 2021



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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



State of Florida – Justice Administrative Commission

Volume XII Issue 2

A Word from JAC's Executive Director



Rip Colvin
JAC Executive
Director

The most recent Justice Administrative Commission (JAC) Meeting was held via Zoom May 25, 2021. A date for the next meeting has not yet been determined. Meanwhile, this issue of the JAC Informer provides updates on JAC training for Judicial-Related Offices (JROs); Year End Meetings; Online Legal Research; Statewide Travel Management System (STMS); Submitting BOMS-Generated Batch Sheets to JAC via the “BOMS to JAC Web Service”; Voucher Delivery to the Offices; Florida PALM – Planning, Accounting, and Ledger Management; and other items of interest.

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JAC Training for JROs

We are considering possibilities related to a rescheduled CNCIII Training Conference in May 2022. In the meantime, JAC's sections are posting new on-demand training materials on our public website. To date, JAC Human Resources has recorded and posted seven PowerPoint videos (<https://www.justiceadmin.org/HR/training.aspx>), including:

- Human Resources Overview
- Request to Fill Vacancy
- Payroll Process from New Hire to Separation
- FLAIR – RDS Overview
- Benefits
- Retirement, Parts I and II

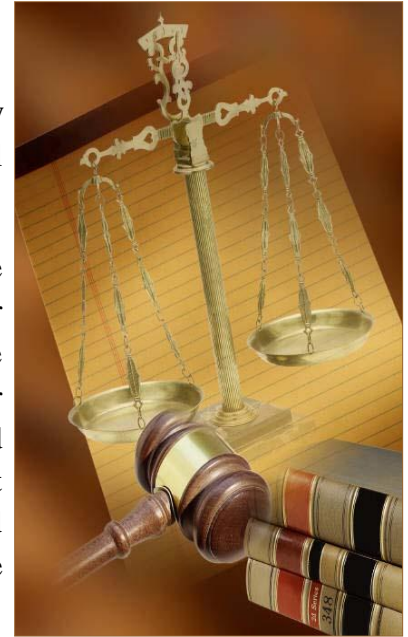
Stay tuned! More on-demand training materials are on the way!

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Online Legal Research

JAC can document **annual recurring savings of approximately \$410,000** by the JROs based on collective efforts associated with both the original online legal research contract and the contract extension we are now operating under.

Specifically related to the contract extension, on February 20, 2020, with the approval of FPAA and FPDA representatives, JAC signed an extension of our original agreement with LexisNexis. The extension allows the JROs to take advantage of enhanced service offerings from LexisNexis at an even greater reduction in price per user per month. These enhanced service offerings and reduced pricing became available to the JROs on June 1, 2020, and are the result of collaboration between a team of representatives from the JROs, JAC staff, and LexisNexis representatives. The operational changes brought about by the contract extension have been implemented without incident.



In an effort to address potential COVID-related budget concerns, JAC staff coordinated with the team of representatives from the JROs and LexisNexis staff to determine if prepayment resulting in further savings would be possible. Specifically, we entered into an addendum to the newly signed agreement to allow for advanced payment for services. Due to the potential size of the advanced payment, a request was made of the Department of Financial Services (DFS) for approval, and DFS approval was received. This prepayment option was implemented without incident and has resulted in an **additional total savings of over \$17,000**.

JAC is also assisting JROs with LexisNexis training and Continuing Legal Education (CLE) opportunities. These opportunities are free and open to any JRO staff.

If you have any questions regarding the training opportunities or any other issues regarding these online legal research efforts, please contact Greg Cowan at greg.cowan@justiceadmin.org.

Voucher Delivery to the Offices

When COVID-19 forced agencies to transition to a mobile workforce, JAC began looking at how to make voucher information available more quickly and easily to the JROs. JAC has begun work with a limited number of JROs to serve on a pilot project. We are reviewing the feedback we have received, and are working to address some of the issues they have identified. We are extremely grateful to the JROs who are helping us test this new process, and will be looking at bringing more offices into the pilot project before rolling this out to all of the JROs. This process will reduce paper usage and save money.

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Messages from the Accounting Office



The Statewide Travel Management System (STMS) has been implemented for most offices. The cooperation of all offices in this endeavor has yielded a successful implementation, which is greatly appreciated. Employee travel should be recorded in the STMS; however, non-employee travel will continue to be processed via the traditional “paper” documents submitted via batch sheets to the JAC Accounting Office. Questions related to travel and the STMS may be directed to: Dina Kamen, Director of Accounting at: dina.kamen@justiceadmin.org.

BOMS to JAC Web Service

JAC’s IT Section, in conjunction with Computer Information and Planning (CIP), developed a secure method for submitting Batch Sheets with supporting documentation to JAC for payment of invoices (i.e., Web Service). Benefits include:

- Secure submission – offering the most secure method for submitting Batch Sheets to JAC – much lower risk of documents (and confidential information) being accessed or confiscated by the wrong party,
- Ease of submission from BOMS – no printing to paper and scanning for email,
- Quality of images remain – JAC receives the highest quality images – program generated, easy to read; less chance for errors vs. scanned documents,
- Electronic signature functionality when BOMS is utilized – no printing, signing, and scanning,
- CIP has provided instructions within BOMS for each office to set up BOMS for the Web Service, and
- JAC IT and Mailroom staff can more quickly route the Batch Sheets to appropriate JAC staff for processing.

Currently, 16 offices (SAs 2, 7, 9, 10, 16, and 20; PDs 1, 2, 4, 13, 17, 19, and 20; and RCs 1, 3, and 5) are using the Web Service for Batch Sheets. JAC encourages more offices to take advantage of the Web Service, primarily because of the high levels of security and efficiency it provides.

Please note: the Web Service is not the MyJAC portal on JAC’s website, and is not available at this time for submissions to Human Resources.



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Jump in and let PALM work for you . . .



- ▶ Track
- ▶ Query expenditures
- ▶ Project needs

▶ Photo Credits: Lorelei Welch



Florida PALM – Planning, Accounting and Ledger Management

Florida PALM is the software platform that will replace the Treasury Cash Management System (CMS), FLAIR, and the State Payroll System (PYRL). DFS and the PALM team are aware of the 49 Judicial-Related Offices (JROs) and the uniqueness of our structure and the related needs. The Treasury functions will be the first to transition to PALM on July 6, 2021. This wave includes a migration from the old system for retrieving the Revolving Fund bank statements.

Unfortunately, this wave does not incorporate the ability to internally separate access for offices that will be in place for the FLAIR wave. Luckily, the only offices impacted in this wave will be the 10 JROs with Revolving Funds held at Wells Fargo within the Consolidated Revolving Account (CRA). At this time, JAC plans to provide these JROs any information needed from the CRA accounts.

The PALM Team plan includes required permission customizations to appropriately separate each JRO's information during the FLAIR implementation. The PALM implementation schedule is below:

- CMS implementation – July 2021
- FLAIR implementation (i.e., Departmental & Central functionality and RDS) – July 2024
- State Payroll implementation – January 2025

The transition to using PALM will update account information printed on checks, deposit slips, and stamps. Susie Kalous with JAC has worked with all 10 JROs to verify the information to be printed on the checks and determine the JROs' needs. The bank (Wells Fargo) will pay the initial cost of these start-up supplies, per an agreement with the bank and Treasury. The start-up supplies will be sent to the offices around the end of June, with a start using date of July 1st. Old checks and deposit slips should be shredded.

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Data and Public Records in PALM

JAC has engaged DFS, and the PALM team, regarding the necessary separation of data and access within PALM as we look ahead to the full accounting and budget information that will be contained within the system. We have communicated the necessity of ensuring that individual office information can be viewed only by that office. JAC Legal provided a memorandum to DFS explaining the legal basis for the need to restrict access to data between the individual offices. Additionally, we will be engaging DFS regarding their public records policy related to PALM. *Eventually* payment information including documents and related “back-up” for transactions will be housed in PALM, including any due process or case-related payments. JAC will continue to work with DFS in developing sound public record request policies and processes.

JAC will continue to keep all offices informed and engaged regarding Florida PALM activities over the next months and years.

Year-End Meeting and Financial Statement Workshop for FY 2020-21

On Wednesday, May 26th, JAC held our annual Year-End Meeting. Managers and staff from all of the sections serving the JROs provided information and guidance regarding the plethora of administrative issues to be addressed as part of the fiscal year-end. The meeting was held virtually via GoToWebinar, and a copy of the presentation from the meeting is available at <https://www.justiceadmin.org/>. If you or your staff have any questions, please contact Greg Cowan at greg.cowan@justiceadmin.org.

The Financial Statement Workshop was held Thursday, June 17th, from 9:00 AM (ET) to 10:45 AM (ET). Approximately 83 JRO staff logged into the workshop. We had some great questions. Thank you JROs for your participation. The final [presentation](#) is available on the [JAC Year-End Resources page](#). DFS has delayed publishing final financial statement forms. Once we receive the information, we will finalize all forms and certifications. An email notification will be sent when they are ready for review.



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PCard Minute

Contractual Billings Form

Many offices use their PCards as a way to make routine payments simpler. If your office pays for services such as utilities, internet connections, cell phones, equipment rentals, postage meters, or shredding services using PCard, this form applies to your office. PCards can be used for these payments if the total amount of the individual contract or authorization is less than \$75,000 per contract year.



The [PCard Contractual Billings Form](#) is required as part of compliance with state PCard guidelines. The form is maintained in-house and must be available to DFS upon request. If your office makes these routine payments using PCards, please complete this form and send it to JAC. This form should be reviewed by offices annually and any updates sent to [JAC](#).

FACTS Contracts

The services paid on PCard may relate to a contract entered in the Florida Accountability Contract Tracking System (FACTS). Each FACTS contract is assigned a 5-digit Contract ID. \This ID should be used on all batch and PCard payments.

The FACTS **contract ID** should be entered in the “GL08: Contract” field in Works so the payments are included in FACTS.

Please contact Merry Sutton or Aleah Roddenberry via Pcard@JusticeAdmin.org with any questions.

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Updates from the JAC Budget Office

The JAC Budget Office conducted the FY2022-23 Legislative Budget Request (LBR) and Long Range Program Plan (LRPP) Annual Meetings with the State Attorney, Public Defender, Public Defender Appellate, Capital Collateral Regional Counsel and Criminal Conflict and Civil Regional Counsel Offices the week of June 14-18, 2021. Important dates highlighted:

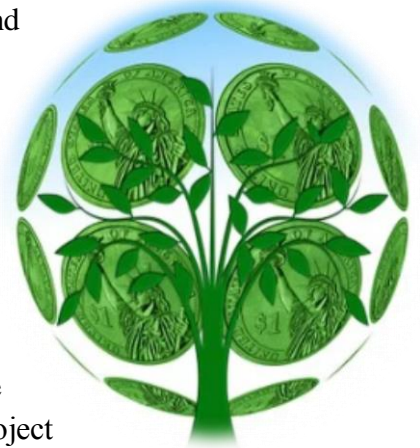
- July 30th – due date for all LBR data entry forms, schedules and exhibits to the JAC Budget Office.
- August 30th – due date for all LRPP data entry forms, schedules and exhibits to the Budget Office.
- September 15th – Department LBR posting deadline to the Florida Fiscal Portal.
- September 30th – Department LRPP posting deadline to the Florida Fiscal Portal.

All meetings were recorded in Zoom Meeting and can be accessed on the JAC website, on the Budget Office webpage under [Trainings and Meeting Presentations](#).

The Budget Office introduced a revised LBR Data Entry Form for LBR Requests, Amended LBR Requests and LBR Reductions during the LBR/LRPP Annual Meetings. With format and material guidance from the Budget Team and the technical expertise of the JAC Information Technology (IT) Development Team, the form is designed with dropdown lists and auto calculation features to assist the preparer in providing information that must be included for budget data entry into the Legislative Appropriations System/Planning and Budgeting Subsystem (LAS/PBS). The forms and complete instructions are posted on the Budget web page under [Legislative Budget Requests and Long Range Program Plans](#).

In conjunction with the new LBR data entry forms and again with the assistance of the JAC IT Development Team, the Budget Office revealed a re-vamped web page in June 2021. The web page features new links for Budget Legislation, Budget Resources and Training and Meeting Presentations. Other material was reorganized to make accessing more streamlined, including locating Budget Amendment Forms, Executive Office of the Governor Office of Policy and Budget Memorandums and LBR and LRPP material. The web page is now poised to serve as a landing pad for all things JAC budget-related as the Budget Office moves to using this environment to communicate more efficiently with the judicial related offices.

A note of appreciation to Susan Stubbs, Michelle Dolce, Mausumi Das, Kelly Jeffries and Adam Preisser for the LBR Data Entry Form revisions and the webpage revitalization. Everyone's contributions were significant to the project success and yielded enhanced resources for our customers.



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State of Florida
Justice Administrative
Commission

227 North Bronough Street,
City Centre, Suite 2100
Tallahassee, Florida 32301

Phone: (850) 488-2415
Toll Free: (866) 355-7902

FAX (850) 488-8944

For comments, suggestions,
and/or submissions for the next
quarterly newsletter, please
contact:

Jhan Snyder
Phone: (850) 488-2415, ext. 225
Jhan.Snyder@justiceadmin.org

The cover beach photo is
courtesy of Rip Colvin.

*It's hard to beat a person who never
gives up.*

~ Babe Ruth ~

JAC In Brief

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.

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WWW.JUSTICEADMIN.ORG