

April – June 2022



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Public Defender
19th Judicial Circuit

~
Kathleen Smith
Public Defender
20th Judicial Circuit

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State Attorney
10th Judicial Circuit

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State Attorney
2nd Judicial Circuit

State of Florida – Justice Administrative Commission Volume XIII Issue 2

A Word from JAC’s Executive Director



Rip Colvin
JAC Executive Director

The next Justice Administrative Commission (JAC) Meeting will be held in September 2022. Topics anticipated to be discussed include the JAC’s Executive Director’s Report; Legal Update; JAC’s Legislative Budget Request and Legislative Package; and other topics of interest. Meanwhile, this issue of the JAC Informer provides updates on JAC training for Judicial-Related Offices (JROs); Online Legal Research; Electronic Voucher Delivery to the Offices; Messages from the Accounting Office; BOMS to JAC Web Service; JAC Teamwork; Florida PALM – Planning, Accounting, and Ledger Management; PCard Minute; Updates from the Budget Office; and many other items of interest.

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JAC Training for JROs

JAC’s Connect and Collaborate III (CNCIII) Training Conference was held May 3-6, 2022, at the Sheraton Bay Point Golf and Spa Resort located in Panama City Beach. Approximately 130 officials and staff attended the conference, and it was great to be able to meet in-person again with friends and colleagues from across the state. Plans are being made to send materials to those offices that were unable to attend, along with recorded presentations for most of the sessions presented at the conference. Materials and presentations from the conference will also be posted on the conference webpage at <https://www.justiceadmin.org/jac/jacconference.aspx>.

Here are a few photos of the connecting and collaborating:

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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 JAC/LexisNexis online legal research contract and the contract extension we are now operating under. JAC also achieved non-recurring savings of approximately \$18,000 from a negotiated advance-payment of the first two years of the three-year extension.

The contract extension is scheduled to expire June 2023. Discussions will be initiated in the upcoming months to determine how best to proceed given the expiration of the contract extension.

If you have any questions regarding these online legal research efforts, please contact Greg Cowan at greg.cowan@justiceadmin.org.



Messages from the Accounting Office

New Vendor Correction Emails

Accounting has recently introduced our new process of emailing your offices anytime a vendor issue occurs. This new procedure was one of the solutions developed during our recent Six Sigma Green Belt project on process improvement.

- To begin, we started tracking what corrections were being addressed on batch sheets most often and how we could help your offices best identify, correct, and prevent those issues in the future.
- Accounting worked with Budget, HR, and Financial Services staff to come up with the most effective solutions to improve our current processes.
- We identified that the previous procedure of only marking vendor corrections on the batch sheet for your offices to update when the voucher and backup was returned was not working successfully.
- In response, we reevaluated our previous method and changed how we are going to communicate these corrections to you.
- Our new process will be to send your office an email whenever a vendor error occurs on a batch sheet and the corrections needed to prevent it in the future.
- Included in that email will be a quick one-page reference guide to adding and editing vendors in BOMS to assist your offices with the changes.

We are open to any feedback you have regarding the new process and will communicate any changes or updates that may occur. If you have any questions, please contact Tim Tice, Deputy Director of Accounting at: tim.tice@justiceadmin.org.

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Message from Financial Services



The Financial Services Section is gearing up for financial statements. A workshop was held on June 16, 2022, to review the documentation and certifications needed from each office. The workshop video was provided via email on June 17. If you did not receive the information and could not participate, please email financialservices@justiceadmin.org to request the information.

For easy reference, a checklist of items needed is provided on the webpage <https://www.justiceadmin.org/ClientAgencies/yearend.aspx>. The following forms are now available on our website:

- The Consideration of Fraud form. It needs to be dated on or after June 30.
- The Agency Representations for Annual Comprehensive Financial Report (ACFR) certifications form.
- The Agency Representations for Schedule of Expenditures of Federal Awards (SEFA) certifications form.

Operating Lease information will not be due on July 8. At the end of July, DFS will provide directions for submitting the information. This form is changing due to the implementation of the Governmental Accounting Standards Board (GASB) Statement No. 87.

If you have questions about financial statements after reviewing the available resources, please contact Nona McCall, Director of Financial Services, at nona.mccall@justiceadmin.org.

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Florida PALM – Planning, Accounting and Ledger Management

Florida PALM (PALM) is the software platform that will replace FLAIR. The Department of Financial Services (DFS) is spearheading this transition. JAC staff continues to participate in meetings and provide requested information. We continue to study and learn about the many system functions and workflows within each phase of this transition. DFS and the PALM team are aware of the 50 JROs of Justice Administration and the uniqueness of our structure.

Jump in and let PALM work for you . . .



- ▶ Track
- ▶ Query expenditures
- ▶ Project needs

▶ Photo Credits: Lorelei Welch



Treasury functions transitioned to PALM on July 6, 2021. JAC staff will perform the Treasury functions in PALM. This phase includes a migration from the old system for retrieving Revolving Fund bank statements. The only JRO staff impacted with this phase will be the 12 offices with Revolving Funds Bank Accounts. JAC Financial Services will distribute bank statements by email when available in the system.

The Legislature required CMS remediation before further implementation of the other PALM waves. DFS' goal is to have CMS remediation completed June 30, 2023.

DFS has delayed the Financials Wave until July 2025 at the earliest. The Financials Wave includes Central and Departmental functions, such as state accounts, vendors, disbursements, and receipt processing. The Payroll Wave will also be delayed and is scheduled to be implemented with the Financial Wave.

JRO Data and Public Records in PALM

JAC has engaged DFS and the PALM team over the past year regarding the necessary separation of JRO data and access within PALM as we look ahead to the comprehensive 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 records request policies and procedures.

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

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PCard Minute

Approvers vs. Auditors

JRO Approvers and Auditors are two very different roles in the Works system.

Approvers check to ensure the completed transactions from the Accountholders are correct before sending them to JAC Accounting for payment. Approvers' permissions prevent them from printing reports or dividing transactions. Their primary role is to keep transactions moving from the Accountholders to JAC Accounting within the 10-day processing guidelines.

Auditors have limited permissions which exclude transaction processing. This role is used to monitor user functions and print reports. ALL Approvers also have Auditors permissions which provide the ability to print reports for the JRO's users and their transactions.

Please feel free to contact Merry Sutton or Aleah Roddenberry at: pcard@justiceadmin.org with any questions.



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. 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, signing, and scanning for email;
- Quality of images remain true – 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 for email;
- CIP has provided instructions within BOMS for each office to set up BOMS for the Web Service; and
- JAC IT and Mailroom staff can route the Batch Sheets to appropriate JAC staff more quickly for processing.

Currently, 25 offices (9 PDs, 12 SAs, and 4 RCs) 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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Updates from the JAC Budget Office



The JAC Budget Office has scheduled the FY 2023- 2024 Legislative Budget Request (LBR) and Long-Range Program Plan (LRPP) Annual Meetings with the Judicial Related Offices (JROs).

- Public Defenders and PD Appellees: July 8, 2022, 8:45 a.m.
- Capital Collateral Regional Counsels: July 13, 2022, 9:30 a.m.
- Criminal Conflict and Civil Regional Counsels: July 14, 2022, 9:30 a.m.
- State Attorneys: July 19, 2022, 9:30 a.m.

The Zoom meeting links have been distributed and the meetings may be attended in person at JAC, except for the Public Defenders, which will be presented at the Florida Public Defender Association's (FPDA) 2022 Summer Training Program, Hyatt Regency Coconut Point, Bonita Springs.

Topics to be discussed:

- August 26th – due date for all LBR and LRPP data entry forms, schedules and exhibits to the JAC Budget Office.
- September 30th – Department LRPP posting deadline to the Florida Fiscal Portal.
- October 15th – Traditional Department LBR posting deadline to the Florida Fiscal Portal. The date will be confirmed once the LBR Instructions are posted to the Florida Fiscal Portal.

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

As announced on June 3, 2022, this year the Budget Office will implement the use of a file sharing portal, Pydio, to exchange LBR and LRPP documents to and from the JROs. A training for all Budget Contacts is being established for a date in June as well as establishing access accounts. Each Budget Contact will need to be added with the submission of a completed JRO Authorized Signature – Staff Designation Form found [HERE](#).

The Budget Office re-vamped the web page last year which now features 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 serves as a landing pad for all things JAC budget-related as the Budget Office has moved into using this environment to communicate more efficiently with the JROs.

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JAC Staff Transitions

JAC welcomes **Kristin Lambert**. Kristin is an Internal Auditor in the Internal Audit unit. She has over 21 years of service in public service and Criminal Justice. Most recently, she worked at the Florida Department of Law Enforcement (FDLE) as a Criminal Justice Information Consultant II within the Firearms Eligibility Research Bureau conducting research for firearm purchases. She also worked within FDLE's Projects Unit as a Quality Assurance Manager for the implementation of various new systems and conducting feasibility studies. Prior to FDLE, she worked as a Parole Investigator at the Florida Commission on Offender Review (aka the Parole Commission) before becoming the Supervisor of the Commission Clerk's Office. She enjoys spending time with her family, traveling, listening to music, and enjoying a beautiful life.

JAC welcomes **Monica Cash**. Monica is Rip's new Executive Administrative Assistant in the Executive Office. She has over 30 years of public service experience. Most recently, she worked at the Florida Department of Legal Affairs (OAG) as a Human Resources Specialist for 9 years. In her free time, she and her Husband enjoy deep sea fishing, camping, traveling and spending time with their children and 2 new grandsons Robert (18 months) & Cole (3 months) as well as their cat Luna & Pomeranian Max.

JAC welcomes **Aimee Hoagland**. Amy is a paralegal. She came to us from the Office of the Governor. She previously worked as a legal assistant at a private criminal defense law firm. Fun fact about Aimee is that she is pursuing a career in the medical field as a nurse. Aimee loves the outdoors and you can often find her offshore fishing. Aimee is in ministry and devotes her life to God and to serve others.

JAC welcomes **Chandika Basdeo**. Chandika is a paralegal. She received her Bachelor of Arts with a double major in Philosophy and History from Florida State University in 2021 and graduates with her Master of Science in Applied Politics and Policy from her alma mater in December 2022. She has worked within the state and federal legislatures since 2019 and plans to pursue a career that lies at the intersection of law and politics. Chandika is a dedicated FSU fan and enjoys the arts, nature trails, a cozy cup of tea, a compelling film, Oprah's Book Club recommendations, and all to do (and eat) in her hometown of Ft. Lauderdale, Florida.

JAC welcomes back **Abram Dale**. Abram is a Senior Management Analyst in the Executive Office. He received his Associate of Arts from Northwest Florida State College as well as his Bachelor of Science in Finance and Master's in Business Administration from Florida State. He also holds a Certified Public Manager (CPM) designation from FSU's Askew School of Public Administration. Abram began his career in budget in 2008 as an analyst for the Department of Juvenile Justice before coming to work for the Justice Administrative Commission in 2010. Upon leaving the JAC in 2016 he served as a Senior Governmental Analyst at the Governor's Office of Policy and Budget and Senior Legislative Analyst at The Florida Senate for multiple criminal justice entities including the JAC. Abram is a dedicated FSU and Pittsburgh Steelers fan and enjoys traveling and spending time with his 4 children.

JAC welcomes **Vanesha Paul**. Vanesha is an Auditor in Court Appointed. She is originally from South Carolina and moved to Florida just last year to pursue a Master's degree at Florida State University. She has a strong love for anything criminal justice and forensics. She received her Bachelor's in Psychology/Criminology from the

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Winthrop University (Near Charlotte, NC) last year. In her free time, she enjoys hiking, being near water (beaches, springs, lakes), trying out new foods, and simply just being outside enjoying nature. She interned at the State's Attorney's office early this year and enjoyed her time within Florida's justice system and knew she wanted to continue to dive deeper. She can't wait to learn more about her JAC family.

JAC welcomes **Jillian Ruthstrom**. Jillian is an Auditor in Court Appointed. She was born and raised here in Tallahassee, FL and has attended Tallahassee Community College as well as Florida State University. Traveling and seeing the world is what she is most passionate about in life. Reading, spending time outdoors, and being with her family are what she enjoys the most. She recently had a baby girl, Percy, and has a dog named Daisy.

JAC welcomes **Chelsea Eberhardt**. Chelsea is an Intern in Human Resources. She was born and raised in Tallahassee Florida. She received her AA from Tallahassee Community College. She plans to start her Bachelor's degree in Finance at Florida State University in the Fall of 2022.

JAC welcomes **Tzu-Hsi (Frank) Lin**. Frank is a Systems Administrator I in IT. He was raised and has lived most of his life in Tallahassee, Florida. He obtained his Bachelor's degree in Computer Information Systems from the University of Florida. He has worked for the state for ten years and he likes tennis.

JAC welcomes **Dahlia Flowers**. Dahlia is a Professional Accountant II in Financial Services. She is from Fort Myers, FL. She started her career with the state in December 2017 working for FDOH in St. Petersburg, where she worked until February 2019. She then started with FDVA – Largo in February 2019 where she stayed until coming aboard here at the JAC in April 2022. She is new to the Tallahassee area.

JAC welcomes **Waheeda**. Waheeda is an Applications/Database Administrator in IT. She comes from the Florida Department of Agriculture. She has a Bachelor's degree in Computer Science and Engineering and has worked in software development for more than 8 years. She is married and lives with her husband and 2 kids in Tallahassee. She loves travelling, painting and gardening.

JAC welcomes **Brian Dorvil**. Brian is a Document Control Coordinator in Operations. Brian comes to us from the FSU Alumni Association where he served as an Administrative Specialist performing a number of duties including planning meetings and maintaining calendars, converting paper forms into electronic forms, and helped manage invoices and payments. He was also involved in a renovation project where he was responsible for contacting multiple vendors. He is currently a senior at FSU studying Criminology.

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The cover beach photo is courtesy
of Rip Colvin.

*Setting goals is the first step to turning
the invisible into the visible.*

~ Tony Robbins ~

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,

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