

October - December 2022



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19<sup>th</sup> Judicial Circuit

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Public Defender  
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**Brian Haas**  
State Attorney  
10<sup>th</sup> Judicial Circuit

~  
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State Attorney  
2<sup>nd</sup> Judicial Circuit

State of Florida – Justice Administrative Commission Volume XIII Issue 4

**A Word from JAC’s Executive Director**



**Rip Colvin**  
JAC Executive  
Director

The most recent Justice Administrative Commission (JAC) Meeting was held September 20, 2022. 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); Online Legal Research; 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**

Materials and recorded presentations for most of the sessions at JAC’s Connect and Collaborate III (CNCIII) Training Conference are available on JAC’s website at <https://www.justiceadmin.org/jac/jacconference.aspx>. Any time your office hires new staff in the areas of Accounting, Budget, Financial Services, Human Resources, and Operations, please encourage them to review the online training materials to assist in the onboarding process.

To further assist JROs with new staff, the JAC Human Resources section provided in-person training to five State Attorney Offices on September 13, 2022. Seven Public Defender Offices sent staff to JAC October 26, 2022, for in-person training. If your office is interested in scheduling in-person training, please contact Andy Snuggs at [Andy.Snuggs@justiceadmin.org](mailto:Andy.Snuggs@justiceadmin.org).

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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 and the extension of the JAC/LexisNexis online legal research contract 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.

Because this contract will expire June 2023, JAC is in the process of drafting a procurement instrument to present to the individuals selected by the Florida Prosecuting Attorneys Association and Florida Public Defender Association for the next procurement of

online legal research services. The goal is that the resulting contract(s) will serve as an online legal research option(s) for all JRO offices. We anticipate having our first meeting in January 2023. Additional information regarding these efforts will be available soon.



## Messages from the Accounting Office

With the anticipation of PALM, JAC has been looking closer at the invoice numbers on the batches submitted to us. While reviewing batches, we noticed that some JROs are using their own invoice numbers on the batch instead of what is on the invoice. A few reasons we have identified that contribute to this are the nine-character limitation in the invoice field in FLAIR and combining groups of invoices for one vendor under one internal invoice. As we learn more about FLAIR's replacement PALM, having inaccurate invoice numbers on the warrants might be a big issue in the future. If your invoice number is longer than nine characters we ask that you use the last nine digits of the number. That will prevent duplicate reports for invoices that have the same beginning nine digits. For example, 123456789-1 and 123456789-2 will appear as duplicates if you use the first nine digits. Sometimes invoices get submitted to JAC more than once. JAC runs a report every day to check for duplicate invoices entered into FLAIR. When we find them, we request The Department of Financial Services (DFS) to delete them. This avoids the warrant or EFT to be generated and the vendor getting paid twice. We appreciate everyone's attention to this matter.

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## Message from Financial Services



### Contracts and the Florida Accountability Contract Tracking System (FACTS)

A contract is any written **two-party agreement** that includes payment or receipt of funds. This includes agreements with other state agencies. Within **30 days** of execution, agreements must be entered into FACTS per s. 215.985(14)(a), F.S. Contracts should be in FACTS prior to payment and should be referenced on batch sheets in order to link a payment to a FACTS contract. Case-related contracts are exempt from FACTS. If you have other non-case related contracts considered confidential, they can be marked confidential in FACT and can only be viewed by DFS and JAC staff.

The most common types of contracts included in FACTS are:

- postage meters and mailing machines,
- copier leases & maintenance,
- maintenance agreements (e.g., BOMs or Stacks),
- online legal research contracts
- office space leases, and;
- sub-grant agreements.

Please submit new or amended contracts via email to [financialservices@justiceadmin.org](mailto:financialservices@justiceadmin.org). Remember to include the following information if it's not included in the contract:

- Start and End date – **important detail often missing from the documentation**
- Vendor's Tax ID
- Vendor's address if the vendor is not already in FLAIR
- Account code to pay from (e.g., GR Operations, G&D Operations, GR Due process)

**Nothing needs to be included in FACTS if a vendor does not require a signed agreement.** However, **all** leased **assets** must still be reported for the Operating Lease requirement for Financial Statements per GASB 87. Examples include but are not limited to copiers, buildings, and postage meters. Offices will be required to report lease-specific information such as lease description, location, FACTS contract ID if applicable, start and end dates, lease rates, and escalation information.


For any FACTS or Operating Lease questions, please call Dahlia Flowers or email [financialservices@justiceadmin.org](mailto:financialservices@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. Cash Management System (CMS) functions transitioned to PALM on July 6, 2021. JAC staff will perform all CMS functions in PALM. The Legislature required CMS remediation before further implementation of the other PALM waves. DFS' goal is to have CMS remediation completed June 30, 2023.

**Jump in and let PALM work for you . . .**



- ▶ Track . . . .
- ▶ Query expenditures
- ▶ Project needs

▶ Photo Credits: Lorelei Welch



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.

JAC staff participate in PALM 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 that comprise Justice Administration and the uniqueness of our structure.

### 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 PALM will contain. We have communicated the necessity of ensuring that individual JROs can view only their own information and not that of other JROs. JAC Legal provided DFS a memorandum explaining the legal basis for the need to restrict access to data between the individual JROs. Additionally, JAC will engage DFS regarding their public records policy related to PALM. Eventually, PALM will house payment information, such as documents and related “back-up” for transactions, and 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 JROs informed and engaged regarding Florida PALM activities as they develop.

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## PCard Minute

### PCard Program Statistics

The JAC PCard program is doing very well. We transitioned to the Works system over three years ago, and the feedback is mostly positive for the system functionality and ease of use. We wanted to let you know some of the highlights for our program.

- Almost all JROs participate in the program- there are only two who do not
- Some JROs have just 1 PCard while others have over 90 PCards
- We are the 8<sup>th</sup> largest agency in transaction volume for all state agencies
- 50% of our annual transactions occur in May-June and November-December due to conferences
- The most common transactions: office supplies, postage, background checks, medical records, travel, and training
- We have about 280 Accountholder accounts
- We have about 360 system users- Accountholders, Approvers, Accountants, Secondary Accountholders, and Auditors
- Many of our system users have more than one role in the system, so JROs often have more than one user group to accommodate the different rules for each user role
- The average time to process a transaction through the system is 9.75 days
- The average number of new transactions per month is about 1,200 items
- PCards are now valid for 5 years in Works instead of 3 years under the old FLAIR module



Please don't hesitate to contact the PCard Administrators with any questions at [pcard@justiceadmin.org](mailto:pcard@justiceadmin.org).

## BOMS to JAC Web Service

The BOMS to JAC Web Service was created to allow for the transmission of batch sheets from your office to JAC in a very secure and efficient manner. In order to utilize the Web Service, JROs must utilize the electronic signatures function in BOMS. JAC currently uses electronic signatures for batch sheets, authorizations, timesheets (and leave approvals), and PARS, with plans to implement it for new hire packets.

Currently, 36 JROs utilize electronic signatures (i.e., 15 PDs, 15 SAs, 5 RCs, and 1 CCRC), with 28 sending batch sheets through the Web Service (i.e., 12 PDs, 13 SAs, and 3 RCs). JAC encourages more offices to take advantage of electronic signatures in order to utilize the Web Service, with benefits to your office, including:

- 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;

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- 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.

JAC is exploring additional options with CIP for offices using BOMS to send any other sensitive documents, including PARS and new hire packets, using this secure submission.

### **Electronic 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. As a result, JAC initiated a pilot project with four JROs (RC1, PD4, PD10, and SA20) to provide delivery of non-payroll disbursement vouchers via an online file sharing portal called Pydio. Currently, all but five offices are using Pydio for voucher delivery.

JAC expanded the use of this service by providing Budget documents to your offices via Pydio, as well as receiving them back from you via Pydio, which has worked out very well. We will continue to look for additional ways to utilize this free service, primarily because of the high level of security and the efficiency it provides.

Wayne Meyer is leading this initiative and may be reached at (850) 488-2415 or [wayne.meyer@justiceadmin.org](mailto:wayne.meyer@justiceadmin.org). We look forward to working with the remaining offices in the near future.

### **Updates from the JAC Budget Office**



The AFP3 third quarter General Revenue release was posted to the Department of Financial Services (DFS) State Accounts on December 13, 2022. The Executive Office of the Governor memorandum #22-064, 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 JAC website Budget Office webpage EOG Memorandums [HERE](#).

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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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