

Helpful Links

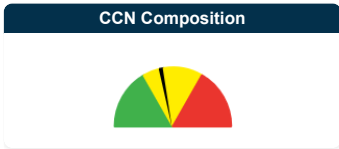
- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for APD
- Readiness Workplan

APD Status Report Dashboard

Reporting Period
January - February 2024

Agency Sponsor
Rose Salinas

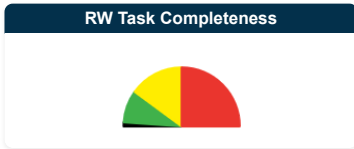
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.



The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

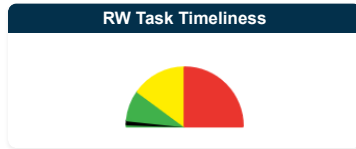
- Unique Filled Role = 6
- Duplicate Filled Role = 11
- Vacant Role = 0



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

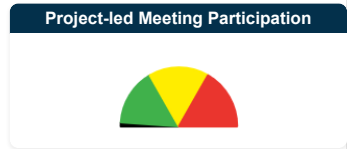
- Score = 100.00%**
- Submitted Complete = 1
 - Submitted Incomplete = 0
 - Completed After Submission = 0



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

- Score = 99.57%**
- Submitted On Time = 20
 - Submitted Late = 0
 - Pending Submission = 0



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24	1/8 - CCN and SME's updated at today 1/22 - Noted all updates in place - however - APD Core Team Review to ID and try to eliminate the overlap 1/24 - sign off completed - review and complete in SS on 1/25		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	1/22 - Teams will be identifying and creating team lists for the FL PALM Users within their organization with user roles 2/1 - formulating plan for all roles/access/teams/level 2/14 - Users defined - listing in process 2/21 - Preparing to upload - defined	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/28 - PALM User Excel Spreadsheet received with updates for teams - finishing placing into Smartsheet by COB 2/29.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - Reviewing and updating based on Finance Team recommendations 2/21 - in progress		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - Teams individual review underway 2/21 - IT Team working 2/28 - new meeting review scheduled for 3/7		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/21 - IT Team sign off needed 2/28 - new meeting review scheduled for 3/7		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/27 - APD IT Team is working thru the Smartsheet for updates to columns/comments and status call is scheduled for 3/7 2/28 - new meeting review scheduled for 3/7		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/27 - APD IT Team is working thru the Smartsheet for updates to columns/comments and status call is scheduled for 3/7 2/28 - new meeting review scheduled for 3/7		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT initiating the activities with new TD onboarding 2/27-APD IT Team is onboarding a new Technical support person to assist with focused IT support to include re-writes to scripting for interface of all APD ABS's 2/28 - new meeting review scheduled for 3/7		

N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24	2/13 - updated within Smartsheet - added Rohan/edit and share capabilities - status for the remaining is correct at this time		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24	3/8 - completed for this period		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 75 • Business Process Groupings = 13 Role Mapping = TBD Training = TBD	Current-State: Cataloged Business Processes = 253 • Related Business Systems = 5 • Related Reports = 32 Documentation Status: - Complete = 254 Partial = 0 Not Started = 0 Implementation: Impacted Agency Business Processes = TBD	Current-State: Cataloged Business Systems = 9 • Criticality: - High = 9 Med = 0 Low = 0 None = 0 Documentation Status: - Complete = 8 Partial = 1 Not Started = 0 Cataloged Interfaces = 78 - Inbound Interfaces = 6 - Outbound Interfaces = 1 Implementation: Business Systems Planned for Integration = 9 • Segment I - Documentation Updates: - Complete = 0 Updating = 3 Evaluating = 0 Not Started = 0 Not Needed = 6 • Segment II - Documentation Updates: TBD Planned Interfaces = 18 - Inbound Interfaces = 7 - Outbound Interfaces = 11	Current-State: Unique FLAIR Data Elements = 480 • Associated Unique Uses = 1181 - Continued Use - Yes = 1094 - Continued Use - No = 57 • Associated Business Systems = 2 Cataloged Reports = 112 • Criticality: - High = 150 Med = 18 Low = 1 None = 0 Implementation: Configuration Workbooks = TBD Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

APD Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	- Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	- APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after	- clean preparation	12/27/23	APD Financial Accounting

Processes Technology Data				migration. - Have contingency plans for reporting errors.	prior to and then checking team after - APD is in clean up mode going forward.		Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Open	6 (High/Medium)	- Implement standardized documentation procedures - 2/6 - Teams working with new Business Analyst to update and fully document to the PALM Process Documentation and narratives - 1st and 2nd qtr 2024	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024	02/06/24	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes. Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams

People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review	12/27/23	APD Core Team
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams

APD Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with the resources we will be able to catch up and move forward.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found -2/6 - BA start Date = 2/20 -2/6 - Tech Support pending	03/29/24	APD Sponsor and Finance Team
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted	06/28/24	APD Sponsor and Finance Team
People Processes Data	APD Finance G/L Team - final PALM Chart of Accounts listing provided for workbook	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024 - 2/6 - new task 513 - to accomplish Workbook initiatives for PALM - in progress	This is will be an on-going APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team 2/29 - asset mgmt team is engaged for location inventory	03/29/24	APD Finance Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team	07/01/24	APD AM Team - BA - PM - Core Team

APD Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress

People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters		02/28/24	APD Project Team/APD IT Team	Accounting Alignment
People	APD Organizational Structure is fully defined and corelated to the correct org code by personnel alignment - updated by HR		02/28/24	APD Project Team/APD IT Team	Organizational Alignment
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.		02/28/24	APD Project Team/APD IT Team	

APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/04/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/11/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/18/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/25/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/01/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/08/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/15/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/22/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/29/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD - January 2024 - High Fives	01/23/24	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD - February 15, 2024 - High Fives	02/16/24	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight

People Processes Technology Data	APD - HR and Finance Team review of Task 508	01/08/24	APD Finance Team/APD HR Team - review of Task 508 for HR Business Process Documentation	APD teams to understand the deliverables for the task - review and go over sample	APD HR discussion of the business process documentation and where the internal resources were and how to get the spreadsheet completed by the due date for upload by Becky.
People Processes Technology Data	APD COA preparation meeting	01/22/24	APD Teams - All	Understand the ChartFields/structure and the mapping of the G/L from FLAIR to new structure	Reviewed resources and understanding from the COA provided by PALM
People Processes Technology Data	APD Budget Team PALM Review	01/24/24	APD Budget Team/PM	Budget Team Meeting to review and discuss PALM Initiatives, Task Review. Project support review within APD.	1. Budget Team Meeting will be scheduled routinely: 4th Wed. of every month going forward: 10 am est. Meeting invite has been updated and sent. 2. Budget Team Participation for the COA/Chart of Accounts Activity – to be included in meetings
People Processes Technology Data	APD - PALM RC review	02/08/24	APD PM/PALM RC	Review open questions and status -	Non routine meeting review for monthly touchpoint preparedness
People Processes Technology Data	APD IT Team - Task Review meeting	02/14/24	APD IT Team	Review new Tasks from PALM Agency Readiness site	shared all documentation from Knowledge Center
People Processes Technology Data	APD - Overview of processes Meeting	02/20/24	APD Accounting Teams - New BA	New Business Analyst onboarding	Current State - updates and overview for APD and new BA
People Processes Technology Data	APD All Hands meeting	02/21/24	APD Accounting Teams - All	Monthly ALL Teams meeting in person	Great overview - including all regions and facilities
People Processes Technology Data	Asset Accounting and Management Team	02/22/24	APD Asset Accounting Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Regions Team	02/27/24	APD Regions Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Payroll Team	02/28/24	APD Payroll Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Contract Team	02/28/24	APD Contract Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Facilities Team	02/29/24	APD Facilities Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	PM Collaboration Call - Commerce	02/28/24	APD PM - Commerce PM	Discuss progress - share updates and information	agency collaboration
People Processes Technology Data	APD Grant Field Overview	02/28/24	APD Revenue Accounting Team and BA/PM	Review the APD use of the Grants field and the need to update and change and handle prior to conversion - update in FLAIR - not a Grant	Agency updates
People Processes Technology Data	APD BA and PM - Review Weekly Status	02/29/24	APD BA/PM	Review weekly information and updates	Agency Review
People Processes Technology Data	APD Asset Management Team Workbook Task	02/22/24	APD BA/PM/AM Team	Area ID identifier - inventory overview and actions for update to deliver to the team for completion	Agency Task Review
Processes Technology Data	APD IT Team meeting - Business Systems review	01/04/24	APD - Ramon Evans/Rohan Mehta/Becky Morris	Smartsheet review for updates asked of PALM Team	Work in Smartsheet
People Processes	APD Strategy Review - Sponsor	01/16/24	APD Sponsor and Project Manager review of APD effort/team participation and align strategy	PM validate the direction APD is going with the Sponsor and review status	Agreement on the direction and alignment with teams to their responsibilities with readiness
People Processes	APD - PALM Documents updates	01/29/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD - PALM Documents updates	01/30/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD - PALM Documents updates	01/31/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD Teams Calendar review	02/07/24	APD Finance Teams/APD PM	Update and complete the Calendar for teams review	Documenting for all teams - activities and events for timeline preparation
People Processes	APD PALM Workforce Readiness Plan updates	02/21/24	APD PM/PALM RC	Update Workforce Readiness plan for PALM Team per their request	Updated file attached
People Processes	APD COA - Review and plan with Finance Teams	02/14/24	APD Financial Reporting team	Alignment of the current G/L and COA to the new PALM ChartField structure - how to update	APD initiative to prepare for what should be cleaned/updated/corrected/changed

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

Confirm *

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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24
November - December 2023	Rose Salinas	rose.salinas@apdcares.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23