

Helpful Links

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

DMS Status Report Dashboard

Reporting Period

January - February 2024

Agency Sponsor

Katie Parrish

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

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 6
- Vacant Role = 3

RW Task Completeness



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

RW Task Timeliness



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

RW Task Timeliness:

- Score = 99.13%**
- Submitted On Time = 18
 - Submitted Late = 2
 - Pending Submission = 0

Project-led Meeting Participation



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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24	Several workshops with DMS Payroll SMEs reviewed 8 Payroll processes and the 35 associated sub-processes. Questions and input were documented in the spreadsheet attached to this row (17). Follow up from the PALM Team is requested.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24	DMS updates to CCN and SMEs is current to date, but ongoing.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	CCN end user inventory complete. Enterprise Partners end user inventory ongoing.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - 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	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/15/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/06/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 87

- Business Process Groupings = 11

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 64

- Related Business Systems = 7
- Related Reports = 40
- **Documentation Status:**
- Complete = 64 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 12

- **Criticality:**
- High = 5 Med = 2 Low = 0 None = 5
- **Documentation Status:**
- Complete = 10 Partial = 1 Not Started = 1
- Cataloged Interfaces = 55**

Data

Information used in or produced from an agency's financial business operations.

Current-State:

Unique FLAIR Data Elements = 143

- **Associated Unique Uses = 1303**
- Continued Use - Yes = 205
- Continued Use - No = 43
- **Associated Business Systems = 5**
- Cataloged Reports = 108**

Implementation:

Impacted Agency Business Processes = TBD

- Inbound Interfaces = 40
- Outbound Interfaces = 15

- **Criticality:**
- High = 91 Med = 18 Low = 3 None = 0

Implementation:

Business Systems Planned for Integration = 4

• **Segment I - Documentation Updates:**

- Complete = 4 Updating = 0 Evaluating = 0
- Not Started = 0 Not Needed = 0

• **Segment II - Documentation Updates:**

TBD

Planned Interfaces = 10

- Inbound Interfaces = 2
- Outbound Interfaces = 6

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.

DMS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Reports are available. Plan for report identification and testing.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Functionality, Will PALM deliver the functionality needed for DMS operations?	Closed	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Reviewed again Dec 20 - no change. Continuing to monitor.	02/22/24	Finance and Administration / Jennifer Gaines
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Continuing to monitor. Reviewed again Dec 20 - no change. Continuing to monitor. Reviewed again Feb 22 - no change. Continuing to monitor.	11/02/23	Finance and Administration / Sandy Watson
People Processes Technology Data	Variable risks at this time with People First. People First is currently working on its next-generation solution and plans to issue an ITN in early 2024. The current contract expires August 2026 and the platform reaches end of life in Dec 2027. The primary risks are converging timelines, and limited information on the level of remediation necessary for PF/PALM integration.	Open	6 (High/Medium)	PALM integration will be addressed in current People First Solution and required in the next generation solution. DMS will work in good faith to request and dedicate appropriate resources to ensure effective coordination of efforts between People First and PALM and will plan for contingencies within the requirements of the next generation solution.	Logged April 22, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Updated Dec 15, 2023. Continuing to monitor.	12/15/23	People First / Stephen Eaton
People Processes Technology Data	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Open	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.	Logged Nov 6, 2023 Reviewed again Dec 20, 2023 and updated mitigation. Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Medium)	Roll out sandbox test capabilities as sections are completed for Agencies to test. Sandbox environment is not secure for testing - PALM needs to work on true test environment. Sandbox status has not changed. PALM is addressing this risk.	Logged April 21, 2023. Reviewed again September 6, 2023. Reviewed again Nov 3, 2023. Mitigation notes updated. Reviewed again Dec 15, 2023. No change. Continuing to monitor. Reviewed again Feb 2 2024. No change. Continuing to monitor.	11/03/23	Division of State Group Insurance / Jason Ottinger
People Processes Technology	Make sure all business and IT and HRM liaisons are included in the appropriate technical sessions for capturing accurate business needs within these areas that will be using and/or interfacing with PALM.	Closed	4 (Medium/Medium)	Weekly follow up with PALM staff to ensure recommended Business and Technical liaisons are up to date prior to these critical PALM sessions. Communications and technical meeting attendance for SMEs and Business Analysts have improved.	Logged Nov 2, 2023. Reviewed again Dec 15, 2023. No change. Continuing to monitor. Reviewed again Feb 2, 2024. Closed.	02/02/24	Division of State Group Insurance / Jason Ottinger
People Processes	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to	Open	4 (Medium/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change.	11/06/23	STMS / Kurt Bonhamer

	departmental and enterprise systems affected by PALM implementation, at the same time. The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users.				Reviewed again Dec 20, 2023. No change. Continuing to monitor. Reviewed again Feb 29, 2024. Continuing to monitor.		
People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.	Open	3 (High/Low)	Programming needs to be completed to allow for flexibility so funds can be released timely. Need more details on how this will work in PALM.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20 - no change. Reviewed again Feb 29, 2024. Continuing to monitor.	11/06/23	STMS / Matt Giglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Feb 29, 2024. Continuing to monitor.	11/06/23	STMS / Matt Giglio

DMS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	The Florida PALM Team has decided to not provide a webservice/real time interface for budget pre-check or vouchers. This does not match up to current FLAIR functionality and presents a significant risk in increasing payment cycle time, which has direct impact on agencies' ability to meet prompt payment requirements.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The recommended proposed solution is for the Florida PALM team to provide a budget pre-check and voucher webservice/real time interface, in addition to the Combo Edit Check and Encumbrance webservice they have already offered.	Interface: There are also impacts to emergency operations invoice payment in the event a vendor needs to be paid quickly to secure emergency supplies or services during Emergency Operations Center (EOC) activation.	01/01/24	State Purchasing / Tyler Brown
People Processes Technology Data	Promised piece of \$20M administered funds not being provided. System remediation and FLAIR clean up can not move forward without funding.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Release of funds to agencies is the proposed solution. New LBRs are currently in development. Waiting for session completion for 2024 or signature of the GAA.	Resources: Funding is a major factor to the success or failure of this effort. Reviewed again on Dec 20, 2023. No change. Reviewed again Feb 22, 2024. No change. Continuing to monitor.	07/01/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct. Reviewed again on Feb 9, 2024. No change.	12/01/25	Florida Retirement System / Megan Biederman

DMS 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	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division. Reviewed again on Dec 27. No change. Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox.

DMS 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	PALM Project Work Session: Payroll Process Review	01/04/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	FRS PALM Solution Review	01/04/24	Project Management Liaisons, SMEs, Production Support, OIT,	Review current PALM capabilities to date.	Recurring meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review Planning	01/04/24	SMEs	Planning for review sessions to complete PALM Task 508: Review Payroll Wave Business Process Models	One-on-one to plan review sessions and determine who needs to participate.
People Processes Technology	PALM Project Work Session: OIT	01/05/24	OIT SMEs	Discuss OIT role in the PALM project.	One-on-one with OIT SME to determine who needs to participate and at what level.

Data					
People Processes Technology Data	PALM Work Session: FRS Payroll Process Review	01/10/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Work group meeting with FRS to address Task 508: Review Payroll Wave Business Process Models
People Processes Technology Data	PALM Interfaces and ABS Review with OIT	01/11/24	OIT SMEs	Review and update Interfaces and ABS for DMS PALM Tasks 504 and 505 due Jan 12.	OIT Work Group Meeting with Production Support SMEs.
People Processes Technology Data	PALM Interface Reporting	01/12/24	OIT SMEs	Review and update Interfaces and ABS for DMS PALM Tasks 504 and 505 due Jan 12.	OIT Work Group Meeting with Production Support SMEs.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/12/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Work Session: FRS Payroll Process Review	01/12/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	FRS Payroll Review work group meeting.
People Processes Technology Data	PALM Project Discussion	01/17/24	Agency Sponsor, Agency Liaisons	Purpose: Discuss Florida PALM project impact on DMS.	Brief DMS PALM Sponsor. Collect information and documentation.
People Processes Technology Data	PALM Project Brief	01/17/24	Agency Sponsor, Agency Project Manager, Agency Liaison	Purpose: Discuss Florida PALM project impact on DMS.	Brief DMS PALM Sponsor on information collected from Agency Liaisons: specific needs or requests, specific concerns / questions, specific project goals, etc.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/19/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/22/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: FRS Payroll Process Review	01/22/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	FRS Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/23/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting. Confirm all input and questions for PALM.
People Processes Technology Data	FRS/KPMG Bi-weekly Status Meeting	01/23/24	Business Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Project Work Session	01/25/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	Internal DMS Monthly PALM Connect	01/25/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review PALM project status: share updates and input on the project status from each Liaison's area. This includes the CCN and Enterprise partners.	Recurring monthly meeting to brief the Agency Sponsor and address PALM project status.
People Processes Technology Data	PALM Project Brief	01/29/24	OIT SMEs	Review current PALM Project status from OIT perspective.	Collected OIT input on agency project charter and work plan.
People Processes Technology Data	PALM Project Work Session	02/01/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM Tasks Review	02/02/24	OIT SMEs, Agency Liaisons	Review upcoming PALM Tasks and determine level of OIT involvement needed to complete the work.	OIT targeted review of the PALM project tasks.
People Processes Technology Data	FRS/KPMG Bi-weekly status meeting	02/06/24	Business Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Risk Identification	02/07/24	Agency Liaisons, SMEs, OIT, Production Support	To identify risk associated with PALM in regards to the Division of Retirement.	Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	PALM Project Work Session	02/08/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	FRS PALM Risks Review	02/09/24	FRS Liaison	Review and update PALM Project Risks, Issues and Assumptions.	FRS one-on-one meeting with Agency Liaison.
People Processes Technology Data	PALM Project Work Session	02/15/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM End Users Updates	02/16/24	Agency Liaisons	Review and address Task 512 - Identify Future PALM End Users.	DGSI one-on-one with Agency Liaison.
People Processes Technology Data	PALM Project Work Session	02/22/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	Review PALM Task 513: Configuration Workbooks	02/23/24	Agency Liaisons	Purpose: Review task materials and begin planning for Completing Configuration Workbooks for Segments I and II. Determine meeting cadence and attendees, etc.	FMS one-on-one with Agency Liaison.
People Processes Technology Data	Internal DMS Monthly PALM Connect	02/28/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review PALM project status: share updates and input on the project status from each Liaison's area. This includes the CCN and Enterprise partners.	Recurring monthly meeting to brief the Agency Sponsor and address PALM project status.
Processes Technology	PALM Demo on Divestments	02/19/24	Agency and Business Liaisons, OIT SMEs, Production Support	Review disinvestments procedures in FL PALM.	Live demo for OIT in PALM. Activity to show OIT SMEs how accounts use the disinvestment function in FL PALM. Demonstrate error checking.

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 *

Submit

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DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Katie Parrish	katie.parrish@dms.fl.gov	03/06/24
November - December 2023	Katie Parrish	katie.parrish@dms.fl.gov	01/11/24
September - October 2023	Katie Parrish	katie.parrish@dms.fl.gov	11/08/23
July - August 2023	Katie Parrish	evelyn.harrison@dms.fl.gov	09/11/23