

# Bimonthly Agency Readiness Status Report

This report is a collection of Bimonthly Agency Readiness Status Reports as provided by agencies on a bimonthly basis, containing the status of the agency and enterprise remediation progress for each business system required for the Florida PALM Financials and Payroll deployment, in accordance with Proviso contained in the 2025/26 General Appropriations Act.

Reporting Period:

July – August 2025

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[Florida PALM Workbook for AHCA](#)  
[Readiness Workplan](#)

# AHCA Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Jon Manalo

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 96.43%

Submitted On Time = 33

Submitted Late = 9

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 84.15%

Submitted Complete = 32

Submitted Incomplete = 1

Completed After Submission = 8

Other Task Completeness:

Score = 86.43%

Submitted Complete = 32

Submitted Incomplete = 1

Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

- The Change Champion Network composition reflects the completeness of your CCN makeup.
- Unique Filled Role = 11

Duplicate Filled Role = 4

Vacant Role = 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
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		9/10/2025: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission	03/07/25	9/10/2025: Accounts Module and MAR Modules 100% complete in remediation. These modules handle the Agency invoicing functionality. MAR module is 99% users tested. Documenting the user testing for the Accounts Module		05/09/25
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		9/10/2025: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission		9/20/2025: ABS Remediation is not on the same Segment Schedule as Florida PALM. Completing mitigation plan to complete the remediation		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		9/10/2025: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	75% - Consolidating/Inputting Information for Submission		9/20/2025: ABS Remediation is not on the same Segment Schedule as Florida PALM. Completing mitigation plan to complete the remediation os SunFocus.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering		9/20/2025: ABS Remediation is not on the same Segment Schedule as Florida PALM. Completing mitigation plan to complete the remediation as SunFocus.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25	5/9/2025 ABS Remediation is not on the same Segment Schedule as Florida PALM. All but 1 interface is ready to exchange with Florida PALM although the remediation efforts of the SunFocus modules is not completed. 4/25/2025 - All but 1 interface are ready for Cycle 2 Interface Testing 4/7/2025 - All but 3 interfaces are ready for Cycle 2 Testing. But system is not remediated to process the files for each of the system modules 01/27-All files have started 01/17- A third of the interfaces have been remediated.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/24/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification	06/23/25	07/18/25	100% - Submitted	07/21/25		Submission	

			#1						Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering		9/10/2025 - AHCA Procurement is working with DFS and BFS to clean up some of the old contracts.		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/28/25			
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering		9/10/2025 - GL Configurations have been completed. Other configurations are in progress.		
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress		9/10/2025 - Updated the Mock Conversion to reflect completion.		

## Agency Reported

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

AHCA Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	11/25/24		Business Process Change	Unavailability of Accounting System	Increasing	9 (High/High)	If there is not an accounting system available in June 2026, AHCA will not be able to complete the Weekly Medicaid Run and will not have the ability to pay the providers, costing the State, millions of dollars in fines/penalties.	Strategy: 1) Change statutory requirements 2) Meet with CMS to explain the absence of Accounting System to plan for holding federal funds for more than 72 hours. 3) Meet with A&A and Treasury to aid in decision making process on the solution. 4) Multiple Projections for the month of July. Note: Banks are still operational	Millions of dollars in interest/fines/penalties.	Reviewing internally
Open and Monitoring	06/20/25		Agency Business System Deployment/Cutover	Loss of Lead Developer with institutional knowledge	Increasing	9 (High/High)	Lead Developer has replaced by new resource for the new FY	Monitor remediation progress more closely	Deployment/Cutover	9/10/2025: The lead developer has become knowledgeable with SunFocus and actively working on Florida PALM remediation.
Open and Mitigating	07/09/25		Agency Business System Business Process Change Deployment/Cutover Staffing/Resource Availability User Acceptance Testing	Continued Implementation of SunFocus enhancements	Stable	6 (High/Medium)	To enhance operational efficiencies, we are conducting an analysis and implementing identified improvements using our development resources.	1) Complete Mitigation plans for SunFocus Remediation (which will the identification of additional technical resources 2) Leadership Prioritization of SunFocus Remediation vs. SunFocus Enhancements	Deployment/Cutover	9/10/2025: An enhanced prioritization process has been implemented to allow the development team to focus on the remediation for Florida PALM. If high-priority items take precedence, impacts on the remediation can be identified more quickly.
Open and Mitigating	02/28/25		Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Implementation Timeline Changes	Stable	2 (Low/Medium)	If Florida PALM project timeline changes, the Agency's FY25-26 LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Request administrative funding from the Legislature.	Operational activities	Monitoring the budget
Open and Mitigating	01/31/25		Agency Business System	Unidentified Impacted ABS	Decreasing	2 (Low/Medium)	If remediation for In-house ABS applications that are impacted with the implementation of Florida PALM have not been planned for by 8/30/2025, AHCA may have the resource constraints for the remediation, resulting in the inability of AHCA communication processes to function.	1) Hire a second PM to manage the ABS applications that are indirectly impacted by Florida PALM where impacts are associated with the Enterprise applications (PeopleFirst, FACTS, etc.)-Completed 2) Identify change requirements for identified applications. ABS: Versa - Completed ABS: ePar- In progress ABS: FX-PeopleFirst Impact ABS: AHCA Network-PeopleFirst Impact ABS: CATS - Due to the nature of this COTS software remediation is not required for Go-Live. Remediation can be completed after FACTS has made its changes. 3) Create Plan of ABS remediation and testing ABS: Versa - Completed ABS: ePar ABS: FX-	The inability to log into the AHCA Network and Federal Resources (FX)	PeopleFirst provided the database changes and AHCA is going forward with the analysis for impacts to ePAR, FX and Network.

									ABS: AHCA Network - In Progress ABS: CATS - N/A	
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AHCA Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	09/24/24		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Lack of Bureau of Financial Services Resources	High - Impacts the ability	As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments.	Identify process improvements	06/30/26	9/2/2025 - This issue persists. While some vacant positions are filled, many have been eliminated. The BFS team will keep prioritizing tasks and seeking process improvements.
Open	09/30/24		Agency Business System	ABS Remediation Schedule different than Florida PALM	High - Impacts the ability	Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness metric to continue to be low.	Interface remediation will be completed to be ready to perform Cycle 2 Interface Testing before the August start date. Update the comments of the remediation tasks as they become complete.	11/21/25	9/2/2025 - Continued monitoring and aligning SunFocus remediation to meet the implementation date of 7/1/2025. In the process of documenting the action plan for unremediated modules.
Open	09/06/24		Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Florida PALM Tasks and SunFocus Operations Competing Resources	High - Impacts the ability	Production incidents and time sensitive activities will continue to interfere with the resource tight bureau. Accept the issue and work with the Florida PALM Project to identify when a deliverable will be late.	Leadership will prioritize the activities	06/30/26	9/2/2025 - Prioritization process has been documented and the BFS team are making request per updated process for production and other service requests for SunFocus.
Closed	07/09/25	09/03/25	Agency Business System Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Implementation Timeline Changes	High - Impacts the ability	Florida PALM project timeline changes occurred after the submission of the Agency's FY25-26 LBR funding requests.	Verify AHCA Florida PALM Budget after end of year officially closes. Review mitigation plans. Revise the Spending Plan Revise Operational Work Plan to create the legislative budget amendment request.	08/25/25	9/02/2025 - Review of the current budget available for the FY is adequate to perform remediation of SunFocus.
Open	07/09/25		Agency Business System Deployment/Cutover	Loss of Intuition and Technical knowledge	High - Impacts the ability	Lead Developer has replaced by new resource for the new FY	Action planning is in progress Monitor progress of remediation closely	08/25/25	9/2/2025 - The lead developer has become knowledgeable with SunFocus and actively working on Florida PALM remediation.
Open	10/28/24		Post Implementation	FY25-26 Lack of Funding for Third-Party Vendor supported Agency Business System	Low - All impacts not listed	Funding was not requested for Third Party Vendor-Supported applications for the FY25-26 due to analysis of agencies business systems being done concurrently with the deadline for the submission of the Legislative Budget Request. Those applications that have now been identified are ePAR (electronically routed PAR app) the is impacted by PeopleFirst changes and CATS (agency contract application that feeds FACTS).	Workaround has been established with CATS. Contract managers will utilize FACTS directly until remediation of CATS can be planned and completed. ePAR remediation impacts and planning remains under investigation.	08/25/25	9/2/2025 - Analysis of ePar impacts are now under way with the receipt of the People First Data warehouse changes

AHCA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

Agency Sponsor Confirmation		AHCA Status Report Confirmation			
<p>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.</p>		Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
		July - August 2025	Jon Manalo	jon.manalo@ahca.myflorida.com	09/10/25
		May - June 2025	Jon Manalo	jon.manalo@ahca.myflorida.com	07/10/25
		March - April 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/25
		January - February 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	03/10/25

Agency Sponsor Name: \*

☐ Confirm \*

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for APD](#)
[Readiness Workplan](#)

APD Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Rose Salinas

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 97.5%

Submitted On Time = 42
Submitted Late = 2
Pending Submission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 99.87%

Submitted On Time = 76
Submitted Late = 1
Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 82.33%

Submitted Complete = 26
Submitted Incomplete = 3
Completed After Submission = 14

Other Task Completeness

Other Task Completeness:

Score = 89.18%

Submitted Complete = 33
Submitted Incomplete = 0
Completed After Submission = 16

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 11

Duplicate Filled Role = 4

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/24/25	1/24 - IT team working 3/3 - IT sources working in tandem and updates in progress 3/31 - team working this as a remediation for overarching ABS that will be completed by task due date - FRS database completed and NOT taking the segment approach - working as an overall update to each ABS - IT team in process 5/12 - actively updating and working - PALM question out for answer to FLAIR to PALM Mapping pending 5/27 - will continue to update as needed - discussed in touchpoint 6/5 - put FRS on hold - working all Interfaces - inbound to PALM at this time 6/19 -continues work - ongoing preparation 6/27 - Smartsheet notes and % updates current 7/14 - mostly complete - team review in progress 7/18 - updated comments - Payroll updates pending 7/21 - final review th tech team - all completed - payroll lag 7/24 - reviewed ready to test	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission		6/5 - APD is working on all UAT stories with teams and initiating the Smartsheet Workbook updated for each team - in person reviews - week of 6/9 6/9 - all teams are working their team Smartsheet to complete at least 3-5 user samples 6/19 - teams are actively working on their stories in Smartsheet - APD 7/23 - continued work in progress - APD separate within Agency Smartsheet's 8/5 - finalizing the task sheet to transfer over to task due sheet 8/11 - working with individual team members and SME's on all updates - documented UAT resources and sample		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25	6/25 - working with teams to verify those users and update - teammeetings the next 2 weeks 6/27 - updates in progress 7/9 - all reviewed - checking off and will complete at eod 7/9 - all users reviewed and up to date at this time	N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25	6/25 - working with the Team - KB leading 6/27 - KB and PL working actively 7/1 - AH will test - the KB handling the Group load in IdP 7/9 - all loaded as per the task	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification	06/23/25	07/18/25	100% Submitted	07/18/25	6/25 Readiness Review in process	Submission	

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			Update Agency Readiness Certification #1	06/26/25	07/10/25	100% - Submitted	07/07/25	06/26 - Readiness Review in process based on listed certification document from PALM 6/27 - in review and working 7/9 - working on this in full as a team working with teams all week updating for the requirements 7/18 - all updates made - Mitigation plan for asset mgmt team for 8/22 added, Agency sponsor sign-off completed	Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/07/25	7/7 - loading risks etc this morning 7/7 - forwarded to Rose for sign off	Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/21/25	7/16 - completed - checking for all attachments 7/21 - completed - all boxes filled out	Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	75% - Consolidating/Inputting Information for Submission		7/16 - read 7/23 - reviewing matrix and all participant roles review with teams 8/5 - teams validation being checked 8/12 - Working thru APD structure and tea alignment with SAM and leadership 9/8 - working all teams - APD working to get things completed		
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25	8/5 - reviewing 8/27 - Rose approved and signed off	Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 8/18 - working in sheets - review of suppliers 9/8 - all workbooks are in progress		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress		
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress		
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress		
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	75% - Consolidating/Inputting Information for Submission		8/29 - working all updates for risks/issues/assumptions - 9/8 - completed and sent to Rose for sign off		
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress		9/8 - tracking and ready for updates		

## Agency Reported

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

APD Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	09/08/25		Training User Acceptance Testing	Compressed schedule reduces time for end-user training	Increasing	9 (High/High)	Internal training assistance will be hired in early 2026	Adjust training schedule dynamically; prepare modular training that can be updated quickly; ensure "train-the-trainer" resources are ready.	Compressed schedule reduces time for end-user training	looking to compress based on delays
Open and Monitoring	09/08/25		Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover	Encumbrance ID and the ABC re-write change from FLAIR	Increasing	9 (High/High)	Because the encumbrance id is not generated in real time and requires an overnight feed - this poses a huge impact on the flow of work/process in the ABC system	Discussion with PALM team to review options and see how things can be worked thru	process change will impact the way ABC handles transactions	this new issue is one that needs to be addressed for process update and then figure the process due to this limitation
Open and Monitoring	05/02/25	07/07/25	Agency Business System Deployment/Cutover Staffing/Resource Availability User Acceptance Testing	Insufficient IT staff experience with cloud technologies	Stable	6 (Medium/High)	APD IT Teams preparation and training and UAT	Upskill internal staff; augment with vendor/cloud consultants - adjust APD staff	Delays and rework due to misconfiguration; higher support burden	close as APD techs are onboard and staffed accurately - no issue
Open and Monitoring	05/02/25		Agency Business System Interface Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Limited time for user testing due to technical delays - interface changes and updates not finalized	Stable	6 (Medium/High)	APD IT Teams preparation and training and UAT	Create a risk buffer in schedule for testing; prioritize high-value scripts - IT Team working sprint and actively testing as you go	Missed defect discovery leading to production errors	PALM to provide the final changes and acknowledge the close of effecting changes
Open and Monitoring	07/07/25		Business Process Change Training User Acceptance Testing	Testers Lack Knowledge of the New PALM Platform	Stable	6 (Medium/High)	No one has seen that actual PALM application - logged on or used it yet - this will be a learn by fire scenario	Training, mentorship, guides expecting PALM direction and initial effort with teams/agencies	Challenged during UAT to fully test the system	APD still unsure of what PALM UAT will really be like.
Open and Monitoring	09/08/25		Staffing/Resource Availability	Increased support demand post go-live due to rushed testing/training	Increasing	6 (Medium/High)	Post implementation support is questions for both IT and functional efforts	Strengthen hypercare team; extend support hours post go-live; provide quick reference guides and job aids.	Increased support demand post go-live due to rushed testing/training	Hypercare prep and availability is expected
Open and Monitoring	05/02/25		Agency Business System Interface User Acceptance Testing	Legacy system interfaces mapping with ABS-PALM APIs	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Develop interface translation layers; validate APIs early - continual review and update	Critical data exchanges fail; project delays and costly rework	Interface testing in process and APD is meeting all requirements - working with the PALM Tech team

Open and Monitoring	05/02/25		Conversion/Configuration Deployment/Cutover	Inadequate cloud platform performance under high user load due to multi agency impact	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Conduct load testing in pre-production; scale infrastructure proactively	Users face slow performance; loss of trust in system usability	performance is still a question especially with the CMS issue notices - to be tested
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Security configuration gaps during system transition	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Security audits and review access controls before go-live	Data breaches or access violations; potential audit or legal issues	Big issue for APD with a current tracking and history issue noted for a normal transaction in the CMS module
Open and Monitoring	05/02/25		Interface Conversion/Configuration Deployment/Cutover Post Implementation	Data corruption or loss during migration process	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Perform dry-run migrations; ensure backups are tested and validated - need PALM Conversion Plan as soon as ready o Perform multiple rounds of test migrations before UAT o Use automated reconciliation tools to compare legacy vs. cloud data o Include specific test cases for historical data validation o Assign a dedicated data QA team	Permanent loss of financial or transactional data	DW/BI must be in place to migrate and this is a big issue for APD
Open and Monitoring	05/02/25		Deployment/Cutover Identity Provider (IdP) Role Mapping	Failure of third-party integrations post-migration - unknowns for peripheral systems - STMS/MFMP/etc	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Engage vendors early; build fallback interface plans - APD attending all meetings at this time	Failure to process essential transactions like payroll or grants	critical to success
Open and Monitoring	05/02/25		Conversion/Configuration Post Implementation	Inadequate disaster recovery or backup strategy during cutover - new system - what if's	Stable	6 (High/Medium)	APD IT Teams preparation and training and UAT	Implement robust backup and rollback strategies; conduct failover tests - once understanding of PALM conversion plan is in place - adjust and ready	Irreversible data loss or extended downtime during transition	understand PALM's process for "Go-Back"
Open and Monitoring	07/07/25		Business Process Change Conversion/Configuration Role Mapping User Acceptance Testing	Incomplete or Incorrect Test Scenarios	Stable	6 (High/Medium)	APD Finance Teams creation of testing stories for UAT inadequate	o Involve key accounting SMEs in test case design o Map test cases to migrated business processes and compliance requirements o Conduct a pre-UAT review/approval of test scripts o Use traceability matrix to ensure coverage	unable to test fully	working the UAT stories to complete all APD job tasks fully
Open and Monitoring	09/08/25		Deployment/Cutover	Delay in UAT completion pushes back project go-live	Increasing	6 (High/Medium)	Planning due to PALM PAUSE	Build buffer into project plan; prioritize critical test cases; agree on criteria for UAT sign-off; escalate blockers quickly.	Delay in UAT completion pushes back project go-live	Planning due to PALM PAUSE
Open and Monitoring	09/08/25		Conversion/Configuration Post Implementation	Data migration defects not identified in time due to late UAT	Increasing	6 (High/Medium)	Use of Config workbook data from current Mock versions - making certain the data is APD's	Perform early mock data conversions; include data validation as a separate workstream; increase data reconciliation effort post-UAT.	Data migration defects not identified in time due to late UAT	mitigation may not have the required time to be rectified
Open and Monitoring	09/08/25		Deployment/Cutover	Cutover rehearsal shortened or skipped	Increasing	6 (High/Medium)	Determine of Freeze timeframe is critical to all transactions	Lock cutover rehearsal windows early; use dry-runs even if UAT lags; ensure rollback procedures are validated.	Cutover rehearsal shortened or skipped	prepping for the cutover - not yet overviewed
Open and Monitoring	05/02/25		Business Process Change Training User Acceptance Testing	1. Inadequate trainer knowledge	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Conduct Train-the-Trainer programs; certify trainers before rollout	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	UAT and Training delayed for PALM PAUSE
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	3. Inconsistent training across departments	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Standardize training materials and delivery; track attendance and completion	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	Continuing to assist and grow the Training effort
Open and Monitoring	05/02/25		Agency Business System Interface Training User Acceptance Testing	4. Technical issues during training (e.g., system crashes)	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Test systems in advance; have IT support on standby during training	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	unknown but identified
Open and Monitoring	05/02/25		Business Process Change Staffing/Resource Availability Training	6. Training not aligned with actual job functions	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Customize training per role; gather pre-training feedback	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	APD Teams want to train together
Open and Monitoring	05/02/25		Staffing/Resource Availability Training	7. Knowledge retention loss post-training	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Provide job aids, refreshers, and post-training support	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	consideration for active learning and continued PALM use of sandbox and connection to the application
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	8. Delayed training timeline	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Build buffer into project schedule; monitor progress regularly	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	APD wants all the time possible - and tho there are delays in UAT and training at this time - APD hopes there is consideration for time sliding to go live to accommodate all that is needed for app use

Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	9. Overwhelming training content	Stable	4 (Medium/Medium)	APD Teams preparing for PALM Training	Break into modules; offer self-paced options	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	working to prepare internal training materials while waiting on PALM
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Delay in configuring role-based access and permissions - changes updates learned during training and UAT	Stable	4 (Medium/Medium)	APD IT Teams preparation and training and UAT	Map all roles early; perform iterative testing with key users - advantage during UAT	Access issues for users; delay in operations post-migration	remembering that this is not FLAIR aligned and must be viewed as a new role based matrix
Open and Monitoring	05/02/25	07/07/25	Agency Business System Business Process Change Interface	Unanticipated technical debt from legacy customizations - for interfaces - need to reduce to cause cost savings - but not aligning with what we have - PALM issue	Stable	4 (Medium/Medium)	APD IT Teams preparation and training and UAT	Catalog all custom logic and evaluate for platform-fit - updating in ABS	Unexpected bugs and incompatibilities in cloud version	PALM issue - interfaces were cost driven - APD needs everything it says it needs
Open and Monitoring	09/08/25		Training	Training content misaligned with final system functionality	Increasing	4 (Medium/Medium)	Revisions and adjustments are dynamic and currently being supported	Develop training with placeholders for UAT updates; plan for quick revisions; validate training content with UAT leads.	Training content misaligned with final system functionality	changes need to be monitored because they are not tied down
Open and Monitoring	09/08/25		User Acceptance Testing	User resistance and loss of confidence due to perceived instability	Increasing	4 (Medium/Medium)	Communication of expectations remains	Maintain clear communication about reasons for delay; involve super users in UAT to advocate system readiness; reinforce benefits of new system.	User resistance and loss of confidence due to perceived instability	PALM integrity - transaction history - audit and capabilities are in question
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training	2. Low user engagement or attendance	Stable	3 (High/Low)	APD Teams preparing for PALM Training	Mandatory training policy; offer flexible schedules and formats	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	Small Agency module responsibility overlap and security rights all in review without use of PALM at this time
Open and Monitoring	09/08/25		Business Process Change	Missed regulatory or financial reporting deadlines if go-live slips	Increasing	3 (High/Low)	deadlines and cutoffs for APD are very important	Identify critical reporting deadlines; prepare contingency plan (e.g., run legacy system in parallel); escalate early if deadlines are at risk.	Missed regulatory or financial reporting deadlines if go-live slips	regulatory - APD requirements
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training	5. Resistance to change from employees	Stable	2 (Medium/Low)	APD Teams preparing for PALM Training	Communicate benefits early; involve staff in design and feedback	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	APD is currently working on Change Mgmt Initiatives and participation in offered learning events
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	10. Lack of evaluation and feedback mechanisms	Stable	2 (Medium/Low)	APD Teams preparing for PALM Training	Implement surveys, quizzes, and performance tracking	Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress	APD Core team working to determine module training and retention opportunities

APD Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/01/25		Agency Business System Interface Conversion/Configuration	PALM Project Mapping Key	High - Impacts the ability	APD IT Teams preparation and training and UAT	Develop interface translation layers; validate APIs early - continual review and update	05/30/25	Not closing as there are balance mapping exercises the Agency must need to understand and validate for migration of balance based on old FLAIR COA to the NEW PALM COA
Open	09/08/25		Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover	Encumbrance ID	High - Impacts the ability	The ABC re-write has exposed an issue that limits a very effective process in assigning IDs for encumbrances that will delayed	review within APD and IT team in the process requirements - understand and see what PALM can support	01/30/26	new issue and this will need to be a process review - the encumbrance Id not being able to be created by hand is forcing the ABC team to address their design, and perhaps their architecture

APD Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025	
People Data	Legacy system data is complete and accurate	Logged	05/12/25	Finance, IT, Audit, All modules using historical data	working with MOCK files is significant	
Processes Technology	Chart of Accounts structure will be successfully mapped to the new system	Logged	05/12/25	Budget, General Ledger, Accounting Leads	Working thru interface validations has given a reason to check all the COA setup	
People Processes	All critical business processes are documented	Logged	05/12/25	All accounting teams, Change Management, Training Team	work in progress	
Technology Data	Cloud system will support all required functionalities	Logged	05/12/25	Program and Financial Users, System Admins	FLAIR is bested	
People Processes Technology Data	Interfaces with peripheral systems will remain compatible	Logged	05/12/25	IT, Third-Party Vendors, Grants/Payroll/Procurement Units	Interface testing is proving a good test	
Processes Technology Data	Data migration will occur with minimal downtime	Logged	05/12/25	All staff, especially Payroll, Accounts Payable, and Receivables	PALM has yet to provide the conversion plan	
People Processes Technology Data	End users will receive adequate training prior to go-live	Logged	05/12/25	All functional end users	UAT and TRaining have not yet started	
People	Security roles and access permissions will be properly	Logged	05/12/25	Security Admins, HR, ...	Working on the user role matrix for APD	

Processes	configured			Supervisors, External Auditors	
Processes Technology Data	Reports used in the legacy system will be recreated accurately	Logged	05/12/25	Finance, Program Managers, Oversight Agencies	UAT and training will be used for report checking
People Processes Technology Data	Project timeline will remain on schedule despite unknowns	Logged	05/12/25	Project Managers, Executive Sponsors, All involved teams	At 9/8 - no change for the timeline yet
People Processes Technology Data	UAT - the system requirements and user stories reflect the real-world processes and accounting requirements of the end users.	Logged	07/07/25	UAT - Critical features may be missing or behave incorrectly, requiring rework late in the project	UAT Pending
People Processes Technology Data	UAT for August - version being tested includes all features required for accounting functions and is free of critical/blocking bugs.	Logged	07/07/25	UAT Tests may not reflect true accounting workflows, leading to gaps or inability for validation.	Interface testing is currently in progress
People Processes Technology Data	UAT Testers have sufficient training or knowledge of the new system as they execute UAT from PALM instruction, are able to validate the accounting processes.	Logged	07/07/25	UAT - hard to determine false positives and false negatives.	pre-req training is being completed by SME's
People Processes Technology Data	Assuming that connected systems (e.g., payroll, enterprise systems, all modules, tax engines, banks) are available and simulate live interaction appropriately for UAT	Logged	07/07/25	UAT - Errors may appear that are integration-related (enterprise systems) rather than related to the core application, delaying sign-off.	Enterprise system is being tracked by APD as the dependencies are agency wide
People Processes Technology Data	Timeline & Scheduling Assumptions <ul style="list-style-type: none"> <li>The overall project timeline will shift, or downstream activities (training, cutover prep, data migration) will need to be compressed or re-sequenced.</li> <li>A buffer must be assumed for additional test cycles or defect resolution, since issues may be uncovered later than planned.</li> <li>Project milestones tied to UAT completion (e.g., training readiness, go-live rehearsals) will also shift.</li> </ul>	Logged	09/08/25	Schedule - dates - timelines must change	APD is waiting to see what impact this will have on everyone with holidays coming up
People Processes Technology Data	Resource & Cost Assumptions <ul style="list-style-type: none"> <li>Additional time will be required from testers, business SMEs, trainers, and project team members, potentially leading to higher project costs.</li> <li>Extended overlap of legacy system and new system (e.g., parallel runs, dual licensing, support contracts) must be assumed.</li> <li>Overtime or additional resources may be required to handle compressed activities.</li> </ul>	Logged	09/08/25	Impact of financial is all overarching to all aspects of the project	PALM funds are being use for Core PM/BA/IT support - APD Trainer will be a new cost and could extend more than the original project projection
People Processes Technology Data	Training & Change Management Assumptions <ul style="list-style-type: none"> <li>Training materials may need revisions after UAT is complete, as final system behaviors/configurations may not yet be validated.</li> <li>End-user training may need to be shortened, delivered closer to go-live, or delivered in waves (e.g., super-user first, general users later).</li> <li>Users may have less time to adapt before cutover, so additional hypercare/support must be assumed post go-live.</li> </ul>	Logged	09/08/25	All Users are affected	UAT - Training - we will need to update any training to adjust for an adjustment to how long training and UAT will last.
People Processes Technology Data	Quality & Risk Assumptions <ul style="list-style-type: none"> <li>Not all test scenarios may be fully executed if UAT time is reduced, so assumptions must include higher risk of defects surfacing post go-live.</li> <li>Data migration validation may be less thorough, requiring additional reconciliation effort during hypercare.</li> <li>Post-go-live support demand will likely be higher than originally planned due to reduced user readiness.</li> </ul>	Logged	09/08/25	All Users are affected	Risks increase if time is not allowed for the full time needed for the whole project success elements
People Processes Technology Data	Stakeholder & Communication Assumptions <ul style="list-style-type: none"> <li>Stakeholders must assume increased communication needs to manage expectations and maintain user confidence.</li> <li>Executive sponsors may need to assume greater tolerance for go-live risk or accept the trade-off of delaying further.</li> </ul>	Logged	09/08/25	All Users are affected	Updates, communication and all direction from PALM must become and stay transparent

#### 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:
July - August 2025	Rose Salinas	rose.salinas@apdcares.org	09/09/25
May - June 2025	Rose Salinas	rose.salinas@apdcares.org	07/07/25
March - April 2025	Rose Salinas	rose.salinas@apdcares.org	05/12/25
January - February 2025	Rose Salinas	rose.salinas@apdcares.org	03/06/25

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[Readiness Workplan](#)

# CITRUS Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Rosa Walsh

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 87.11%

Submitted On Time = 24

Submitted Late = 14

Pending Submission = 1

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 80.00%

Submitted Complete = 24

Submitted Incomplete = 3

Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

### Change Champion Network:

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

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 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
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	Pending Resubmission	05/27/25		Submission Incomplete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	Pending Resubmission	04/16/25		Submission Incomplete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25			The Change Analysis Tool provided by Florida PALM does not conform to the methodology selected by Citrus. As such, we have deferred this task indefinitely and will complete the required analysis as part of the completion of Task 574.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		Citrus has delayed this task to begin until September 2025 due to budget and operational constraints. Citrus is using only outbound interfaces, and their completion does not pose a risk to the overall project timeline.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	Pending Resubmission	08/07/25	Per the task instructions, Citrus is using Option 3: Agency-specific format which is attached to this tracker.	Submission Incomplete	08/14/25
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/10/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	08/01/25	Due to changes in our IT environment, this will be completed next week. It cannot be done at this time.	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/18/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/25/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/15/25			
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial				

						Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

## Agency Reported

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

### CITRUS Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	02/28/25		Staffing/Resource Availability	Funding Alignment	Stable	9 (High/High)	The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed.	Certain Readiness Tasks are delayed until remediation can be accomplished. It is anticipated that Citrus will be able to complete these tasks by Fall 2025.	This is a risk we re monitoring, and we do not anticipate it becoming an issue.	This Risk is still valid.
Open and Monitoring	02/28/25		Deployment/Cutover	Design Misalignment	Stable	9 (High/High)	Florida PALM designs fail to take into account the reporting and business needs of the agencies, requiring each agency to develop alternative solutions to meet their existing business needs currently met by FLAIR.	Citrus is working to resolve the reporting issues we anticipate through the use of interfaces from PALM.	Lack of reporting to our governing body.	This Risk is still valid.
Open and Monitoring	02/28/25		Business Process Change	Foreign Currency Transactions	Stable	6 (Medium/High)	Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank).	Citrus is working with Treasury and CFO's office to identify possible solutions. Still to be identified is method for reporting foreign currency payments in FACTS.	If the issues is not resolved, information in FACTS could be incomplete/inaccurate.	This Risk is still valid.
Open and Monitoring	09/19/23		Staffing/Resource Availability	New IT Staff	Stable	2 (Low/Medium)	Citrus has newer IT staff with no knowledge of PALM.	IT staff is quickly coming up to speed with Citrus business systems and the needs going forward with the implementation of PALM. More meetings/workshops targeted to the technical liaisons would be beneficial.	IT systems not capable of meeting the needs of PALM implementation.	This Risk is still valid.

### CITRUS Issues

Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

### CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People	The leadership of the Department of Citrus will support the project by providing resources, access to systems and stakeholders, and by supporting the organizational change management strategy created by the project team.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Processes Technology	The Legislature will appropriate and timely release General Revenue funding for contracted services for Agency support of the PALM project and those resources are available to perform the work assigned to them as scheduled.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Processes Technology Data	The timeline of the project is subject to the independent DFS Florida PALM project and all key milestones and transition dates are provided by the larger PALM Project.	Logged	05/12/25	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
People Processes	Citrus business process owners will provide input for necessary process mapping efforts with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Technology	Citrus business system owners will provide requirements for necessary system modifications with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Processes	Citrus project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet project milestones.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
Technology	Citrus stakeholders have a clear understanding of the benefits and limitations of low-code development and are supportive of its implementation.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Technology	The project team has access to relevant documentation, specifications, and knowledge about the legacy systems and their data structures.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This Assumption is still valid.
People Processes	The DFS Florida PALM project team will provide a PALM UAT environment to all CCN members, SMEs, and End Users prior to go-live. The Department will be given sufficient time to test and practice critical transactions before go-live in this	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.

	dedicated testing environment.				
People Processes Technology Data	The DFS Florida PALM project will provide key information identifying the functionality, business processes, and timeline of the larger project in a timely manner to facilitate planning and execution.	Logged	08/30/24	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
Processes Technology Data	The DFS Florida PALM project team will provide a reporting solution at go-live to support the business needs of the Department.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
Processes Data	The DFS Florida PALM project team will provide information regarding the data fields to support all Chart of Accounts values Citrus currently uses (such as OCA's).	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
Technology	The DFS Florida PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
People	The DFS Florida PALM project team will provide both in-person, on-line, and recorded training for CCN's, SMEs, and all accounting staff.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.
People Processes Technology Data	Key tasks, such as user maintenance, vendor maintenance, vendor payment registration, etc. will be done outside of PALM in their respective enterprise systems, e.g. AOD, STMS, VIP, etc.	Logged	02/09/24	PALM Project Team, Citrus Accounting Dept, CCN's	This Assumption is still valid.

#### 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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#### CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Rosa Walsh	rwalsh@citrus.myflorida.com	09/10/25
May - June 2025	Christine Marion	cmarion@citrus.myflorida.com	07/10/25
March - April 2025	Christine Marion	cmarion@citrus.myflorida.com	05/12/25

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[Readiness Workplan](#)

# COM Status Report Dashboard

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

Reporting Period

July - August 2025

Agency Sponsor

Tisha Womack

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 97.67%

Submitted On Time = 36

Submitted Late = 7

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 88.81%

Submitted Complete = 32

Submitted Incomplete = 3

Completed After Submission = 7

Other Task Completeness:

Score = 95.10%

Submitted Complete = 44

Submitted Incomplete = 1

Completed After Submission = 4

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/26/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25		Submission Complete	07/18/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/17/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/14/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/22/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/25/25			
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/08/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

## Agency Reported

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

COM Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	08/26/24		Agency Business System Business Process Change	Lack of support for Life-to-Date Accounting and Reporting	Stable	9 (High/High)	Commerce needs LTD balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module	Create internal life-to-date reporting system.	Commerce will face significant disruptions in financial oversight, reconciliation, and compliance. This gap will hinder our ability to produce accurate historical financial	Remains stable, as more information is needed of how this feature will work in Florida PALM.

							that has some type of LTD capability but details are not known to agencies at this time. Contingency plans have been identified and Commerce is currently working to determine best response if Project Costing module will not provide needed support.		reports, negatively impact audit readiness, and delay decision making processes that rely on cumulative financial data.	
Open and Mitigating	12/12/24		Business Process Change	Documentation Tracking Process	Decreasing	9 (High/High)	Team identified the need for a consistent documentation tracking process.	Develop documentation tracking process tool, schedule meetings with supervisors and determine a centralized location for BPs. We will then develop a matrix to cross check and verify all BPs listing in the tracking tool are in the centralized location. Supervisors will provide any missing information or correct incorrect information.	If there is no documentation tracking process in place, then documentation updates may be missed, causing delays, inconsistencies, or errors in project deliverables.	Commerce is currently in the process of creating a centralized process in Sharepoint.
Open and Mitigating	12/12/24		Training	Common Understanding of Florida PALM project goals	Decreasing	6 (Medium/High)	Florida PALM project impacts many business units in Commerce's F&A area. Team acknowledges there must be unity in understanding of project goals.	Provide project update communications to team or team members associated with the areas of impact via email, Teams channels, Teams chat, face-to-face and/or virtual meetings. Also provide opportunities to participate in workshops and CoLab sessions provided by PALM. We will also provide and share information to team members with office/agency social gatherings approved by management in approved locations/areas.	If there is no common understanding of the PALM project goals, then there could be misalignment among team members, leading to potential misunderstandings, inconsistent priorities, and inefficiencies in project task execution.	Though this risk is decreasing, Commerce will remain focused on this risk as more information is released by Florida PALM.
Open and Mitigating	01/30/25		Conversion/Configuration	Data Migration Process	Stable	4 (Medium/Medium)	Proactive efforts by project team to identify potential data-related risks.	<ul style="list-style-type: none"> <li>- Perform a comprehensive data audit before migration to identify and resolve inconsistencies</li> <li>- Use automated data validation tools to ensure data accuracy during migration</li> <li>- Conduct multiple rounds of data testing in a staging environment to verify accuracy and completeness</li> <li>- Establish a plan to address any critical issues identified post migration</li> </ul>	If the data migration process from FLAIR to PALM encounters inconsistencies or errors, then critical financial data could be compromised, leading to reporting inaccuracies and delays in operational processes.	Risk remains stable as we continue interface testing.
Open and Mitigating	01/07/25		Training	End User Training	Stable	3 (High/Low)	Proactive efforts by project team to identify potential end user risks.	<ul style="list-style-type: none"> <li>- Develop a detailed training plan tailored to various user roles, including hands-on practice sessions</li> <li>- Provide user-friendly guides, FAQs, and on-demand video tutorials for continuous learning</li> <li>- Partner with Florida PALM to provide support helpdesk information to address end-user questions during and after implementation</li> <li>- Involve SMEs and end users in Commerce specific and Florida PALM User Acceptance Testing for familiarization purposes, as well as feedback"</li> </ul>	If end users are not adequately trained or fail to adapt to Florida PALM, then system usage could be inefficient, causing a decrease in productivity and potential disruption to daily operations.	This risk remains stable, as Florida PALM has not released the End User Manual. This manual is necessary in that it will provide key procedural information concerning how processes will be performed in Florida PALM.
Open and Mitigating	01/07/25		Interface	FLAIR Integrations	Stable	2 (Medium/Low)	Proactive efforts by project team to identify potential interface risks.	<ul style="list-style-type: none"> <li>- Conduct a system mapping and dependency analysis for all interfacing applications</li> <li>- Test integrations thoroughly during User Acceptance Testing</li> <li>- Partner with Florida PALM, third-party vendors, and in-house teams to ensure compatibility</li> <li>- Monitor system performance post-integration and address any issues promptly using Florida PALM help desk"</li> </ul>	If FLAIR does not seamlessly integrate with existing Commerce applications and third-party interfaces (MFMP, etc.), then there could be disruptions in data exchange, resulting in operational bottlenecks and delayed financial transactions.	Risk remains the same as we are in testing.
Open and Mitigating	01/07/25		Business Process Change	Business Processes Alignment with Florida PALM	Stable	2 (Medium/Low)	Proactive efforts by project team to identify potential business process risks.	<ul style="list-style-type: none"> <li>- Review all Florida Commerce Finance &amp; Administration business processes impacted by the Florida PALM implementation in order to identify inefficiencies and areas for improvement before system implementation</li> <li>- Collaborate with key</li> </ul>	If existing business processes are not adequately reviewed and aligned with Florida PALM, the inefficiencies may persist or new process gaps could emerge, leading to operational delays and reduced system effectiveness	This risk remains stable, as Florida PALM has not released the End User Manual. This manual is necessary in that it will provide key procedural information concerning how processes will be performed in Florida PALM.



Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for DACS](#)  
[Readiness Workplan](#)

# DACS Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Alan Edwards

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 100%

Submitted On Time = 45

Submitted Late = 0

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 95.19%


Submitted On Time = 73

Submitted Late = 4

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 99.32%

Submitted Complete = 41

Submitted Incomplete = 0

Completed After Submission = 3

Other Task Completeness



Other Task Completeness:

Score = 99.79%

Submitted Complete = 47

Submitted Incomplete = 0

Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 2
- Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25	4/10: 576 Addendum for Interface Test Planning completed. Progress for Cycle 2 test readiness on-going.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	50% - In Progress				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/26/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	06/30/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/17/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/01/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/26/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/26/25			
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/03/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

## Agency Reported

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

DACS Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	10/31/24		Agency Business System Business Process Change Interface User Acceptance Testing	Florida PALM UAT Plan details needed for batch processing	Stable	3 (High/Low)	The Department is waiting on more information from PALM regarding their testing plans. We attended PALM's test preparation workshop in November 2024 where these topics were discussed and the PALM team provided more insight	Internal management and mitigation of this risk is dependent on pending information about Florida PALM UAT testing details from the PALM Project. Our Agency CCN collectively continues to monitor any updates related to the release of the PALM Project UAT	FL PALM Project UAT Plan (not approach) details unknown at this time. FL PALM must be running regular batch processing during UAT to allow FDACS to interface Agency Business System test scenario data (API002, ARI007, ARI009, ARI014, ARI015)	08/2025 - Beginning interface testing activities with PALM. Agency will continue to monitor through next reporting cycle.

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							Without the final UAT plan. Pending information about UAT testing details will impact our internal management of this risk.	the PALM Project UAT Plan (AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing time line.	AR1011, IUI002, POI002, POI006, SDI009) to PALM during the testing window. Failure to successfully test batch processing is detrimental to the departments planning and preparation for go live fiscal operations.	
Open and Monitoring	10/31/24		Agency Business System Business Process Change Interface User Acceptance Testing	Florida PALM UAT Plan details needed for Outbound Interfaces	Stable	3 (High/Low)	We are updating this risk as the Department has begun interface testing with PALM. We are receiving outbound files for interface testing and a good amount have been successfully loaded. We are incorporating the data as it becomes available in our ABS remediation to ensure we have valid data ready for UAT and go-live. This risk remains open until successful completion of testing of all Outbound Interfaces.	Internal management and mitigation of this risk is dependent on the successful continuation of Interface Testing with the PALM Project. We have had a few of the outbound files that did not get successfully loaded and have communicated issues with the Florida PALM Technical Readiness team. Outside of our internal monitoring of testing activities, our Agency CCN collectively continues to monitor any updates related to testing (PALM Technical Team communications, AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing timeline.	FDACS must be able to continue to receive and test outbound interface file data from PALM (AMI003, API020, API031, ARI002, ARI020, ARI024, ARI034, GLI001, GLI017, IUI003, KKI009, POI001, POI007, SDI008) that will contain records associated with the agency test data and foundational data such as the chart of account values, chartfield combinations, and budget information. Failure to successfully test these outbound interface files and data is detrimental to the departments planning and preparation for go live fiscal operations.	08/2025 - Risk updated to include Interface Testing has begun. Agency will continue to monitor through next reporting cycle.

DACS Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

DACS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Technology	Funding for staff augmentation and services will continue through implementation and Hypercare.	Logged	08/31/23	Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM.	08/2025 - On going through Hypercare. Continuing to monitor.
Data	Division reporting needs currently handled by Data Warehouse will be taken care of by user roles for Information Warehouse or PALM reports.	Logged	12/19/23	Division fiscals, Finance and Accounting, OPB, Purchasing, Payroll	08/2025 - Assumption stands until reporting functionality can be tested and confirmed to meet department needs.
People	The Florida PALM team will be able to provide timely and complete requirements for the transition to Florida PALM with sufficient detail and time to implement the changes according to the Florida PALM schedule.	Logged	11/13/23	FDACS PALM Readiness Team, CCN, all FDACS key stakeholders, PALM/Impacted Agency Business System end users	08/2025 - Continuing to monitor.
Processes	Work efforts of staff augmentation resources are undertaken to collectively achieve a broader understanding of the totality of work that must be accomplished to meet all Critical Success Factors. As such, the deliverables outlined in the Operational Work Plan are critical, and the FDACS PALM Transition Readiness Team assumes that the deliverables are accurately and thoroughly defined and reflect the necessary Level of Effort to achieve all transition tasks and activities. Work efforts under the deliverables may adjust to accommodate operational variances, but the deliverables are fixed.	Logged	11/13/23	Staff Augmentation; FDACS PALM Readiness Team, CCN	08/2025 - Assumption stands until completion of UAT, at minimum.
Technology Data	FDACS is assuming that interface testing between PALM and enterprise partners/third parties will be completed on schedule and that suitable batch scheduling between PALM and enterprise partners/third parties will be established. Deviation from those outcomes might impact downstream project activities including agency interface testing and user acceptance testing.	Logged	10/22/24	FDACS PALM Readiness Team, PALM/impacted Agency Business System end users.	08/2025 - Assumption stands until completion of UAT, at minimum.

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

DACS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Alan Edwards	alan.edwards@fdacs.gov	09/03/25
May - June 2025	Alan Edwards	alan.edwards@fdacs.gov	07/01/25
March - April 2025	Alan Edwards	alan.edwards@fdacs.gov	05/01/25
January - February 2025	Alan Edwards	alan.edwards@fdacs.gov	03/03/25

- [Dashboard Snapshots](#)
- [Knowledge Center](#)
- [Florida PALM Workbook for DBPR](#)
- [Readiness Workplan](#)

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

July - August 2025

Sally Huggins

DBPR Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	01/13/25		Staffing/Resource Availability	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Stable	9 (High/High)	DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed.	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	There may not be enough time for DBPR IT to make modifications in time to be retested	DBPR-IT is now working on the Versa interface. Updates will be added soon.
Open and Mitigating	06/30/25	07/24/25	Staffing/Resource Availability	If our business analyst is not onboarded and ready to go by the start of UAT Online, then he/she may miss an opportunity to understand navigation necessary to thoroughly complete test scripts	Increasing	6 (Medium/High)	The BA is needed to write test cases for UAT	Hire and onboard the business analyst prior to August 2025 or find other resources who can assist..	Delays will be encountered in creating and completing test cases in time for UAT in August.	Hiring a BA is not possible. The new OCM Manager will take on this task.
Open and Mitigating	03/27/25		Deployment/Cutover	If the deployment PALM occurs on 7/1/2026 as is now planned, working on bugs and other remedies as well as transition activities could interfere with Year End activities.	Increasing	6 (High/Medium)	Year End is a very hectic time of the year for DBPR Finance & Accounting.	Discuss with readiness coordinators and arrive at logistics that least impact Year End efforts	Working on bugs and other remedies as well as transition activities could interfere with Year End activities	Florida PALM confirmed this is an issue across multiple agencies and it being taken into consideration.
Open and Mitigating	04/23/25		Business Process Change	If PALM (The Project) does not take into account Statutory requirements surrounding Financial Statement preparation and completion into their decision making (particularly Year end activities in 2026 around deployment time), then violations of statutes from a timing perspective may result	Increasing	6 (High/Medium)	This was discussed with IV&V at our monthly IV&V meeting	Share Risk with RC Team and ensure this is presented to the PALM Project decision-makers so Statutes can be incorporated into planning and subsequent Decisions that impact the Agencies.	The PALM Project could be out of compliance with state statute(s).	This will be addressed after UAT has completed to determine if processes were updated to take into account this risk.
Open and Monitoring	06/11/25		Conversion/Configuration	If Mock 3 conversion data is not full cleansed and converted from FLAIR to PALM, then DBPR could have incomplete and/or inaccurate data in the UAT environment and that could negatively impact UAT testing	Decreasing	6 (High/Medium)	This Risk relates to PALM Tasks 571, 657, and 659 that are very substantial and impactful. The due dates are aggressive.	Work closely with SMEs and data experts and closely monitor and manage PALM Tasks 571, 657/657-A, and 659.	Incomplete or inaccurate data for the UAT Online sessions.	Mock 3 cleanup is in progress as part of Mock 4.
Open and Mitigating	02/19/25		Business Process Change	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Increasing	4 (Medium/Medium)	Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities.	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	DBPR SMEs will have minimal time to catch up review of business processes	Test Cases will be reviewed with business units to flush out any issues prior to the start of UAT
Open and Mitigating	04/09/24		Training	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional)	Decreasing	3 (High/Low)	Requires Organizational Change Management	Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners. Create visual aids, mapping documents, and other PALM educational tools.	PALM readiness for DBPR could be negatively impacted	During walk throughs of future processes with process owners, the team is identifying areas of concern to address with training, documentation, and communications.

				then PALM readiness could be negatively impacted						
Open and Mitigating	05/31/24		Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Decreasing	3 (High/Low)	Documentation on Future-State business processes is being provided by The Project on the PALM website.	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Meetings are being scheduled with process owners for each DBPR area so that the team can prepare materials necessary for support and to identify any issues that require more attention.
Open and Mitigating	11/15/24		Deployment/Cutover	If DBPR does not have a cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.	Stable	3 (High/Low)	Down time and other conditions need to be planned for to ensure a smooth transition.	Create a Cutover Plan that Identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	Key business processes may not be able to be completely timely and could have negative consequences	This plan is on hold until after UAT and Service Now tickets are resolved
Open and Mitigating	01/13/25		User Acceptance Testing	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely, efficient, and successful completion of UAT	Increasing	3 (High/Low)	It is important to have detailed and comprehensive test scripts in order to conduct thorough testing and reduce the possibility of errors in production.	Ensure that crosswalks, user stories, and flow detail diagrams are covered at a detail level. Ensure sources of data required to complete business processes (e.g. FLAIR@BPR, Reports, queries, etc are identified for current processes so equivalents (when applicable can be identified before test scripts are created.	Negative impact to the timely, efficient, and successful completion of UAT	The videos with each Palm Flow help, especially when there are dropdowns with multiple options where screenshots don't help. Making progress.
Open and Mitigating	07/09/25	08/08/25	Staffing/Resource Availability	If the Organizational Change Manager is not onboarded and ready to go by the start of UAT Online, then he/she may miss an opportunity to understand navigation necessary to thoroughly complete test scripts	Stable	3 (High/Low)	The OCM Manager resigned unexpectedly Monday, July 7.	Interviews are scheduled for today, July 10 for a possible replacement.	Delays may be encountered in coordinating Training and in UAT testing.	The new OCM is on board. This risk is closed
Open and Mitigating	04/18/24	08/14/25	Business Process Change	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete workflows	Increasing	2 (Medium/Low)	KPMG assesses all of DBPR's current business processes and that documentation is be used to transition to PALM business processes. Flow diagrams are being used.	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, flow diagrams, screen mockups from Design Workshops, FLAIR Transactions to PALM Equivalents Crosswalk, etc.)	DBPR end users will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete workflows	Closing this as a duplicate of Risk #18
Open and Mitigating	04/23/24		Agency Business System	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live	Stable	2 (Medium/Low)	FLAIR@BPR has been a tool that DBPR staff have relied to run real-time custom queries to get current data necessary to complete business functions.	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live with PALM	Florida Palm is currently working on DW tools similar to FLAIR@DBPR. These will be tested when available.
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit	Stable	2 (Medium/Low)	It would be better to have real transfers occur involving the actual real-life players to get more real testing	Identify an Agency that we can partner up with and coordinate send/receive testing with them	UAT testing could be inadequate and could negatively impact DBPR PALM readiness	DBPR will contact POCs before UAT

				process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness			and to reduce the likelihood of unanticipated errors.			
Open and Mitigating	08/19/24		User Acceptance Testing	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Stable	2 (Medium/Low)	We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world.	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	DBPR may not have the desired email notification flexibility once we go to production with PALM	Linda confirmed with Nicole that email testing will be during Full UAT, not UAT Online.

DBPR Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	06/04/25		Agency Business System	ABS Versa Regulation remediation is behind schedule	Critical - Impacts the abil	DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule.	Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT.	10/03/25	The first draft of the Versa Interface was delivered on Friday, 08/29/25 with many questions to answer regarding field mapping. Resolutions are in progress.

DBPR Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025	
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR stakeholders	DBPR is committed to this project and has made resources available as needed. Unplanned resource changes have had minimal impact.	
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	All DBPR stakeholders	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository. The Project Schedule has been re-baselined and includes all new Tasks and dates per the 6-month extension.	
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan (Smartsheet).	Logged	04/01/24	Project Manager Organizational Change Manager DBPR Sponsor	Updates are current through 09/09/2025	
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR division/office staff	Resources have been providing assistance as needed. More will be required of them as we finish preparations for UAT.	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR stakeholders	Extending the Online UAT start date makes this assumption more a reality.	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR division/office staff	DBPR staff have been engaged and responsive.	
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR division/office staff	Project guidance and direction will continue to be provided by the DBPR Project Manager in a timely manner.	
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	DBPR Executive Leadership Project Manager	DBPR Leadership continues to be engaged.	
People Processes Technology Data	The Department will remediate all agency business systems (ABS) impacted by Florida PALM that cannot be retired.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Remediation of Versa is in progress.	
People Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producing 2 other files to be imported into PALM, but those remain upload spreadsheets (ARI010 and IUI001).	
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a “fallback” option after the transition to Florida PALM. Note: A snapshot of FLAIR@BPR data query tool will be retained and available for subsequent use of historical data only.	Logged	04/01/24	All DBPR stakeholders	There will be a period of time where neither FLAIR nor PALM will be available. Details are still not know at this time.	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Logged	04/01/24	All DBPR stakeholders	Some processes will remain outside of PALM, some will begin outside of PALM, and some manual processes will be replaced by PALM automation.	
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	All DBPR stakeholders	Reviews of business process changes are being scheduled with impacted business units.	
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	Confirmation of the changes are expected as they review test cases prior to UAT.	
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	One (1) direct interface from Versa to PALM (API002) is being developed. Enterprise Business Systems will be tested during Full UAT.	
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau	Agency SMEs will review test cases before attending UAT to validate their needs will be met.	

				Finance & Accounting Bureau Chief	
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	DBPR Sponsor Project Manager Organizational Change Manager	Consultant resources have been contracted through June 2026
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	Training materials are available on the PALM site and in the LMS system. UAT Training is on hold until test cases are reviewed by SMEs.
People Processes Technology Data	The Department will support data cleansing. PALM configuration and conversion tasks will facilitate this cleansing.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Data cleansing is currently in progress for Mock 3 and Mock 4.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Florida PALM is performing data conversions for Mock 4.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	These are available on the PALM website under the Chart of Accounts tab.
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	11/06/24	DBPR Revenue staff Project Manager Finance & Accounting Bureau Chief DBPR Sponsor	Remediation of processes after the CMS wave were not necessary
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Logged	05/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Processes continue to be identified and flagged that will not have a future state in PALM.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	The UAT environment availability is on hold until further notice from PALM.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Logged	06/14/24	Project Manager Business Analyst	PALM has indicated recently that they will provide information for SMEs the Monday of each UAT Week.
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Logged	06/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	While screen mockups are available, it is more helpful to have videos or access to UAT so SMEs can see the information, or lack thereof, specific to DBPR.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	PALM has provided sample reports to show the data elements. More information is expected as the data warehouse portion of PALM is developed.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	The Versa interface is in progress
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	The Project Management Plan is updated only when there are scope changes. There have not been any scope changes after the most recent update.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Logged	08/16/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	PALM Reports currently include OA2 codes, but will be reviewed regardless during Test Case reviews

				Finance & Accounting Bureau Chief Project Sponsor	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	Spreadsheet Upload Interfaces are being adopted in DBPR/PALM processes where appropriate.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Data will be available in reports, queries, the data warehouse, etc. Some date will be available via batch processing, and some batches are run on demand to move a PALM process forward. PALM provides Outbound Data Files for agency use too.
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	The Versa Interface is in progress
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR division/office staff Project Manager Organizational Change Manager	This is extending to at least 10/03/2025
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	This will continue to be the case since customers are managed in Versa.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Logged	12/04/24	All DBPR division/office staff Project Manager Organizational Change Manager	Future State Crosswalks will be completed prior to Online UAT
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create/enhance all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR division/office staff Project Manager Organizational Change Manager	Updates to user stories will be expected as well as updates to test cases.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Logged	12/18/24	Project Manager Business Analyst	The scenarios will be tested during Online UAT and then updated to prepare for full UAT
People Processes Technology Data	All appropriate supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR division/office staff	Addresses were provided.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	We meet weekly now to discuss tasks and scheduled deliveries
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Change Analysis details are reviewed regularly for any updates that are needed.
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	Questions from DBPR-IT are being researched for resolution
People	The new Business Analyst will be onboarded and available to attend PALM Training during the initial leg of UAT in August 2025.	Logged	03/19/25	Project Manager Business Analyst	The OCM manager is filling in as a BA.
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	The OCM manager is reviewing the training plan for updates
People Processes Data	DBPR as well as the Project will follow PMI best practices and Rule 60GG statute.	Logged	05/28/25	IV&V endorses this.	The project follows PMI best practices and follows Rule 60GG.

#### Agency Sponsor Confirmation

The form you are attempting to access is no longer active.

[Smartsheet.com](https://smartsheet.com)

#### DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Sally Huggins	sally.huggins@myfloridalicense.com	09/10/25
May - June 2025	Sally Huggins	sally.huggins@myfloridalicense.com	07/08/25
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 92.89%

Submitted On Time = 30

Submitted Late = 15

Pending Submission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 76.58%

Submitted On Time = 42

Submitted Late = 34

Pending Submission = 1

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 82.95%

Submitted Complete = 32

Submitted Incomplete = 4

Completed After Submission = 8

Other Task Completeness

Other Task Completeness:

Score = 75.63%

Submitted Complete = 29

Submitted Incomplete = 8

Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 7

Duplicate Filled Role = 7

Vacant Role = 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
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	Pending Resubmission	06/27/25	Documentation Update Ongoing - To be Completed in Task 576	Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	Pending Resubmission	06/10/25	This indirect task is ongoing. Many of our business processes will be mapped out during and post UAT.	Submission Incomplete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission	08/04/25	DCF received notification that the task is incomplete as is. Note, the rubric listed on the 'RW Task Completion Verification Form' is not fully listed on the task instructions themselves. With the extension given and a more detailed rubric provided by our RC, DCF is working to mitigate.		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/07/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/21/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25	Assigned to: Joan, Q	Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission	08/28/25			
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				

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Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/08/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

## Agency Reported

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

DCF Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	08/25/25		Agency Business System Business Process Change Interface Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	<b>Late-Stage Removal of State Program Component (SPGM) from PALM Allotments</b>	Increasing	9 (High/High)	<p>The PALM Project Team have introduced an 11th-hour requirement change that prevents the use of the State Program Component (SPGM) in PALM allotments, despite this component being:</p> <p>Required for legislative appropriations processing Currently supported in FLAIR allotments (TR 20)</p> <p>Included in PALM KK templates and file layouts</p> <p>Part of established business process documentation Recognized as an official Florida PALM ChartField</p>	<p>Escalate to PALM Leadership: Request formal clarification on the requirement change and rationale</p> <p>Document Impact: Quantify specific business processes, systems, and timelines affected</p> <p>Stakeholder Alignment: Engage DFS and other affected agencies to present unified concerns</p> <p>Legal Review: Confirm legislative/statutory requirements for State Program level processing</p> <p>Alternative Solutions: Explore workarounds or mapping solutions if change cannot be reversed</p> <p>Timeline Assessment: Evaluate go-live date implications and potential delays</p> <p>Resource Planning: Identify additional development resources needed for rework</p> <p>Communication Plan: Develop messaging for internal stakeholders about potential impacts</p>	<p>Business Impact</p> <p>Budget Processing Disruption: SPGM is required for LAS/PBS budget amendments and LBR request submissions</p> <p>Legislative Compliance: Legislature appropriates at State Program level - removal may create compliance gaps</p> <p>Process Redesign: Substantial rework of established agency business processes required</p> <p>Data Continuity: Loss of consistency with current FLAIR allotment practices</p> <p>Technical Impact</p> <p>System Integration: Business systems currently under development may require significant rework</p> <p>Data Architecture: Existing data outputs and reporting structures need modification</p> <p>Timeline Impact: Changes required during final month of system development</p>	This risk has been moved to an issue
Open and Monitoring	05/06/25		Agency Business System Business Process Change Training User Acceptance Testing	Risk of not completing system development/remediation by deadline for interface testing approval, potentially resulting in exclusion from PALM end-to-end testing at a future date.	Increasing	6 (Medium/High)	The Florida PALM Project has imposed a deadline for agencies to identify and have in place the interfaces for systems that will connect to PALM. Risk of not completing system development/remediation by that deadline for interface testing approval, potentially resulting in exclusion from PALM end-to-end testing. Since many of the development teams that will address these builds and remediations are newly online, there is a high likelihood that work will not be completed by this deadline.	<p>Avoid. Establish aggressive development milestones</p> <p>Increase development resources</p> <p>Weekly progress monitoring</p> <p>Early interface testing preparation</p> <p>Prioritize critical system components</p> <p>Regular communication with PALM project team</p> <p>Mock up files as if they were coming from our apps, for completion of April/May testing</p>	<p>Missing development deadlines can exclude the project from critical testing phases, impacting overall project success and delivery.</p>	This remains a risk.
Open and Mitigating	05/06/25		Staffing/Resource Availability Training User Acceptance Testing	Out-of-balance prioritization of PALM with other business processes	Increasing	6 (Medium/High)	Potential negative impacts to user acceptance training, business interface development and deployment, and readiness for go-live may result if activities related to the transition to Florida PALM are raised to the same (or higher) priority than other, legacy business processes in and around FLAIR.	<p>Mitigate. Work with business units to develop work management plan to ensure adequate distribution of personnel resources across competing priorities.</p> <p>Involve SMEs frequently in discussion of interface systems to ensure mapping of existing FLAIR chartfields to PALM chartfields.</p> <p>Engage Agency Liaison and Sponsor as necessary to set priorities for business system managers</p>	<p>Imbalanced prioritization can strain resources and affect the efficiency of other business processes, leading to operational challenges.</p>	This remains a risk.
Open and Mitigating	05/06/25		Business Process Change Deployment/Cutover Post Implementation	If encumbrances are not accomplished in MFMP then sufficient budget may not be available for	Increasing	6 (High/Medium)	DCF accumulates expenses that are payable from multiple fund sources (Federal, Grant, GF, etc). In FLAIR, encumbrances could be made against a single fund, regardless of whether	<p>Mitigate. Provide training and job guides to teach that budget check must be conducted before seeking purchase order approval.</p>	<p>Failure to accomplish encumbrances can lead to budgetary issues and financial mismanagement, affecting project funding and execution.</p>	This remains a risk.

				purchase even though purchase order is approved.			or not that fund was sufficient to pay the obligations. When the expenses were realized, they were split across multiple funds to accumulate a sufficient amount. Since MFMP will budget check against PALM at the time of the encumbrance, a new business process will be needed to replace prior one.			
Open and Mitigating	05/06/25		Staffing/Resource Availability Training	Operational Staff Turnover - General	Stable	4 (Medium/Medium)	Personnel changes are an ever-present risk to the project.	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	Similar to management turnover, this can cause delays in operations but can be managed with proper documentation and training.	This remains a risk although unlikely to occur.
Open and Mitigating	05/06/25		Agency Business System Business Process Change Training User Acceptance Testing	FL PALM's inclusion of Speed Keys, particularly with Enterprise Applications, can support current business processes that utilize Expansion Option with front end processing.	Stable	4 (Medium/Medium)	FL PALM's inclusion of Speed Keys, particularly with Enterprise Applications, may not be able to support current business processes that utilize Expansion Option with front end processing.	Mitigate. Adjust documentation where needed. If Speed Keys are not adopted such that they can support "front end processing" for "splits" then a new application must be made to act as a front end to conduct those operations.	Improper integration of speed keys can disrupt business processes, requiring additional resources to develop new applications and potentially causing delays.	This remains a risk.
Open and Mitigating	05/06/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Imp Data Cleansing Activities	Increasing	4 (Medium/Medium)	FL PALM initiated agency data cleansing activities in September 2024 with Mock 1. After the first error dump, it was discovered that there were algorithmic errors the precluded the Mock 2 data extraction on November 30, 2024. Since that time, the focus of the data cleansing timeline has shifted to meet stage gates on the PALM schedule rather than focus on data integrity.	Avoid. Continue data cleansing activities, otherwise UAT testing with the data sets will produce unexpected and inaccurate results.	Inaccurate data cleansing can lead to flawed data analysis and decision-making, affecting the reliability of project outcomes.	This remains a risk.
Open and Mitigating	05/06/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Imp Current State Analysis	Stable	4 (Medium/Medium)	DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis.	Mitigate. Due to change in implementation strategy and change in stakeholders, avoiding inconsistencies in current state analysis is unlikely. Remediation must take place when and where appropriate.	Misunderstanding the current state can result in flawed project planning and execution, leading to inefficiencies and potential project failure.	This remains a risk.
Open and Mitigating	05/06/25		Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Imp UAT planning and execution	Decreasing	4 (Medium/Medium)	With the approval of Amendment 12, UAT has shifted to a two-fold purpose: 1) test PALM; 2) Train on how to use PALM. The second of these two purposes could derail deliberate focus on testing PALM and connected ABSs.	Avoid. Build user stories that accurately represent current business processes so that users are aware which processes to test against PALM and enterprise systems. Ensure a time management plan for SMEs so that a testing/work balance can be achieved.	Poor user acceptance testing can result in untested processes and system failures post-implementation, affecting project success.	This remains a risk.
Open and Monitoring	05/06/25		Business Process Change Deployment/Cutover Post Implementation	Federal Grant System Integration Approval Requirements	Increasing	4 (Medium/Medium)	Potential delays or complications in obtaining federal approval for transition of GRANTS remediation/replacement when interfacing with Florida PALM versus current FLAIR system. This may impact federal grant management and reporting capabilities.	Mitigate. Early engagement with federal stakeholders Detailed documentation of PALM-GRANTS interface specifications Parallel testing of both systems during transition Regular status updates to federal authorities Contingency planning for extended approval timeline	Delays in approval can affect project timelines and funding, potentially jeopardizing project success.	This remains a risk.
Open and Monitoring	05/06/25		Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Delays and negative impacts may result if adequate training materials and information are not made available by the Florida PALM Project Team.	Stable	4 (Medium/Medium)	The PALM Project team has mentioned statewide training a number of times, only to remove commitments from discussion at a later date. The common rationale is that the agencies will be responsible for training.	Monitor. Continue to request materials and information from PALM. Work with SMEs and other agencies to develop comprehensive training plan independent of PALM Project team.	Lack of adequate training materials can hinder user adoption and system effectiveness, affecting overall project outcomes.	This remains a risk.
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Manager/Agency Liaison Turnover	Stable	2 (Medium/Low)	Personnel changes are an ever-present risk to the project.	Mitigate. Ensure project approach and status are well-documented.	Disruption in leadership can lead to communication breakdowns and loss of project momentum. New leadership may require time to understand project intricacies, potentially causing delays in project timelines and	This remains a risk although unlikely to occur.

									affecting team morale.	
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Staff Turnover	Stable	2 (Medium/Low)	Personnel changes are an ever-present risk to the project.	Accept. Ensure project staff responsibilities are well defined and documentation is up-to-date	While manageable, staff turnover can lead to temporary disruptions in workflow and productivity. It may require additional resources for recruitment and training, impacting project costs and timelines.	This remains a risk. Creating extensive process documentation and instructions could help mitigate if this occurs.
Open and Mitigating	05/06/25		Agency Business System Business Process Change Staffing/Resource Availability Training User Acceptance Testing	Operational Management Turnover - General	Stable	2 (Medium/Low)	Personnel changes are an ever-present risk to the project.	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	Changes in operational management can lead to inefficiencies in process execution and decision-making. It may require time for new managers to adapt, potentially affecting project deliverables and stakeholder satisfaction.	This remains a risk although unlikely to occur.
Open and Mitigating	05/06/25		Staffing/Resource Availability	Department Leadership Turnover	Decreasing	2 (Medium/Low)	Personnel changes are an ever-present risk to the project.	Accept. Monitor political developments as they unfold, and adapt as needed.	A shift in department leadership can alter project priorities and affect strategic alignment, potentially leading to changes in project scope or objectives.	This remains a risk although unlikely to occur.
Open and Mitigating	05/06/25		Staffing/Resource Availability	Financial Leadership Distraction by competing priorities	Decreasing	2 (Medium/Low)	Including EOY activities, the budget process, and day-to-day resource challenges, the agency has many distractions that may impact the ability to focus on PALM at key times in the project lifecycle.	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.	If financial leadership is distracted, it can lead to mismanagement of resources and financial oversight, affecting project funding and resource allocation.	This remains a risk although unlikely to occur.
Open and Monitoring	05/06/25		Staffing/Resource Availability Training User Acceptance Testing	Not enough time for training before go live.	Stable	2 (Medium/Low)	The announced plan for rollout of PALM UAT suggests the window for SME Training will be too small for adequate training given the competing priorities for legacy business activities and processes.	Monitor. Continue to promote the importance of prioritizing the PALM transition at a level equal to or greater than performance of legacy business processes.	Insufficient training can lead to user errors and operational inefficiencies, affecting the smooth transition to new systems.	This remains a risk.
Open and Mitigating	05/06/25		Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover User Acceptance Testing	Potential for inaccurate or inconsistent mapping of organizational codes during transition from FLAIR to PALM, affecting financial tracking, reporting, and departmental accountability.	Stable	2 (Medium/Low)	The changes to chartfield purposes and lengths with PALM have necessitated a complete org code restructuring for the agency. This new structure will not be fully testable until access to PALM is provided.	Mitigate. Conduct a Comprehensive audit of existing FLAIR org codes. Documentation of mapping logic and decisions. Stakeholder validation of crosswalk methodology	Inaccurate mapping can affect financial tracking and accountability, leading to compliance issues and financial discrepancies.	This remains a risk.
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Sponsor Turnover	Stable	1 (Low/Low)	Personnel changes are an ever-present risk to the project.	Ensure sponsor commitments and operational plans are well documented and rationale is well established.	May result in delays in decision-making, potential loss of funding, and a decrease in stakeholder engagement. The project may struggle to align with organizational goals, leading to potential scope changes or project cancellation.	This remains a risk although unlikely to occur.
Open and Mitigating	05/06/25		Staffing/Resource Availability Training	Operational Staff Turnover - Key Personnel	Stable	1 (Low/Low)	Personnel changes are an ever-present risk to the project.	Accept. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	Loss of key personnel can create significant knowledge gaps and operational inefficiencies, impacting project execution and outcomes.	This remains a risk. Creating extensive process documentation and instructions could help mitigate if this occurs.
Open and Monitoring	05/06/25		Business Process Change Interface Deployment/Cutover Training User Acceptance Testing	Cutover date from FLAIR to PALM not formally established	Stable	1 (Low/Low)	Amendment 12 shifted go live to July 26 and is now aligned with end-of-year activities. At an ESC meeting earlier this year, one of the discussion items pertained to the cutover date. As of this date, we do not have confirmation of a specific date when cutover will occur.	Monitor. Continue to engage with PALM contract to obtain meaningful and timely schedule for cutover. Establish "roughed-in" and anticipated cutover date and build agency plan around this expectation.	Uncertainty in transition timelines can disrupt planning and resource allocation, leading to potential delays and confusion.	This remains a risk.

DCF Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/08/25		Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover	Cost Allocation Not Available in PALM. (See attachments)	Critical - Impacts the abil	DCF is revisiting as plans for remediating internal applications for PALM. Several overtures have been made to PALM RA to communicate functional impacts to DCF processes and requesting one or more sessions with PALM technical and DFS F&A staff regarding DCF concerns.	On going pending SpeedKey and other conversation with Enterprise applications	08/28/26	This remains an issue.

Open	05/08/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover	DCF's journal distribution process	Critical - Impacts the abil	Given information provided, DCF team has concluded there are 2 viable options: building a front end application to perform front end splits or utilize Speed Key functionality (amongst PALM and Enterprise Applications) to simulate splits. Further conversation will be had post Segment 4 as of 8/20.	As DCF is moving forward with reviewing and updating processes, we have several concerns related to the journal distributions which is a critical business process in DCF. We have sent the related concerns to the PALM team, conversations are on-going. Several of our updates are dependent on the concerns being addressed.	08/28/26	This remains a risk.
Open	05/08/25		Agency Business System Business Process Change Interface Conversion/Configuration	Budget Funding Process since PTAXX cannot be loaded in FACTS.	Critical - Impacts the abil	DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis.	Develop alternate budgeting process for TANF processing that estimates and budgets revenue per year.	08/28/26	This remains a risk.
Open	08/12/25		Agency Business System Conversion/Configuration Deployment/Cutover Training User Acceptance Testing	<b>Late-Stage Removal of State Program Component (SPGM) from PALM Allotments</b>	Critical - Impacts the abil	<p>On 8/8/2025, the project made an update to KB article for KK1009, but not the attached file layout indicating the removal of State Program as a field from the interface file. DCF immediately responded with email to RC indicating our concerns and the impacts to the agency if this change was to be confirmed as accurate to be applied to the layout.</p> <p>As of this update, the email has not been acknowledged. Should this change be confirmed, DCF will be required to completely revisit Agency Business Systems and Processes. This issue directly places our readiness in jeopardy.</p> <p><a href="https://myfloridacfoflorida">https://myfloridacfoflorida</a></p> <p>1. State Program was removed from the article text, but not the attached EXCEL file layout. (Discrepant documentation.)</p> <p>2. We have already completed development expecting to receive the State Program within this file and expecting to use it in downstream processes, not the least of which is our automation of SpeedKey generation based on our recorded Budget Allotments.</p> <p>3. State Program is part of the PALM Chart of Accounts. Why would it not be provided in output from the KK module?</p>	<p>"Escalate to PALM Leadership: Request formal clarification on the requirement change and rationale</p> <p>Document Impact: Quantify specific business processes, systems, and timelines affected</p> <p>Stakeholder Alignment: Engage DFS and other affected agencies to present unified concerns</p> <p>Legal Review: Confirm legislative/statutory requirements for State Program level processing</p> <p>Alternative Solutions: Explore workarounds or mapping solutions if change cannot be reversed</p> <p>Timeline Assessment: Evaluate go-live date implications and potential delays</p> <p>Resource Planning: Identify additional development resources needed for rework</p> <p>Communication Plan: Develop messaging for internal stakeholders about potential impacts"</p>	08/29/25	This remains a risk.
Open	05/08/25		Business Process Change Interface Role Mapping Staffing/Resource Availability Training User Acceptance Testing	MFMP to PALM interface will not support more than 100 splits per invoice line item, some of our Collocated expenditures are expected to split to at least 500 lines, directly impacting our ability to utilize that enterprise business system.	High - Impacts the ability	Given information provided, DCF team has concluded there are 2 viable options: building a front end application to perform front end splits or utilize Speed Key functionality (amongst PALM and Enterprise Applications) to simulate splits. Further conversation will be had post Segment 4 as of 8/20.	Restructure invoices and implement manual processing in the short term Develop intermediate processing systems and request interface enhancements in the medium term System integration improvements and potential accounting structure redesign for the long term	08/28/26	This remains a risk.
Open	05/08/25		Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Agency often experiences delays between requests for meetings and other communication with various PALM teams and acknowledgement of these requests.	High - Impacts the ability	PALM RCs are placed between agencies and SMEs on various topics. This has proven to cause confusion and miscommunication on several occasions.	Continue to submit requests and follow-up with RCs to ensure message is received and appropriate prioritization occurs.	08/28/26	This remains a risk.
Open	05/08/25		Conversion/Configuration Staffing/Resource Availability Training	Staffing challenges in General Services are presenting difficulties with readiness workplan tasks related to assets, leading to voids in data migration.	High - Impacts the ability	DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis.	Meet with impacted stakeholders to create strategy for resolving personnel and training shortfalls.	08/28/26	This remains a risk.

#### DCF Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

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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DCF Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Chad Barrett	chad.barrett@myflfamilies.com	09/08/25
May - June 2025	Chad Barrett	chad.barrett@myflfamilies.com	07/10/25
March - April 2025	Chad Barrett	chad.barrett@myflfamilies.com	05/12/25
January - February 2025	Chad Barrett	chad.barrett@myflfamilies.com	03/13/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.52%

Submitted On Time = 40

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.79%


Submitted On Time = 67

Submitted Late = 10

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 97.56%

Submitted Complete = 40

Submitted Incomplete = 1

Completed After Submission = 0

Other Task Completeness



Other Task Completeness:

Score = 100.00%

Submitted Complete = 49

Submitted Incomplete = 0

Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 5

Duplicate Filled Role = 10

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/17/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/11/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/17/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 - APC001 Suppliers	08/11/25	10/17/25	100% - Submitted	08/27/25			
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/12/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

DEM Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	05/21/25		Interface Post Implementation	Interface need fulfillment	Stable	6 (High/Medium)	If the PALM interfaces do not cover all required data elements as currently engaged by DEMES to FLAIR connections, then either the elements will need to be accessed via the data warehouse or DEMES will need to be changed to interact correctly with the new PALM structure	DEMES development assets have been onboarded to the PALM project to project any issues that may arise and attempt to port all elements of PALM on top of the FLAIR structure	Cost will be added to the DEMES development project.	Development team made aware of need to engage with interfaces

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Open and Mitigating	06/20/25		Agency Business System Interface Post Implementation	New Interfaces Required due to changing ABS functionality	Increasing	4 (Medium/Medium)	If there is no way to ask for new interface connections to our ABS starting now moving into the future then any new (or overlooked) functionality that requires an interface connection not initially listed will be impossible	If new interface needs arise, email our Readiness Coordinator and technical coordinator with the new need and what new interface is requested.	Wasted Development Dollars, decreased ABS functionality	May be able to add interfaces if necessary
Open and Monitoring	05/21/25		Interface Identity Provider (IdP)	EOG/DEM Interface relationship	Stable	2 (Medium/Low)	EOG and DEM interfaces and elements are under the same OLO umbrella.	Working directly with Kelley Sasso in EOG to put process agreements in place.	Increased lead time in access aspects of processes or reporting confusion when summarizing agency workload	Relationship working well
Open and Mitigating	05/21/25		Agency Business System Business Process Change	PA Payment Process	Increasing	2 (Low/Medium)	Many projects related to DEM incidents are built by an enterprise business system Florida PA. If the Florida PA development team is not aware of the inbound and outbound Project information interface needs the process of creating projects related to an incident may become more complex	Will socialize with Florida PA users and then the poc for those users to ensure the appropriate interface conversation is had	IT spend will be used to upgrade Florida PA or create a secondary process/system for data movement	Still working with Internal Florida PA stakeholder to increase their awareness
Open and Monitoring	05/21/25		Post Implementation Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Need PALM Promoters	Stable	2 (Low/Medium)	If PALM is seen as creating work or uncertainty then the finance team will be unwilling to explore further functionality	Communication about PALM including changes and updates is ongoing, frequent and positively positioned	The FDEM agency Will have trouble with accounting post PALM launch	Concern has been shown regarding PALM rollout
Open and Monitoring	06/20/25		Agency Business System Interface Conversion/Configuration	Backend Report Information	Stable	2 (Low/Medium)	If no information is released about how reports are created using interface data then the teams building ABS functionality from reports will be unable to replicate report information in the regular exports and a manual process will need to be used	Monitoring the Knowledge Center to determine if new information is released	Inclusion of a manual process and person hour requirements in ABS updates	No Change
Open and Monitoring	05/21/25		Agency Business System Business Process Change	Payroll Process	Increasing	1 (Low/Low)	If the payroll processes built in PALM cannot support the needs of the FDEM Payroll team, then the payroll system currently managed by FDEM IT may need continuing support meaning the Payroll process may become more complex/expensive	Highlighting Payroll within UAT as an important module with downstream impact so we can quickly close or escalate this risk	We cannot sunset the Payroll system and we may require IT spend to update	Most likely going to move Payroll to PALM native
Open and Mitigating	05/21/25		Business Process Change Conversion/Configuration	Grant LTD balances	Stable	1 (Low/Low)	If life to date balances are not transferred either as a datum or as a concept between FLAIR grant tracking and PALM project costing then a system of balance tracking processes will need to be built to managed life to date reporting	The FDEM Finance team is building it's reporting effectiveness to increase the agility of building reporting structures to the necessary level to meet this challenge	Process complexity will be added to the Finance team	Seems to have been solved by the Florida PALM team, will monitor
Open and Mitigating	05/21/25		Conversion/Configuration	Fund Data Freshness	Stable	1 (Low/Low)	If stale funds are carried over into the project costing module then the day to day operation of project accounting will increase in complexity	The budget team in the finance bureau has been tasked with clearing stale funds/project ids out of our system	Project costing module will create less value for the accounting team	Seems to have been solved by the Florida PALM team, will monitor
Open and Monitoring	05/21/25		Deployment/Cutover Post Implementation User Acceptance Testing	FLAIR to PALM shutdown around Year End	Stable	1 (Low/Low)	If FLAIR shuts down before PALM goes live then our business processes will be delayed	Request more information from Felecia	We will lose effectiveness on PALM rollout as well as day to day business execution	No Change

DEM Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/12/25	08/14/25	Conversion/Configuration	CSFA/ALN Value Recognition	High - Impacts the ability	CSFA and ALN values not recognized from FACTS, See Mock Conversion 1 for specifics  Grants & Contracts in FACTS affected, 31086 should be active.	Discuss the specific expectations with a technical contact  Need to Review Mock Conversion 2 to see if changes were effective	06/05/25	Fixed

DEM Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology Data	The Division will be able to process all financial activity in order to adequately report to our grantors and all requestors to continue to assist in financial management of the Division's missions and objectives	Logged	05/12/25	FDEM	No Change
Technology Data	Connecting to interfaces within PALM will be supported by a request process that is not difficult to navigate AFTER launch	Logged	05/12/25	DEMES; FDEM IT; Slalom Development Team	Ongoing
Processes	There will be a process to change, add, remove speedkeys after launch. The knowledge center is up to date on exceptions and speedkey expectations.	Logged	05/12/25	Finance;	Confirmed
Data	The PALM Data Warehouse will be accessible by appropriate agency staff for self service reporting	Logged	05/12/25	DEMES; FDEM IT; Slalom Development Team; Finance	No Change

Processes Data	Project information and OA1 & 2 can be added to PALM if needed for data conversion post Configuration	Logged	05/12/25	Finance	Confirmed
Processes	Budget Year Close will be either done in FLAIR or easily managed in PALM post cutover 6/1/26	Logged	05/12/25	Finance	No Change
Processes Data	Grant LTD balances can be represented in the PALM General Ledger with representative entries balanced with a reporting element, and users will be able to access this information in the PALM Data Warehouse	Logged	05/12/25	Finance	Seemingly confirmed by PALM project

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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DEM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	09/12/25
May - June 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	07/10/25
March - April 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	05/12/25
January - February 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	03/06/25

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- [Knowledge Center](#)
- [Florida PALM Workbook for DEP](#)
- [Readiness Workplan](#)

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

July - August 2025

Darinda McLaughlin

Direct	Data	<b>587-B</b>	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	<b>587-C</b>	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	<b>661</b>	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	<b>662</b>	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	<b>617</b>	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	<b>09/10/25</b>			
Indirect	N/A	<b>664</b>	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

## Agency Reported

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

DEP Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	08/31/23		Agency Business System Business Process Change Conversion/Configuration Post Implementation Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Loss of knowledge due to staff turnover and time to get added staff trained to meet expectations	Increasing	9 (High/High)	Accounting for staff turnover that may occur during the implementation phase of the project.	Ensure job-specific processes are properly documented, staff are cross trained and backups are trained on processes.	Will require retraining of new resources and potential reshuffling of existing resources which could affect the agency's ability to meet critical deadlines	DEP is monitoring resource needs and augmenting where possible, any resource constraints that may occur.
Open and Monitoring	11/04/24		Agency Business System Interface Conversion/Configuration Staffing/Resource Availability Training User Acceptance Testing	Timeline for ABS system testing and PALM UAT	Stable	9 (High/High)	PALM Process Changes were introduced in a staggered approach which impacted ABS Remediation efforts until PALM changes and impacts were completed.  As a result some ABS remediation may not be fully completed until Interface testing which may not allow for all internal ABS testing to be completed prior to PALM UAT.	Continuing to monitor remediation progress. Remediation is anticipated to complete in advance of full UAT start date.	Will require ABS testing to be continued during UAT	ABS remediation is progressing with the majority of tier 1 and 2 applications complete. ABS UAT will begin before SME Online and continue during Full UAT testing.
Open and Mitigating	11/20/24		Agency Business System Business Process Change Interface Conversion/Configuration User Acceptance Testing	PALM data availability for ABS testing of remediated applications	Increasing	6 (High/Medium)	Based on preliminary information about PALM's mock conversion data and configuration processes, agencies will not have access to PALM data files until full UAT in December 2025. Therefore, Agency will have to create sample files or sample data sets to mimic PALM data to test agency business systems and reports.  Waiting for full UAT training with PALM files could create testing and remediation delays that would coincide with PALM UAT and agency training efforts.	DEP will establish a data strategy for testing based on the mock conversion and configuration data submitted to PALM. Additional mock files and data will have to be created where PALM does not have planned conversions. Sample test data will be created by using FLAIR data files mapped to PALM values.  DEP will also establish testing scenarios and cases to ensure that transactions are posted correctly to the new Chart of Accounts and verifiable totals possible for new and old transactions based on reporting.	Will cause a delay in completing ABS testing activities and validating system processes and reports.	DEP is working on building mock PALM data to continue with ABS UAT testing, where PALM data is required. This is an issue in some cases (API002) where PALM outbound interface data is not available to create inbound data.
Open and Mitigating	11/20/24		Agency Business System Business Process Change Interface Conversion/Configuration Post Implementation Staffing/Resource Availability User Acceptance Testing	Availability of reports through PALM	Increasing	6 (High/Medium)	PALM reporting information is being provided in a staggered cadence, with many reports dependent on the outcome of the data warehouse design which will extend report definitions and mockup completion into the Spring of 2025. Reports not provided by PALM, will require agency resources to build reports utilizing a mix of interface data and DW/BI custom reporting.  There is a risk that agency reporting needs may not be identified until UAT, depending on when PALM releases DW/BI information to the agencies. Delayed identification of reports needed for PALM could cause additional strain on agency remediation schedules and the ability to provide management reporting needs in time for go-live.	DEP is monitoring changes to PALM reports through the knowledge center. DEP is now mitigating this by identifying critical reports that PALM will not provide or may be provided in the data warehouse. These critical reports will be developed in DEP applications.	Will require additional agency resources to build suitable reports for PALM using DW/BI and ABS systems data which could cause delays in critical information needs for management.	DEP has transitioned to prioritizing the remediation of existing reports and developing new reports using PALM interfaces to ensure sufficient testing occurs at ABS, SME and Full UAT Testing. There is not sufficient time to wait for the DW/BI to be developed and tested for DEP to use as a report creation tool for go-live.

Open and Mitigating	09/06/24		User Acceptance Testing	Training and Testing Resource Conflicts	Increasing	6 (High/Medium)	Internal training efforts for agency users is dependent on agency SME's completing PALM system training and testing during UAT efforts, test ABS, develop agency training material, and being able to train agency end users while also being expected to conduct Full UAT.	DEP will ensure that SME's are prepared for SME UAT based on process and role information from the knowledge center. ABS testing will begin prior to PALM UAT where possible.  DEP PALM core team and training staff will provide support to SMEs for creating training materials and coordinating training sessions, in addition to coordinating testing efforts.	SMEs would be unfamiliar with the new systems to confidently complete UAT and unable to properly train end users, which would lead to incomplete and inaccurate UAT results.  Invalid UAT results would potentially lead to an unsuccessful go-live.	DEP is monitoring schedule adjustments to the PALM UAT to determine impacts on SMEs and DEP's UAT and training plans.
Open and Monitoring	05/08/25		Staffing/Resource Availability	Changing Requirements and Impacts on Resources and Delivery	Increasing	6 (High/Medium)	High volume and impact changes to PALM processes and interfaces could negatively impact the agency's ability to remediate and test ABS prior to interface testing and UAT.  Changes are anticipated to continue, though large volume or late developing updates in these areas have to be analyzed for impact and work redirected to change remediation and process knowledge efforts.  Changes in requirements and replanning of activities due to unforeseen changes can lead to rescheduling of project activities. This can disrupt project flow, affect dependencies, and require changes to resource allocations in a short time leading to unforced errors, overloaded resources and delayed delivery schedules.	The agency will continue to monitor the PALM Change log and proactively seek to understand how to allocate resources and knowledge transfer across the agency (SMEs and End Users)	Business system remediation could be delayed impacting interface testing and business system testing and preparedness.  Additionally, impacts to role assignments and workload estimations could occur.	DEP continues to monitor the Change Log on a regular cadence, identifying where changes require remediation efforts.  All changes are being reviewed for potential changes to agency understanding for training content.
Open and Monitoring	05/02/25		User Acceptance Testing	UAT Preparation and Readiness	Increasing	4 (Medium/Medium)	The extended timeframe between design sessions and UAT and the unknown details of PALM training could lead to SMEs being unfamiliar with PALM processes and their affect on agency processes which could lead to inefficient or inaccurate end user training and testing.  UAT preparation activities are dependent on agency staff reviewing knowledge center resources, using newly developed agency workgroup materials, and preparing testers for the PALM UAT testing process, updated agency processes, defect tracking, and coordinating ABS updates. The DEP PALM team will be responsible for ensuring SMEs and end users are equipped with the knowledge and information to be efficient and successful during UAT.	Agency is a member of the Colab Training Workgroup to produce UAT preparation materials and is developing tasks for SMEs to be prepared for UAT.	Lack of training and preparedness for testing and detailed PALM navigation and process steps could potentially affect the efficiency and effectiveness of SME UAT.  This could lead to uncertainty and delays in preparing end users for testing and completing full integration testing.	DEP is monitoring schedule adjustments to the PALM UAT to determine impacts on DEP's UAT plan and schedule.

DEP Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

DEP Assumptions						
Critical Operational Elements	Assumption				Status	Reporting Period Comments for July - August 2025
People Processes Technology	Agency critical tier 1 and tier 2 processes and business systems are successfully tested with PALM UAT environment and have zero "critical" defects prior to recommending readiness for go-live.				Logged	This assumption is valid for the reporting period.
People Processes Technology	Agency SME's are trained and ready to execute DEP and PALM processes in UAT prior to January 2026.				Logged	This assumption is valid for the reporting period.
People Processes Technology	PALM process steps, navigation guides, and other UAT materials will be provided in a timely fashion in advance of end user UAT to allow SMEs to develop DEP training content for end users				Logged	This assumption is valid for the reporting period.

	and more.			users to effectively test their functionality during the full UAT testing phase.	
People Processes Technology	Final changes to external systems such as MFMP, Works, STMS, People First and FACTS will be provided by the respective enterprise partners, along with process impacts, in advance of UAT, to allow time for specific content to be incorporated into DEP training.	Logged	06/30/25	SMEs would be required to create enterprise training materials and end users will be unable to effectively test enterprise systems functionality during the full UAT testing phase.	This assumption is valid for the reporting period.

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


Privacy Policy

Report Abuse

DEP Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	09/10/25
May - June 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	07/10/25
March - April 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	05/09/25
January - February 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	03/10/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.78%

Submitted On Time = 44

Submitted Late = 1

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 89.35%


Submitted On Time = 64

Submitted Late = 13

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 97.05%

Submitted Complete = 39

Submitted Incomplete = 0

Completed After Submission = 5

Other Task Completeness



Other Task Completeness:

Score = 98.78%

Submitted Complete = 48

Submitted Incomplete = 0

Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 6

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25	Project approved exception for FLIPS as it has a separately agreed to timeline with Florida PALM.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	50% - In Progress		As of 7/17/25, DFS has reached 82.76% completion of the PALM Standard Topics, exceeding the 75% threshold required for Agency Certification ahead of the 7/18 deadline.		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/26/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/07/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/17/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

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## Agency Reported

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

DFS Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	04/17/25		Conversion/Configuration Training User Acceptance Testing	ENTERPRISE A&A - Conversion and Data Validation:	Stable	9 (High/High)	There is a risk that the agencies' data conversion validation process may not be thorough or accurate, leading to incomplete or incorrect data being converted to Florida PALM.	<ul style="list-style-type: none"> <li>• A&amp;A will work closely with the Project to understand where agencies need support and additional guidance in understanding their agency's FLAIR data.</li> <li>• A&amp;A will provide guidance to agencies to help them understand the critical things to consider and evaluate for conversion.</li> <li>• A&amp;A will meet with agencies through workshops or one-on-one sessions to further support agencies in cleaning up their data in preparation for conversion.</li> <li>• Closely working with project and agencies on mock conversion results to find solutions.</li> </ul>	This could result in operational inefficiencies, data integrity issues, potential delays in project timelines, and incorrect trial balance information in Florida PALM, which could impact financial reports.	Risk has been reviewed and we continue to monitor.
Open and Monitoring	10/20/23		Deployment/Cutover Staffing/Resource Availability	ENTERPRISE A&A - Project Timeline.	Stable	9 (High/High)	<ul style="list-style-type: none"> <li>• The Project timeline is very conservative regarding flexibility, and A&amp;A's involvement is critical for project success. A&amp;A Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&amp;A change management and internal preparation for A&amp;A preparedness activities have already started, but having adequate resources will be key to successful implementation.</li> </ul>	<ul style="list-style-type: none"> <li>• Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations.</li> <li>• Retain our critical staff that are involved in Florida PALM activities and those who are picking up added job responsibilities so that subject matter experts can dedicate time to Florida PALM activities.</li> <li>• Provide expectations that staff will cross-train and provide knowledge transfer to increase the depth need to continue operating with a high level of service and accuracy.</li> <li>• A&amp;A was approved for for 9 FTEs to be onboarded for FY 2026.</li> </ul>	It can hinder successful implementation of project.	Mitigation updated
Open and Monitoring	10/11/23		Staffing/Resource Availability	ENTERPRISE A&A - Resource Impacts.	Decreasing	9 (High/High)	<p>Resource impacts due to A&amp;A operational staff spending a significant amount of time performing Project related tasks.</p> <ul style="list-style-type: none"> <li>• Project tasks may require additional time outside employees designated working hours to attend meetings, review time sensitive documents, or contribute to critical tasks. Some positions are not granted flexibility to flex time throughout the month, but they must flex it within the week. This policy limitation causes a strain on availability of resources. Allowing current staff more flexibility to flex their time beyond the work week would help with resource allocation.</li> <li>• As we get closer to implementation, the number of items that will require attention will continue to increase. This will include, assisting agencies with data management, preparing enterprise data for conversion, developing cut-over and FLAIR close out plans, participating in all levels of integration and UAT testing, validating testing results, participation and validation of mock and production conversions, developing policy around new processes</li> </ul>	<ul style="list-style-type: none"> <li>• Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities.</li> <li>• Hire additional staff (FTE or OPS) to learn current operations so that our experienced staff can continue to participate with the Florida PALM Project in design, testing, and implementation activities.</li> <li>• Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team.</li> <li>• Work with Human Resources to properly document team members who should be classified as SES staff.</li> <li>• Establish plans for reduction of current operational activities and prioritize responsibilities based on risk and probability. This could include posting all payments and suspending pre-audit activities, suspending Article V and Contract Management audits, suspending processing of EET applications, as</li> </ul>	Pulling resources from operations, will increase workloads, and will cause stress and an increased chance of employee burnout.	Risk has been reviewed and we continue to monitor.

							around new processes.	of EFT applications, as examples.		
Open and Monitoring	01/25/24		Deployment/Cutover	TREASURY - Outstanding warrants at cutover	Stable	6 (High/Medium)	Discussions relating to the status of outstanding warrants at the cutover from June 2026 to July 2026 has not been finalized and could, potentially have impacts to warrant recipients and reconciliation processes.	<ul style="list-style-type: none"> <li>• Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants.</li> <li>• Potential solutions being discussed between PALM and Treasury including the possibility that warrants would be maintained in FLAIR and concurrently canceled and reissued in PALM while maintaining warrant number. Note that solution is pending approval from Treasury.</li> </ul>	Could potentially have impacts to warrant recipients and reconciliation processes.	Cutover discussions have ended and Florida PALM is working to make decisions and will provide updates when available.
Open and Monitoring	12/13/23		Interface Conversion/Configuration	TREASURY - Concentration account	Increasing	6 (High/Medium)	<p>The current Deposit Concentration Account was issued in 2016 contract ends in March of 2026. DFS has already invoked one 5-year renewal and does have one 6-month extension available. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM.</p> <p>The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, BAI codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. Agencies would also need to receive and distribute new depository supplies to their locations.</p> <p>This could also impact User Acceptance Testing if processes are validated using current contractor and new vendor values are not in the UAT environment.</p>	<ul style="list-style-type: none"> <li>• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li> <li>• The current concentration account agreement, Contract #TR201, has a 6-month extension available as permitted in Section 287.057, F.S. if additional time is needed. Treasury and OPCS will work together to implement the extension when appropriate.</li> <li>• Stay in close communications with Edward Nabong within OPCS on the vendor negotiation status. Edward is the sole point of contact for the ongoing ITN, and all communications must be directed specifically to him. If negotiations not concluded before December 2025, DFS will extend our contract with existing financial institution in 6-month increments.</li> </ul>	Although unlikely, if Wells Fargo does not agree to extend their contract, this could result in agencies not being able to make deposits into their accounts and impacting agencies revenue.	Negotiations are still in progress at this time.
Open and Monitoring	02/19/24		Staffing/Resource Availability	CCN - Potential loss of CCN resources.	Stable	6 (High/Medium)	The loss of CCN resources would constrain current CCN staff capacity and could result in the loss of critical functional and institutional knowledge, which is imperative to the success of the Florida PALM Project.	<ul style="list-style-type: none"> <li>• Create a knowledge base of CCN operational processes and procedures; develop training methods to facilitate knowledge transfer; and provide cross-training among CCN members where feasible.</li> <li>• Use of dedicated back-up CCN Liaisons will aid in the short-term continuity.</li> </ul>	It could result in the loss of critical functional and institutional knowledge.	Risk continues to be monitored and mitigation strategies are ongoing.
Open and Monitoring	10/20/23		Agency Business System Interface User Acceptance Testing	OIT/ABS - Reduced Testing Window	Stable	6 (High/Medium)	Reduced duration for agency business system end-to-end testing with Florida PALM during UAT could impact Tier 1 agency business systems with significant changes, as well as those systems that will require downstream Tier 2 interface testing.	<ul style="list-style-type: none"> <li>• Develop remediation timelines and resources to prepare the agency business systems to be ready for the start of ABS end-to-end testing with Florida PALM.</li> <li>• Work with Division/Office management to allow technical and functional resources to be available during the ABS end-to-end testing period with Florida PALM.</li> </ul>	As a result, DFS may not have enough time to successfully complete all of the testing needed for agency business systems, which in turn could impact agency readiness for go-live with Florida PALM.	Risk has been reviewed and continues to be monitored.
Open and Monitoring	10/11/23		Deployment/Cutover Staffing/Resource Availability Training	ENTERPRISE A&A - Planning.	Decreasing	6 (High/Medium)	<p>Planning for some critical activities has not been done. Until these plans have been developed, A&amp;A cannot adequately determine needed resources, time and effort.</p> <ul style="list-style-type: none"> <li>• Cutover planning</li> <li>• FLAIR retirement planning</li> <li>• Stabilization period planning</li> <li>• Specialized knowledge that may be needed for new processes, such as processing States'</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to collaborate with the Florida PALM Project and seek resources through staff aug. additional FTE or contracts as needs are discovered.</li> <li>• Cutover planning sessions are in progress</li> </ul>	Lack of required resources to support around go live and beyond.	Risk has been reviewed and we continue to monitor.

							taxes from payroll • Financial Reporting mappings and data rollup			
Open and Monitoring	12/13/23		Business Process Change Conversion/Configuration	TREASURY - CMIA	Stable	4 (Medium/Medium)	Relating to CMIA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMIA reporting.	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	If PALM cannot track and calculate the clearance pattern for CMIA, Federal reporting will be impacted	Treasury has requested data in UAT to test the calculation of clearance patterns. Once we are able to test in UAT, we will have a better idea of whether the solution meets the needs of agencies and Treasury.
Open and Mitigating	02/27/24		Agency Business System Deployment/Cutover User Acceptance Testing	OIT/ABS - Third Party Vendors	Increasing	4 (Medium/Medium)	Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation activities.	<ul style="list-style-type: none"> <li>• Communicate the Florida PALM timelines with third-party vendors.</li> <li>• Provide information and advisory support to the functional area(s) related to remediation activities and timelines.</li> <li>• Provide advisory support if needed related to interfaces, interface field mapping, and possible functional changes.</li> </ul>	This could impact the Department's ability to meet the scheduled finish dates for Florida PALM Readiness Workplan tasks related to design, build, and testing activities.	Risk continues to be monitored and mitigation strategies are ongoing.
Open and Mitigating	10/20/23		Agency Business System Staffing/Resource Availability	OIT/ABS - Resource Impacts.	Stable	4 (Medium/Medium)	Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities.	<ul style="list-style-type: none"> <li>• Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline.</li> <li>• Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration.</li> </ul>	It could cause delays in the ABS Remediation timeline.	Risk has been reviewed and continues to be monitored.
Open and Monitoring	10/11/23		Business Process Change Deployment/Cutover Training	ENTERPRISE A&A - Process Changes.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>• All bureaus within the division will have significant process changes.</li> <li>• Insufficient preparation or reluctance to adopt and adapt to changes could result in delays; operational deficiencies; and critical operations, tools, technologies, and resources not being available.</li> <li>• Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output.</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare staff through regular change management engagements.</li> <li>• Perform knowledge transfer on why things are done so we can ensure better understanding of future processes.</li> <li>• Complete thorough process analysis and mapping of each process, along with the technology, tools, and resources to future functionality can ensure that we have identified where operational changes will occur and to what extent it will be affected.</li> <li>• Monitor staffs' engagement.</li> <li>• Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps.</li> <li>• Review organizational charts and identify succession planning or knowledge transfers for known gaps.</li> <li>• A&amp;A has contracted with a People Soft experienced resource to help with implementation activities, including identifying staffing model changes and process changes.</li> <li>• A&amp;A onboarded a UAT Testing Team, and is working to onboard an HCM functional expert to assist with transformation.</li> </ul>	Due to the unique activities that A&A performs at an enterprise level, reduced performance could have a negative impact on agencies.	Mitigation updated
Open and Monitoring	10/11/23		Deployment/Cutover Staffing/Resource Availability	ENTERPRISE A&A - Risk of External Impacts on Business Processes.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>A&amp;A serves all other agencies; therefore, our processes are at risk from external impacts:</li> <li>• Agencies – All A&amp;A processes are downstream of agency processes. Agencies may lack their own training and resources</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff.</li> <li>• A&amp;A OFFE team make outreach with agencies to determine training needs for skills that will</li> </ul>	This will cause significant issues for A&A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&A staff around go live.	Risk has been reviewed and we continue to monitor.

							<p>for proper preparation. If agencies are not ready for implementation, this will cause significant issues for A&amp;A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&amp;A staff around go live.</p> <p>• Project – There may be changes in Project directions or decisions that negative affect A&amp;A that would cause an increase of time and resources or provide confusion and lack of clarity among A&amp;A's expectations.</p> <p>• Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&amp;A's operations.</p>	<p>be needed in Florida PALM users.</p> <p>• Participate with all FFMIS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon.</p> <p>• Assist agencies with readiness tasks such as data analysis and cleansing.</p> <p>• Develop contingency plans for agencies that are not prepared for Florida PALM implementation.</p> <p>• Monitor activities, changes in rules and regulations, and agencies competencies.</p> <p>• Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible.</p> <p>• A&amp;A is seeking funding through the LBR process to contract for financial expertise that State Agencies can use to identify knowledge gaps and areas needing improvement and address those issues.</p>		
Open and Monitoring	10/08/24		Agency Business System Business Process Change Interface User Acceptance Testing	ENTERPRISE A&A - ABS Testing.	Stable	4 (Medium/Medium)	<p>A&amp;A is responsible for several enterprise business systems, some of which are interdependent. Testing each system through the entire process, from start to finish, will be critical to determine success. This will require testing to be synchronized according to the Interdependencies and workflow. Failure to do so could result in functions not being appropriately tested. This risk is really meant to address the issue around the complication of staging multiple business systems and the data within them for testing. This requires a huge effort and any misalignment of data, or refresh dates, can impact testing results, or the ability to test processes. Both Interface Testing and User Acceptance Testing can be impacted.</p>	<p>• Identify all enterprise business systems that will need to be tested.</p> <p>• Work with Division/Office management to allow dedicated technical and functional resources to be available for enterprise business systems testing efforts when the UAT timeline is released.</p> <p>• We plan to work through the CCN Network with other agencies on planning and collaboration that needs to happen for those cross agencies testing scenarios.</p> <p>• A&amp;A has onboarded a UAT Testing Team, and is currently working to onboard an HCM functional expert to assist with transformation.</p>	<p>It has potential to impact, or delay go live if agency enterprise systems cannot be fully tested in the allotted time.</p> <p>The enterprise owners and systems impacted includes STMS, PeopleFirst, PCard Works, FACTs, LASPBS, and other critical agency business systems that interface with Florida PALM.</p>	Mitigation updated.

#### DFS Issues

Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

#### DFS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Technology	The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces and business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Assumption reviewed and continues to be valid.
Technology	Agency business system owners will understand Florida PALM impacts to be able to provide requirements for system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Assumption reviewed and continues to be valid.
Technology	Based on the Florida PALM implementation timeline established with the execution of Amendment #12, the Go-Live date for the Florida PALM solution is expected to occur in July 2026.	Logged	03/31/25	Agency Business Systems	Assumption reviewed and continues to be valid.

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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DFS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Scott Fennell	scott.fennell@myfloridacfo.com	09/10/25
May - June 2025	Scott Fennell	scott.fennell@myfloridacfo.com	07/10/25
March - April 2025	Scott Fennell	scott.fennell@myfloridacfo.com	05/09/25
January - February 2025	Scott Fennell	scott.fennell@myfloridacfo.com	03/06/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for DJJ](#)  
[Readiness Workplan](#)

# DJJ Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Heather DiGiacomo

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 98.25%

Submitted On Time = 35

Submitted Late = 5

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 87.92%


Submitted On Time = 57

Submitted Late = 20

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 82.05%

Submitted Complete = 28

Submitted Incomplete = 4

Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 98.78%

Submitted Complete = 45

Submitted Incomplete = 0

Completed After Submission = 4

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/02/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/21/25	DJJ does not have confidential suppliers.		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

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## Agency Reported

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

DJJ Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	12/03/24		Business Process Change Staffing/Resource Availability Training User Acceptance Testing	Separation of Qualified Employees - F&A	Increasing	9 (High/High)	If DJJ loses quality staff, then the agency may be at risk of losing historical agency knowledge. The Reporting and Reconciliation supervisor has recently left the agency. This person was included as role for UAT SME.	Libby will be the SAM until the training, then it will change to Marcia so that Libby can operate other roles; SME end user roles will need to be reviewed and if applicable, reassigned to other employees.  Encourage SMEs to document and archive their job functions and business processes to allow for swift training and knowledge transfer; Continue to advertise to recruit for vacant positions; Continue to allow for management decisions that support personnel actions to retain qualified employees.	Bureau staff may not be as prepared for UAT SME.	This risk is increasing due to the recent vacancy of the Reporting and Reconciliation Manager.
Closed	07/08/25	07/21/25	Conversion/Configuration Staffing/Resource Availability User Acceptance Testing	Inefficient Computer - F&A PALM Administrator	Stable	9 (High/High)	The F&A PALM Administrator's computer is inefficient in operating on a day-to-day basis. Programs cannot run, applications don't work, etc.	Libby is working with IT on getting a new laptop. It has been assigned and is awaiting imaging; she will work on a temporary computer, but without the proper set up there are only a limited number of tasks she can work on.	Task progress will stall.	F&A PALM Administrator received new computer. Closed risk during the reporting period.
Open and Monitoring	10/28/24		Staffing/Resource Availability User Acceptance Testing	UAT/LBR Timing Conflict	Decreasing	6 (Medium/High)	Budget schedule conflict between UAT and LBR deadline.	When developing the testing schedule, the Budget Office will need to go first so that an appropriate amount of time is dedicated to both UAT and the LBR due 9/15/25; The agency's LBR schedule started earlier this year due to prepare for this. Additionally, paperwork is being routed to engage Morgan to assist with UAT test script creation; escalate to PALM and request additional budget meetings be held with PALM staff after LBR due date.	Budget staff will be unavailable for SME UAT.	With the delay of UAT, this risk is decreasing.
Open and Monitoring	05/29/25		Staffing/Resource Availability User Acceptance Testing	Inventory/SME UAT Overlap	Stable	6 (Medium/High)	Owner: General Services  In preparation of Florida PALM, General Services staff are conducting a statewide physical inventory between June 2025 and October 2025. During this time, property staff will travel throughout the state to document assets and property.	The main two SME's for assets and property are the Bureau Chief and Deputy Bureau Chief of General services. We plan to have at least one of the two SME's available during UAT. We are working to have back-up staff to cover duties for these two roles, should both SME's be required for UAT.	Bureau property SME's maybe limited on their involvement with UAT between August and October.	Reviewed for period. No changes.
Open and Mitigating	08/19/25		User Acceptance Testing	Delay In Documenting Test Scripts	Increasing	6 (Medium/High)	If SMEs wait for the PALM Project to provide test procedures before writing UAT test scripts, they may be overwhelmed and not have sufficient time to complete the creation of their UAT test scripts. Currently, the Project's process steps are expected to be provided just one week before UAT.	Use the current business processes documented by DJJ to draft/create generic aspects of tests of the scripts with assistance from PMO, and then complete the scripts with the PALM Project test procedures when they become available. However, F&A has opted to wait for PALM to provide more specific and actionable information before proceeding; they are prepared to work overtime, including weekends, if needed, to get this done.	SMEs could be overwhelmed trying to create the test scripts from scratch during UAT.	New risk added during the reporting period.
Open and Monitoring	11/04/24		Staffing/Resource Availability User Acceptance Testing	Limited Staff for End-User UAT	Stable	6 (High/Medium)	Vacancies and competing priorities within bureaus heavily affected by the implementation of PALM have caused less time to work on developing and preparing for UAT SME.	Mitigation Plan: bureaus are actively advertising, interviewing, and recruiting for vacancies as they occur. Training backups to work activations, so if needed, they can free up SME's for UAT.	Bureau SME's and staff may be unavailable for end-to-end UAT if positions are not filled. Budget will not have adequate participation in UAT and/or not have sufficient office coverage during UAT. Staff may be unavailable to test access to end user report.	Reviewed for period. No changes.
Open and Monitoring	02/28/25		Staffing/Resource Availability User Acceptance Testing	Processing Backlog of AOD Invoices	Stable	6 (High/Medium)	With limited staff resources, F&A is currently managing a heavy workload of	Mitigation is in progress. Overtime has been approved to reduce the backlog but	Finance and Accounting staff may be unavailable for both UAT SME and UAT	<b>This risk is trending downward.</b> Progress has been made to process old invoices, but the risk remains until F&A staff are caught up

							<p>disbursements due to ABS failure in the last quarter of FY 2023-24. If F&amp;A is unable to process the backlog of outstanding invoices to bring the agency to managing the standard workload, SMEs may not have time for adequate participation in UAT.</p> <p>The backlog of invoices has been reduced significantly over the past fiscal year. As of 7/30 25% of outstanding AOD invoices were older than the 45-day payment window. By the end of August, that amount decreased to 18%.</p>	<p>competing priorities (year-end, financial statements, certified forward) and vacancies remain. Regular reports are provided to leadership.</p>	End-to-End	
Open and Mitigating	02/28/25		Business Process Change Post Implementation	Reliance on Florida PALM and Data Warehouse for Reporting Functionality	Stable	6 (High/Medium)	<p>FLAIR @ DJJ is an agency system that staff rely on to pull financial information and to conduct research. When PALM goes live, FLAIR @ DJJ will only maintain financial historical information; it will not be remediated to incorporate PALM financial information. Because of this, users will need to rely on untested PALM and Data Warehouse reports for their duties, potentially leading to challenges.</p>	<p>SMEs to work with Agency Liaison to ensure that all related financial reports and research information are documented and tested during UAT; Bureau staff will study the reports currently available in the Knowledge Center; PMO to stay abreast of changes and/or updates to reports and communicate major changes to pertinent bureaus.</p>	Reporting functionality will be severely hindered.	Reviewed for period. No changes.
Open and Monitoring	11/04/24		Staffing/Resource Availability Training User Acceptance Testing	Staff Involvement in UAT Preparation	Stable	6 (High/Medium)	<p>Vacancies within the bureaus responsible for UAT preparation limit the amount of time spent on preparing for UAT SME.</p>	<p>Bureau Chiefs are monitoring vacancies and are striving to fill them within a timely manner so that preparation of UAT is not impacted; PALM Administrators within Budget and Finance and Accounting are preparing the majority of the test scripts with input from the SMEs when available.</p>	Preparation and understanding of expectations during UAT will not be learned by UAT SMEs. UAT will be less informed and may take longer to get through test scripts; Staff will not have a sufficient knowledge base or understanding of the elements of PALM, which could lead to frustration, lack of motivation, and prolonged participation in UAT.	Reviewed for period. Vacancy rate remains 16%.
Open and Monitoring	05/29/25		Staffing/Resource Availability User Acceptance Testing	Staff Involvement in UAT - Hurricane Response	Stable	6 (High/Medium)	<p>Owner: General Services</p> <p>Bureau SME's are also the department lead emergency coordinators for Hurricane Season. Pending on any storms effecting the state this year, SME's would be unavailable for UAT testing during activation and recovery stages of storm events.</p>	<p>General Services SME's all have roles during storm activations and recovery. The Bureau will try to use back-up staff to help with storm-related activities to minimize the time that SME's would be unavailable for UAT.</p>	Bureau SME's would be limited on their involvement with UAT if any storms effect the state.	No storms during the reporting period. No change to this risk.
Open and Monitoring	06/03/25		Conversion/Configuration	Data Cleansing Maintenance - FLAIR Encumbrances and AOD	Stable	6 (High/Medium)	<p>The decision has been made that FLAIR will be the book of record and that AOD will not be cleansed. There has been discussion that at the time of go-live, PALM will only convert the encumbrances active in FLAIR and the remaining balances will be reflected accurately in AOD.</p>	<p>DJJ is planning to establish Available Balance (AB) Checking August 1 so that program staff submitting purchase orders in AOD will begin to understand how encumbrances affect available budget. Because of the budget control option DJJ has selected for PALM, AB checking will be a precursor to how encumbrances will work within PALM.</p>	If encumbrances aren't managed in AOD and AB checking isn't implemented prior to PALM Go-Live, then budget check will occur on encumbrances as planned in Florida PALM. Since encumbered purchase orders consume budget, there is a chance that there will be limited budget to pay suppliers.	The establishment of AB checking is in progress. No changes to this risk at this time.
Open and Monitoring	08/11/25		Agency Business System Business Process Change User Acceptance Testing	Test Scenarios Unidentified	Stable	6 (High/Medium)	<p>Required testing items may be inadvertently omitted during UAT.</p>	<p>Newly identified test scenarios will be documented and test scripts will be created as UAT testing evolves.</p>	Untested scenarios can result in post-deployment defects and/or unmet functional requirements.	New risk added during the reporting period.
Open and Mitigating	12/13/24		Agency Business System Interface	Limited Availability of Interface Testing Sample Data	Stable	4 (Medium/Medium)	<p>Limited number of testing data has been provided by the Project, leaving interface testing to be done with many assumptions as opposed to testing with real test files.</p>	<p>Test remediations with the sample data that has already been provided. Additionally, IT to create agency-specific sample data to test in ABS'.</p>	Additional remediation may be needed on agency business systems when system data is received during end-to-end testing. Depending on the remediation that's needed, this risk has the potential to delay the usage of the ABS' at go-live.	Reviewed for period. No changes.
Open and Monitoring	08/09/24		Conversion/Configuration	Data Cleansing Maintenance - Contracts - FACTS	Stable	4 (Medium/Medium)	<p>Data cleansing activities not conducted on a routine basis which could lead to inaccurate, incomplete, or errors in data being transferred to Florida PALM.</p>	<p>The following mitigation plan will occur in order to reduce the likelihood of this risk: 1. CTS will be reconciled with FACTS to ensure that all contracts have been input into FACTS</p>	This could result in inaccurate contract information being transferred into PALM at go-live and additional work by staff must occur to input and/or correct data once PALM is live	Reviewed for period. No changes.

								Input into FACTS. 2. FACTS reports will be run on a quarterly basis and items addressed as needed.	IS LIVE.	
Open and Monitoring	06/06/25		Agency Business System Interface User Acceptance Testing	People First DB Links	Stable	4 (Medium/Medium)	People First is yet to deliver the DB Links used by DJJ's agency business systems. Upon reaching out to People First directly, we did not receive confirmation that the DB links will be available before interface testing. People First impacted DB links list is shared with all agencies, the date by which People First DB links will be ready is still not known. expected to look for additional information	Currently systems are remediated with the information provided by People First.	Will not be able to test the ABS that has been remediated for PALM without the updated DB Links from People First. Impacted ABS: HRES	Reviewed for period. No changes.
Closed	07/01/25	07/09/25	Staffing/Resource Availability Training User Acceptance Testing	Alligator Alcatraz Project	Stable	4 (Medium/Medium)	General Services staff have been activated to the State Emergency Operations Center (SEOC) to support the Governor's Alligator Alcatraz Project. This in conjunction with inventory and PALM UAT cause staff to be unavailable for PALM UAT.	The bureau is presently cross training existing staff that will assist in SEOC and daily operations, when needed, so that SMEs can be available for PALM UAT.	General Services staff will not be available for PALM SME UAT.	Risk added and closed out within the reporting time period. Staff are no longer activated.
Open and Mitigating	06/03/25		Business Process Change Conversion/Configuration	Data Cleansing Maintenance - Projects	Stable	4 (Medium/Medium)	Prior to PALM, Project IDs were not deactivated or deleted in FLAIR and there was not a process to do so. In preparation for Go-Live, the Budget PALM Administrator and Facility Services staff researched all Project IDs and determined those that needed to be deactivated and deleted. A script was created and run to mark those Project IDs as I or D in FLAIR. These data need to be reviewed on a recurring basis so that inaccurate or incomplete information is not converted to Florida PALM.	Mitigation plan has ensured that the additional details associated with Project IDs are being correctly input in FLAIR (those that are required in PALM). Additionally, the Facility Work Order System (DJJ's ABS to manage Projects) is being remediated to incorporate a financial reconciliation and Project ID close-out workflow. For monitoring, Budget is actively reviewing, updating, and/or correcting Project Data to ensure the data requirements for conversion are met.	Inaccurate Project data converted into PALM will result in conversion failures, too many records being converted, or inaccurate records being recorded. This would require additional efforts to clean the data in multiple system.	Mitigation and monitoring plans in
Open and Monitoring	03/28/24		Conversion/Configuration	Inaccurate Completion of Project Tasks	Stable	3 (High/Low)	Previously submitted tasks (prior to March 2024) were marked as complete, but after further analysis were not complete. Additionally, having multiple reviewers on larger data-centric tasks is a best practice and reduces mistakes, mistyping, and missing information provided within task assignments.	Submissions will be checked by the F&A PALM Administrator and Agency Liaison prior to submission to the Project; associated SME's and PALM administrators will be invited to attend Task Talks when tasks are assigned to them.	Conversion and/or configuration data will not be accurate in Florida PALM; agency staff will be responsible for entering missing data when PALM goes live	Risk is once again stable with the filled Budget PALM Administrator position.
Open and Mitigating	06/03/25		Conversion/Configuration	Data Cleansing Maintenance - Assets and Property	Stable	3 (High/Low)	Data cleansing activities not conducted on a routine basis which could lead to inaccurate, incomplete, or errors in data being transferred to Florida PALM.	Data review and cleansing will be occur on a monthly basis; Teams task cards will be used as a way to assign a checklist of items needing review.	This could result in inaccurate property information being transferred into PALM at go-live and additional work by staff must occur to input and/or correct data once PALM is live.	Reviewed for period. No changes.
Open and Monitoring	06/03/25	08/29/25	Staffing/Resource Availability Training User Acceptance Testing	Separations of Qualified Employees - HR	Stable	2 (Medium/Low)	One SME within HR retired 7/31/2025.	HR is in the process of filling the position and aims to have it filled as quickly as possible.	If this position isn't filled, involvement in UAT SME will be impacted.	At this time, payroll staff will not be included in UAT SME, therefore this separation had little impact. Closed the risk during the reporting period.

DJJ Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Closed	06/27/25	08/15/25	Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Vacant Budget PALM Administrator Position/Backup Agency Liaison Role in CCN.	High - Impacts the ability	The PALM Administrator position within the Budget Office has been vacated. This position served as the backup agency liaison for DJJ's CCN and was one of the primary positions involved in agency data configurations, conversions, role mapping, developing test scripts, preparing for cutover, preparing training documents, and implementing changes to business processes to prepare the agency for PALM.	Recruit new employee to fill the role. While that's occurring, coordinate with DFS to allow previous incumbent to work on some tasks in preparation for UAT.	08/08/25	PALM Administrator position and Backup Agency Liaison position have both been filled.

DJJ Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Haye (F&A)	Reviewed for current period. Still applicable.
People	All SMEs will be available to work on required PALM-tasks.	Logged	04/17/24	Bureau SMEs	Reviewed for current period. Still applicable.
People	There is a commitment from end users to the PALM Project.	Logged	04/23/24	All	Reviewed for current period. Still applicable.
People Technology	PALM funding is maintained at the current level or greater allowing current BU-specific PALM administrators to be kept on staff.	Logged	04/23/24	PMO, F&A, General Services, Budget	Reviewed for current period. Still applicable.
People Processes Data	There will be sufficient engagement from DJJ's SME's who are knowledgeable about agency business processes.	Logged	04/23/24	F&A, Budget, General Services, HR, BPCA, BCM	Reviewed for current period. Still applicable.
People Processes Technology Data	The PALM team will provide sufficient and adequate guidance to DJJ.	Logged	04/23/24	F&A, Budget, General Services, HR, BPCA, BCM, PMO	Reviewed for current period. Still applicable.
People	DJJ PMO can drive the implementation of the PALM Project with four team members.	Logged	12/03/24	PMO	Reviewed for current period. Still applicable.
Data	Unreconciled payroll warrants will not be included in the Outstanding Warrant Report (APR018).	Logged	04/21/25	HR	No additional information provided during this reporting period.
People Technology	Cutover will be no longer than approximately 3 weeks.	Logged	04/30/25	Supplier payments	Reviewed for current period. Still applicable.
Technology	PALM will incorporate additional interfaces after Go-Live, if needed by DJJ.	Logged	05/01/25	IT, F&A	Reviewed for current period. Still applicable.
Technology Data	PALM will not alter the interfaces DJJ has selected.	Logged	05/01/25	IT	Reviewed for current period. Still applicable.
Data	If balances on purchase orders in AOD are different than what's reported in FLAIR, when encumbrance data is converted to PALM, AOD will update to reflect the FLAIR/PALM balances. As long as encumbrance balances are maintained in FLAIR, the full balances of the purchase orders from AOD will not be converted to PALM, potentially causing budget checking issues.	Logged	05/01/25	F&A, Budget, General Services	No additional information provided during this reporting period.
Data	We assume that all identified Florida PALM roles are included on the export from the PALM website.	Logged	05/05/25	Agency Liaison and SMEs	Reviewed for current period. Still applicable.
Data	We assume that all identified Florida PALM reports are included on the export from the PALM website.	Logged	05/05/25	Agency Liaison and SMEs	Reviewed for current period. Still applicable.
Processes	DFS A&A will provide agencies with new policies by the start of Florida PALM End User Acceptance Testing (UAT) in December. New policies will allow DJJ to adjust any agency specific test scripts.	Logged	05/08/25	All end users involved in UAT	No additional information provided during this reporting period.
Data	Zero dollar contracts in FACTS will not be converted to PALM	Logged	10/15/24	BCM, F&A contract disbursement payments	No additional information provided during this reporting period.
People Processes Technology	FACTS will be available to test when end-to-end user testing for PALM begins. When asking FACTS about UAT, the response was that "...we are still in the testing phases with Florida PALM. We will provide the agencies with an update when the UAT environment becomes available."	Logged	06/26/25	BPCA, Contract Tracking System (ABS), and F&A Contract employees	No additional information provided during this reporting period.
Processes	The BOSP Beneficiary Form will be updated from FLAIR to PALM account values and provided to the agencies prior to PALM Go-Live	Logged	07/25/25	Human Resources	No additional information provided during this reporting period.
People Data	Employees will be provided training on the object code to account crosswalk.	Logged	08/20/25	UAT SMEs and End-Users involved in UAT Full	Reviewed for current period. Still applicable.
Processes	Process steps will be provided for all Project-Recommended Standard Activities documented in the Topics and Activities list.	Logged	08/26/25	UAT SMEs	No additional information provided during this reporting period.
Technology	Image API, the company responsible for remediating Axiom Pro, will have remediated Axiom Pro such that it will be available for agency testing in August 2025.	Removed	07/07/25	F&A	Reviewed for current period. Still applicable.
Technology	The supplier ID conversion data will be included within API020 so that we can test that interface with the applicable supplier IDs in Cycle 2 Testing.	Removed	08/29/25	IRR and CTS	Assumption closed.

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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DJJ Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Heather DiGiacomo	heather.digiacom@fldjj.gov	09/05/25
May - June 2025	Heather DiGiacomo	heather.digiacom@fldjj.gov	07/09/25
March - April 2025	Heather DiGiacomo	heather.digiacom@fldjj.gov	05/09/25
January - February 2025	Heather DiGiacomo	heather.digiacom@fldjj.gov	03/10/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 98.84%

Submitted On Time = 39

Submitted Late = 4

Pending Submission = 1

Other Task Timeliness



Other Task Timeliness:

Score = 91.3%


Submitted On Time = 64

Submitted Late = 13

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 88.33%

Submitted Complete = 26

Submitted Incomplete = 2

Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 87.35%

Submitted Complete = 34

Submitted Incomplete = 1

Completed After Submission = 14

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Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 10

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress		The file format has been identified and provided to Business Unit for Remediation. Testcases are in Progress.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	09/02/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

Agency Reported

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

DLA Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	02/26/24		Staffing/Resource Availability	Loss of technical CNN participant	Increasing	9 (High/High)	The position is still vacant, creating a gap in support for F&A functions.	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	F&A tasks may face delays. affecting project deadlines and deliverables.	Risk remains open
Open and	04/23/24	08/20/25	Business Process	Changes to	Increasing	9 (High/High)	Review of BPMs was	Review BPM's for	Changes to project	Risk can be closed.

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Mitigating			Change	project scope potentially impacts agency planned mitigation.			initiated to access workflow changes and identify potential impacts on agency solutions, interfaces, and processes.	changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	scope potentially impacts agency planned mitigation.	
Open and Mitigating	04/09/25	08/20/25	Agency Business System	DFS Single Pay Approval Impact on consumer restitution payments and Refunds.	Increasing	9 (High/High)	Additional processes are being added to support Single Pay for consumer restitutions, and refunds, requiring updates to ABS and supplier records to prevent payment delays.	We need to revise ABS processes to include supplier records being added by DFS then being ingested by ABS which causes delay in payment processing.	Delay in payment processing affects timely disbursements.	Risk can be closed.
Open and Monitoring	08/20/25	09/10/25	Staffing/Resource Availability	Sponsor Departure Creating Leadership and Decision-Making Gap	Increasing	9 (High/High)	The current Agency Sponsor will be leaving in the first week of September. This transition creates a leadership gap and may delay decision-making. Although the Business Liaison and Agency Liaison are available, they are heavily occupied with their existing responsibilities, limiting the support they can provide.	Distribute sponsor responsibilities between the Business Liaison and Agency Liaison, with clear escalation paths. Request executive leadership to assign a new sponsor.	Lack of sponsor advocacy may affect coordination across agencies.	Risk can be closed
Open and Mitigating	04/30/25		Role Mapping	Segregation of responsibilities with a Florida PALM user role.	Increasing	6 (Medium/High)	FLAIR user access allows the agency to restrict functions but Florida PALM user roles do not allow for restricting activities.	We need to determine if this will be a training issue or if responsibilities will need to be shifted to HR for payroll related activities.	HR will have to assume additional responsibilities.	Risk remains open

DLA Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	
Open	04/23/24	08/20/25	Agency Business System	Need ability to make corrections to closed reporting period	Critical - Impacts the abil	The need to correct transactions after the reporting period closed highlighted a system gap affecting timely financial adjustments.	Need a solution option	04/14/25	This issue is closed	
Open	12/20/24		Conversion/Configuration	Approval seeking on batch upload to Import process for supporting documents	Critical - Impacts the abil	The need for batch upload approval was identified to improve the efficiency of importing supporting documents.	If there is no project solution it will require considerable staff effort to complete the supporting docs	04/14/25	Issue still pending	
Closed	02/18/25	05/28/25	Agency Business System	DFS approval to use single pay option for consumer restitution payments and refunds.	Critical - Impacts the abil	DFS approval to use single pay option for consumer restitution payments and refunds.	Need a solution option from PALM. 05/29/2025 - DFS provided approval for the agency to use the single pay option.	07/31/25	this issue is closed	
Open	10/31/24	08/20/25	User Acceptance Testing	UAT scheduling conflict due to fiscal year transition.	Critical - Impacts the abil	The recent decision to begin UAT on July1 will have an adverse impact on fiscal year close out and opening a new fiscal year and thats critical.	Need PALM funding to support F&A consultants that will perform the duties of F&A FTEs during UAT.	04/01/25	this issue is closed	
Open	04/09/25		Agency Business System	Manual payroll split for federal grants.	Critical - Impacts the abil	Manual process may be required to split payroll costs related to federal grants rather than utilizing Florida PALM payroll accounting functions.	We are hopeful that the future tasks will allow us to rectify the issue	09/25/25	Can be confirmed for closure once SMEs complete review through the IU Interface.	
Open	05/21/25		User Acceptance Testing	Data Warehouse	Critical - Impacts the abil	we have no way to test whether the new data warehouse will function the way that it does today because it's not available for us to test it.	we will explore optional reporting solutions.	06/30/26	Still pending resolution.	
Open	08/20/25		Staffing/Resource Availability	Transition of Agency Sponsor Role	Critical - Impacts the abil	The current Agency Sponsor departed in early September, leaving a leadership gap.	The role of Agency Sponsor will be replaced by Senior Executive Staff from F&A to ensure leadership continuity and decision-making support.	09/30/25	Issue still pending	
Open	09/10/25		Conversion/Configuration	Review and validation of extensive APLM Supplier file	High - Impacts the ability	The PALM Supplier file is significantly large, making it difficult for F&A staff to complete reviews within the required timeframe. This may impact timely validations and downstream processes.	Extend review timelines or allocate additional resources to ensure accurate validation of supplier data.	11/07/25	Additional time and resource support is required.	
Open	09/02/25		Staffing/Resource Availability	Project Team Member out on extended FMLA who had expertise working with our grants and property areas.	Low - All impacts not liste	This individual is currently the only person who handles our property inventory and works with the agency business system application that is a part of the inventory tracking. He is also the primary person for out grant reporting.	Key resource remains unavailable. Monitoring will continue until the individual returns or additional support is secured.	11/07/25	Issue still pending	

DLA Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)		Reporting Period Comments for July - August 2025
Processes	Processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting		Still open

Data	Data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	Still open
People Processes Technology Data	Final build is complete and available for UAT and Interface Testing	Logged	12/20/24	Finance & accounting, VANExt, EGrants, SQL reporting	Still open
Processes Data	Supplier records were added by DLA, but PALM and FLAIR outputs show discrepancies that need clarification.	Logged	09/10/25	Finance & Accounting	Reviewed with RCs; supplier data alignment between PLAM and FLAIR still needs resolution.

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

DLA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Darlene Faris - Interim	darlene.faris@myfloridalegal.com	09/10/25
May - June 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	07/10/25
March - April 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	05/09/25
January - February 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/07/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.29%

Submitted On Time = 39

Submitted Late = 3

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 98.83%


Submitted On Time = 70

Submitted Late = 7

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 88.05%

Submitted Complete = 28

Submitted Incomplete = 2

Completed After Submission = 11

Other Task Completeness



Other Task Completeness:

Score = 90.00%

Submitted Complete = 34

Submitted Incomplete = 0

Completed After Submission = 15

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 2

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/21/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering	08/28/25			
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/01/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/14/25	Working with IT personnel on security group admissions	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/14/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/08/25		Submission Complete	07/09/25
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/21/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	09/02/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering	08/28/25			
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/09/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

DMA Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025

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DMA Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	07/31/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Start planning process for 2-3 week downtime of system when FLAIR converts to PALM	High - Impacts the ability	DMA Staff must plan and implement downtime process necessary for the potential FLAIR offline due to conversion to PALM.	Continue to monitor	06/01/26	Currently working plan.
Open	02/28/25		Agency Business System Business Process Change Training User Acceptance Testing	Lump sum payment made for multiple items that become Assets: a. FLAIR allows these payments to be unitized into Assets by the Asset tag and cost per item. b. Palm allows these payments to be unitized into Assets by dividing the total costs by the total assets averaging the costs per unit rather than by the true costs.	Low - All impacts not listed	Cost averaging is ok if every asset has the exact same cost but there are many assets purchased together where the costs are completely different. This will result in inaccurate asset valuations. Example would be a skid steer with multiple attachments.	Continue to monitor	10/01/25	Continue to monitor.
Open	02/28/25		Agency Business System Business Process Change Interface Post Implementation Training User Acceptance Testing	FLAIR Pending table vs PALM staging table	Low - All impacts not listed	a. FLAIR allows for pending items to be deleted. If payments are made for assets that fall outside the threshold of property by State and Agency requirements. These can be deleted. b. Palm allows for the pending item to be skipped but its can never be deleted.	Continue to monitor	10/01/25	Continue to monitor

DMA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Processes	Changing of ARRO file format	Logged	03/05/24	Agency has concern about potential file changes that will be required from ARRO without missing any bi-weekly payrolls.	Will test the interface mid-Sep.
People Processes Technology Data	A downtime plan for FLAIR will be in place prior to the conversion to PALM	Logged	07/31/25	All agency business systems	Currently working plan.
People Processes Technology Data	Florida State Guard data will be managed by DMA.	Logged	09/04/25	FSG is currently managed by DMA and is a separate agency. Need to ensure that our DMA accounting staff has access and can manage FSG.	Testing data for both DMA and FSG.

#### 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

#### DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	COL Adam Curry	adam.m.curry.mil@army.mil	09/09/25
May - June 2025	COL Adam Curry	adam.m.curry.mil@army.mil	07/08/25
March - April 2025	COL Adam Curry	adam.m.curry.mil@army.mil	05/05/25
January - February 2025	COL Adam Curry	adam.m.curry.mil@army.mil	03/04/25

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# DMS Status Report Dashboard

Reporting Period

July - August 2025


Agency Sponsor

Lance Dyal

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

RW Task Timeliness

Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**


Score = 99.76%

Submitted On Time = 40

Submitted Late = 1

Pending Submission = 0

Other Task Timeliness



**Other Task Timeliness:**

Score = 96.88%


Submitted On Time = 68

Submitted Late = 9

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



**Direct Task Completeness:**


Score = 88.75%

Submitted Complete = 26

Submitted Incomplete = 1

Completed After Submission = 13

Other Task Completeness



**Other Task Completeness:**

Score = 91.22%

Submitted Complete = 42

Submitted Incomplete = 0

Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

- Unique Filled Role = 7
- Duplicate Filled Role = 6
- Vacant Role = 1

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/24/25	04-09-25: Addendum readiness columns complete for all interface testing.  07-24-25: PALM confirmed TRIRIGA interface data file for PRI010.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission		Sept 3: Midpoint Check-in due Sept 12 - in progress.		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25	07-09-25: Updates complete to date. There may be a few more in the future. Our CCN reviews this on a regular basis.	N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	06/25/25	06-25-25: Testing complete with both DMS SAMs - Goldie McCloud and Michael Tribble. UAT SMEs have been added to the Active Directory group.	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/09/25	07-07-25: DMS Agency Sponsor dashboard review meeting with Agency Liaison and Change Management Liaison. Agency Liaison is preparing an Executive brief on DMS Readiness to date - including Enterprise Partners status.	Submission Complete	07/17/25
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/09/25	07-07-25: DMS Agency Sponsor dashboard review meeting with Agency Liaison and Change Management Liaison.	Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/21/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	75% - Consolidating/Inputting Information for Submission		Sept 3: Holding review meetings.		
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/26/25	08-26-25: Florida PALM Workbook for DMS > Inventories > Agency Supplier Record has been completed.  Edited version of the APC001 Mock 3 data pull with comments checked back into the DMS Secure Portal.		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	617	Submit Bimonthly Agency Readiness	08/29/25	09/10/25	100% - Submitted	09/08/25			

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[illegible]

### Agency Reported

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

DMS Risks											
Sheet Name	Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
<a href="#">STMS Risks</a>	Open and Monitoring	07/29/25		Interface Staffing/Resource Availability User Acceptance Testing	Cycle 2 Testing Delays	Increasing	9 (High/High)	Cycle 2 testing delays in getting the error log or outbound file.	Continue to monitor the timeframe when files are sent to PALM and results returned.	Delays in schedule.	Error log details with questions take about a week for responses.
<a href="#">DMS Risks</a>	Open and Mitigating	02/19/25		Business Process Change Training User Acceptance Testing	User Acceptance Testing (UAT) Failure To Ensure Successful End User Training	Increasing	9 (High/High)	Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction. Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training.  Owner: Stephen Russell, DSGI	Feb 19: Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail to create the UAT tests and End User Training.  UAT success will be dependent on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.  The success of end-user training and testing for PALM at any state agency is contingent of having detailed instructions of the steps to perform for each Business Process, also called a User Manual. Currently, the "process steps" are not available. Based on the PALM project timeline and need for accurate, uniform information as the basis of testing the training, the PALM Team will need provide these "Process Steps" in the form of a user manual for the Tier 1 and Tier 2 's Business Process before testing and training scripts can be created.	This will negatively impact the validity of testing DMS business processes in the new PALM system and conduct lucrative End User Training.  Not having the Business Process steps available in early enough time to allow state agencies to create test scripts and training courses, creates a HIGH risk of failure to UAT.	No change. Continuing to monitor.
<a href="#">DMS Risks</a>	Open and Monitoring	04/09/25		Interface Post Implementation Staffing/Resource Availability User Acceptance Testing	Interfaces and Possible Redevelopment	Stable	9 (High/High)	Interfaces Late discovery of defects, requirements changes, or any other event that could cause redevelopment for DMS could strain resources on the DMS team.  Owner: OIT / Production Support	Weekly internal technical meetings to review and address. Recommend PALM establish a cutoff date to any changes to fields and interface layouts. Interface testing readiness is crucial to DMS success.	Changes will negatively affect the interface reliability.	No change. Continuing to monitor.
<a href="#">FRS Risks</a>	Open and Monitoring	09/22/23		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping User Acceptance Testing	Retiree payroll warrants and EFTs not being processed timely and/or accurately.	Stable	9 (High/High)	Retiree payroll warrants and EFTs (approximately \$12 billion per year for 472,000+ payees) not being processed timely and/or accurately.  Currently, because we are using the accounts payable module, instead of a payroll module, we may not be able to schedule payrolls with a specific timing. We may not be guaranteed that the payments will be made timely, or the checks will be printed prior to the pay date. • Pay dates for Retired Payroll is set a year in advance. After going through an approval process, these dates are sent to DFS every year before December prior to the year beginning. (Payroll schedule attached.) o This may need to be adjusted on the fly for natural disasters. o Pay date for Retired Payroll is the last business day of every month, as required by statute (F.S. 121.091(1), F.S. 121.091(3), and F.S. 121.091(4)). o Florida PALM needs to be responsible for scheduling changes or adjustments.	Going through confirming requirements, build an acceptable design, extensive testing - especially formal parallel testing to ensure everything is running properly for several cycles. Working with PALM to get more information to better define the programming needs.	FL Statute mandates that FL retirees are paid on the last business day of each month and dates are set one year in advance.  Members are aware that their benefit is received on the last business day of the month. RP cannot coordinate to print ""Early"" as retirees will have a false understanding of monthly timing.  If checks are deposited on a different day other than the last business day of the month, tax payments/accounting will be affected as well.	2025-08-27: Reviewed and confirmed still valid

								<ul style="list-style-type: none"><li>• We believe we can make this work using the Accounts Payable (AP) module, however, this could be an extremely human driven and coordinated process, if this cannot be pre-established with supplemental and monthly fixed dates.</li><li>• Of other known retirement systems, none process benefit payments through Accounts Payable (AP) modules.</li><li>• Potential Options:<ul style="list-style-type: none"><li>o Have a direct interface with the state disbursement bank (currently JP Morgan) (this is how other states function).</li><li>o Third Party sending bank files to and from our state disbursement bank account.</li><li>o Build the AP module around our pay cycle. (Supplemental and Monthly)</li></ul></li></ul>			
<a href="#">FRS Risks</a>	Open and Monitoring	04/08/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping User Acceptance Testing	Cut over and the impact on payroll, both weekly and monthly retirement payroll processing.	Stable	9 (High/High)	Cut over and the impact on payroll, both weekly and monthly retirement payroll processing: <ul style="list-style-type: none"><li>- Timing if down in July, impacts COLA, service retirement and DROP exit;</li><li>- EFT Reversals;</li><li>- Direct Deposit starts/stops (Sun-Thur);</li><li>- Need to know in advance so we can send communication to members regarding the Direct Deposit starts and stops;</li><li>- Holds/in Lieu of list where the member has direct deposit set up, but we have put them on the in lieu of list to create a physical warrant in lieu of direct deposit.</li></ul>	timing of when there will be no access – run monthly payroll early or ensure monthly payroll will not be impacted. This will need sign off on not processing weekly payrolls during the “down” time and busiest months.	RetiredPayroll will not be able to run weekly or monthly payrolls. The monthly payroll is mandated by statute and tax monies and retiree payments will have to be allocated prior to the transition time.	2025-08-27: Reviewed and confirmed still valid.
<a href="#">FRS Risks</a>	Open and Monitoring	07/11/25		Deployment/Cutover	Active Retirement Receipts and Report Processing during transition period from the legacy system to PALM.	Stable	9 (High/High)	Affected: <ul style="list-style-type: none"><li>• M30 FRS monthly/SUSORP, SMSOAP biweekly retirement data files (PALM PRI030).</li><li>• Receipt processing by Division for retirement files for state and non-state agencies.</li><li>• Payments submitted to Retirement through the Dept. of Revenue (DOR) for non-state agencies.</li></ul> Pursuant to chapter 121 F.S. (various references) contributions are due to the Division of Retirement no later than the 5th working day of the month immediately following the month during which the payroll period ended. Accompanying payroll data must be transmitted concurrent with the contributions. Submissions that are not able to process (missing data/contribution or out of balance), are considered delinquent, and a penalty is assessed. SUSORP/SMSOAP are on a biweekly schedule. The Division receives payment from the Bureau of State Payrolls for the state’s submissions. Non-state agencies have the option to remit payment through DOR and through other sources. Concern: During the transition period to PALM, if there is a moratorium enacted on processing, without an allowance for parallel processing under the legacy system, and it falls on either the monthly or biweekly due dates 1) Preventing the state’s monthly and/or biweekly from being submitted	Factors outside of the Division’s control: <ul style="list-style-type: none"><li><input type="checkbox"/> Dependent on when it occurs and the length of time.</li><li><input type="checkbox"/> Dependent on DOR’s accommodations for the transition.</li></ul> Factors within the Division’s control: The assessment of penalties (delinquency fees) is programmed into IRIS based on dates data or contributions are received and/or when a submission balances. (A waiver would not fall within the intent of the law, and granting such may require approval from the Governor’s office.) <ul style="list-style-type: none"><li><input type="checkbox"/> The Division could program IRIS to not assess delinquency fees for late submission for a period of time, but this would be a blanket approach covering all agencies. (Note, the state’s submissions are not assessed delinquency fees.)</li><li><input type="checkbox"/> Payments received from non-state agencies (outside of DOR) could be held internally, if they are logged into IRIS and allocated with the actual receipt date. If this occurs properly, IRIS will not register a delinquency.</li></ul>	Any delay in processing could affect the timely transfer of funds for the FRS Investment Plan or SUSORP/SMSOAP to member accounts for investment. While there may not be a loss of earnings assessed (if a moratorium is short term), there may be pushback from the membership, especially on the SUSORP side. If DOR if does not provide accommodation for the transition, what will happen? There are over 900 agencies of which the state is considered one. We do not track the agencies that use DOR and cannot force agencies to pay in a particular way, and many agencies have their own limitations on the way they can remit payment, and any change may require broader approval from their leadership/board or constituent group.	2025-08-26 - Risk added for this period.

								2) Preventing non-state agencies from transmitting funds through DOR 3) Preventing the Division's Accounting team from receiving funds transmitted from any source (EFT/ wire transfer, check) 4) Preventing the Division's Accounting teams entering logging information (in FLAIR?) The impact could be far reaching.			
<a href="#">STMS Risks</a>	Open and Monitoring	11/06/23		Deployment/Cutover Staffing/Resource Availability Training	Timeline. Competing deadlines immediately prior to go-live.	Increasing	6 (Medium/High)	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to 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.	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.  Meetings with PALM.	Unable to meet timelines to go-live.	Cycle 2 testing timelines are now impacting other timelines.
<a href="#">DMS Risks</a>	Open and Monitoring	10/09/24		User Acceptance Testing	Developing Test Plans Prior to System Availability	Increasing	6 (Medium/High)	Developing test plans before the system is available will limit test coverage.  Owner: OIT / Production Support / FMS	Have test environment available prior to UAT execution.  Oct 23: UAT Plan currently in development to address this. Waiting on PALM to provide more info.  Dec 18: No change. Continuing to monitor.  Feb 19: No change. Continuing to monitor and address via tasks.	This will negatively impact the validity of testing DMS business operations in the new PALM system.	No change. Continuing to monitor.
<a href="#">DMS Risks</a>	Open and Mitigating	04/27/23		Staffing/Resource Availability Training User Acceptance Testing	PALM and Statutorily Required Tasks Overlap	Stable	6 (High/Medium)	Timeline and Resources. There are multiple overlapping Palm tasks with due dates that utilize the same personnel resources as statutorily required tasks during year end.  Owner: Eric Thiele, FMS	Complete the tasks early or ask for a later due date. Most PALM tasks completed early - some still in progress. Year end required tasks complete.  Dec 18: Key staff are required to do fiscal year end close out. Also required to participate in UAT and Training activities. Attempting to mitigate this risk with staff augmentation.	This will negatively impact the testing and training tasks prior to GoLive.	No change. Continuing to monitor.
<a href="#">MFMP Risks</a>	Open and Monitoring	04/30/24		Business Process Change Interface Conversion/Configuration Deployment/Cutover	DFS Vendor Portal	Stable	6 (High/Medium)	On March 1, 2024, the Department of Financial Services (DFS), Division of Accounting and Auditing (A&A) team met with the MFMP program to discuss its vendor management initiative. This initiative includes analyzing existing vendor management business processes, determining improvements, and developing a data clean-up plan. DFS A&A also proposed a new vendor portal solution that will impact the vendor registration and master vendor data exchange between MFMP and Florida PALM. DFS issued a competitive solicitation in July 2024 for the new portal, executing a contract in mid-FY2024-25. The project has started before Florida PALM's July 2026 go-live date with a phased approach to full implementation by Florida PALM Go-Live. MFMP, Florida PALM, and DFS are discussing integration and interface requirements, including the master data vendor exchange. Launching a design, test, and implementation effort for a new DFS vendor portal parallel with MFMP's Florida PALM implementation activities and during the current build schedule presents significant risk	MFMP and Florida PALM continue to design the master vendor data exchange based on MFMP and Florida PALM's existing requirements. MFMP will continue to work with DFS and Florida PALM on planning activities for the new vendor portal; however, based on the current lack of formal requirements, a defined implementation plan, timeline, etc., MFMP cannot begin building to support the new vendor portal at this time.	Failure to successfully integrate supplier records between MFMP, Florida PALM, and FLIPS would cause several critical issues within the Procure to Pay process in the State of Florida.	No update continuing to monitor

								the MFMP to Florida PALM integration and interface implementation.			
<a href="#">MFMP Risks</a>	Open and Monitoring	06/06/25		Interface Conversion/Configuration Deployment/Cutover	MFMP Florida PALM Testing Delays	Stable	6 (High/Medium)	<p>Due to a lack of return data from Florida PALM mock testing, MyFloridaMarketPlace (MFMP) was unable to participate in Mock One testing and did not have Mock Two PALM conversion data until the end of May 2025 to begin evaluating. Florida PALM not returning Mock Two conversation data to MFMP until six business days before the planned start of Florida PALM's Interface Cycle Two Testing (June 2025) presents significant risk with the two programs being unable to evaluate possible errors and valid or invalid failure reasons until shortly before the start of Cycle Two testing. Mock One and Two testing was intended to begin exploring conversion results and troubleshooting issues that arise prior to the start of Cycle Two Testing.</p> <p>Based on these events and according to Florida PALM's current timeline, this puts MFMP a full cycle behind in testing efforts from the Florida PALM data perspective. MFMP has continued to complete all system and integration design, build, and test activities in its timeline that it has control over; however, any testing requiring data from Florida PALM is behind the anticipated schedule. Although these testing efforts can be completed during Cycle Two testing, this requires several activities to occur later in the cycle than originally anticipated, introducing risk on both sides of the project to meet the completion dates in preparation for User Acceptance Testing, End-to-End testing, and Go-Live Dry-Run testing.</p>	The Department will continue to monitor timely completion of testing activities and openly communicate with the Florida PALM project when data return deadlines are not met. If these return deadlines continue to have delays, they may result in an overall delay in the MFMP and Florida PALM testing timelines.	Continued delays in receipt of testing data from Florida PALM to MFMP will hinder the Department's ability to complete testing activities that have a dependency on available Florida PALM testing return data.	No update continuing to monitor
<a href="#">FRS Risks</a>	Open and Mitigating	11/07/23		Business Process Change	Retirement needs to be able to go negative in specific funds	Decreasing	6 (High/Medium)	<p>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.</p> <p>Retirement needs to be able to go negative in specific funds, not all funds have been approved that are required to be able to go into negative cash balances. Specifically fund 70500 (need to invest Health Insurance Subsidy (HIS) and Investment Plan (IP) Investment Vouchers need to post even if the fund is negative in cash), other funds needed were previously approved. The current process has allowed us to keep loss of earnings at a minimum, however, if the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts we will be forced to pay more loss of earnings which would negatively effect the Florida Retirement System (FRS) Trust Fund.</p>	<p>Programming needs to be completed to allow for flexibility so funds can be released timely.</p> <p>Continue to work with the PALM team.</p>	If the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts, we will be forced to pay more loss of earnings which would negatively affect the Florida Retirement System (FRS) Trust Fund.	2025-08-27: Reviewed and confirmed still valid.
<a href="#">FRS Risks</a>	Open and	11/07/23		Business Process	Pulling reports	Stable	6 (High/Medium)	Pulling reports from	Plan for report	If the information in FL	2025-08-26: Reviewed

	Monitoring		Change Conversion/Configuration Deployment/Cutover Post Implementation	from FLAIR/PALM is mandatory to complete the statutory requirements.			FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	identification and testing. Verify reports are available.	PALM is not complete or correct, and/or we are not able to pull reports, the ACFR will not be accurate and will cause an audit finding.	and confirmed still valid.
<a href="#">FRS Risks</a>	Open and Monitoring	02/17/22	Business Process Change Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping	Any significant change to existing Retiree payroll, EFT processing, BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time.	Stable	6 (High/Medium)	Any significant change to existing Retiree payroll, EFT processing (EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop payments, etc., not being automated or not being processed timely and/or accurately.), BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time.	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to create online entries manually in Florida PALM. Working with PALM to get more information to better define the programming needs.	If EFTs and Direct Deposit stops are not done timely it could result in monies being put into a fraudulent, closed or the wrong account. The impact could also include overpayments due to death.	2025-08-27: Reviewed and confirmed still valid.
<a href="#">STMS Risks</a>	Open and Monitoring	05/01/25	Business Process Change Interface	API133 - new interface	Increasing	4 (Medium/Medium)	New interface for voucher errors likely to be used by STMS. This will provide error messages for vouchers.	Initial meeting with PALM 5/1/25 to discuss interface. Continue to review the interface and determine the impact to STMS.	Possible delay in schedule with adding a new interface.	API133 scheduled to begin testing in Sept/Oct.
<a href="#">DMS Risks</a>	Open and Monitoring	04/21/23	Training User Acceptance Testing	Sandbox Function	Stable	4 (Medium/Medium)	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?  Owner: Jason Ottinger, DSGI	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.	This remains a risk until UAT goes into production.	No change. Continuing to monitor.
<a href="#">DMS Risks</a>	Open and Monitoring	06/30/25	Identity Provider (IdP)	Testing Environment Access	Stable	4 (Medium/Medium)	In reference to Task 591 - Confirm IdP Configuration for Florida PALM, both DMS SAMs successfully logged in to test access. However, loading of the page and the search function was excessively delayed. This may cause backlog issues in the UAT environment during testing activities. This note appears in the comments column of the DMS UAT IdP Smartsheet.  Owner: OIT / Production Support	The Project has acknowledged this potential risk and will keep DMS informed re: mitigation.	This may cause backlog issues in the UAT environment during DMS PALM testing activities.	No change. Continuing to monitor.
<a href="#">FRS Risks</a>	Open and Monitoring	11/07/23	Conversion/Configuration	Unknown risks due to changes to major statewide systems during modernizations.	Stable	4 (Medium/Medium)	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.  Continuing to monitor Class Code implications by being aware of what is coming out of HR regarding class codes.	IRIS is designed based on the way the classification system is today. If the system is changed, operation and administration of Special Risk, EOC and SMSC will be affected. A complete overhaul may be needed.	2025-08-26: Reviewed and confirmed still valid.
<a href="#">PF Risks</a>	Open and Monitoring	09/09/24	Agency Business System Interface Conversion/Configuration	Multiple agencies with different testing schedules and testing needs	Stable	4 (Medium/Medium)	With development happening in multiple systems held by multiple organizations, schedule variance in different areas can have unforeseen impacts on People First development. If developments become too out of sync, it could cause issues with productivity and the ability to pass stage gates successfully.	People First is on schedule and anticipates continuing to be in lock step with the project timeline well before the next stage gate.  COMPLETE: Team has hired a project manager with primary focus on ensuring People First maintains PALM readiness. Additionally, People First will be adding significant staff augmentation to assist us.	Certain tests may not be possible in the defined timeframe if stakeholders aren't ready	Mitigation plan updated to reflect activities that have been completed.
<a href="#">PF Risks</a>	Open and Monitoring	09/09/24	Interface Deployment/Cutover Staffing/Resource Availability	Late discovery / defect management	Stable	4 (Medium/Medium)	Late discovery of defects, requirements changes, or any other event that could cause redevelopment for People First could strain resources on the People First team and	PALM and People First teams will continue to meet weekly to collaborate on testing timelines and will add additional meetings on special topics as needed.	If a defect is identified too late and People First and / or PALM has to enter re-development, it could strain resources and potentially cause delays or loss of functionality/	Mitigation plan updated to reflect activities that have been completed.

								our vender.	COMPLETE: We are continuing to refine our parallel testing schedule to ensure that we have time built into the schedule for development. People First will continue to send functional design documents to the PALM team to review and provide feedback to minimize surprises during development.		
<a href="#">DMS Risks</a>	Open and Mitigating	04/26/23		Agency Business System Business Process Change Interface Conversion/Configuration	Delivering PALM Functionality Required for DMS Operations	Stable	3 (High/Low)	Functionality. Will PALM deliver the functionality needed for DMS operations?  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.  Owner: Stephen Russell, DSGI	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees.  PALM is addressing this risk.  June 20: PALM is requiring that agencies create and implement their own testing plans. That initiative is in planning.  Oct 23: Implementation plan in development. UAT plan is in progress.  Dec 18: Still evaluating interface requirements in light of new business requirements. UAT plan will address this and is in progress.  Feb 19: In progress. Evaluating training needs and requirements.	This will negatively impact DMS business operations.	No change. Continuing to monitor.
<a href="#">DMS Risks</a>	Open and Monitoring	05/01/25		Deployment/Cutover	Act of God/ office closure during cut over.	Stable	3 (High/Low)	If an Act of God (Pandemic, Hurricane, Tornado, Snow, etc.) were to cause office closures during the deployment/cutover from FLAIR to PALM there would be great risk to accurate, timely participation.  Owner: Stephen Russell, DSGI / Eric Thiele, FMS	Key staff in financial wave roles will be identified and included in coop planning for any disasters that occur in the cutover timeframe.	If risk becomes an issue COOP Plan must be activated.	No change. Continuing to monitor.
<a href="#">FRS Risks</a>	Open and Monitoring	02/17/22		Agency Business System Business Process Change	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Stable	3 (High/Low)	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Going through confirming requirements, build an acceptable design, extensive testing. In the process of working through the design with PALM. No work around except using the existing payroll system.	The delay will affect allocations to balance the retirement reports, which will delay posting of contribution data in IRIS. This will result in the delay of fund transfers to Investment Plan member accounts, which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to the Division of Retirement. For the pension plan, the trust fund will have a loss of investment earnings, which are needed for benefit payments.	2025-08-26: Reviewed and confirmed still valid.
<a href="#">FRS Risks</a>	Open and Mitigating	02/17/22		Agency Business System Business Process Change Interface	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately.	Decreasing	3 (High/Low)	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately. This risk includes the timely and accurate posting of revenues in PALM. (These transactions record the receipt of retirement contributions of approximately \$6 billion per year.) If this risk happens, Retirement would not be able to receive the revenue and be able to invest (loss of earnings) and allocate to employer's accounts (the delay will affect allocations to balance the retirement reports which will delay posting of contribution data in IRIS which delays funds transfers to Investment Plan member accounts which may result in loss of earnings. If the	Going through confirming requirements, build an acceptable design, extensive testing. The risk would be on IRIS - would be able to take information from the Department of Revenue website and manually enter, reconcile, and adjust in IRIS.  Completed everything regarding strategy, need to test in UAT.	The delay will affect allocations to balance the retirement reports, which will delay posting of contribution data in IRIS. This will result in the delay of fund transfers to Investment Plan member accounts, which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to the Division of Retirement. For the pension plan, the trust fund will have a loss of investment earnings, which are needed for benefit payments.	2025-08-26: Reviewed and confirmed still valid.

								employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to Retirement).			
<a href="#">FRS Risks</a>	Open and Monitoring	04/29/25		Deployment/Cutover	Act of God/ office closure during cut over.	Stable	3 (High/Low)	If an Act of God (Pandemic, Hurricane, Tornado, Snow, etc.) were to cause office closures during the deployment/cutover from FLAIR to PALM there would be great risk to accurate, timely participation.	Key staff in financial wave roles will be identified and included in coop planning for any disasters that occur in the cutover timeframe.	If risk becomes an issue COOP Plan must be activated.	2025-08-26: Reviewed and confirmed still valid.
<a href="#">STMS Risks</a>	Open and Mitigating	11/06/23		Interface	Interface. Inability to design flat file transfer process.	Decreasing	2 (Medium/Low)	Concern about flat file data loading and transfer of files.	Provide information about when and where flat file data will be provided and how it will be accessed.  Meetings with PALM continue.	Failure to receive file transfers.	In Cycle 2 Testing, where file transfers occur on MFT.
<a href="#">STMS Risks</a>	Open and Mitigating	12/19/23		Business Process Change Interface Training	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Decreasing	2 (Medium/Low)	Concern about design and process changes with speed keys.	Provide information about the Speed Key interface, as well as training about how agencies will be using it in PALM. Provide training about how Speed Keys will be used by travelers to communicate billing information to Fiscal Accountants.  Meetings with PALM continue.  CCN and Enterprise Partners are currently collaborating.  Close to resolution; will review next cycle.	Training issues with end users.	Speedkeys are in Cycle 2 Testing.
<a href="#">MFMP Risks</a>	Open and Monitoring	05/01/24		Staffing/Resource Availability	Project Staff Turnover	Stable	2 (Medium/Low)	Over time, the Florida PALM project team has encountered staff turnover. This can present risk associated with knowledge transfer, or lack thereof, between the existing resource and their successor. New project staff must be informed and prepared to continue open integration and interface design decisions. Delayed or incomplete knowledge transfers for the successor may delay design decisions, thus risking the implementation of the MFMP to Florida PALM integration according to the existing timeline.	MFMP will work with Florida PALM to assist in expediting any knowledge transfer incoming successors require to mitigate delays in design decisions	Insufficient transfer of knowledge can result in delays in design decision making, putting the implementation timeline or quality of design efforts at risk.	No update continuing to monitor
<a href="#">PF Risks</a>	Open and Mitigating	06/28/24		Interface Conversion/Configurator Deployment/Cutover User Acceptance Testing	Parallel Testing Complexity	Decreasing	2 (Medium/Low)	The need for parallel testing will increase the complexity of operations. Data will need to be maintained in a new environment and the legacy environment and could lead to inconsistencies.	Ongoing weekly sync ups with PALM continue to brainstorm solutions, sync on results, and align on test success criteria.  Complete: Parallel testing meetings Scheduled for August 2024 to ensure that the needs of PALM project team align with the current processes implemented by People First team and vendor. In addition, People First team has brought in a full-time project manager so that the team can maintain PALM readiness and continue day to day operations without sacrificing either.	Testing results may not match expected outcomes if data desynchronization happens.	Mitigation plan updated to reflect activities that have been completed.
<a href="#">PF Risks</a>	Open and Mitigating	10/28/24		Conversion/Configurator	Environment Management	Stable	2 (Medium/Low)	Testing for PALM includes multiple success criteria. To be successful, People First will need to test payroll parallel to production payroll. But we will also need to test interfaces, conversions, and end user testing of changes within People First and our agency interfaces / reports. Scheduling must align with PALM schedules and environments will need to be refreshed at multiple intervals. We currently are limited in testing environments, so schedule management is key.	People First continues to prioritize scheduling and is anticipating schedule variance by being ahead of schedule and by adopting hybrid project management methodology.  COMPLETE: People First team is crafting a change order to add 5 additional environments during the PALM testing period. This will allow us to build contingencies into the testing schedule to accommodate any schedule creep. This will also allow us to hold production data from the first payroll run in	People First UAT would be impacted without environments ready to run multiple scenarios with different data requirements in parallel.	Mitigation plan updated to reflect activities that have been completed.

									2025 until PALM's environment is built to run parallel testing of payroll.		
									Along with Amendment 12, the PALM schedule has extended its testing period, which should mitigate the complexity of testing for People First (in conjunction with enhanced environment management).		
<a href="#">STMS Risks</a>	Open and Mitigating	11/06/23		Interface Conversion/Configuration Staffing/Resource Availability Training	Functionality. Inability to design new STMS user interface for creating vouchers	Decreasing	1 (Low/Low)	Concern about creating UI for vouchers.	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 continue.	Training issues with end users.	Vouchers are in Cycle 2 Testing.

DMS Issues										
Sheet Name	Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
<a href="#">DMS Issues</a>	Open	02/19/25		Role Mapping Training User Acceptance Testing	Risk of User Acceptance Testing (UAT) Failure  Owner: Stephen Russell	High - Impacts the ability of the agency to meet deadlines or milestones	Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction.  Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training.	Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail to create the UAT tests.  UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.	07/30/25	No change. Continuing to monitor.
<a href="#">MFMP Issues</a>	Open	06/06/25		Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation	DFS Vendor Portal	High - Impacts the ability	The Department was originally made aware in March 2024 of a new vendor portal project the Department of Financial Services (DFS) was pursuing to replace their current W9 portal and vendor electronic funds transfer (EFT) business process. After further discussions with DFS, the Department logged a risk for this vendor portal in April 2024, citing the concern that a new DFS vendor portal design, build, and test process operating parallel with MFMP and Florida PALM's implementation activities and during the current build schedule presents significant risk the MFMP to Florida PALM integration and interface implementation.  Since that time, DFS completed a competitive solicitation and awarded a contract in December 2024 to begin their design, build, and test process. Up until that activity, and since that time, the Department has continually requested information from DFS on how supplier integrations between MFMP, Florida PALM, and the new DFS vendor portal are intended to function, with very few updates. Beginning on April 23, 2025, the Department attended bi-weekly design sessions with Florida PALM and DFS Accounting and Auditing (A&A) to better understand what is to be called the Florida Integrated Payment System (FLIPS) functional and technical requires so that the	The Department will continue to meet with DFS A&A and Florida PALM to confirm business and functional requirements. Once those are confirmed, MFMP will make changes in VIP, AOD, and our interfaces to accommodate the changes in approach. MFMP will include these changes in its testing efforts to ensure everything is functioning as expected. Agency Customer education will be essential in mitigating this issue, emphasizing the importance of choosing the correct remittance address associated with their payments. Because this will present a moderate change in business process for customers, they should plan for this change prior to Florida PALM and FLIPS Go-Live.	TBD	No update continuing to monitor

Department can ensure a successful integration between the two systems and Florida PALM. Based on previous knowledge and these discussions starting in April, there are two primary issues with FLIPS related to MFMP and Florida PALM's ability to be successful with a July 2026 Go Live:

1. Timeline and Scope – MFMP and PALM have worked together to design and build the interface based on PALM's defined supplier interface requirements for over a year, with testing scheduled to begin in June 2025. During that time, no information was available allowing the two programs to design what FLIPS would require, and any designs or supplier integration models do not currently accommodate FLIPS as part of the process. Attempting to make an integration shift this late in the process is an issue that has resulted in increased scope and project cost, a shift in testing timelines that have already been planned out, and use of time already allocated to other Florida PALM – MFMP integration activities to instead redesign the supplier integration approach. Interface Cycle Two – Technical Testing is scheduled to begin on June 9, 2025, and extend through the end of October 2025. This means the Department and Florida PALM are required to dedicate resources to redesigning the supplier integration approach and expected to test that integration in the same timeline window. FLIPS will also need to participate in this testing, meaning they must be far along enough in their build process to begin testing between August and October 2025, likely requiring MFMP, Florida PALM, and FLIPS to utilize the contingency period of Interface Cycle 2 Technical Testing in November 2025. Based on all of these considerations, DMS is raising the risk originally logged in April 2024 to an issue as of June 2025.

2. Supplier Data Connection and Remit Information – As of June 5, 2025, less than one week before Interface Cycle 2 Technical Testing is scheduled to begin, it has been communicated to the Department by DFS A&A that they have decided the expectation is for MFMP to not send any supplier data to Florida PALM or FLIPS. DFS A&A intends on all supplier data responsible for direction of the payment process to originate from FLIPS and be sent over to Florida PALM for creation of a PALM Supplier ID. Florida PALM would then send remittance address information to MFMP for inclusion in the MFMP Vendor Information Portal (VIP) and Ariba On Demand (AOD). This introduces issues with connecting vendor records between all

							three enterprise systems, requiring remittance data to be applied in MFMP strictly at the Tax ID level because no unique identifier will be integrated between MFMP and Florida PALM prior to FLIPS sending			
<a href="#">STMS Issues</a>	Open	10/01/24		Interface	GLI012 - Time out error when testing web service connection	High - Impacts the ability	PALM & STMS Teams are troubleshooting the connection issue. Multiple meetings have been scheduled. STMS provided the IPs to the sandboxes for whitelisting.	Provided the IPs to whitelist in 4/4/2025.  STMS requested another session to confirm PALM is seeing connection attempts. If still an issue, STMS will request Salesforce assistance.	07/31/25	STMS has uploaded one of the certificates. The chain of certificates
<a href="#">DMS Issues</a>	Open	01/15/25		Business Process Change Interface	MIP Interface Selections  Owner: OIT / Production Support	Low - All impacts not listed as Critical or High	MIP interfaces selected may not be 100% remediated without testing.	Could be manually resolved with more manpower, but would want to make changes to interface selection and possibly the interfaces themselves to account for missing / unknown elements.  Oct 23: Confirmed interfaces. MIP has updated and automated internal FLAIR reports. Next steps are in progress - id data fields that need to be integrated with MIP and PALM.  Feb 19: Reconfirmed interface selections. Potential interfaces are selected, but may not be initially required.	07/15/25	No change. Continuing to monitor.
<a href="#">DMS Issues</a>	Open	08/21/24		Staffing/Resource Availability Training	End Users New to DMS and PALM  Owner: Evelyn Harrison, OOS	Low - All impacts not listed as Critical or High	The majority of the DMS End Users are new to DMS. An even larger percentage have held their current jobs at DMS for less than 5 years.	Consistent monitoring, training and follow up. Regular communication, meetings, and increased involvement in the project Readiness Workplan Tasks.	06/30/26	Consistently tracking this via the stated Action Plan. New hires are included in workgroup meetings. One-on-one interactions are scheduled as needed.
<a href="#">FRS Issues</a>	Open	09/22/23		Agency Business System	Business System (IRIS) upgrade	Low - All impacts not listed as Critical or High	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.	Testing and training in advance - plan to be developed.	12/31/25	2025-08-26: Reviewed and confirmed still valid.
<a href="#">STMS Issues</a>	Closed	06/25/25	08/25/25	Interface	GLI017 - Change to required fields (fund and category) on interface not communicated to STMS until 6/24/25.	Low - All impacts not listed as Critical or High	STMS developed based on the interfaces provided. Once integration files were received and reviewed 6/18/25, our team asked for clarification on 6/24/25. PALM team noted the field was not required, resulting in a change in coding for STMS. Any changes this late require coding and may impact testing timelines.	STMS team is making the coding change for the field to not be required based on details from PALM team. 6/25/25	07/18/25	STMS made coding changes which are now in interface testing.

#### DMS Assumptions

Sheet Name	Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
<a href="#">DMS Assumption</a>	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	All DMS PALM end users are impacted.  Owner: Evelyn Harrison, OOS	This has also been logged as a risk. Continuing to address this with consistent communication, training, and inclusion.
<a href="#">PF Assumptions</a>	Processes Technology	Funding will continue as needed to maintain People First operationally as well as for changes necessary to implement the PALM project.	Logged	06/28/24	People First, PALM	No changes
<a href="#">PF Assumptions</a>	People Processes Technology	The additional monies allocated to our vendor to fulfill necessary changes to People First to integrate with PALM will be sufficient for the project.	Logged	06/28/24	People First, PALM	No changes
<a href="#">FRS Assumption</a>	Data	The State Retirement file from Bureau of State Payrolls (BOSP) will contain all of the same data elements that it currently contains, the reporting will function as it currently does, and Retirement will continue receiving the same information from People First.	Logged	08/28/24	Bureau of Enrollment and Contributions, IRIS	2025-08-26: Reviewed and confirmed still valid.

#### 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.

#### DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Lance Dyal	lance.dyal@dms.fl.gov	09/08/25
May - June 2025	Lance Dyal	lance.dyal@dms.fl.gov	07/08/25
March - April 2025	Lance Dyal	lance.dyal@dms.fl.gov	05/07/25
January - February 2025	Lance Dyal	lance.dyal@dms.fl.gov	03/11/25

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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#### FRS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Kathy Gould	kathy.gould@dms.fl.gov	08/28/25
May - June 2025	Kathy Gould	kathy.gould@dms.fl.gov	07/07/25
March - April 2025	Kathy Gould	kathy.gould@dms.fl.gov	05/05/25
January - February 2025	Kathy Gould	kathy.gould@dms.fl.gov	02/24/25

#### MFMP Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Ayanna Bridges	ayanna.bridges@dms.fl.gov	08/29/25
May - June 2025	Tyler Brown	tyler.brown@dms.fl.gov	06/25/25
March - April 2025	Tyler Brown	tyler.brown@dms.fl.gov	05/05/25
January - February 2025	Tyler Brown	tyler.brown@dms.fl.gov	03/03/25

#### PF Status Report Confirmation


Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Jesse Johnston	jesse.johnston@dms.fl.gov	09/05/25
May - June 2025	Jesse Johnston	jesse.johnston@dms.fl.gov	07/02/25
March - April 2025	Tony Lloyd	tony.lloyd@dms.fl.gov	05/06/25
January - February 2025	Tony Lloyd	tony.lloyd@dms.fl.gov	02/28/25

#### STMS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Casey Taylor	casey.taylor@dms.fl.gov	08/27/25
May - June 2025	Casey Taylor	casey.taylor@dms.fl.gov	07/02/25
March - April 2025	Casey Taylor	casey.taylor@dms.fl.gov	05/02/25
January - February 2025	Casey Taylor	casey.taylor@dms.fl.gov	02/28/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.18%

Submitted On Time = 37

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 92.63%


Submitted On Time = 67

Submitted Late = 9

Pending Submission = 1

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 95.79%

Submitted Complete = 35

Submitted Incomplete = 1

Completed After Submission = 2

Other Task Completeness



Other Task Completeness:

Score = 96.25%

Submitted Complete = 43

Submitted Incomplete = 0

Completed After Submission = 5

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 4

Duplicate Filled Role = 8

Vacant Role = 2

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
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	75% - Consolidating/Inputting Information for Submission				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	08/26/25	DOAH has contracted with Docufree/Image API to reconfigure Axiom Pro application to be ready for UAT Interface Testing in October 2025.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/08/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/08/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25	Added meetings held with CCN and Leadership to the communications sheet.	Submission Complete	08/08/25
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	100% - Submitted	08/26/25			
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/08/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

DOAH Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	11/07/24		Agency Business System Interface User Acceptance Testing	If Axiom Pro is not reconfigured for UAT, communication will be delayed	Decreasing	4 (Medium/Medium)	DOAH utilizes the Axiom Pro application for our voucher schedule workflow	Agency Liaison will collaborate with other agencies and Image API to ensure the reconfiguration is completed	Staff will make plans to test the process using our previous method of assembling and storing vouchers	DOAH established a purchase order with Docufree/Image API to reconfigure the Axiom Pro application. They will meet monthly with DOAH to discuss needs and provide status updates

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			Testing	accountants will be unable to test and verify the functionality of the application with FL PALM..			approval and as a repository for our voucher schedules.	reconfiguration is completed prior to UAT. Agency Liaison will request status updates from Image API to ensure timeliness of end product.	our vouchers.	needs and provide status updates.
Open and Mitigating	07/05/23		Staffing/Resource Availability Training	If resources are not fully trained to do their jobs, go-live will continue but DOAH will not be ready for go-live.	Decreasing	3 (High/Low)	DOAH is a small agency with limited workforce. There are eight purchasing and accounting positions, one budget director, and one personnel director that perform functions in FLAIR today. It is critical these personnel are able to perform their function in PALM.	DOAH will work with the DOAH's SMEs and PALM team to ensure staff's capabilities to function in PALM by attending meetings, reviewing information from the Knowledge Center, and Thursday Talks to keep abreast of information. Have affected staff (all end users) participate in testing and training for PALM. All SMEs have participated in Segment III and IV workshops.	DOAH will not effectively function in PALM and business processes will be delayed for completion. This will effect our internal and external customers.	End users will be actively participating in UAT. They are currently taking the UAT prerequisite training required to participate in UAT.
Open and Mitigating	08/28/24		Staffing/Resource Availability	The staff's previous experience with system implementation may lead to low or lack of engagement in transitioning to the new financial system.	Decreasing	2 (Medium/Low)	Staff's experience with the previous rollout of the CMS was did not go well. They are anxious about transitioning to a new system.	Agency Liaison will integrate PALM awareness through emails, meeting discussions and providing updates regarding PALM during management staff meetings. Agency Liaison will provide staff with PALM resources to become familiar with the system. SMEs and future end users will participate in Segment IV meetings and meet regularly to discuss PALM implementation in designated meetings so the conversation is focused."	Staff will not be actively engaged and will hinder the testing and training with PALM. Thus, not having trained staff to function in PALM on the Go-Live date.	Staff are actively engaged with UAT activities such as prerequisite training, developing user stories and reviewing business processes.

DOAH Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	04/08/25		Staffing/Resource Availability	Accounting Supervisor Resigned	High - Impacts the ability	Accounting Supervisor resigned their position of March 21st and their duties and responsibilities have been reallocated in the interim.	Management will review the accounting supervisor's duties and responsibilities to develop a strategy to address the structure of the unit. Based on the analysis, it will be determined how to move forward with position.	09/30/25	During UAT an analysis will be conducted to determine workload impact and how best to fill the position.
Open	02/07/25		Staffing/Resource Availability	Contract Manager Leaving	Low - All impacts not liste	Staff Member (Contract Manager) leaving October 31st who prepares invoices for auditors and creates invoices for ALJ Services Contracts	Transition Plan to fill the position with overlap time in order for the outgoing staff member to train the new staff.	10/31/25	DOAH has made a contingent offer to fill the anticipated vacancy. This should allow for 6 weeks overlap for training.
Open	09/03/25		Staffing/Resource Availability	Accountant III-Revenue Resigned	Low - All impacts not liste	Accountant III-Revenue resigned their position on September 3rd.	Accountant II will be placed in the Accountant III role with assigned duties and responsibilities effective September 12th. This will create a vacancy with the Accountant II position. Advertise and fill Accountant II position.	11/03/25	Emailed the Accountant II advertisement to HR Manager for posting. Will advertise for 7 days.

DOAH Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology Data	Staff will be able to perform their assigned function proficiently in PALM on Go Live Date	Logged	09/08/23	End Users	Staff are working to complete the required prerequisite training modules for PALM prior to UAT.
Technology	Axiom Pro Application will be reconfigured to pull the vouchers in PALM by UAT.	Logged	10/31/24	End Users	DOAH established a purchase order with Docufree/Image API to reconfigure Axiom Pro prior to UAT Interface testing. Monthly meetings have been set up them to discuss efforts.
People	All positions will be filled with staff trained on current business processes.	Logged	04/04/25	End Users	Staff have been working on updating their desk manuals for all their activities and will align them with the topics/activities with FL PALM.

#### 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: \*

#### DOAH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Megan S. Silver	megan.silver@doah.state.fl.us	09/08/25
May - June 2025	Megan S. Silver	megan.silver@doah.state.fl.us	07/08/25
March - April 2025	Megan S. Silver	megan.silver@doah.state.fl.us	05/12/25
January - February 2025	Megan S. Silver	megan.silver@doah.state.fl.us	03/07/25

Helpful Links

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[Knowledge Center](#)  
[Florida PALM Workbook for DOE](#)  
[Readiness Workplan](#)

# DOE Status Report Dashboard

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

Reporting Period

July - August 2025

Agency Sponsor

Suzanne Pridgeon

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Task Completeness:

Score = 96.34%

Submitted On Time = 38

Submitted Late = 3

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 75.75%

Submitted Complete = 19

Submitted Incomplete = 5

Completed After Submission = 16

Other Task Completeness:

Score = 85.00%

Submitted Complete = 33

Submitted Incomplete = 2

Completed After Submission = 13

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 8

Duplicate Filled Role = 5

Vacant Role = 1

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	07/28/25
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/08/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/15/25		Submission Complete	07/18/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/15/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	09/03/25		Task Closed - Not Submitted	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/02/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

## Agency Reported

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

DOE Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	07/02/25		Staffing/Resource Availability Training	Operational Staff Turnover - General	Stable	4 (Medium/Medium)	Staff turnover is an ever-present risk and is especially significant when contemplating a new financial platform.	Mitigate: Ensure job-specific processes are documented and generic enough to permit retraining of new, incoming staff.	Delays could occur.	Continuing to monitor staffing changes.
Open and Mitigating	07/15/25		Agency Business System Interface	Weak integration plan between legacy agency systems and PALM	Stable	4 (Medium/Medium)	Current agency systems may not align or integrate cleanly with PALM data structures or workflows.	Mitigate: Continue to evaluate ABS during PALM testing.	Delays in data flow and reporting; potential data loss or duplication.	Completed first interface file (API002) testing meeting.
Open and Monitoring	07/15/25		Post Implementation Staffing/Resource Availability Training	No training plan or materials provided for end users	Increasing	4 (Medium/Medium)	Training needs assessment not conducted; PALM training assets not yet distributed.	Monitor. Coordinate with PALM training team; develop internal training schedule and delivery method.	Low adoption, user errors, and surge in post-go-live support needs.	Monitoring and reporting staff completion of PALM UAT prerequisite training activity.
Open and Mitigating	07/29/25		Role Mapping Staffing/Resource Availability User Acceptance Testing	SMEs and UAT	Increasing	4 (Medium/Medium)	SMEs have limited availability or unclear responsibilities for test participation.	Mitigate: Establish SME commitment calendar with sponsor oversight.	Insufficient test coverage and validation of configurations.	Engaged SMEs in UAT user story and test case creation.
Open and Monitoring	07/29/25		Staffing/Resource Availability Training User Acceptance Testing	Overlapping UAT and Training Development	Increasing	4 (Medium/Medium)	Critical path activities such as SME testing and internal training design are scheduled simultaneously.	Monitor. Separate workstreams with distinct leads and buffer schedules.	Reduced availability of key resources and delays in readiness activities.	Emphasizing prerequisite training as independent task to UAT itself.
Open and Mitigating	07/29/25		Conversion/Configuration	Data Integrity Issues During FLAIR-to-PALM Conversion	Increasing	4 (Medium/Medium)	Data extracted from the legacy FLAIR system may be incomplete, inconsistent, or poorly structured, posing conversion challenges.	Mitigate. Perform multiple test conversions and reconciliations; involve business SMEs to verify data mapping accuracy.	Financial records may be inaccurate, requiring extensive reconciliation and delaying go-live.	Data cleansing activities on-going.
Open and Mitigating	11/22/24		Agency Business System Interface Training User Acceptance Testing	The project is leans on one or two key people who possesses the primary knowledge of the business applications. If these individuals become unavailable (due to illness, departure, or other reasons), there is a risk of project delays, errors, and reduced efficiency in resolving technical or operational challenges.	Stable	3 (High/Low)	Matt has extensive knowledge of the Comptroller's business applications. The staff that backs Matt up knowledge of the applications are limited and would cause delays if the Matt becomes unavailable.	Mitigate: 1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members. 2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible. 3.) Cross-Training: Train other team members to create redundancies in expertise. 4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity. 5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise.  By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity.	-Delays in project timelines due to the lack of expertise available to address critical issues. -Reduced quality of deliverables due to incomplete understanding of business applications. -Increased operational and knowledge transfer costs if the individual exits or is unavailable. -Potential for project failure in critical phases where the knowledge is essential.	Working to distribute business activities related to PALM.
Open and Mitigating	01/07/25		Agency Business System Business Process Change Interface User Acceptance Testing	ABS Applications (FLAGS, Deposit, Indirect Cost and PARS) risk being not ready for UAT and go-live due to insufficient remediation.	Stable	2 (Medium/Low)	DOE has encountered development delays resulting from moving interface file standards with the Project and lacked one developer for applications.	Monitor. Prioritize Applications: Assess and prioritize applications based on criticality and impact. Focus remediation efforts on the highest-risk applications first; Reallocate resources: Identify and allocate resources from less critical projects or consider temporary hires/contractors to bolster the team; implement phased rollout: Consider a phased rollout approach where non-critical features are delayed to allow for necessary remediation; Conduct regular progress reviews: Implement weekly check-ins to monitor remediation progress and adjust resources as needed.	Significant delays could occur	Engaged in routine meetings with development team.
Open and Mitigating	07/29/25		Business Process Change Training User Acceptance Testing	Moderate OCM efforts.	Stable	2 (Medium/Low)	Organizational Change Management efforts have been minimal, risking user adoption and SMF readiness	Mitigate. Accelerate internal OCM activities, engage leadership, deliver targeted messaging	Delayed adoption and lack of preparedness during implementation.	Assisted with OCM strategy and built end user survey.

Open and Mitigating	07/29/25		Interface Conversion/Configuration	ABS and interface compatibility with PALM	Stable	2 (Medium/Low)	Interfaces and legacy systems may fail to transmit or receive PALM-compatible data.	Mitigate. System integration testing, interface validation, early defect tracking.	Critical data failures during financial processing or reporting.	Completed first interface file (API002) testing meeting.
Open and Mitigating	07/15/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	PALM roles not yet aligned to agency job functions	Increasing	2 (Low/Medium)	Agency not yet focused on solidifying role-mapping effort.	Mitigate. Schedule role-mapping session and communicate responsibilities.	Users receive incorrect permissions, reducing efficiency or creating access issues.	Reviewed role mapping with department heads.
Open and Mitigating	07/29/25		Staffing/Resource Availability Training User Acceptance Testing	Competing Responsibilities for Key Roles During Testing	Increasing	2 (Low/Medium)	Key agency staff fulfilling Project Team roles (e.g., BAs, Liaisons, Workgroups) are also managing core business responsibilities, limiting availability for PALM testing and training.	Mitigate. Secure dedicated time allocations through resource management planning and escalate conflicts to Sponsor for prioritization.	UAT execution may be delayed or insufficient, leading to missed defects and rework.	Waiting for new UAT date announcement.

DOE Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	09/05/25		Interface	API002 Interface file transmittal from DOE to PALM not being received correctly by PALM Project.	Critical - Impacts the abil	A core requirement of ABS-PALM interface testing is the transmittal of ABS-generated interface file getting picked up from PALM server for processing. The agency has the responsibility to ensure file is placed in the correct folder on the PALM server and PALM Project the responsibility for correctly picking up that file.	DOE has initiated communication with PALM development team to seek resolution to API002 reaching the correct location and PALM picking up that file from the location.	09/19/25	Missing file at location issue identified on 9/4/2025.

DOE Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People	All staffing needs will be met to complete the project	Logged	03/03/25	Leadership	CML left agency and waiting new hire.
People	The PALM central project team will provide deadlines, templates, and support for key deliverables.	Logged	07/15/25	SMEs, Leadership, End Users	Engaged with RCs in level-setting meeting.
People Processes	Business process knowledge is fragmented but recoverable through interviews and document reviews.	Logged	07/15/25	SMEs, Leadership, End Users	Continuing to hold weekly meetings with key staff.
People	Current lack of OCM effort is due to oversight, not resistance.	Logged	07/15/25	SMEs, Leadership, End Users	PML is assisting with CML activities.
Processes Data	The division has access to or can obtain relevant FLAIR documentation and historical process flows.	Logged	07/15/25	SMEs, Leadership, End Users	BA and PML researching.
People Processes	End-user community is unaware of upcoming changes and will require structured, repeated communication.	Logged	07/15/25	SMEs, Leadership, End Users	Sharing information with SMEs and end users.
People Processes Technology Data	Data conversion from FLAIR will rely heavily on existing systems and internal technical SMEs.	Logged	07/15/25	SMEs, Leadership, End Users	Gathering information on where subject matter experts can help others.
People Processes Technology Data	UAT will require active participation from functional staff.	Logged	07/15/25	SMEs, Leadership, End Users	Waiting for new SME UAT start date.
People Processes	PALM stakeholders will respond positively to constructive engagement.	Logged	07/15/25	SMEs, Leadership, End Users	Engaging with stakeholders with eye on communication plan.

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

DOE Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	09/05/25
July - August 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	08/29/25
May - June 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	07/18/25
May - June 2025	Matt Kirkland	matt.kirkland@fldoe.org	07/15/25
March - April 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	05/12/25
January - February 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	03/12/25

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 97.57%

- Submitted On Time = 33
- Submitted Late = 4
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 89.19%

- Submitted Complete = 30
- Submitted Incomplete = 2
- Completed After Submission = 5

Other Task Completeness:

Score = 88.94%

- Submitted Complete = 40
- Submitted Incomplete = 3
- Completed After Submission = 4

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25	Marked as completed due to DOE not having any business systems interfacing with Florida PALM.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	50% - In Progress		SMEs working on documenting different testing scenarios and gathering data for test scenarios.		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25	Confirmed with TF that all users on smartsheets need access.	N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25	Confirmed with SAMs (TF and DR) that they had access to UAT SAM Portal.	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25	TJ submitted the bimonthly report.	Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/09/25	TJ submitted the bimonthly report.	Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25	Sent newsletter out to PALM distro list. Gave Agency leadership and update during the standing leadership meetings.	Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress		Waiting on confirmation from supervisors that role mapping is correct		
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress		SMEs working on fixing data errors		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		Confirmed with JN that suppliers were listed and confirmed with RW, RP, &FF for the agency supplier record.		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress		SMEs working on reviewing the data		
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress		SMEs working on reviewing the data		
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress		SMEs working on reviewing the data		
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/09/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

Agency Reported

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

DOEA Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	09/05/24		Conversion/Configuration	Data Clean Up	Decreasing	4 (Medium/Medium)	While cleaning up existing data, making sure new data entered meets PALM requirements for conversion.	Reviewing conversion inventory carefully to minimize post go-live clean up. Communicating new requirements to staff.	Inflated workload post go-live for Agency staff.	Completed partial data clean up however some data is still needed.

							conversion. This was Risk 4 from the archived Risk log.	requirements to staff. Also working with contracted staff to aid in the clean up of data.		
Open and Monitoring	09/10/23		Business Process Change	Streamlining Manual Processes	Stable	2 (Low/Medium)	Agency has been dependent on manual and/or outdated processes prior to data entry currently in FLAIR. This is replacing Risk 1 from the archived Risk log.	Having internal cross-functional meetings to reduce dependencies on manual/physical processes.	Minimal impact - more work for the training team and staff to learn in tandem with new system.	Currently implementing process changes to reduce reliance on manual/paper processes.

DOEA Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	
Open	01/16/24		Staffing/Resource Availability	Multiple Position Vacancies	Low - All impacts not liste	Have multiple vacancies leading to knowledge gaps and increased workload on existing staff	Activley filling positions, training new hires, and continuing to update desk procedures to make sure they are up to date.	06/30/26	Vacancies are being filled. Currently focusing on training the new hires.	

DOEA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

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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DOEA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Teresa Johnson	johnsont@elderaffairs.org	09/09/25
May - June 2025	Teresa Johnson	johnsont@elderaffairs.org	07/09/25
March - April 2025	Teresa Johnson	johnsont@elderaffairs.org	05/09/25
January - February 2025	Teresa Johnson	johnsont@elderaffairs.org	03/10/25

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[Knowledge Center](#)  
[Florida PALM Workbook for DOH](#)  
[Readiness Workplan](#)

# DOH Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Robert Herron

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 100%

Submitted On Time = 43

Submitted Late = 0

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 83.33%

Submitted Complete = 23

Submitted Incomplete = 2

Completed After Submission = 17

Other Task Timeliness:

Score = 96.49%

Submitted On Time = 73

Submitted Late = 4

Pending Submission = 0

Other Task Completeness:

Score = 88.22%

Submitted Complete = 32

Submitted Incomplete = 2

Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 16

Duplicate Filled Role = 0

Vacant Role = 0

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

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
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	Pending Resubmission	06/14/24	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Interface files have updates based on questions or corrections asked to the PALM team, thus interface file is not finalized. 2) Some questions asked about the interfaces from Segment I for remediation are crucial and many technical decisions are made based on the answers provided by PALM 3) Part of remediation and data dependencies are contingent on Segment IV and recap in October	Submission Incomplete	04/25/25
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress	04/25/25	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies are contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 9/27 now 10/4		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress	04/25/25	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 12/13 (Task end date)		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress	04/25/25	"Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. Technical team is now deciphering information and meeting with ABS systems to give this information.		

								3) Coding to reflect and make changes has started but will not complete by 03/14 (Task end date)*		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/07/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/07/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/07/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/16/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/04/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

## Agency Reported

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

DOH Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Stable	9 (High/High)	N/A	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	DOH will have to continue working on remediation with the information they have.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Business Process Change	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Stable	9 (High/High)	N/A	DOH will wait for the Organization codes to be set up by DFS	This will delay things for DOH	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Training User Acceptance Testing	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Increasing	9 (High/High)	N/A	DOH resources will attend the in-person trainings	DOH will have to have expedite the testing and training.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Business Process Change	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting	Increasing	9 (High/High)	N/A	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability. DOH resources are also reviewing current Grants reports start to end again.	DOH will have to continue working on remediation with the information they have.	DOH has reviewed the risk.

				within PALM.						
Open and Monitoring	04/22/25		Business Process Change	PALM eliminating the IBI field for DOH	Stable	9 (High/High)	N/A	DOH is working on a work-around to address this issue.	DOH will have to continue working on remediation with the information they have.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Post Implementation	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Stable	9 (High/High)	N/A	DOH will await the changes in policies and procedures	DOH will have to prepare for possible delays.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Business Process Change	"Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in May - June 2026 when PRP is to process in July 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between May-June 2026 when we go to PALM July 2026? • If only the balances are rolling over to PALM, then what about the voucher details? This is specific for Payroll Reallocation, but this will be true for all Vouchers."	Stable	9 (High/High)	N/A	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	DOH will have to continue working on remediation with the information they have.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Business Process Change	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management System (STMS), our trips were sampled for	Stable	9 (High/High)	N/A	DOH will await the changes in policies and procedures	DOH will be prepared for delays.	DOH has reviewed the risk.

				audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and a struggle to learn a new system and deal with the influx in sampled trips being returned.						
Open and Monitoring	04/22/25		Interface Deployment/Cutover	Missing or Incomplete information - Clear understanding and instructions from the Project team to the agency to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.	Stable	9 (High/High)	N/A	DOH is in constant touch with the Readiness Coordinator to understand / clarify instructions	DOH PM will be in touch with the PALM Project Readiness Coordinator	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Deployment/Cutover	PALM Go-Live planned during hurricane season	Increasing	9 (High/High)	N/A	This may cause possible delays to Go-Live	Possible delays in Go-Live activities	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Interface Conversion/Configuration	DOH PALM ABS are required to create test data (Agency Business Systems need more than the 5 rows of data provided by PALM), we could miss scenarios during testing. The sample data provided in the interface files is not accurate.	Increasing	9 (High/High)	N/A	DOH is converting a couple of months of old data	DOH technical team is working with Terri Mulkey to create data for testing	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Staffing/Resource Availability	Go-Live is planned at Year End, this will not give enough time for DOH staff to complete Year end activities, PALM Testing, and completing various activities for Go-Live.	Increasing	9 (High/High)	DOH staff works almost fulltime on Yearend closing activities in May, June and July.	DOH SMEs will struggle to make time for year-end activities as well as PALM testing and various Go-Live tasks.	DOH will struggle to Go-Live with Year end activities	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Training User Acceptance Testing	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Increasing	6 (High/Medium)	N/A	DOH is working on creating Foundational trainings and involved in UAT Pre-requisite meetings with DFS team.	DOH will have to have expedite training.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Training	The training timeframe	Stable	6 (High/Medium)	N/A	DOH training team is currently working on	DOH will have to have expedite training.	DOH has reviewed the risk.

				given that not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either.				means to create a CAP plan to manage trainings for all PALM users.		
Open and Monitoring	04/07/25		Business Process Change Training User Acceptance Testing	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Increasing	3 (High/Low)	N/A	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in August 2025. Upon delivery of this we will remove the risk.	DOH will have to have expedite the testing and training.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Agency Business System	Awaiting confirmation and finalized configurations, conversions, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Stable	3 (High/Low)	N/A	We are creating DOH's FDW	DOH will have to continue working on remediation.	DOH has reviewed the risk.
Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Decreasing	3 (High/Low)	N/A	DOH is reading all the available information on knowledge center to understand Payroll changes.	DOH will have to continue working on remediation with the information they have.	DOH has reviewed the risk.

DOH Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/01/25		Training	Changes to PALM website, PALM tasks, and the Interface files: Our agency is taking a lot of effort to educate and train technical and non-technical staff. Constant changes disrupts processes and it takes time to find the same information and retrain staff. For e.g., DOH staff got used to receiving emails for Interface and Report updates, now we have 2 or 3 resources who will check the Change Log every so often	High - Impacts the ability	DOH staff got used to receiving emails for Interface and Report updates, now we have 2 or 3 resources who will check the Change Log every so often	Resources will check PALM site and Change Log every week	06/30/26	DOH has reviewed the issue

DOH Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	05/01/25	DOH Finance and Accounting	DOH has reviewed the assumption
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	05/01/25	DOH PALM Project team	DOH has reviewed the assumption
People Processes Technology Data	Enterprise entities like AG/IG's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period	Logged	05/01/25	DOH Finance and Accounting	DOH has reviewed the assumption

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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DOH Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Robert Herron	robert.herron@flhealth.gov	09/04/25
May - June 2025	Robert Herron	robert.herron@flhealth.gov	07/07/25
March - April 2025	Robert Herron	robert.herron@flhealth.gov	05/02/25
January - February 2025	Robert Herron	robert.herron@flhealth.gov	03/06/25

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# DOL Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Becky Ajhar

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 99.25%

Submitted On Time = 38

Submitted Late = 2

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 93.33%

Submitted Complete = 32

Submitted Incomplete = 1

Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 4

Duplicate Filled Role = 9

Vacant Role = 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
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		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. We anticipate finalizing the updated documentation within 3 weeks.  5/29 - Documentation for business processes reviewed and completed. Areas which require remediation have been identified and currently being updated by Finance Department. ETC unknown. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		12/2024 - Will not submit until UAT		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	Pending Resubmission	07/22/25		Submission Incomplete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	50% - In Progress				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/21/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/09/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End	07/14/25	10/03/25					

			Users.							
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/27/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/27/25			
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25					
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

### Agency Reported

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

DOL Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	05/26/25		Staffing/Resource Availability Training User Acceptance Testing	Fiscal year-end agency audits will overlap with Florida PALM go-live	Stable	9 (High/High)	New go-live date will conflict with the audit schedule and may impact go-live and UAT.	Lottery will develop a mitigation and communication plan to ensure successful end of year close-out activities and go-live transition.	There may be resource constraints which may result in delays.	Risk is currently being tracked and continuously assessed for impacts to project. No change in status.
Open and Mitigating	06/02/25		Agency Business System Business Process Change Staffing/Resource Availability	Delay in monthly transfer to the EETF. This occurs on the 20th of each month.	Increasing	9 (High/High)	A&A will schedule the close each month. It has been suggested that close will take place after interest has been received each month. Currently, interest is not available until after the 20th which will put us behind in our monthly transfers.	Discuss with Florida PALM closer to go-live to develop resolution.	DOE will not receive monthly transfer.	Risk is currently being tracked and continuously assessed for impacts to project. No change in status.
Open and Monitoring	05/01/24		Agency Business System Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	The new Claims and Payment System (CAPS) may delay training efforts in Florida PALM	Stable	4 (Medium/Medium)	The implementation of Lottery's new Claim and Payment System (CAPS) is tentatively scheduled to go-live during FY 26-27. The implementation may impact Florida PALM training activities. The new CAPS will be replacing the current system known as Fortune.	Lottery will develop a proactive strategy for the upcoming launch of the new CAPS; will focus on early communication, training for Florida PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	There may be resource constraints which may result in scheduling delays and project slippage.	Risk is currently being tracked and continuously assessed for impacts to project. No change in status.

DOL Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	

DOL Assumptions										
Critical Operational Elements	Assumption				Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025		

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

DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Rebecca Ajhar	ajharb@flalottery.com	09/05/25
May - June 2025	Rebecca Ajhar	ajharb@flalottery.com	07/08/25
March - April 2025	Rebecca Ajhar	ajharb@flalottery.com	05/07/25
January - February 2025	Rebecca Ajhar	ajharb@flalottery.com	03/07/25

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[Readiness Workplan](#)

# DOR Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Clark Rogers

RW Task Timeliness

Direct Impact Task Timeliness




**Direct Impact Task Timeliness:**

Score = 94.63%

- Submitted On Time = 32
- Submitted Late = 9
- Pending Submission = 0

Other Task Timeliness




**Other Task Timeliness:**

Score = 91.82%

- Submitted On Time = 65
- Submitted Late = 12
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness




**Direct Task Completeness:**

Score = 88.25%

- Submitted Complete = 27
- Submitted Incomplete = 2
- Completed After Submission = 11

Other Task Completeness



**Other Task Completeness:**

Score = 84.49%

- Submitted Complete = 34
- Submitted Incomplete = 0
- Completed After Submission = 15

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

**Change Champion Network:**

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

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/11/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	100% - Submitted	09/10/25			

## Agency Reported

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

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DOR Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	06/28/24		User Acceptance Testing	DOR - PALM and ABS UAT	Stable	2 (Medium/Low)	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment. Originally filed by Shannon Segers	Unable to mitigate at agency level; must be mitigated by the enterprise.	Work with SMEs, PALM Projects and DOR remediation Teams	Continue Monitoring
Open and Monitoring	12/04/24		Post Implementation Training	PALM Reporting and Datawarehouse	Stable	2 (Medium/Low)	With Agency Reporting Systems like RABIT and FICAS retiring away, DOR will solely rely on PALM Reports and the proposed PALM Datawarehouse for all its reporting needs. Until the PALM Data warehouse is available, DOR is not sure whether it can meet its reporting needs. PALM Datawarehouse is proposed to be available in June 2025.	Unable to mitigate at agency level; must be mitigated by the enterprise.	With no other ABS planned for RABBIT and reporting systems, DOR will explore datawarehouse capability for tis reporting needs	Continue Monitoring
Open and Monitoring	10/17/23		Staffing/Resource Availability	GTA - EFile and Pay	Decreasing	1 (Low/Low)	The GTA E-services project may be conducted at the same time agency business system remediation is conducted. Originally filed by Business Technology Office	Staff augmentation resources to support Florida PALM activities.	Need to ensure PALM resources are not diverted to EFile & Pay until SUNTAX remediation is completed.	Continue Monitoring

DOR Issues									
Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	

DOR Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Data	New chart of account data from the configuration workbooks will be loaded by the Florida PALM Project Team into all enterprise business systems.	Logged	03/08/24	All agencies, all agency business systems.	We will verify the information during UAT
Data	People First data will be cleansed and updated chart of accounts data will be available in a test environment for UAT.	Logged	04/12/24	All agencies, all business systems that use People First data.	We will verify the information during UAT
Processes Data	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	Logged	06/28/24	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	We will verify the information during UAT

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

DOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	09/10/25
May - June 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	07/10/25
March - April 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	05/09/25
January - February 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	03/05/25

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DOS Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Antonio Murphy

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.21%

Submitted On Time = 36

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:


Score = 82.89%

Submitted On Time = 48

Submitted Late = 27

Pending Submission = 0

Direct Impact Task Completeness



Direct Task Completeness:


Score = 80.00%

Submitted Complete = 20

Submitted Incomplete = 3

Completed After Submission = 15

Other Task Completeness



Other Task Completeness:

Score = 85.11%

Submitted Complete = 37

Submitted Incomplete = 2

Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 2

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/11/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/11/25	RC updated; status should not be reflected as pending resubmission b/c Task is closed.	Task Closed - Submission Incomplete	09/03/25
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 - APC001 Suppliers	08/11/25	10/03/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

DOS Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025

DOS Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	

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DOS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

Agency Sponsor Confirmation

The form you are attempting to access is no longer active.

[Smartsheet.com](#)

DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	09/10/25
May - June 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	07/11/25
March - April 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	05/09/25
January - February 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	03/07/25

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# DVA Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

AI Carter

RW Task Timeliness

Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**


Score = 94.63%

Submitted On Time = 38

Submitted Late = 3

Pending Submission = 0

Other Task Timeliness



**Other Task Timeliness:**

Score = 80.79%


Submitted On Time = 52

Submitted Late = 24

Pending Submission = 1

RW Task Completeness

Direct Impact Task Completeness



**Direct Task Completeness:**


Score = 90.25%

Submitted Complete = 30

Submitted Incomplete = 2

Completed After Submission = 8

Other Task Completeness



**Other Task Completeness:**

Score = 82.50%

Submitted Complete = 34

Submitted Incomplete = 5

Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

**Change Champion Network:**

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

Unique Filled Role = 6

Duplicate Filled Role = 13

Vacant Role = 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
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	06/28/24	1/16/2025: task remains incomplete. Address items noted in verification form for completion. -dlt ETA by July 2024 - RFQ in process RC comment: as of 8/20, task remains incomplete via review with E. RiceMorgan. Anticipate completion by end of December 2024. VACO Analyst Jose Gutierrez working through Business processes.	Submission Incomplete	01/15/25
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	07/12/24	Remains incomplete. 1. Mark None where spreadsheet uploads are not identified. 2. Complete process documentation updates for Segments I, II, and III. -dlt, 11/6/2024	Submission Incomplete	09/19/24
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	04/08/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/30/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25	Agency continues to keep leadership informed of progress. We do not have many stakeholders that will have a direct impact/play with Florida PALM.	Submission Complete	07/24/25
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering		Looking to bring new vendor on board August 1. Then will incorporate them into the process of working training matters. End User Role mapping is nearly complete.		
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/19/25	DVA does not have any confidential Supplier records.		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25		
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25				

## Agency Reported

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

DVA Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	05/14/25		Staffing/Resource Availability	Staffing shortfalls	Increasing	6 (Medium/High)	FDVA has one person performing most functions and must keep PALM tasks on track while simultaneously performing day-to-day required tasks. Also, staff turnover is an issue as some of these personnel are retiring or terminating employment due to increased workload. Additionally, major cyclic operations and events like year-end closeout and hurricane season becomes priority for these singularly manned positions.	Working to hire a new vendor/consultant to assist with key tasks as the current vendor was terminated for work performance.	Tasks will not be accomplished in a timely manner, if at all.	Vendor on board as of 10 September 2025. This vendor, who provided two analyst/consultants, should relieve some pressure from the Agency on policy development and training and allow us to more efficiently meet our goals and timelines.
Open and Monitoring	05/14/25		Staffing/Resource Availability	Contracting and Procurement Funding	Stable	6 (High/Medium)	Our Agency is unique and may require contractor support to meet implementation requirements and ensure our processes and procedures align to meet State, federal and local requirements, and that it supports the transition of staff. It could impact the Agencies ability to meet deliverables. Processes that don't align with PALM will have to be retooled to do so. Technology expertise may not be resident to perform retooling requirements.	Requesting that current funding be reverted and reallocated to support getting the contractual support needed.	PALM and Agency required processes won't synchronize leading to the Agency having to do manual processes.	Vendor started today (10 September 2025) so it is too early to determine the impact of the support they will be able to provide when it comes to transition and meeting deliverables. We are hopeful they will be able to assist with aligning our existing processes with PALM and developing our training to crosswalk between the two processes.
Open and Monitoring	05/14/25		Staffing/Resource Availability	Technology - IT Staffing	Stable	4 (Medium/Medium)	Existing IT Staffing has limited knowledge of PALM system and will take time to get trained up, especially given their existing Agency requirements. Agency requested additional personnel through the LBR process but positions to date, have not been approved.	Agency requested additional IT personnel through the LBR process, but these positions were not approved by the legislature. The next legislative session is another year away and the PALM implementation will have begun	Agency will not be able to meet IT requirements timely, if at all, if IT personnel can't support.	Agency is in the process or hiring additional IT Staff which should free existing staff to assist with PALM Information Technology requirements as they pop up.
Open and Monitoring	05/14/25		Interface	FDVA FLAIR and PALM Data Interface	Decreasing	4 (Medium/Medium)	FLAIR and Florida PALM data will be different in its input and likely representation, which may cause challenges when performing data analysis as well as input errors.	Staff will incur extra time and productivity lag in trying to learn, crosswalk and translate data outputs. Hopefully training and SOPs will minimize this issue. SOP being developed and revised, and training plan in place to mitigate this issue.	Data errors or data lag in inputting data.	Still think this will be a time intensive undertaking. A lot of staff have or are in the process of transitioning to retirement or other jobs. Will take time to bring the new and some existing employees up to speed on the PALM platform.

DVA Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	04/22/25		Staffing/Resource Availability	Human Resources Shortfall	Low - All impacts not listed	VACO Consultants were hired to assist Agency with PALM Transition 9 months ago, but had to fire them due to performance issues on 15 April 2025.	Secure a new contractor from State Term Contract listing and bring them onboard NLT 15 May 2025. A new vendor contract is being worked and we anticipate the new contractor being on board on 1 August 2025.	08/01/25	Contractor "Katydid" started today (10 September 2025). Agency is hopeful that the two analyst will be able to support our needs in both administration, operations, and training.

DVA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology Data	Funding will be approved/provided by the Florida Legislature to secure personnel or contract vendors to support the Agencies full PALM Transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation/all connected Agency process converted to PALM.	Funding received from legislature to procure contract support personnel to assist with PALM. Vendor started on 10 September 2025.
People Processes Technology Data	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	05/14/25	FDVA PALM required processes (Admin, Fiscal, and Finance and Accounting functions)	Contractor began on 10 September 2025. Being integrated into the Agency and its processes.

People	FDVA Executive Leadership, including project Sponsor, will support the project by providing resources, access to systems and by supporting the organizational change management strategy created by the project development team.	Logged	09/18/23	Agency Administrative functions (Fiscal and Finance & Accounting)	Receiving support from State PALM Coordinators and have access to workshops, training, and task talks on upcoming requirements/tasks.
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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 \*

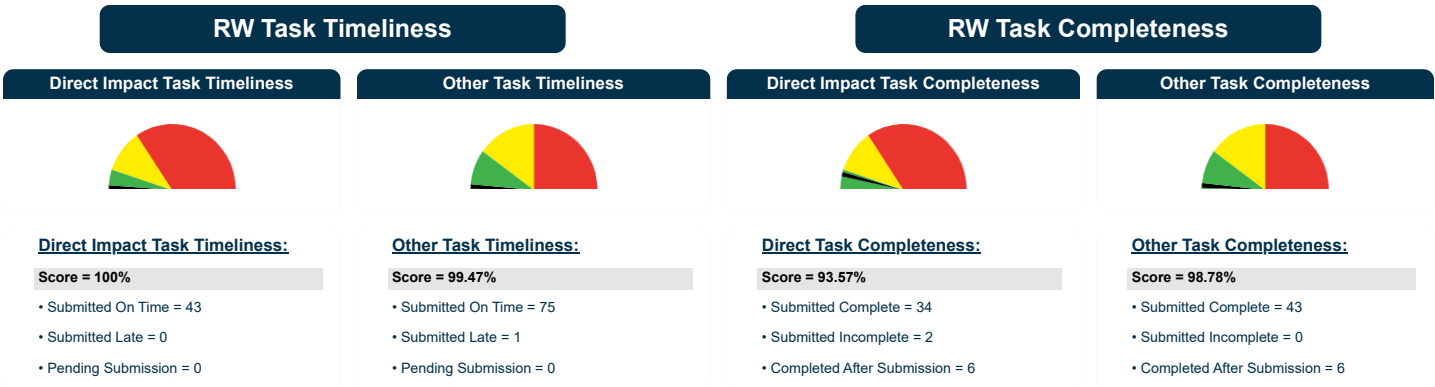
Submit

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DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	09/10/25
May - June 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	07/01/25
March - April 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	05/12/25
January - February 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	03/07/25



## Agency Reported

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

### EOG Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	10/31/23		Deployment/Cutover Staffing/Resource Availability	Limited Staff	Stable	9 (High/High)	The EOG has limited staff and technical/training resources.	EOG will monitor transactions and will use UAT for training. It should be noted that on boarding temporary additional staff may not be the most effective method to handle additional workload, as the same individuals that are participating in UAT, training, and FLAIR work are also the same individuals that would be training onboarded new staff. Onboarding temporary new staff may place a greater work strain on current staff than none at all. EOG will monitor workload and with PALM's training assistance, determine what additional resources may be necessary.	Efficiency and accuracy of transactions will be hindered.	No change.
Open and Monitoring	02/17/25		Post Implementation Staffing/Resource Availability Training	Limited Staff - Timing	Stable	9 (High/High)	There are/will be many competing priorities for staff working on this project. Staff on the project serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work. Some of the FL PALM tasks coincide with some of the busiest times for financial/budget/accounting agency resources. The July - October timeframe is the busiest of the fiscal year with most duties falling to a very limited number of individuals. November, 2026- early 2027 is an elected official transition period. This timeframe affects the workload of all Administrative Services (PALM end user) staff.	The EOG will monitor staff workload, and will utilize UAT as a training period.	Efficiency, pace, and timeliness of transactions will be hindered.	No change.
Open and Mitigating	12/31/24		Business Process Change Post Implementation	DEM - Separation General	Stable	9 (High/High)	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries. It was determined that many of the solutions initially discussed will not be able to be effectively implemented. We will continue to monitor and meet with the PALM team as the final design takes shape to determine the best methodologies for the differentiation of data. System configuration will be tested during UAT to determine what will be policy or procedure driven changes vs. what will require additional PALM knowledge or staff resources.	Incorrect, inaccurate reporting; combined transactions and payments that will have to be re-vouchered; incorrect personnel inputting or approving transactions not related to the correct individual's roles/responsibilities	No change.
Open and Monitoring	08/23/24		Business Process Change Post Implementation	DEM - Separation InterUnit Transactions	Stable	6 (Medium/High)	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outlined in Risk Line 007 relates to payment management. In reviewing Segment IV -Inter-Unit transactions, we noted that all receiving transactions may be rolled together with no ability to discern 'ownership' of the transaction since only OLO/Business Unit is required. Sent suggestions to the PALM team requesting additional fields be mandatory. Also	The EOG has reported the issue and made suggestions to FL PALM as potential solutions. EOG will document errors (should they occur) to the project during UAT.	Incorrect transfers will be incorrectly approved or will not be approved, since staff will not know to whom the transfer belongs.	No change.

							requested that search menus be available on each workcenter screen to filter out unneeded transactions to only those relevant to DEM or EOG.			
Open and Mitigating	06/06/24		Training	Nomenclature	Stable	6 (Medium/High)	Nomenclature is changing in from FLAIR terms to PALM terms. Some fields in PALM are named the same as in FLAIR but with different meanings/uses. Examples are category, asset location, etc. This will primarily be a training challenge; however, there exists the risk that procedures, guidelines, data, queries, etc will be misinterpreted or not updated properly.	The EOG will work to highlight terminology/naming differences and provide documents to mitigate risk of confusion. Users are participating in prerequisite overview training.	Incorrect fields or incomplete transactions posted due to misinterpretation.	No change.
Open and Monitoring	10/31/23		Business Process Change Role Mapping Staffing/Resource Availability	Limited Staff - Roles and Workflow	Stable	6 (High/Medium)	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There are not enough appropriate staff available to assign unique backup processors and approvers.	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals. DFS policies will most likely still require the spreadsheet upload to be reviewed and approved prior to upload. While this may mitigate some risks, the transactions will still bottleneck to one or two employees knowledgeable in the specific transactions.	Efficiency, pace, and timeliness of transactions will be hindered.	No change.
Open and Mitigating	06/06/24		Business Process Change Post Implementation	DEM - Separation Warrant Management	Stable	6 (High/Medium)	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Risk Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant.	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use. We will review reports during early phases of UAT to seek a solution, since end to end UAT will not be available during the early testing periods.	If warrants combine, the entire warrant will need to be deleted and invoices re-vouchers. This is an efficiency and effectiveness issue that will need to be addressed.	No change.
Open and Monitoring	10/31/23		Business Process Change Staffing/Resource Availability Training	Limited Staff - Processing Changes	Stable	2 (Medium/Low)	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	The EOG will monitor staff workload and will utilized UAT as a training period for all staff. EOG will monitor reports and instructional/policy documents provided by the Department of Financial Services and the FL PALM team.	Inaccurate or incomplete data/reports may result (depending on the requirement).	No change.
Open and Monitoring	10/31/23		Post Implementation Training User Acceptance Testing	Statewide System Revisions/	Stable	2 (Medium/Low)	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in UAT and early implementation transaction processing.	EOG will monitor all tasks and attempt to report issues to all relevant parties.	Transactions will be incorrectly processed (or not processed timely) - inefficiencies in issue resolution.	No change.
Open and Monitoring	10/31/23		Business Process Change Training	Attachments	Stable	1 (Low/Low)	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will	Incorrect/improper record keeping of documentation.	No change.

								be attached or redacted prior to attaching in FL PALM.	ensure that all staff attend training and have access to PALM resources when appropriate.		
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EOG Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	

EOG Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025	
People Processes Technology Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	04/18/25	Administrative Services	No change. We are aware of UAT process and prerequisite overview trainings.	
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	04/18/25	Administrative Services	No change. We are aware of user roles and will test during UAT.	
People Processes Technology Data	EOG assumes that ALL transactions and functions will be available for User Acceptance Testing to allow for full learning opportunities will prior to system go-live.	Logged	04/18/25	Administrative Services	No change. We are aware of the UAT functions that will be available to test.	

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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EOG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/04/25
May - June 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	07/17/25
May - June 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	07/08/25
March - April 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	05/07/25
January - February 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/04/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for FCOR](#)  
[Readiness Workplan](#)

# FCOR Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Ryan Schenck

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.46%

Submitted On Time = 35

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 95.84%


Submitted On Time = 71

Submitted Late = 6

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 99.17%

Submitted Complete = 32

Submitted Incomplete = 0

Completed After Submission = 4

Other Task Completeness



Other Task Completeness:

Score = 97.96%

Submitted Complete = 48

Submitted Incomplete = 0

Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/26/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	07/18/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/14/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/26/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/19/25			
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/05/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

## Agency Reported

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

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FCOR Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	06/25/25		Deployment/Cutover	Several readiness deliverables for agencies have been removed from the Florida PALM Program plan.	Increasing	6 (Medium/High)	Newly added, on 6/25/2025	Risk Management Strategy: Mitigate  1. Analysis of the removed readiness workplan tasks which are still applicable to the agencies. 2. Agencies to add the applicable deliverables as part of agency specific activities. 3. Continue to progress these agency specific deliverables and ongoing monitoring.  Target Closure Date: 11/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Agency specific plan has been updated for People, Technology readiness areas. The team started working on these deliverables.
Open and Monitoring	12/04/24		User Acceptance Testing	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.	Increasing	6 (High/Medium)	Archived Risk Id: 014/011	Risk Mitigation Strategy: Reduction  1. Prepare the UAT testing team thoroughly, w.r.to Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.  Target Closure Date: 12/31/2025	Fail to achieve the mandatory success measure of User Acceptance Testing for PALM Go-Live.	7/21/2025: The schedule for individual UAT-Online sessions was published in the July Advisory Council (7/16), including detailed sessions for August. Information for future months is yet to be published. Delays in sharing 'Project Recommended UAT scenario' and new directions have created challenges for agencies in UAT planning. Additionally, shorter durations for Configuration and Conversion updates led to mid-way baselining. FDC/FCOR need to analyze the information and continue assessing the agency readiness status.  8/20/2025: Agency SMEs continued with the preparation activities, including the UAT pre-requisite trainings and UAT Test cases. However State PALM ESC took a decision not to start the UAT-Online in August/2025 due to the project not meeting the exit criteria for Stage Gate 3; the State PALM yet to publish the revised schedule for UAT-Online. Agency plan for Cycle-2 Interface testing could get impacted due to unavailability of Outbound interface files in-time from State PALM team.  9/3/2025: on August 27th, PALM ESC could not take decision on the start of UAT-Online. Agency to assess the revised program plan once published, to understand cascading impact to the agency readiness.
Open and Mitigating	12/04/24		Business Process Change	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Stable	6 (High/Medium)	Archived Risk Id: 015/012	Risk Mitigation Strategy: Mitigate  Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation  Target Closure Date: 12/30/2025	Fail to achieve the mandatory success measure Business Process readiness for PALM Go-Live.	8/22/2025: Process gap to be finalized based on SMEs attending the individual sessions in UAT-Online. Since UAT has been postponed, this date needed to be extended.
Open and Mitigating	12/04/24		Staffing/Resource Availability	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Decreasing	6 (High/Medium)	Archived Risk Id: 010/007	Risk Management Strategy: Mitigate  1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Identified lower than expected productivity of the agency QA resources, therefore initiated hiring of replacement.

								activities to ensure readiness for E2E interface testing/ UAT  Target Closure Date: 10/30/2025		
Open and Mitigating	12/04/24		Staffing/Resource Availability	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Increasing	6 (High/Medium)	Archived Risk Id: 017/ 014	Risk Mitigation Strategy: Mitigate  1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.  Target Closure Date: 5/31/2026	Fail to achieve the mandatory success measure User Acceptance Testing, User training and People readiness for PALM Go-Live.	7/21/2025: Agency continues to balance the year end F&A closure activities with the critical priority, complex deliverables with shorter turnaround time, which is affecting the agency's ability to complete the data cleansing fully.  8/20/2025: SMEs are currently working on several data cleansing and configuration activities along with preparation for UAT-Online, in parallel to their day to day work. These conflicting priorities are affecting agency's ability to ensure on-time completion of readiness activities.
Open and Mitigating	12/04/24		Agency Business System	Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) could be challenging as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from FL PALM.	Increasing	6 (High/Medium)	Archived Risk Id: 018	Risk Mitigation Strategy: Mitigate  1. Vendor to refer FL PALM knowledge center to plan & design the system remediation. 2. Vendor to perform unit testing with the information provided by the FL PALM team. 3. FL PALM Team to make sizable and reliable testing data available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing)  Target Closure Date: 11/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/21/2025: Continue discussions with the 3rd party product vendor for the AxiomPro system to bring schedule alignment with the PALM Technical Interface Test schedule.  8/20/2025: Received approval from State PALM team to leverage contingency period (November/2025) for Cycle-2 Testing for Axiom Pro. Additionally, ongoing monitoring has been put in place to review the progress of the remediation efforts for this 3rd party managed agency system.  9/3/2025: Technical Interface Testing of Bar Code Scanning tool is blocked, as the testing has hard dependency on the relevant Outbound Interface file (AMI004).
Open and Mitigating	06/25/25		Deployment/Cutover	Lack of clear guidelines from the Florida PALM Program on preparing for Cutover activities and setting up Operations support for the agencies.	Increasing	6 (High/Medium)	Newly added, on 6/25/2025	Risk Management Strategy: Mitigate  1. Identify the agency specific cutover activities for the agency systems and readiness activities to prepare for operations support. 2. Add the agency specific cutover activities and operations support preparation to agency plan. 3. Continue to progress on the agency specific plan and ongoing monitoring  Target Closure Date: 11/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/7/2025: The Agency specific plan is being updated. Next step is to brainstorm on the agency specific cutover planning and readiness for operations support.
Open and Monitoring	08/20/25		Staffing/Resource Availability	Reduced budget allocation for fiscal year 2025-26 could lead to impediments to the planned readiness activities for the agency PALM efforts and agency systems remediation.	Increasing	6 (High/Medium)	Newly added, on 8/20/25	Risk Management Strategy : Avoid.  1. Identify the fixed vs variable part of the spend plan. 2. Prepare strong basis for the estimation for the variable cost, with credible assumptions and experts' assessments. 3. Manage the spend plan regularly, aligning the available budget against the prioritized project needs.  Target Closure Date: 6/30/2026.	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Current spend plan does not have any contingency to cover large unforeseen cost. Estimation for PowerBI tool is based on the shared licenses in FDC OIT, team is assessing the available capacity to support FDC agency reporting needs.
Open and Mitigating	12/04/24		Training	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Decreasing	4 (Medium/Medium)	Archived Risk Id: 013/ 010	Risk Management Strategy: Reduction  Action: Develop and Launch to PALM Superusers the pre] PALM 4-Part training series. Training 1.1: Orientation to PALM Business Process Groups. Training 1.2: Orientation to PALM Modules. Training 1.3: Orientation to PALM Business Process Models.	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/21/2025: Test data for UAT should be prepared during the 'Preparation' phase, using the format provided in PALM demos and pre-materials. Recent information sharing from PALM revealed that there are 'mandatory' pre-requisite training to be completed by all participants of UAT-Online. FDC/FCOR need to analyze the information and continue

								Training 1.4: Orientation to PALM Roles & Workflows.  Target Closure Date:12/31/2025		assessing the agency readiness status.  8/20/2025: preJPALM training series has been replaced by, 1. UAT Prerequisite Learning Paths via the PeopleFirst Learning Management System. 2. Wisdom Wednesday- Pause for PALM Knowledge Check Series. PALM state team has provided UAT testers access to online prerequisite trainings for UAT. Comprehensively, these trainings for, learning paths that will prepare end users for upcoming spring training by permitting early exposure to content.
Open and Monitoring	12/04/24		Role Mapping	Insufficient information on access security model and planning of changes to current user roles/responsibilities may impact agency user readiness/ adoption.	Stable	4 (Medium/Medium)	Archived Risk Id: 016/ 013	Risk Mitigation Strategy: Mitigate  1. Read & understand the access security model and role definition, published by FL PALM. 2. Map the current business teams to the appropriate user role. 3. Identify the users for whom role/ responsibility are changed. 4. Provide required support to the users to adapt to their changed role.  Target Closure Date: 10/31/2025	Fail to achieve the mandatory success measure User Acceptance Testing and Go-Live Readiness for PALM Go-Live.	7/21/2025: Role assignment knowledge articles were published in mid-May, and the SME role assignment deliverable was due in mid-June. With the shorter turnaround time, the agency assigned SME roles have been assigned to the best of their knowledge, and any gaps may be identified during the UAT-Online sessions.  8/20/2025: Agency started the user role mapping for remaining UAT testers beyond the SMEs (RWP - 573-B).
Open and Mitigating	12/04/24		Agency Business System	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/ historical data.	Stable	3 (High/Low)	Archived Risk Id: 012/ 009	Risk Management Strategy : Mitigate  1. Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components. 2. Archive BARS reporting solution, as the reporting tool for the legacy (FLAIR) information.  Target Closure Date: 8/31/2026	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Setting up of BARS archival is planned around the PALM go-live, whereas preparation for this shall begin a few months prior to the go-live.

FCOR Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	
Open	01/30/25		Agency Business System	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	Critical - Impacts the abil	Archived Issue Id: 007/ 006	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	11/30/25	8/19/2025: Agency systems remediation activities on-track to start the Cycle-2 Testing (Technical Interface Testing) in August/2025. State PALM team continued to generate and share sample Outbound interface files, leading agency to be able to partially start the Cycle-2 Testing.  9/3/2025: State PALM team published sample files for 9 out of 22 Outbound interfaces that are required for Technical Interface Testing of the agency. Team started the testing with the available sample files.	
Open	03/25/25		Agency Business System	Continued changes to the interface specifications by FL PALM due to ongoing system development, may require FDC PALM project team to rework on the solution for agency systems remediation, which could lead to agencies missing the interface testing milestone.	Critical - Impacts the abil	Archived Issue Id: 008/ 007	Team to work on minimizing the impact due to this issue. 1. Develop a scalable solution design with system level flexibility built-in. 2. Collaborate closely with the FL PALM interface team, and ensure the FDC PALM team is updated with the recent/ upcoming changes to the interface file structures. 3. Resolve the gaps in the agency system remediation solution. 4. Escalate in case the changes to interfaces are not feasible to be mitigated.	12/31/25	8/19/2025: State PALM team yet to conclude the Interface Development and Testing activities, therefore we find continued changes to the Interface specifications, which is leading to rework at agency and impacting agency system remediation.	
Open	02/28/24		Interface	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time	High - Impacts the ability	Archived Issue Id: 004/ 003	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on	07/01/26	7/21/2025: Delayed sharing of 'Project Recommended UAT scenario' and new directions has created challenges for agencies in UAT planning. Additionally, shorter durations for Configuration and Conversion updates led to mid-way baselining. FDC/FCOR need to analyze the information and continue assessing	

							the issues with the SmartSheets. 3. Continue to communicate with the FL PALM on the impacted delayed deliverables. 4. Re-prioritize/ reorganize the work in agencies to complete the deliverables with minimal impact possible.		the member and status assessing the agency readiness status.  8/19/2025: Awaiting PALM ESC decision on the Stage-Gate-3 and revised UAT/ program plan, to assess the impact of not able to start UAT-Online in August, on the completion of it by mid-November.
Open	07/31/24		Staffing/Resource Availability	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	High - Impacts the ability	Archived Issue Id: 005/004	Onboard additional staff aug position with FLAIR data experience.	10/30/25	8/19/2025: F&A team continued to recruit financial domain experts to mitigate the impact of attrition.
Open	08/31/24		Staffing/Resource Availability	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes.	High - Impacts the ability	Archived Issue Id: 006/005	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.	11/30/25	8/19/2025: State PALM team shared the high level schedule for UAT sessions on 7/16. Agency team prioritized the UAT test cases preparation accordingly. Identified lower than expected productivity of the agency QA resources, therefore initiated hiring of replacement.
Open	08/21/23		Staffing/Resource Availability	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	High - Impacts the ability	Archived Issue Id: 001/001	1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency.	12/31/25	8/22/2025: Continuing to monitor and reassess 6 months prior to Go-Live.

FCOR Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FDC UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	No further updates in this reporting period.
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	No further updates in this reporting period.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	No further updates in this reporting period.
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g. ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
Technology	State PALM team to provide necessary support to the agency for Cycle-2 Technical Interface Testing	Logged	08/20/25	All agency business systems and the remediation of agency business systems.	8/20/2025: State PALM team is yet to generate the Outbound files which are required for Cycle-2 Technical Interface Testing of agency business systems.

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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FCOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	09/05/25
May - June 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	07/10/25
May - June 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	07/10/25
March - April 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	05/07/25
January - February 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	03/05/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for FDC](#)  
[Readiness Workplan](#)

# FDC Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Mark Tallent

RW Task Timeliness


Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**  
Score = 94.29%

- Submitted On Time = 34
- Submitted Late = 8
- Pending Submission = 0

Other Task Timeliness




**Other Task Timeliness:**  
Score = 90.8%

- Submitted On Time = 63
- Submitted Late = 12
- Pending Submission = 2

RW Task Completeness


Direct Impact Task Completeness



**Direct Task Completeness:**  
Score = 85.12%

- Submitted Complete = 30
- Submitted Incomplete = 4
- Completed After Submission = 7

Other Task Completeness



**Other Task Completeness:**  
Score = 94.26%

- Submitted Complete = 42
- Submitted Incomplete = 0
- Completed After Submission = 5

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

**Change Champion Network:**

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

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 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
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		3/7/2025: Task-519 was marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress		This task cannot be completed. This is due to us not have the sufficient information from PALM to complete the remediation of our Agency Business Systems. We are still analyzing the data that they have provided, and will continue to work to complete this task. ETA Unknown. 3/7/2025: Task-504 and Task-544 were marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However, based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/26/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	07/18/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/14/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/24/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	660	Submit Monthly Progress Report -	08/04/25	08/29/25	100% - Submitted	08/26/25		Submission	

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			Testing						Complete	
Direct	Data	<b>587-A</b>	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	<b>587-B</b>	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	<b>587-C</b>	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	<b>661</b>	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	<b>662</b>	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	<b>617</b>	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	<b>664</b>	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

## Agency Reported

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

FDC Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	06/25/25		Deployment/Cutover	Several readiness deliverables for agencies have been removed from the Florida PALM Program plan.	Increasing	6 (Medium/High)	Newly added, on 6/25/2025	Risk Management Strategy: Mitigate  1. Analysis of the removed readiness workplan tasks which are still applicable to the agencies. 2. Agencies to add the applicable deliverables as part of agency specific activities. 3. Continue to progress these agency specific deliverables and ongoing monitoring.  Target Closure Date: 11/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Agency specific plan has been updated for People, Technology readiness areas. The team started working on these deliverables.
Open and Monitoring	12/04/24		User Acceptance Testing	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.	Increasing	6 (High/Medium)	Archived Risk Id: 014/011	Risk Mitigation Strategy: Reduction  1. Prepare the UAT testing team thoroughly, w.r.to Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.  Target Closure Date: 12/31/2025	Fail to achieve the mandatory success measure of User Acceptance Testing for PALM Go-Live.	7/21/2025: The schedule for individual UAT-Online sessions was published in the July Advisory Council (7/16), including detailed sessions for August. Information for future months is yet to be published. Delays in sharing 'Project Recommended UAT scenario' and new directions have created challenges for agencies in UAT planning. Additionally, shorter durations for Configuration and Conversion updates led to mid-way baselining. FDC/FCOR need to analyze the information and continue assessing the agency readiness status.  8/20/2025: Agency SMEs continued with the preparation activities, including the UAT pre-requisite trainings and UAT Test cases. However State PALM ESC took a decision not to start the UAT-Online in August/2025 due to the project not meeting the exit criteria for Stage Gate 3; the State PALM yet to publish the revised schedule for UAT-Online. Agency plan for Cycle-2 Interface testing could get impacted due to unavailability of Outbound interface files in-time from State PALM team.  9/3/2025: on August 27th, PALM ESC could not take decision on the start of UAT-Online. Agency to assess the revised program plan

										once published, to understand cascading impact to the agency readiness.
Open and Mitigating	12/04/24		Business Process Change	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Stable	6 (High/Medium)	Archived Risk Id: 015/ 012	Risk Mitigation Strategy: Mitigate  Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation  Target Closure Date: 12/30/2025	Fail to achieve the mandatory success measure Business Process readiness for PALM Go-Live.	8/22/2025: Process gap to be finalized based on SMEs attending the individual sessions in UAT-Online. Since UAT has been postponed, this date needed to be extended.
Open and Mitigating	12/04/24		Staffing/Resource Availability	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Increasing	6 (High/Medium)	Archived Risk Id: 017/ 014	Risk Mitigation Strategy: Mitigate  1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.  Target Closure Date: 5/31/2026	Fail to achieve the mandatory success measure User Acceptance Testing, User training and People readiness for PALM Go-Live.	7/21/2025: Agency continues to balance the year end F&A closure activities with the critical priority, complex deliverables with shorter turnaround time, which is affecting the agency's ability to complete the data cleansing fully.  8/20/2025: SMEs are currently working on several data cleansing and configuration activities along with preparation for UAT-Online, in parallel to their day to day work. These conflicting priorities are affecting agency's ability to ensure on-time completion of readiness activities.
Open and Mitigating	12/04/24		Agency Business System	Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) could be challenging as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from FL PALM.	Increasing	6 (High/Medium)	Archived Risk Id: 018	Risk Mitigation Strategy: Mitigate  1. Vendor to refer FL PALM knowledge center to plan & design the system remediation. 2. Vendor to perform unit testing with the information provided by the FL PALM team. 3. FL PALM Team to make sizable and reliable testing data available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing)  Target Closure Date: 11/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/21/2025: Continue discussions with the 3rd party product vendor for the AxiomPro system to bring schedule alignment with the PALM Technical Interface Test schedule.  8/20/2025: Received approval from State PALM team to leverage contingency period (November/2025) for Cycle-2 Testing for Axiom Pro. Additionally, ongoing monitoring has been put in place to review the progress of the remediation efforts for this 3rd party managed agency system.  9/3/2025: Technical Interface Testing of Bar Code Scanning tool is blocked, as the testing has hard dependency on the relevant Outbound Interface file (AMI004). Similar dependency on API031 Outbound file, to start Technical Interface Testing of AxiomPro system.
Open and Mitigating	12/04/24		Staffing/Resource Availability	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Decreasing	6 (High/Medium)	Archived Risk Id: 010/ 007	Risk Management Strategy: Mitigate  1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT  Target Closure Date: 10/30/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Identified lower than expected productivity of the agency QA resources, therefore initiated hiring of replacement.
Open and Mitigating	06/25/25		Deployment/Cutover	Lack of clear guidelines from the Florida PALM Program on preparing for Cutover activities and setting up Operations support for the agencies.	Increasing	6 (High/Medium)	Newly added, on 6/25/2025	Risk Management Strategy: Mitigate  1. Identify the agency specific cutover activities for the agency systems and readiness activities to prepare for operations support. 2. Add the agency specific cutover activities and operations support preparation to agency plan	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/7/2025: The Agency specific plan is being updated. Next step is to brainstorm on the agency specific cutover planning and readiness for operations support.

								3. Continue to progress on the agency specific plan and ongoing monitoring  Target Closure Date: 11/30/2025		
Open and Monitoring	08/20/25		Staffing/Resource Availability	Reduced budget allocation for fiscal year 2025-26 could lead to impediments to the planned readiness activities for the agency PALM efforts and agency systems remediation.	Increasing	6 (High/Medium)	Newly added, on 8/20/25	Risk Management Strategy : Avoid.  1. Identify the fixed vs variable part of the spend plan. 2. Prepare strong basis for the estimation for the variable cost, with credible assumptions and experts' assessments. 3. Manage the spend plan regularly, aligning the available budget against the prioritized project needs.  Target Closure Date: 6/30/2026.	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Current spend plan does not have any contingency to cover large unforeseen cost. Estimation for PowerBI tool is based on the shared licenses in FDC OIT, team is assessing the available capacity to support FDC agency reporting needs.
Open and Mitigating	12/04/24		Training	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Decreasing	4 (Medium/Medium)	Archived Risk Id: 013/ 010	Risk Management Strategy: Reduction  Action: Develop and Launch to PALM Superusers the pre] PALM 4-Part training series. Training 1.1: Orientation to PALM Business Process Groups. Training 1.2: Orientation to PALM Modules. Training 1.3: Orientation to PALM Business Process Models. Training 1.4: Orientation to PALM Roles & Workflows.  Target Closure Date:12/31/2025	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	7/21/2025: Test data for UAT should be prepared during the 'Preparation' phase, using the format provided in PALM demos and pre-materials. Recent information sharing from PALM revealed that there are 'mandatory' pre-requisite training to be completed by all participants of UAT-Online. FDC/FCOR need to analyze the information and continue assessing the agency readiness status.  8/20/2025: pre]PALM training series has been replaced by, 1. UAT Prerequisite Learning Paths via the PeopleFirst Learning Management System. 2. Wisdom Wednesday- Pause for PALM Knowledge Check Series. PALM state team has provided UAT testers access to online prerequisite trainings for UAT. Comprehensively, these trainings for, learning paths that will prepare end users for upcoming spring training by permitting early exposure to content.
Open and Monitoring	12/04/24		Role Mapping	Insufficient information on access security model and planning of changes to current user roles/responsibilities may impact agency user readiness/ adoption.	Stable	4 (Medium/Medium)	Archived Risk Id: 016/ 013	Risk Mitigation Strategy: Mitigate  1. Read & understand the access security model and role definition, published by FL PALM. 2. Map the current business teams to the appropriate user role. 3. Identify the users for whom role/ responsibility are changed. 4. Provide required support to the users to adapt to their changed role.  Target Closure Date: 10/31/2025	Fail to achieve the mandatory success measure User Acceptance Testing and Go-Live Readiness for PALM Go-Live.	7/21/2025: Role assignment knowledge articles were published in mid-May, and the SME role assignment deliverable was due in mid-June. With the shorter turnaround time, the agency assigned SME roles have been assigned to the best of their knowledge, and any gaps may be identified during the UAT-Online sessions.  8/20/2025: Agency started the user role mapping for remaining SMEs (RWP - 573-B).
Open and Mitigating	12/04/24		Agency Business System	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/ historical data.	Stable	3 (High/Low)	Archived Risk Id: 012/ 009	Risk Management Strategy : Mitigate  1. Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components. 2. Archive BARS reporting solution, as the reporting tool for the legacy (FLAIR) information.  Target Closure Date: 8/31/2026	Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live.	8/20/2025: Setting up of BARS archival is planned around the PALM go-live, whereas preparation for this shall begin a few months prior to the go-live.

FDC Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	01/30/25		Agency Business System	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	Critical - Impacts the abil	Archived Issue Id: 007/006	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	11/30/25	8/19/2025: Agency systems remediation activities on-track to start the Cycle-2 Testing (Technical Interface Testing) in August/2025. State PALM team continued to generate and share sample Outbound interface files, leading agency to be able to partially start the Cycle-2 Testing.  9/3/2025: State PALM team published sample files for 9 out of 22 Outbound interfaces that are required for Technical Interface Testing of the agency. Team started the testing with the available sample files.
Open	03/25/25		Agency Business System	Continued changes to the interface specifications by FL PALM due to ongoing system development, may require FDC PALM project team to rework on the solution for agency systems remediation, which could lead to agencies missing the interface testing milestone.	Critical - Impacts the abil	Archived Issue Id: 008/007	Team to work on minimizing the impact due to this issue. 1. Develop a scalable solution design with system level flexibility built-in. 2. Collaborate closely with the FL PALM interface team, and ensure the FDC PALM team is updated with the recent/ upcoming changes to the interface file structures. 3. Resolve the gaps in the agency system remediation solution. 4. Escalate in case the changes to interfaces are not feasible to be mitigated.	12/31/25	8/19/2025: State PALM team yet to conclude the Interface Development and Testing activities, therefore we find continued changes to the Interface specifications, which is leading to rework at agency and impacting agency system remediation.
Open	02/28/24		Interface	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	High - Impacts the ability	Archived Issue Id: 004/003	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets. 3. Continue to communicate with the FL PALM on the impacted delayed deliverables. 4. Re-prioritize/ reorganize the work in agencies to complete the deliverables with minimal impact possible.	07/01/26	7/21/2025: Delayed sharing of 'Project Recommended UAT scenario' and new directions has created challenges for agencies in UAT planning. Additionally, shorter durations for Configuration and Conversion updates led to mid-way baselining. FDC/FCOR need to analyze the information and continue assessing the agency readiness status.  8/19/2025: Awaiting PALM ESC decision on the Stage-Gate-3 and revised UAT/ program plan, to assess the impact of not able to start UAT-Online in August, on the completion of it by mid-November.
Open	07/31/24		Staffing/Resource Availability	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	High - Impacts the ability	Archived Issue Id: 005/004	Onboard additional staff aug position with FLAIR data experience.	10/30/25	8/19/2025: F&A team continued to recruit financial domain experts to mitigate the impact of attrition.
Open	08/31/24		Staffing/Resource Availability	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes.	High - Impacts the ability	Archived Issue Id: 006/005	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress. 4. Continue to monitor the effectiveness/ productivity of the QA resources from OIT and make course-corrections, as required.	11/30/25	8/19/2025: State PALM team shared the high level schedule for UAT sessions on 7/16. Agency team prioritized the UAT test cases preparation accordingly. Identified lower than expected productivity of the agency QA resources, therefore initiated hiring of replacement.
Open	08/21/23		Staffing/Resource Availability	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	High - Impacts the ability	Archived Issue Id: 001/001	1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency.	12/31/25	8/22/2025: Continuing to monitor and reassess 6 months prior to Go-Live.

FDC Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g. ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	No further updates in this reporting period.
Technology Data	It is assumed that data in FLAIR will exist in a new field in PALM except for fields that are discontinued. For the discontinued fields, it is assumed that PALM project team will communicate the names of the discontinued fields and will be shared as the data dictionary is updated for each Palm Design Segment.	Logged	04/22/24	All agency business systems and the remediation of agency business systems.	No further updates in this reporting period.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FDC UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	No further updates in this reporting period.
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	No further updates in this reporting period.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	No further updates in this reporting period.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	No further updates in this reporting period.
Technology	State PALM team to provide necessary support to the agency for Cycle-2 Technical Interface Testing	Logged	08/20/25	All agency business systems and the remediation of agency business systems.	8/20/2025: State PALM team is yet to generate the Outbound files which are required for Cycle-2 Technical Interface Testing of agency business systems.

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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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	09/05/25
May - June 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	07/10/25
March - April 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	05/12/25
January - February 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/25

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# FDLE Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Mike Moore

RW Task Timeliness


Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**  
Score = 94.55%

- Submitted On Time = 34
- Submitted Late = 10
- Pending Submission = 0

Other Task Timeliness




**Other Task Timeliness:**  
Score = 86.71%

- Submitted On Time = 62
- Submitted Late = 14
- Pending Submission = 1

RW Task Completeness


Direct Impact Task Completeness



**Direct Task Completeness:**  
Score = 81.63%

- Submitted Complete = 32
- Submitted Incomplete = 3
- Completed After Submission = 8

Other Task Completeness



**Other Task Completeness:**  
Score = 91.04%

- Submitted Complete = 42
- Submitted Incomplete = 0
- Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

**Change Champion Network:**  
The Change Champion Network composition reflects the completeness of your CCN makeup.

- Unique Filled Role = 4
- Duplicate Filled Role = 9
- Vacant Role = 1

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
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	75% - Consolidating/Inputting Information for Submission		9/10/25 - Delayed		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/30/25	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. Technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by – October 25 (Approx.) 12/6 Remediation Ongoing 07/25/2025 - Comments from Anik - We are in the process of building the interfaces and conducting internal testing. 07/29/2025 - Comments from Terri - Interface Testing Plan updated.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission		9/10/25 On Track for 10/3/25		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/09/25	Reattached SAM UAT screenshot	Submission Complete	07/18/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/09/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress		9/10/25 On Track for 10/3/25		
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/26/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress		9/10/25 On Track for 10/3/25		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission		9/10/25 On Track for 10/3/25		
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress		9/10/25 On Track for 10/3/25		
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress		9/10/25 On Track for 10/3/25		
Direct	Data	662	Submit Updated Configuration	08/11/25	10/03/25	50% - In Progress		9/10/25 On Track for 10/3/25		

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			Workbooks						
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25	9/10/25 On Track for 9/10/25	
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering		9/10/25 On Track for 9/30/25	

## Agency Reported

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

FDLE Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	02/01/25		Interface	Going live in July 2026 which is fiscal year-end, presents new challenges that need to be considered and addressed, as well as months of upfront work.	Increasing	9 (High/High)	Yearend in FLAIR is extremely complex and time consuming. Trying to learn an entirely new system as well as complete financial statement duties at the same could prove problematic.	Work through the challenges going live at this time will present.	The impact would be that Resources and Systems will not be available to close out the Fiscal Year.	Confirmed on 8/28 Still at RISK
Open and Monitoring	05/16/24		Interface	FDLE will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Stable	4 (Medium/Medium)	Many of our budget and grant tasks required life-to-date tracking and research.	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	None for now	None for now
Open and Mitigating	09/04/24		Interface	There is a RISK that FDLE will not receive a comprehensive list early enough of anticipated errors and warnings that may occur in relation to interface interactions and report parameters input. This is needed ~ January 2026 in order to have ITS code and Test error handling across Florida PALM functions including interfaces and online functionality.	Increasing	4 (Medium/Medium)	Waiting for the updates that are planned for Spring of 2026 according to the Question Log/Answer #0520	The project is developing a comprehensive Error Handling Matrix that will be released in early Spring next year (2026). This matrix will cover errors across Florida PALM functions including interfaces and online functionality.	Scope : Mitigate the Interface Errors Cost : Development time may increase Schedule : Implementation timeline will be affected	Confirmed on 8/28/25 Still a need.
Open and Monitoring	10/31/24		Interface	The Configuration Review and Update task during UAT poses a potential risk. Changes could affect the UAT timelines and outcomes.	Increasing	4 (Medium/Medium)	Pause the risk as of now	Paused	Paused	PAUSED for Now due to Delay in UAT .
Open and Mitigating	08/27/25		User Acceptance Testing	Delays in UAT, but not in UAT dependencies may cause gaps in the UAT Test Stories and Test Scripts.	Increasing	4 (Medium/Medium)	The UAT was initially planned to start on 8/11/25. It was pushed out without a new date. The UAT milestone had dependencies that were not pushed out. The RISK is that the Dependencies of UAT Test Stories and Test Scripts will be incomplete, due to not have the UAT system to reference for testing.	Team will use Processes to Write the PALM UAT Stories and request were made on 9/5/25 that B.As. (Business Analysts) are given access to the PALM Wire Frames, PALM Functional Testing Documentation, PALM Technical Specifications and any other PALM development documentation that is related to the PALM UAT User Interface and functionality, so FDLE's B.As. can write TEST CASES and TEST SCRIPTS prior to the UAT start.	The impact will be gaps in the PALM UAT Testing. Possibly leading to not all functionalities being validated by the various Florida departments.	Just opened on 8/27/25- Updated on 9/8/25

FDLE Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	
Open	09/08/25		Deployment/Cutover	The task "Update Reports Inventory" is missing from the new 'Agency Implementation Roadmap.' There is no visibility of the Data Warehouse reporting tool in the current roadmap.	High - Impacts the ability	This RISK was opened up on 2/17/25 and we have yet to receive updates as to when the Data Warehouse work will be started and completed.	Our FDLE ITS team is planning to build a Data Warehouse to be used to meet the needs of the business. In order to be successful, ITS needs the PALM Report List and the Data that will be available to replicate.	Not Available	No Change 9/8/25	

FDLE Assumptions										
Critical Operational Elements	Assumption				Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025		
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.				Logged	07/01/23	Agency business systems	Still an Assumption		
Data	PALM will provide similar functionality as ABS which is used for querying FLAIR and PYRL data so that we can retire those applications.				Logged	09/01/23	Office of Financial Management Office of Policy and Planning All divisional/regional business liaisons Management	Still an Assumption		
People Processes Technology Data	PALM will provide significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT).				Logged	10/31/23	All agency business systems	Still an Assumption		
Data	PALM transactional data will be moved to Palm Warehouse on daily basis. We assume that this will stay for indefinite time in Warehouse.				Logged	07/02/25	All agency business systems	Still an Assumption		
Technology Data	FDLE assumes that PALM Reports and Data will meet Florida's Retention Policy Standards.				Logged	09/08/25	All agency business systems	Still an Assumption		

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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FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Mike Moore	mikemoore@fdle.state.fl.us	09/10/25
May - June 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	07/08/25
March - April 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	05/12/25
January - February 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/07/25

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# FDOT Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Lisa Saliba

RW Task Timeliness

Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**


Score = 92.09%

Submitted On Time = 27

Submitted Late = 16

Pending Submission = 0

Other Task Timeliness



**Other Task Timeliness:**

Score = 77.14%


Submitted On Time = 44

Submitted Late = 33

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



**Direct Task Completeness:**


Score = 88.05%

Submitted Complete = 31

Submitted Incomplete = 2

Completed After Submission = 8

Other Task Completeness



**Other Task Completeness:**

Score = 94.29%

Submitted Complete = 37

Submitted Incomplete = 1

Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

- Unique Filled Role = 26
- Duplicate Filled Role = 0
- Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission	07/25/25	Access to a PALM UAT environment is crucial for remediation of three Tier 1 agency data systems. These systems rely on updated encumbrance and allotment balance information for data validations, information warehouse data for reporting, and need validation of inter/intra unit transfer functionality in order to be properly remediated. Remediation of these systems will remain below 60% complete until we have access to a PALM UAT environment and access to interface testing data from the Florida PALM system.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for Remaining End Users	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/09/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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## Agency Reported

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

FDOT Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	07/30/24		User Acceptance Testing	Late Publication of Batch Schedule	Stable	9 (High/High)	PALM Interfaces - Not knowing the batch schedule will leave agencies little time to remediate processes as needed. (39)	Continue to work with the Readiness and Technical Coordinators. Plan to align the UAT batch schedule with business processing as part of interface testing and Cycle 3 testing.	The FDOT file processing is performed in a specific order and priority, within a defined timeframe. Interruption or the inability to align with our system design will impact the effectiveness of the remediation or cause data mismatches and errors.	Still relevant this reporting period.
Open and Monitoring	07/30/24		Interface	Excel Upload Volume Capacity	Stable	9 (High/High)	PALM Interfaces - The inability to efficiently enter large amounts of records via Excel uploads will incur delays on account of providing technical solutions for mass entry. (41)	Project costing could have a large number of records - an interface to automatically accept our transactions is necessary.	If volume exceeds capacity and the upload is interrupted, it will undermine the success of the record processing.	Still relevant this reporting period.
Open and Mitigating	09/30/24		Interface	Data Source Indicator - Input or System Generated	Stable	9 (High/High)	PALM Technical - Need to identify the "Input and Automated" records in extracts. FLAIR indicates whether records are input manually, automated, or system generated. FDOT uses this indicator for various reporting and balancing methods. (47)	If PALM cannot provide the transaction indicator for the data source, we will need to design backup plans and work with the business experts to develop alternative methods.	PALM not having this indicator could cause major impacts to Cost Allocation and Cash Forecasting, especially if the automated records do not come across in the extracts.	Still relevant this reporting period.
Open and Monitoring	08/21/25		Conversion/Configuration	Handling Historical Data & Unclear Data Warehouse Structure & Access	Stable	9 (High/High)	Related to Decision 100 & 101, currently unclear how we'll be storing historical data that is going away with the elimination of OOC Table 31 & 33 and SAMAS Table 16. (76)	Will monitor for Data Warehouse design & access to be provided to identify what agency options are to resolve this risk	Will delay our development when we don't have a full idea of the design of the PALM Data Warehouse and what we will have access to.	New this reporting period.
Open and Mitigating	06/12/25		Staffing/Resource Availability	PALM Changes late in Development	Stable	6 (Medium/High)	PALM changes occurring late in any phase introduces uncertainty when phase activities are in progress and functioning properly. Late changes are a step backward, jeopardizing quality and the timeline. (66)	Stay informed of PALM notices and changes, and raise questions early.	Difficult to meet the deadlines when simultaneously handling changes, and assessing completeness or quality.	Still relevant this reporting period.
Open and Mitigating	08/06/25		User Acceptance Testing	Outbound Interface Testing	Stable	6 (Medium/High)	Not receiving a Delta File for Interface Testing impedes the ability to validate the outbound files. PALM is providing Master Files, the master file that they sent had about 60k projects on it and want us to use that, which isn't a realistic daily interface file that we will normally get. Also, not all records are included in this file, causing extra time to be taken using the provided master file for validation. (71)	Using our own 20 records that we're using to validate our testing rather than the provided master file. PALM will be providing these Delta files in a few months.	Using the master file will not be a realistic opportunity to test this process, since a delta file will be provided to agency after Go-Live.	New this reporting period.
Open and Monitoring	08/07/25		User Acceptance Testing	Online UAT Schedule Delay	Stable	6 (Medium/High)	PALM is likely going to push Online UAT back a few weeks which will shorten the testing and bug resolution window for agencies. (72)	Monitoring at this time to see what the new start date will be for UAT.	FDOT won't have the proper testing and resolution time to be prepared and ready for Go-Live.	New this reporting period.
Open and Monitoring	10/24/24		Agency Business System	Project Costing - Manual Inputs	Decreasing	6 (High/Medium)	PALM Technical - Project Costing Module: Manually adding additional data into Florida PALM for over 15,000 projects is not feasible. (51)	Florida PALM - will advise if it can be through Excel upload.	Hiring staff will be more expensive than developing an interface. Average 70-90 updates a day. Manual entry may introduce errors.	Still relevant this reporting period.
Open and Monitoring	12/12/24		User Acceptance Testing	Delayed Testing for Excel Uploads	Decreasing	6 (High/Medium)	PALM Interfaces - Uploading data files through the use of Excel is critical for interface testing, yet there is no mechanism in place to test this in advance of our unit testing. (54)	Awaiting the ability to completely test the upload functionality.	Not having a way to test in advance removes the opportunity to work through errors or unknowns and be prepared for implementation.	Still relevant this reporting period.
Open and Mitigating	02/18/25		Interface	Interfaces and Data Processing Visibility	Decreasing	6 (High/Medium)	PALM Technical - Unresolved questions and issues regarding the PALM interfaces, including details on the layouts and contents of the interfaces, limits the ability to remediate Agency Business Systems. (61)	Expect an unknown amount of rework, consider this in planning activities.	When the data interpretation or system expectations are incorrect, the agency's downstream systems may have errors in testing with PALM.	Still relevant this reporting period.

Open and Mitigating	04/24/25		User Acceptance Testing	Data Warehouse	Stable	6 (High/Medium)	Not knowing the FLAIR data that will be part of the PALM's Data Warehouse can affect our mitigation planning for several risks. (63)	Request information from the PALM Readiness Coordinator, monitor the Knowledge Center and ask questions.	The ambiguity of the data contained in the Data Warehouse impacts the validity of some risk mitigations because we are assuming specific data will be available.	Still relevant this reporting period.
Open and Mitigating	06/12/25		Deployment/Cutover	FY Balances and Fund Availability	Stable	6 (High/Medium)	From a business perspective, year-end processes like certified, carry forward, and others have changed massively, and the unknowns cannot be identified until they are fully worked through. (65)	Define scenarios and data variations for a complex and comprehensive testing strategy.	Balances may be incorrect, funds for payables may be insufficient.	Still relevant this reporting period.
Open and Mitigating	08/07/25		Interface	Encumbrances Not Linked to Chart of Accounts Fields Used	Stable	6 (High/Medium)	New Risk, based on PALM Line Ref # 1289: Needs Encumbrance Balance available on POI001 (Outbound Encumbrance Extract) and IUI003 (Outbound Inter/Intra Unit Interface) interfaces at the Distribution/Line (lowest) level so that it is linked to the Chart of Accounts (COA) fields used. Agencies were advised to use reports, such as KKR018 in to achieve this, but it has the following issues: KKR018 doesn't have all pertinent information in it (just as a quick example, Organization is not on the output), so it really requires multiple reports to be run and chained together to track the balances (at minimum 3 reports would need to be chained together). Reports aren't easily digestible through automated processes, due to the non-tabular format, and chaining multiple ones together adds even more complexity. This risk could be alleviated if the Data Warehouse tracks the balances at a level that links it to the COA string. (73)	Monitoring, seeing if PALM will change course on this decision.	Will require complex coordination and manipulation of reports to resolve this risk without PALM changing course on this design.	New this reporting period.
Open and Mitigating	07/22/21		User Acceptance Testing	PALM Responses for Detail Information	Decreasing	4 (Medium/Medium)	PALM Response - FDOT not receiving clear answers from Florida PALM in a timely manner will increase the duration to perform the remediation. Responses are marked as Completed when the question may not be answered. (15)	Continue to have our open/new questions as part of our PALM Touchpoint meetings, and email our Readiness Coordination between meetings if we are blocked..	Not having information to understand the interoperations of Florida PALM will lead to assumptions and incorrect remediation of systems.	Still relevant this reporting period.
Open and Mitigating	02/06/25		Role Mapping	Roles Required	Stable	4 (Medium/Medium)	PALM Functionality - There is a concern that more PALM user roles will be added in the future before go-live. If additions are not communicated timely there is a risk going forward that some roles may not be captured in AARF/SailPoint right away, delaying our ability to set up user roles. (62)	Moving forward, we are developing a PowerBI dashboard, AARF roles, and SQL-based reports in a flexible manner so that when roles are provided, we can quickly add them.	Additional rework is required, and limitations for users' access.	Still relevant this reporting period.
Open and Mitigating	08/12/25		Interface	Inbound/Outbound Payment Linking	Stable	4 (Medium/Medium)	No unique identifier to link outbound payments from EED to inbound confirmations from PALM. Current Limitation: PALM generates journal IDs post-processing, making it impossible to pre-link. (75)	Potential Work Around: Use Supplier ID + Invoice ID as a composite key. Consider populating the document number field in the outbound voucher line with a custom tracking ID. Use line and distribution line numbers to increase granularity. Be cautious: repeated document numbers across multiple distribution lines may reduce uniqueness. Possibility of duplicate payments, we won't know what happened to payments if we don't get a successful acknowledgment from PALM, not only related to EED.	Will require some sort of workaround by the agency to link outbound payments from Agency Business System (EED) to inbound confirmations from PALM.	New this reporting period.
Open and Mitigating	07/22/21		Staffing/Resource Availability	Funding to Completion	Stable	3 (High/Low)	PALM Funding - Allocations may not be available through to completion for all systems. (6)	Document program funding requirements and communicate with FDOT leadership, the Governor's office, and	Unable to remediate and test systems within the timeline, and the Florida PALM implementation may not	Still relevant this reporting period.

Open and Mitigating	12/12/24		Conversion/Configurator	Mock Conversion	Decreasing	3 (High/Low)	PALM Data - The Mock Conversion is problematic, having conversion errors that are inaccurate. (56)	House/Senate staff. Continue to collaborate with PALM to work through the process and find a pattern to help identify the problem points.	be successful. Some of the data conversions may be inaccurate causing erroneous processing or failure and impacting the goal of successful UAT.	Still relevant this reporting period.
Open and Monitoring	05/09/24		User Acceptance Testing	Knowledge Center Change Identification	Decreasing	2 (Medium/Low)	PALM Technical - Knowledge Center does not have version history on what was changed. It is a manual compare effort. This would require agencies to check each field in every interface to implement technical changes and some changes may be missed. (27)	Requested the Readiness Coordinator for additional communications when there are updates to the Knowledge Center, and what was updated.	Missing essential PALM changes for the remediation work.	Still relevant this reporting period.

FDOT Issues										
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	
Open	03/05/25		User Acceptance Testing	No UAT for Year-end	Critical - Impacts the ability to complete the financial year-end scenario will not be replicated in the PALM UAT phase. The parallel work stream with year-end is a major increase in complexity for PALM Go-Live. Half of the functionality in the old system and half in the new PALM system. (19)	In the PALM timeline, a financial year-end scenario will not be replicated in the PALM UAT phase. The parallel work stream with year-end is a major increase in complexity for PALM Go-Live. Half of the functionality in the old system and half in the new PALM system. (19)	Assessing how we will accomplish both the Go-Live and year-end tasks, a gargantuan effort that would involve a number of resources already at capacity. People and computer processing resources.	04/01/26	Still relevant this reporting period.	
Open	05/09/24		Staffing/Resource Availability	Mainframe capacity	High - Impacts the ability to process data	FDOT - Low on mainframe available capacity and space to allocate for separate PALM environments. (6)	Requested NWRDC/Ensono for 10% increase by end of SFY 2025. A large application (Right of Way Management System) is scheduled to be moved off of the mainframe by end of SFY 2026 which will provide more processing capacity. FDOT Technical resource is looking at offloading flat files to SQL Server by 08/2026.	08/03/26	Still relevant this reporting period.	
Open	06/13/24		Interface	Interfaces Continue to Change	High - Impacts the ability to process data	PALM Interfaces – Interfaces continue to change and the documentation is incomplete in some areas. This impacts our design, remediation, and integration with our systems. (10)	Continue to convey the importance to PALM Readiness Coordinator during Touchpoint meetings.	08/01/25	Still relevant this reporting period.	
Open	06/13/24		Staffing/Resource Availability	Limited SMEs	High - Impacts the ability to process data	FDOT - SME Resources limited for business processes and the technical knowledge experts are overallocated. (12)	Monitor allocations closely and identify tasks that may be accomplished by another resource. Streamline communications. Set Priorities and work arounds. Escalate to management when necessary.	07/01/26	Still relevant this reporting period.	
Open	09/16/24		Interface	Interface Data Relationships	High - Impacts the ability to process data	PALM Interfaces - Cannot provide ERD's or DDL for the interface files reduces the understanding of the data relationships. There is insufficient detail on parent/child/sibling, one:one, or one:many, relationships, or optional record types. There is a need for ERD diagrams to answer these questions for remediation efforts. (15)	Reach out to PALM regularly for details. Work with PALM to articulate the need and offer examples and communicate how it impacts us, particularly in the way we adhere to data integrity at the database level.	08/01/25	Still relevant this reporting period.	
Open	10/30/24		Interface	Need Interface Error Report	High - Impacts the ability to process data	PALM Interfaces - Submission feedback: In the Interface layouts, the tab containing the feedback the agencies will receive after file processing was removed. This information is necessary to know of successful entries, or which ones had errors and the cause; need the format/layout and definition of feedback we will receive. (17)	Raise to the Technical Coordinator. Run error report next day, soft errors. We do not know how we will receive feedback on the fatal errors. Continue to work with PALM and by August we expect to have more information.	08/01/25	Still relevant this reporting period.	
Open	12/12/24		Agency Business System	Functionality Gap	High - Impacts the ability to process data	FDOT Applications - Switching from the FLAIR transactions to the internal PALM functionality is considerably different for our internal systems. (16 h)	Business processes, functionality, and data mapping is progressing, and once we are in UAT we will reassess any gaps, the impact and mitigation.	07/01/26	Still relevant this reporting period.	

Open	12/12/24		Interface	Sample Data Scenarios	High - Impacts the ability to use the interface files is standalone and does not represent the complete set of transactions. Without data continuity examples that support workflow scenarios the accuracy of the internal edits and quality checks may be incorrectly assessed. (18)	PALM Technical - The sample data for the interface files is standalone and does not represent the complete set of transactions. Without data continuity examples that support workflow scenarios the accuracy of the internal edits and quality checks may be incorrectly assessed. (18)	PALM advised that we will not receive sample data. As an alternative we are creating test data to represent the full scenarios.	08/01/25	Still relevant this reporting period.
Open	06/12/25		Staffing/Resource Availability	RW Tasks expanded after they start	High - Impacts the ability to complete the tasks are being expanded beyond the original description, often after the tasks' start date and without extending the dates that the RW tasks are to be completed. For example, the requirements for configuration have had ongoing changes, and new tasks are being added with short notice. (21)	The Florida PALM Readiness Work tasks are being expanded beyond the original description, often after the tasks' start date and without extending the dates that the RW tasks are to be completed. For example, the requirements for configuration have had ongoing changes, and new tasks are being added with short notice. (21)	Request a longer lead time before the task start date. Request the full scope of the task and instructions when the task is added.	12/31/25	Still relevant this reporting period.

FDOT Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments for July - August 2025
Processes	The Florida PALM Project implementation will replace the current FLAIR functionality and will not encompass FDOT's agency-specific planning and analysis requirements. (1)	Logged	06/30/23	FDOT Florida PALM End Users FDOT Application Owners		Still relevant this reporting period.
Processes	FPST work efforts classified as operations and maintenance (O&M) will follow the established standards for O&M activities. (5)	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers		Still relevant this reporting period.
People	Adequate staffing, equipment, software, and hardware are primary drivers of the department's FPST Program activities will be available, and there will be funding to support FDOT FPST Program. (6)	Logged	06/30/23	Executive FPST Program Sponsors Chief Information Officer		Still relevant this reporting period.
People	Due to the overallocation of FDOT key subject-matter resources, hiring consultants and other resources to augment the FPST Program is essential for the department's continuity of operations and successful transition to the Florida PALM solution. (8)	Logged	06/30/23	Executive FPST Program Sponsors		Still relevant this reporting period.
Technology	FDOT has total dependencies on the PALM Solution Design deliverables. (10)	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers		Still relevant this reporting period.
Processes	Staff resources are assigned to multiple workstreams and may have limited availability for FPST activities. Scheduling and resourcing for the FPST Program must take into consideration the department's annual operational schedule to minimize interference with development and delivery of the Work Program and required activities for the state and federal fiscal year-end closings. (11)	Logged	06/30/23	Executive FPST Program Sponsors		Still relevant this reporting period.
Technology	Excel spreadsheet uploads will be entered by business users, and the process will be simple and function smoothly. (13)	Logged	02/20/24	FDOT End Users		Still relevant this reporting period.
Data	The 'CFDA' number storage location needed in PALM for expenditure of grants, workaround would be to leverage OA fields and create data relationships.	Logged	04/05/24	FDOT Florida PALM Agency Liaisons FPST Program Managers		Still relevant this reporting period.
Data	OA1 and OA2 will fully remain agency specified. This will ensure that PALM will not be using these fields for any PALM functionality that could conflict with other agency's usage of OA1 or OA2. (18)	Logged	05/17/24	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Business Owners		Still relevant this reporting period.
Technology	MFMP - System integration between MFMP and PALM will not introduce incompatibility with FDOT. (19)	Logged	06/19/24	FDOT Procurement and Payments		Still relevant this reporting period.
Technology	People First - System integration between People First and PALM will not introduce incompatibility with FDOT. (20)	Logged	06/19/24	FDOT Payroll		Still relevant this reporting period.
Processes	PALM will provide functionality to allow FDOT to input accounts payables into the system. (Part of the carry forward process last months of the year.) (22)	Logged	10/01/24	FPST Program Managers FDOT Business Owners		Still relevant this reporting period.
Data	PALM Data Warehouse and/or PALM Reports will provide the necessary information that our systems and processes require to perform core functionality. (23)	Logged	04/24/25	FPST Program Managers FDOT Business Owners FDOT End Users		Still relevant this reporting period.
Data	Testing during Cycle 3 will be comprehensive and inclusive of our business scenarios, volume testing, and error conditions to assess how failures are handled. Cycle 2 testing is primarily a connectivity test, but some error records can still be submitted. (24)	Logged	06/27/25	FPST Program Managers FDOT Business Owners		Still relevant this reporting period.
Data	The Sub Funds functionality that will be used for FDOT local funds will need to be updated in the GL module and that should be comparable to the Funds used today. (25)	Logged	07/10/25	FPST Program Managers FDOT Business Owners		Still relevant this reporting period.
Processes Data	Related to Decision 97, assuming that PALM is going to treat Asset ID in Production the same way that it is right now, first asset will be 11 zeros and a 1, second will be 11 zeros and a 2, and so on. If they don't, this will create a problem with how we're utilizing Journal ID and Asset ID (26)	Logged	08/07/25	Agency Business Systems that utilize AMI003.		New this reporting period.

#### 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.

#### FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	09/09/25
May - June 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	07/09/25
March - April 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	05/12/25
January - February 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	03/10/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for FGCC](#)  
[Readiness Workplan](#)

# FGCC Status Report Dashboard

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

Reporting Period


July - August 2025

Agency Sponsor

Lisa Mustain

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 98.25%

Submitted On Time = 34

Submitted Late = 6

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.44%


Submitted On Time = 68

Submitted Late = 9

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 94.36%

Submitted Complete = 31

Submitted Incomplete = 0

Completed After Submission = 8

Other Task Completeness



Other Task Completeness:

Score = 88.00%

Submitted Complete = 36

Submitted Incomplete = 2

Completed After Submission = 12

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 5

Duplicate Filled Role = 9

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	07/31/25
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/17/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/09/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/11/25		Submission Complete	07/25/25
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/07/25		Task Closed - Submission Incomplete	07/24/25
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/17/25					
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/17/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 - APC001 Suppliers	08/11/25	10/17/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/17/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/17/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/09/25		Submission Incomplete	09/12/25
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

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FGCC Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	11/25/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC is unable to receive our source data from Versa (DBPR). Without this source data FGCC will be unable to create revenue inbound interfaces/spreadsheet uploads for interface testing, UAT, and Go Live.	Increasing	9 (High/High)	This risk is the results of current meetings with DBPR	FGCC is trying to identify alternative methods to create upload interface/spreadsheet	This risk has lead to an issue	This is still an open issue
Open and Monitoring	09/27/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC has not found definitive information about the process, procedures, and schedule related Enterprise systems updating the PALM UAT environment during UAT. This impacts our ability to develop appropriate test plans and may also hinder the ability to input and reconcile PALM UAT data and balances.	Stable	6 (Medium/High)	This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops	FGCC requests clarification of the interaction between each Enterprise system and PALM UAT environment during UAT	Additional changes to process, procedures, and testing plans	This is still an open issue
Open and Monitoring	06/28/24		Agency Business System Business Process Change Interface Conversion/Configuration User Acceptance Testing	FGCC has not found any definitive information regarding the scope and depth of the conversion testing. Additionally, FGCC has not found definitive information about the available of outbound interface files that can be used to reconcile conversion data in order to identify conversion errors.	Stable	4 (Medium/Medium)	This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops	FGCC has bene told that the PALM team is working on process changes between Mock 2 and Mock 3 and that the Mock 3 conversion process will provide more insight	Additional changes to our Go Live process and procedures will need to occur in order to identify and address any conversion errors that are identified after Go Live	This is still an open issue
Open and Monitoring	11/25/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC has found no definitive information about the schedule and availability of outbound interface files during UAT.	Stable	4 (Medium/Medium)	This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops	FGCC requests clarification that outbound interfaces files will be available on a daily scheduled basis	May impact the ability to complete Testing objectives and reconciliation during UAT	This is still an open issue
Open and Monitoring	09/25/24		Business Process Change Conversion/Configuration User Acceptance Testing	PALM has explained that there are no scheduled resets of initial data loads during UAT. This introduces a risk associated with overall UAT processing. Without reset of initial data loads there is no way to test and confirm fixes associated with errors associated with data conversion that cannot be recreated. This means that the same errors may still occur during Go Live.	Stable	1 (Low/Low)	This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops	FGCC requests that there be a few scheduled resets of initial conversion data	Adding additional steps to process and procedures to identify and address errors in cutover promptly	This is still an open issue

FGCC Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/12/25		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC is unable to receive our source data from Versa (DBPR).	Critical - Impacts the	This has been an outstanding issue from the beginning	There is no action plan to resolve this issue. FGCC is trying to find alternative methods of getting our revenue data	06/30/26	This is an ongoing issue
Open	09/05/25		Agency Business System Business Process Change Interface	<p>The Knowledge Center business process screen shots, descriptions, and explanations tend to be incomplete. This coupled with the delay in access to UAT environment impacts the ability to verify and validate interface file layouts, developing updated agency business processes, and finalizing agency system remediation.</p> <p>For example, when you go to the knowledge center for Acquire and Setup Assets 40.1 there are 4 sub process. 40.1.2 Online Asset Add is described as "creates individual asset records from details through direct input in Asset Management (AM)." This page contains zero screen shots and zero instructions for how an Agency AM Asset Processor would input anything. Under 40.1.1 Import AssetAdd is intended to describe the</p>	High - Impacts the a	This issue has been identified during interface development and testing	There is no action plan to resolve this issue. FGCC requests that PALM update the knowledge center or provide the agencies access to additional PALM screen shots until access to UAT is granted	06/30/26	This is a new issue

				import (inbound interface/spreadsheet upload) process. This does have a few screen shots. The screen shots show that the asset module has 6 tabs (general, maintenance, acquisition, location, license, supplemental). However, the knowledge center only provides a screen shot of two of these tabs and therefore the agency can only guess as to what is one the other tabs.					
Open	09/09/25		Agency Business System Business Process Change Interface User Acceptance Testing	<p>The Knowledge Center reports sections appears to be out of date or in some case incorrect.</p> <p>There are multiple reports within the General Ledger Module that appear to be incorrect because they include a column for GAAFR which is a FLAIR data element that has been replaced and does not exist in PALM. A few examples are GLR085, GLR112, and GLR115.</p> <p>Additionally, there are numerous reports that only provide a message for "more information will be available soon" (GLR132, GLR133, GLR136, GLR139, GLR140, etc.)</p> <p>As we prepare out testing plan for UAT as well as our training plans we are unable to identify what can be tested and what will be available to users and agency business systems. Currently, it has been explained that if some data is not available in outbound interfaces then it would be available via the reporting modules. We are unable to complete these processes and plans without knowing what information may be available.</p>	High - Impacts the a	This issue has been identified during interface development and testing	There is no plan of action to resolve this. FGCC requests that PALM update the Knowledge Center Reporting information	06/30/26	This is a new issue
Open	05/12/25		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC will not be able to utilize all of the built-in PALM Interfaces in preparation for UAT and at PALM Go Live. Therefore, FGCC will not be able to utilize all current capability and functionality of the new statewide accounting system. This also means that FGCC will not be able to fully test available functionality during UAT. Additionally, instead of consistent automated business processes, FGCC must utilize a combination of standard interfaces, spreadsheet uploads, and exported hard copy reports in order to piece together process and procedures to send, receive, and reconcile data between agency business systems, PALM, and other state enterprise systems.	Low - All impacts no	This was uncovered during the interface approval process	There is no action plan to resolve this issue. Currently, FGCC must change our desired business process and procedure to accommodate the lack of access to all PALM functionality.	06/30/26	This is an ongoing issue
Open	05/12/25		Agency Business System Business Process Change Interface User Acceptance Testing	The changes in the iterative PALM processes has forced FGCC to change intended business process as well as alter testing plans and preparation. The iterative processes leading to Mock conversions have changed and have limited the ability of FGCC to make intended changes in FLAIR as well as the subsequent related conversion process.	Low - All impacts no	This issue was created after the original identified risk was not addressed	There is no action plan that to resolve this issue. FGCC would like to restore the iterative process is possible.	06/30/26	This is an ongoing issue

FGCC Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Technology Data	FGCC is making the assumption that all Enterprise systems will establish an environment that will coordinate with PALM UAT and that we will be able to enter transactions/data into the enterprise UAT environment and these transactions/data will be integrated into PALM UAT	Logged	05/01/25	Agency Business Ssystems	This is still a current assumption
Technology Data	FGCC will not have a Versa Replacement system in place prior to PALM Go Live	Logged	05/01/25	Agency Business Ssystems	This is still a current assumption
Technology Data	FGCC will be able to utilize all PALM interface available to other agencies files at some point after PALM Go Live but will only have the approved PALM Interfaces for PALM Go Live	Logged	05/01/25	Agency Business Ssystems	This is still a current assumption

Agency Sponsor Confirmation

The form you are attempting to access is no longer active.  
[Smartsheet.com](#)

FGCC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Lisa Mustain	<a href="mailto:lisa.mustain@flgaming.gov">lisa.mustain@flgaming.gov</a>	09/09/25
May - June 2025	Lisa Mustain	<a href="mailto:lisa.mustain@flgaming.gov">lisa.mustain@flgaming.gov</a>	06/23/25
March - April 2025	Lisa Mustain	<a href="mailto:lisa.mustain@flgaming.gov">lisa.mustain@flgaming.gov</a>	05/06/25
January - February 2025	Lisa Mustain	<a href="mailto:lisa.mustain@flgaming.gov">lisa.mustain@flgaming.gov</a>	03/12/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for FLHSMV](#)  
[Readiness Workplan](#)

# FLHSMV Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Steve Burch

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 97.73%

Submitted On Time = 38

Submitted Late = 6

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 91.63%

Submitted Complete = 31

Submitted Incomplete = 0

Completed After Submission = 12

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 2
- Vacant Role = 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	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Due to the importance of other tasks, and the agency's operational work priorities, this task may not be completed by HSMV.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	04/16/24	We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during UAT testing, when we'll have full access to the PALM screens and testing environment.	Submission Incomplete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during Agency UAT testing, when we'll have full access to the PALM screens and testing environment.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	11/01/24	Submitted 11/1/2024 per previous update.	Submission Incomplete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/25/25	Last meetings July 25, 2025, July 16 2025; On track for July 25 deadline per developer meetings June 26, 2025 and May 30, 2025   Update: discussion with developer 5/7/25 on replicating current FLAIR process in PALM for support of existing TR2 file pickup. The business does not yet have new TR2 solution in place so development on GLI051 will be ready in October instead of August. We can work around the pending procurement and develop replicated process in PALM for TR2, until new solution can develop connection for automatic TR2 pickup via GLI051.   Agency continues development monitoring via daily standups, regular collaborative work sessions. Last interface status discussion: 4/16/25 during April touchpoint agency prep meeting.	Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission		The agency continues to gather test data and collect and analyze support materials for HSMV SMEs in Project UAT and HSMV End Users in Agency UAT. HSMV has compiled agency user stories for unique processes, and continues to enhance or change those as necessary. The team reviewed and will continue to review the project-recommended activities worksheet released on 7/10/25. The agency is using Option 3 in Task 574, and will submit an Excel file containing agency user stories to task 574. HSMV will use task 663 due 10/3/25 to update the UAT user stories, support materials, and gathering test data.		

N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/30/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/07/25	Users added to group; Confirmed both SAMs had affirmative testing result.	Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25	Team collaborated on June 27; Agency Criteria sheet updated 6/27/25. Next meeting on July 14. Criteria sheet updated July 14, July 17. Sponsor signed July 18 by deadline. - KG 7/18/25	Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/08/25	Submitted July 8, 2025.	Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/09/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

## Agency Reported

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

### FLHSMV Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	12/20/24		Agency Business System Interface Deployment/Cutover User Acceptance Testing	Supplier ID	Increasing	9 (High/High)	Final Supplier ID will be provided by PALM before Go Live. Risk to agency is in not receiving finalized Supplier IDs until or just before go live. In order to successfully match supplier IDs provided by PALM, the FEID is critically needed by FLHSMV, confirmed by Data Manager. The agency does not have an idea of the manual processing time required to match Supplier IDs until initial data received (approximately May 2025).	The agency will test Supplier ID fields and matching as received on each iterative Mock Conversion, and will use the iterative Supplier ID test results	The ability to match the Supplier ID (throughout multiple mock conversions) period to agency data would be quite taxing and require multiple, additional hours that are not currently included in the plan budget.	Uncertainty in Testing; unforeseen impacts from data conversion, specifically special characters.
Open and Monitoring	04/14/25		Interface Deployment/Cutover Training User Acceptance Testing	Interface Error File and Summary Logs	Stable	6 (High/Medium)	Interface Error Log layouts (multiple) have not been provided to HSMV.	HSMV has tested Error Files for API002 from PALM (during interface testing).	The agency was advised by PALM that agencies will receive error files and summary logs at Interface Testing. FLHSMV would need to re-evaluate impact if the error files and summary logs are NOT able to be read (further development and testing may be required). Resolving the errors may be delayed in UAT.	Updated Mitigation plan.
Open and Mitigating	12/20/24		Staffing/Resource Availability	Resources - Accounting (train / hire)	Stable	4 (Medium/Medium)	FLHSMV has a large number of key vacancies within the Bureau of Accounting. Due to difficulties in filling these positions, FLHSMV will need to move duties performed by vacant positions to other employees reducing the amount of time that can be committed to complete Florida PALM Tasks. HSMV is attempting to hire new and cross-train existing, accounting staff to learn new / daily business processes in addition to testing the PALM system and learning adjacent systems.	HSMV is actively working to train new staff, cross-train existing staff, and provide Florida PALM information. The agency has filled some positions, and is actively working to fill others.	Staff resource challenges could impact successful PALM implementation and go-live experience during a critical period.	Updated 9/3/25: Issue of Staff resources was Elevated to a Risk per Project Lead, and merged into this line of existing Risk (line 3).
Open and Monitoring	06/18/25		Conversion/Configuration	Mock 3 Conversion Errors	Stable	4 (Medium/Medium)	The agency continues to work on Mock 3 data tasks, while completing UAT documentation and training preparation tasks.	HSMV will review Mock 3 conversion errors and correct as soon as possible.	Staff burnout due to daily job duties, UAT participation, and cleanup of Mock 3 conversion files.	Updated Background and Impact.
Open and	09/01/23		Agency Business	FAME	Stable	2 (Medium/Low)	HSMV processes large	HSMV is working on	The agency has	Lowered impact rating

Open and Mitigating	08/07/23		Agency Business System	FAME application	08/07/23	08/07/23	FLHSMV processes large volume of data through its FAME application (Revenue Distribution, WEX, Goodyear, PRIDE, etc.). It is imperative that the interfaces and reports work properly when tested.	FLHSMV is working on developing multiple interfaces and has begun developing reports. Changes to the payment batch jobs are in progress.	The agency has adequate time to complete development, given delay to project UAT.	External input using
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FLHSMV Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

FLHSMV Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
Data	Florida PALM will provide similiar functionality as FLAIR@HSMV	Logged	08/31/23	Impacted Stakeholders include all end users.	No changes.
People Technology	Departmental technical resources will be available to update internal databases and reports for distributions from FRVIS to FAME for the new PALM Account codes.	Logged	08/31/23	Impacted ABS could include FAME, Hireback, Asset Management, Service Now, and spreadsheet uploads as they pertain to FAME. Impacted Stakeholders include All End Users and potentially other agencies.	No changes.

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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FLHSMV Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Steve Burch	steveburch@flhsmv.gov	09/09/25
May - June 2025	Steve Burch	steveburch@flhsmv.gov	07/08/25
March - April 2025	Steve Burch	steveburch@flhsmv.gov	05/12/25
January - February 2025	Steve Burch	steveburch@flhsmv.gov	03/07/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for FSDB](#)
[Readiness Workplan](#)

FSDB Status Report Dashboard

Reporting Period

July - August 2025

Agency Sponsor

Tracie Snow

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 93.95%

Submitted On Time = 30
Submitted Late = 8
Pending Submission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 95.47%

Submitted On Time = 54
Submitted Late = 21
Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 76.05%

Submitted Complete = 20
Submitted Incomplete = 4
Completed After Submission = 14

Other Task Completeness

Other Task Completeness:

Score = 80.63%

Submitted Complete = 29
Submitted Incomplete = 3
Completed After Submission = 16

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 2
Duplicate Filled Role = 12
Vacant Role = 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
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	Pending Resubmission	05/12/25		Submission Incomplete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	05/12/25	Not really applicable to FSDB	Submission Complete	05/12/25
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/08/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/08/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/21/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25	Awaiting operational system	Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25					
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25					
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/03/25	Awaiting operational system	Submission Complete	
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

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## Agency Reported

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

### FSDB Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025

### FSDB Issues

Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

### FSDB Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

### 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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### FSDB Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Tracie C. Snow	snowt@fsdbk12.org	09/03/25
May - June 2025	Tracie C. Snow	snowt@fsdbk12.org	07/20/25
May - June 2025	Tracie C. Snow	snowt@fsdbk12.org	07/10/25
March - April 2025	Tracie C. Snow	snowt@fsdbk12.org	05/28/25
January - February 2025	Tracie C. Snow	snowt@fsdbk12.org	03/14/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 98.1%

Submitted On Time = 36

Submitted Late = 6

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.27%


Submitted On Time = 74

Submitted Late = 3

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 90.00%

Submitted Complete = 30

Submitted Incomplete = 3

Completed After Submission = 8

Other Task Completeness



Other Task Completeness:

Score = 95.71%

Submitted Complete = 46

Submitted Incomplete = 0

Completed After Submission = 3

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 6

Duplicate Filled Role = 8

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	03/03/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	06/24/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	06/25/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/16/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/07/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/22/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/27/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	100% - Submitted	08/22/25			
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/08/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

Agency Reported

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

FWC Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	11/06/23		Staffing/Resource Availability	Limited subject matter expert (SME) availability	Increasing	6 (Medium/High)	Our agency is short-staffed, therefore, we have limited access to SMEs	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	If SMEs aren't available to learn and test the system, we will have issues once we go live.	No change

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Open and Monitoring	11/06/23		Staffing/Resource Availability	Team Attrition	Stable	6 (Medium/High)	People come and go	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	If team members leave, they take all their knowledge with them, making it that much harder for whoever is left once we go live.	No change
Open and Monitoring	11/06/23		Training	Resistance to change	Stable	4 (Medium/Medium)	We have a workforce that is familiar with current processes, any type of change, causes fear amongst the team members.	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact	If folks don't get on board with the changes, we will have issues once we go live	No change
Open and Monitoring	08/09/24		Training User Acceptance Testing	There is no communication plan between PALM, Enterprise systems and the agencies. FWC is unable to accurately define impacts to processes and potentially agency business systems.	Stable	4 (Medium/Medium)	Agencies are very dependent upon the enterprise systems, since Florida PALM is not managing a communication plan as part of the process, agencies are left hoping there is communication going to occur.	1. FWC Analysis, design, and system remediation is being based on calculated assumptions	If we learn of enterprise changes too late in the process, we will be at risk for not being able to perform the needed activities within those applications at go live.	No change
Open and Monitoring	11/06/23		Interface	Not all PALM interfaces are fully designed/documented, additionally currently defined interfaces are subject to change.	Stable	1 (Low/Low)	Since Florida PALM is using an agile development approach interfaces aren't fully designed and documented prior to agencies needing to do development/remediation activities	1. FWC Analysis and design is being based on calculated assumptions	If interfaces change too late in the game, we will be at risk for not being able to process incoming files once we go live.	No change

FWC Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

FWC Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

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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FWC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Jessica Crawford	jessica.crawford@myfwc.com	09/08/25
May - June 2025	Jessica Crawford	jessica.crawford@myfwc.com	07/07/25
May - June 2025	Jessica Crawford	jessica.crawford@myfwc.com	07/05/25
March - April 2025	Jessica Crawford	jessica.crawford@myfwc.com	05/07/25
January - February 2025	Jessica Crawford	jessica.crawford@myfwc.com	03/05/25

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 92.79%

Submitted On Time = 35

Submitted Late = 8

Pending Submission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 83.46%

Submitted On Time = 54

Submitted Late = 23

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 80.00%

Submitted Complete = 23

Submitted Incomplete = 4

Completed After Submission = 15

Other Task Completeness

Other Task Completeness:

Score = 80.20%

Submitted Complete = 29

Submitted Incomplete = 2

Completed After Submission = 19

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 13

Duplicate Filled Role = 2

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	04/11/25	4/11/25:RC requested submission be changed back to 50%. JAC continues remediation and unit testing. Addendum completion does not complete task.	Submission Complete	08/26/25
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/17/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/07/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/17/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Task Closed - Submission Incomplete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25	JAC's Website: <a href="https://justiceadminorg.sharepoint.com/s">https://justiceadminorg.sharepoint.com/s</a>	Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	09/02/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/17/25					
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/17/25					
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/17/25					
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25		Submission Incomplete	09/12/25
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

JAC Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Monitoring	05/09/25		Business Process Change Staffing/Resource Availability Training User Acceptance	User Acceptance Testing (UAT) and complete test coverage	Stable	6 (High/Medium)	UAT coincides with year-end and financial statements, impacting JAC's Accounting and Financial Services teams heavily	JAC is developing UAT planning materials and targeted communications aimed at preparing staff for UAT and its anticipated	JAC staff will inadequately prepare for UAT or fall behind on year-end duties.	JAC modified risk background and mitigation to more accurately reflect the original intent of the risk.

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			User Acceptance Testing				teams heavily.	UAT and its anticipated time commitments. This will allow staff to better prepare for the increased workload that UAT presented in addition to standard year end busy season.		
Open and Monitoring	05/05/25		Agency Business System	Limited Sample Data	Increasing	4 (Medium/Medium)	Limited sample data available for interface testing	Waiting for more test data to be available during interface testing and UAT	Agency Business Systems may have issues which were not discovered earlier	Closed
Open and Monitoring	05/12/25		Agency Business System Post Implementation	Transfer of FLAIR IW data to PALM DW fails.	Stable	3 (High/Low)	The Florida PALM plan indicates that FLAIR IW data will be extracted and stored in PALM DW. If this process fails, the agency will be without historical data needed for reporting	As of July 2025, we will monitor the risk and updates from the Florida PALM team related to DW. In the future, we may need a more robust plan. At this time, JAC does not have a viable mitigation plan to address the risk.	The agency would be unable to access data to be able to complete reports using historical data. The Risk would elevate to an issue. At this time, JAC does not have a viable response plan if this were to become an issue.	JAC does not have an internal Data Warehouse. Risk is still valid and stable.
Open and Mitigating	04/30/25		Business Process Change User Acceptance Testing	Project/Grant Tracking - Revenue and Disbursement	Decreasing	3 (High/Low)	JAC anticipates losing priority accounting data elements (e.g., EO / LS) in the transition to PALM, which will require JAC to create a large volume of new projects for every grant or revenue stream in order to track both revenue and disbursements.	We are working with each JRO to set up projects they need to be tracked.	Due to the large volume of Projects created, JAC may fail to create all required Projects prior to go-live. In addition, JAC won't be able to provide accurate reporting at the grant/project level.	Due to the anticipated project delay JAC expects sufficient time to work with JROs and set up projects that need to be tracked. At this time, the risk is mitigated and closed, however should the risk to JROs resurface, JAC will log the risk again as a new risk.
Open and Monitoring	05/09/25		Agency Business System	Business Management Operations System (BOMS)	Decreasing	3 (High/Low)	JAC, and the Judicial Related Offices (JROs) JAC serves, utilize an external business system (BOMS) for core business functionality. BOMS requires substantial remediation efforts to meet PALM requirements, including system and process-based changes.	JAC formed an Advisory Council comprised of JRO leaders to work with the vendor on remediation activities. JAC will continue to assist the Advisory Council when requested regarding activities related to BOMS, to support the successful remediation of the system and associated processes.	If BOMS remediation is unsuccessful, substantial manual workarounds would need to be developed to continue core business operations across JAC and the JROs it serves.	JAC understands BOMS remediation is based on a four (4) build model. It has been reported that build 1 has been submitted for testing and build 2 is in progress.
Open and Monitoring	04/30/25		Post Implementation	Downtime during transition	Increasing	1 (Low/Low)	In the period between FLAIR sunset and PALM go-live, JAC risks violation of prompt payment statutes, and anticipates significant transactional volume backlog and increased calls from vendors regarding payment schedules.	Monitor schedule and plan accordingly, constant communication with the JROs and vendors on the delay and timelines.	This will cause a significant disruption to the workflow as well as compliance and interest penalties owed to vendors. JAC will work through the backlog as quickly as possible.	JAC is in the process of quantifying the level of disruption potential. The number of invoices will be affected by the time of the transition - a June/July shutdown will impact invoices differently than a Dec/January shutdown.

JAC Issues									
Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025	

JAC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025	
People Processes	Project teams will have access to the appropriate management, staff and related Program stakeholders (internal and external) and other resources as required and as needed without delays	Logged	05/09/25	All Stakeholders and Systems	JAC validates assumption for reporting period	
People Processes	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	05/09/25	All Stakeholders and Systems	JAC validates assumption for reporting period	
Technology	There will be no technical barriers to the integrations required for future-state data exchange between JAC systems and those impacted by PALM.	Logged	05/09/25	All Agency Business Systems	JAC validates assumption for reporting period	
Data	JAC assumes data will be fully cleansed, and remain cleansed, prior to go-live.	Logged	05/09/25	All JAC staff, including JRO fiscal staff.	JAC validates assumption for reporting period	
People Processes Technology	JAC will receive requested funding throughout the duration of the PALM project lifecycle.	Logged	05/09/25	All JAC staff	JAC validates assumption for reporting period	
People Processes Technology	All JAC agency business system remediation projects that require direct interface with PALM will successfully achieve PALM and JAC requirements.	Logged	05/09/25	All JAC staff	JAC validates assumption for reporting period	
Processes	JAC assumes the Florida PALM team will provide clarity regarding process to create certified forward payables during the cutover period from FLAIR to PALM in a timely manner to allow for necessary preparations to be made across JAC staff.	Logged	07/07/25	JAC Accounting, Financial Services, Budget	Removed - PALM addressed	
People Processes Technology Data	JAC assumes the PALM schedule will be updated to reflect the delay in UAT and provide sufficient time (as much or more than previously scheduled) for UAT when the new schedule is published to Agencies.	Logged	09/09/25	All JAC staff	New assumption logged	

#### Agency Sponsor Confirmation

The form you are attempting to access is no longer active.


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#### JAC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	09/10/25
May - June 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	07/10/25
March - April 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	05/12/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/08/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 86.67%

Submitted On Time = 26

Submitted Late = 16

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 89.1%


Submitted On Time = 57

Submitted Late = 20

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 81.46%

Submitted Complete = 27

Submitted Incomplete = 5

Completed After Submission = 9

Other Task Completeness



Other Task Completeness:

Score = 82.24%

Submitted Complete = 37

Submitted Incomplete = 1

Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 7

Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	07/23/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/17/25	75% - Consolidating/Inputting Information for Submission		Submitted addendum 8/28/2025		
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/07/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/07/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/07/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/15/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/17/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/28/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/17/25	100% - Submitted	08/25/25	Updated Agency Supplier Record and marked confidential suppliers are complete as is. Legislature does not have any confidential suppliers.		
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/17/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/17/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25			09/11/25
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25					

Agency Reported

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

LEG Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	10/28/24		Post Implementation	EDR and Auditor General Data needs	Stable	9 (High/High)	PALM must continue to provide EDR and Auditor General the data they need to	Continue to work through issue with partners	High	EDR and Auditor General will need access to the same data from Florida PALM that they receive from the Auditor General

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Closed	07/01/25	09/10/25	Staffing/Resource Availability	Loss of project resources to DROP, absences or other turnover.	Stable	9 (High/High)	support the Legislature Loss of key PALM resource and institutional knowledge due to death of employee	Working to backfill this resource	High	from FLAIR today. Staff has been hired to replace the vacancies that were a concern related to Florida PALM.
Open and Mitigating	08/26/24		Agency Business System	Procurement of a new Travel Management System to be implemented and integrated commensurate with PALM implementation	Stable	3 (Low/High)	Current Legislative travel system vendor will not support PALM. New travel management system must be procured and operational in time for PALM Go-Live on July 1, 2026.	Continue to work through issue with partners	High	LEG is continuing to work toward selection of a new travel system to fully integrate with Florida PALM, however, LEG has a backup plan in place to move forward with Florida PALM implementation even if a new travel system is not ready during testing and at go-live.
Open and Mitigating	08/26/24		Agency Business System	Procurement of a new Asset Management System to be implemented and integrated commensurate with PALM implementation	Stable	3 (Low/High)	Current Asset Management system vendor will not support PALM. New system must be procured and operational in time for PALM Go-Live on July 1, 2026.	Continue to work through issue with partners	Medium	LEG is continuing to work toward selection of a new AM system to fully integrate with Florida PALM, however, LEG has a backup plan in place to move forward with Florida PALM implementation even if a new AM system is not ready during testing and at go-live.

LEG Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

LEG Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People	Will not lose project resources to competing priorities, retirements or other turnover.	Logged	07/01/23	Temporary impact to project	With new LEG hires, there is very little impact to Florida PALM if others within the LEG team separate or retire.

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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LEG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Heather Cleary	cleary.heather@leg.state.fl.us	09/10/25
May - June 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	07/07/25
March - April 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	05/09/25
January - February 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	03/10/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 96.76%

Submitted On Time = 24

Submitted Late = 10

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.67%


Submitted On Time = 62

Submitted Late = 13

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 84.12%

Submitted Complete = 24

Submitted Incomplete = 3

Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 88.72%

Submitted Complete = 34

Submitted Incomplete = 1

Completed After Submission = 12

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 2

Duplicate Filled Role = 12

Vacant Role = 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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	02/13/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/08/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/08/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/21/25	Due to an unforeseen circumstance the task was unable to be submitted by the due date.	Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/05/25			
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

Agency Reported

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

PSC Risks										
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025

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PSC Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025

PSC Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025

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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PSC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Apryl Lynn	alynn@psc.state.fl.us	09/05/25
May - June 2025	Apryl Lynn	alynn@psc.state.fl.us	07/10/25
May - June 2025	Apryl Lynn	alynn@psc.state.fl.us	07/09/25
March - April 2025	Apryl Lynn	alynn@psc.state.fl.us	05/05/25
January - February 2025	Apryl Lynn	alynn@psc.state.fl.us	03/03/25

Helpful Links

[Dashboard Snapshots](#)  
[Knowledge Center](#)  
[Florida PALM Workbook for SCS](#)  
[Readiness Workplan](#)

# SCS Status Report Dashboard

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

Reporting Period

July - August 2025

Agency Sponsor

Eric Maclure


RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness


Direct Impact Task Completeness

Other Task Completeness




**Direct Impact Task Timeliness:**  
Score = 99.51%

- Submitted On Time = 40
- Submitted Late = 1
- Pending Submission = 0




**Other Task Timeliness:**  
Score = 97.01%

- Submitted On Time = 68
- Submitted Late = 9
- Pending Submission = 0



**Direct Task Completeness:**  
Score = 84.50%

- Submitted Complete = 24
- Submitted Incomplete = 2
- Completed After Submission = 14



**Other Task Completeness:**  
Score = 89.17%

- Submitted Complete = 37
- Submitted Incomplete = 1
- Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

**Change Champion Network:**

- Unique Filled Role = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

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

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	04/11/25		Submission Complete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/10/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/10/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/10/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25		Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/03/25	50% - In Progress				
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/26/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/03/25	50% - In Progress				
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/03/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	587-C	Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects	08/11/25	10/03/25	50% - In Progress				
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/03/25	50% - In Progress				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/03/25	50% - In Progress				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	50% - In Progress				

## Agency Reported

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

### SCS Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	06/11/25		Agency Business System Business Process Change Deployment/Cutover Staffing/Resource Availability User Acceptance Testing	If SCS can not process end-to-end transactions at or above FLAIR transaction times, (i.e., invoice-to-warrant within 48 hours or procure-to-pay within 48 hours), SCS will not certify that the PALM system and Enterprise Partners are ready for SCS to go live.	Increasing	9 (High/High)	SCS has requested PALM to include formal UAT testing scenarios that exercises PALM processing times (singular) and Enterprise Partners (dual processing dependencies)	SCS has requested PALM to include formal "performance based" UAT test scenarios that includes multiple end-to-end transaction types that measure life-cycles timings in PALM and Enterprise Partners against what FLAIR and Enterprise Partners achieve today. Service Level Agreement (SLA) targets need to be defined and achieved with UAT testing for SCS to accept the PALM and Enterprise Partner systems for go-live.	SCS will not accept the PALM solution for go-live.	SCS continues to prepare for UAT end-to-end processing to meet operational requirements.
Open and Mitigating	05/02/25		Agency Business System Interface Conversion/Configuration	<p>If PALM is not fully operations in UAT, then SCS schedules, timelines, and delivery dates in SCS IMS will need to be delayed with dependencies adjusted.</p> <p>Depending on what PALM UAT functionality is delivered, SCS's will need to reassess which parts of our Financial, HR/Payroll, and Reporting operations PALM will be able to service. To ensure proper alignment is in place to operate in PALM throughout UAT and possibly Training and Production, SCS must perform additional analysis of our business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems to determine our SCS functional and technical operational models.</p>	Increasing	6 (High/Medium)	Milestones missed, Schedules and Timelines have been extended	Requested through IV&V to have PALM communicate directly to all agencies their progress against plan on establish "control thresholds information" on a regular basis. Following up with PALM POC's and other Agency contact.	SCS schedules, timelines, and delivery dates in SCS IMS will be delayed with increases in time and costs.	SCS continues to monitor PALM functional and technical capabilities through all Project interactions such as; interface testing, PALM tasking and discussions, Knowledge Center updates, meetings & workshops and general discussions..
Open and Mitigating	05/02/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Role Mapping User Acceptance Testing	<p>If Enterprise Partner applications are not operational in UAT, then SCS schedules, timelines, and delivery dates in SCS IMS will need to be delayed with dependencies adjusted.</p> <p>Enterprise Partners are critical in processing SCS Financial, HR/Payroll, and Report distribution information.</p> <p>Depending on what functionality is delivered, SCS's will need to reassess which parts of our Financial, HR/Payroll, and Reporting operations PALM and Enterprise Partners will be able to service. To ensure proper alignment is in place to operate in PALM throughout UAT and possibly Training and Production, SCS must perform additional analysis of our business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems to determine our SCS functional and technical operational models..</p>	Increasing	6 (High/Medium)	PALM has encouraged Agencies to take on more responsibilities by directly engaging Enterprise Partners (EP). This approach can overwhelm EPs.	<p>SCS is focusing on internal ABS testing and defining where Enterprise Partners can be leveraged. Also, communicating with external partners our requirements &amp; expectations for successful integration support</p> <p>Continuing to reach out to Enterprise Partner (EP) POC, PALM POC's, and other Agency contacts. Attending EP workshops and demos as they are made available.</p>	SCS will not be able to process critical transactions end-to-end in PALM resulting in schedules, timelines, and delivery date delays.	SCS continues to monitor Enterprise Partner functional and technical capabilities through all Project interactions such as; interface testing, meetings and general discussions..
Open and Mitigating	05/02/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Identity Provider (IdP) Post Implementation Role Mapping	<p>If SCS does not receive supplemental funding as requested, then SCS's ability to migrate and transform to PALM Financials, HR/Payroll, and Reporting at go-live will be at risk.</p> <p>Receiving requested</p>	Increasing	6 (High/Medium)	SCS will submit supplemental funding request and justification to support additional SCS resources	Monitoring funding allocations	SCS's ability to migrate and transform to PALM Financials, HR/Payroll, and Reporting at go-live will be at risk.	SCS requested funds will allow SCS to properly prepare, migrate, and transition to PALM Financial, HR/Payroll, and Reporting operations within schedules, timelines, target delivery dates, and

			Staffing/Resource Availability Training User Acceptance Testing	funds will allow SCS to properly prepare, migrate, and transition to PALM Financial, HR/Payroll, and Reporting operations within schedules, timelines, target delivery dates, and costs.						costs.
Open and Mitigating	06/06/25		Agency Business System Business Process Change Interface User Acceptance Testing	If PALM Business Intelligence, Reporting and Data Warehouse is not similar to FLAIR functionality in UAT, then SCS will have to modify our current PALM defined business process models, staffing levels, resource structures, workflows, operating procedures and changes to internal Agency Business Systems which will delay SCS schedules, timelines, and delivery dates.	Increasing	4 (Medium/Medium)	In July 2024, prior to opening a Risk, SCS sent a question to the PALM Project Team regarding Financial Transaction Details and received a response in December. This did not satisfy SCS reporting requirements that are provided in FLAIR today.	Following up with PALM POC's and other Agency contacts.  Sent an email to PALM on June 06/06/2025 requesting similar FLAIR Data Warehouse capabilities and for PALM to conduct a session discussing reporting solutions/alternatives with agencies.  SCS has received responses from PALM around operationalizing PALM delivered Business Intelligence, Reporting and Data Warehouse functionality.  SCS is currently set to begin testing internal ABS testing scenarios that will accommodate "end-to-end" functional scenarios between PALM, SCS, & Enterprise Partners. However, based on PALM's responses to SCS questions around PALM delivered Business Intelligence, Reporting and Data Warehouse utilization, SCS is having to modify our current PALM defined business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems. SCS Transaction History will be our heavy lift on how to retrieve transactional data fields from a wide array of PALM tables.	SCS will not be able to properly provide pre-defined and custom reports for individuals, units, organizations, locally, and remotely (Florida-wide SCS community).	SCS continues to work on alternative reporting capabilities to satisfy SCS report recipients and to validate meeting requirements for internal processing.
Open and Mitigating	05/02/25		Training User Acceptance Testing	If SCS domain transition from ".org" to ".gov" is not complete	Stable	1 (Low/Low)	This change has impacted current SCS Cash Management	SCS is working with PALM IT with case number CS0012635 - to	SCS users may have trouble accessing the PALM UAT environment	SCS continues to roll out changes through the organization that will

SCS Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	05/07/25		Business Process Change Conversion/Configuration Role Mapping Staffing/Resource Availability User Acceptance Testing	SCS is adopting new PALM HR/Payroll processing requirements, designs, & reporting: - This will Impact internal SCS ABS Timekeeping with PALM and SCS HRIS payroll reports with PALM	High - Impacts the ability	Implementing the information collected during the PALM HR/Payroll workshops. SCS is conducting internal design sessions to update agency procedures.	Validating updated processing with SCS HR, F&A, & OIT	07/31/25	Since PALM has recommended SCS adopt new PALM HR/Payroll processing requirements, designs, & reporting capabilities, SCS is dependent on PALM to reveal full functional and technical PALM HR/Payroll capabilities - This adoption will impact internal SCS ABS Timekeeping and SCS HRIS payroll reports from PALM

SCS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People Processes Technology Data	SCS is assuming that PALM will provide full application functionality for all modules & business processes to support SCS's modified production performance model.  SCS is creating internal ABS testing scenarios that will integrate a complete "end-to-end" testing scenario between SCS, Enterprise Partners, & PALM	Logged	06/06/25	SCS Business Units: - F&A - Budget - Contracts & Grants - HR/Payroll - OIT - Courts Administration	With the delay of UAT Online, SCS continues to monitor the progress of PALM's full functionality around Financials, HR/Payroll, Business Intelligence, Data Warehouse and Reporting.

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: \*

SCS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Eric W. Maclure, State	macluree@flcourts.org	09/09/25
May - June 2025	Eric W. Maclure, State	macluree@flcourts.org	07/10/25
March - April 2025	Eric W. Maclure, State	macluree@flcourts.org	05/07/25
January - February 2025	Eric W. Maclure, State	macluree@flcourts.org	03/10/25