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 2023/24 General Appropriations Act.

Reporting Period:

March – April 2024

Helpful Links

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

AHCA 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

March - April 2024

Agency Sponsor

Lynn Smith

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 6
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 72.50%

- Submitted Complete = 2
- Submitted Incomplete = 1
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 66.56%

- Submitted On Time = 12
- Submitted Late = 14
- Pending Submission = 4

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	Technology	**504**	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		4/30 - Some updates were provided, but it appears to be incomplete. 4/19 Awaiting updates from AHCA Technical Team on next steps after the reissuance of initial documentation (Task 326). 4/12 - AHCA Technical Team was unable to schedule meeting (due to conflicts) with the Florida PALM team for outstanding questions. Also - See Issue 0001		
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/03/24**	4/30 - All are completed, but will not submit until we review it once more as a team		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		4/30 - Working with A&A on data cleansing 4/12 - Have begun some data review of the files provided to the Bureau for Financial Services team by DFS; Will Review and determine if additional data needs to be addressed and the approach. To be completed by		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		4/30 - Some updates were provided, but it appears to be incomplete. 4/19 Awaiting updates from AHCA Technical Team on next steps after the reissuance of initial documentation (Task 326) 4/12 - AHCA Technical Team was unable to schedule meeting (due to conflicts) with the Florida PALM team for outstanding questions.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/13/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**05/01/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	75% - Consolidating/Inputting Information for Submission	**04/19/24**	Awaiting documentation from the team for end user engagement	Submission Incomplete	05/01/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					

Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**	Signed on Thursday 5/9		05/13/24
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 30

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 67

• Related Business Systems = 5

• Related Reports = 31

• Documentation Status:

- Complete = 65 Partial = 1 Not Started = 0

Implementation:

Impacted Agency Business Processes = 67

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 4

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 15 None = 1 Uncertain = 20

• Level of Impact: Processes Changes

- High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0

• Level of Impact: Technology Changes

- High = 1 Medium = 30 Low = 4 None = 1 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 25 In Progress = 0 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 23

• Criticality:

- High = 20 Med = 0 Low = 2 None = 1

• Documentation Status:

- Complete = 3 Partial = 15 Not Started = 0

Cataloged Interfaces = 18

- Inbound Interfaces = 13

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 23

• Segment I - Documentation Updates:

- Complete = 0 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 0

Planned Interfaces = 11

- Inbound Interfaces = -2

- Outbound Interfaces = 9

Data

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

Current-State:

Unique FLAIR Data Elements = 82

• Associated Unique Uses = 82

- Continued Use - Yes = 1

- Continued Use - No = 0

• Associated Business Systems = 22

Cataloged Reports = 62

• Criticality:

- High = 59 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 8 Not Started = 1

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 0 Not Started = 3 Not Applicable 0

Reports = TBD

Agency Reported

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

AHCA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	When SunFocus and other urgent operational events occur, resources will be shifted to focus on the operational events thereby impacting the completion of Florida PALM tasks (schedule).	Open	9 (High/High)	Production incidents and time sensitive activities will continue to interfere with the resource-tight bureau. Assume the risk and work with the PALM Project staff to identify when a deliverable will be late. Document each occurrence and continue working on Florida PALM tasks and activities.	On-going	11/02/23	Phyllis Wander
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander
People Processes	Loss of Institutional Knowledge - Matriculation of knowledgeable business process and the SunFocus Application resources will hinder the progress of the project thereby impacting the timely completion of Florida PALM tasks (schedule).	Open	6 (High/Medium)	Continue to document desk procedures and manual processes and systems as well as encourage cross-training of operational functions.	On-going	11/09/23	Phyllis Wander

AHCA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Technology	After requesting system documentation, the Vendor team has not provided any functional/system documentation for SunFocus to attach to Florida PALM Task 326. The task did not meet the scheduled due date of 10/27/2023.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	2/28/2024: Monitor the completion of Segment I and II updates to the documentation. Escalate	4/30//2024: Vendor team provided updates to documentation (Tasks 504 and 516) but it was incomplete. 4/19/2024: Vendor team provided documentation in the proposed format but has not provided in updates. Meeting Coordination between the Florida PALM technical team needs to be held to answer outstanding questions Vendor team has. Coordination of that meeting will begin again after the first attempts	01/15/24	Scott Ward

					after the first attempts failed. Will update the resolution date when meeting is scheduled. 2/28/2024: Segment I updates were not included with the initial documentation. 2/23/2024: Met with the Vendor team and reviewed the documentation (in-progress). Initial documentation (Completion of Task 326) is expected before the end of the reporting period (February 29th). 2/9/2024: AHCA Management has reached out to the Vendor to address the need for system documentation.		
People Processes Technology	If the resources are not identified and on-boarded by the end of March 2024, 1) the Agency will not complete the tasks in a timely manner and 2) the Agency will not transition to Florida PALM in January 2026.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Immediate plan is to add an additional BA or Business Process Consultant to document the HR/Payroll processes and complete the tasks that were done for the Financials Wave.	4/19: BPC 1 has been onboarded with the second one to begin on 4/29 4/10/2024: BPCs with extensive FLAIR background confirmed for the 4/29. 3/22/2024: Business Process Consultant (BPC) accepted position to begin in the next few weeks. 3/11/2024: Initial round of interviews completed. 2/28/2024: Currently holding interviews. 2/9/2024: Resumes have been received and reviewed by the AHCA team. In the process of setting up interviews. 01/11/2024: Re-evaluated the advertisement and revised the eQuote documentation. Plan to post at the end of the week. 11/09/2023: Reviewed current resumes, but they did not have the specific skills we were seeking. Need to re-evaluate and resubmit a posting for the Staff Aug.	01/15/24	Phyllis Wander

AHCA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

AHCA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Weekly Governance Meetings	03/04/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	03/06/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	03/04/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	03/11/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	03/11/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Project Team Meeting	03/18/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	03/18/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	03/20/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	04/01/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/01/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	04/08/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Change Champions Workgroup Meeting	04/10/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Governance Meetings	04/15/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	04/15/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Change Champions Workgroup Meeting	04/17/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	

People	Quarterly Financial Ecosystem Governance	04/19/24	Executive Leadership and BFS Leadership	Managing for the transition of Florida PALM for Agency-wide visibility	
People	Weekly Project Team Meeting	04/22/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/22/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	04/24/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	04/29/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/29/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
Processes	Weekly Disbursement To-Be Processes	04/24/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Weekly Disbursement To-Be Processes	04/30/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	

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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AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/24
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24
November - December 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	01/13/24
September - October 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	11/09/23
July - August 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	09/11/23

Helpful Links

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

APD 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

March - April 2024

Agency Sponsor

Rose Salinas

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Completeness:

Score = 65.71%

- Submitted Complete = 3
- Submitted Incomplete = 2
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 99.38%

- Submitted On Time = 29
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission		2/28 - PALM User Excel Spreadsheet received with updates for teams - finishing placing into Smartsheet by COB 2/29. 3/14-APD Teams breakdown on internal tracker - Reports documentation updated (3/12)/Business Process Review Seg I & II 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - 90% completed- working to close final open items from internal tracker - Finance Team leading - multiple sheets broken out for team input 4/18 - internal APD tracker updated with specific breakdown of all rubrics and teams follow thru defined. ongoing meetings and effort 5/7 - final review on all spreadsheets for completion - no blanks - all identified and sheets completed correctly - will submit on time - goal is 5/9 ***5/10 - 5/10 TLH office closures - per conversation with RC, leaving task open, all workbooks completed pending Location Definition Workbook - RC meeting slated for 5/13 - pending internal APD follow up as well 5/13*** 5/13 - RC comments: APD's config workbook is complete with exception of location id. RC discussed with PM-Business Analyst on 5/10 during TLH storm office closure. Organization tree structure process cleared up. Sheet complete. Matching FLAIR location codes to addresses is a challenge. PM will follow up with APD F&A on 5/13 about Flair location id's, make appropriate selections in sheet, and assign Florida Palm location ids in sheet. (Note: APD is assigning FP location codes based on current day FLAIR location codes.) Task tracker comment to be added noting 5/10 phone call with RC. Due to 5/10 TLH storm office closures, PM will follow up with APD team on 5/13 to resolve Location ID.		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	**04/11/24**	2/5 - Start of review for TASK completion 2/14 - Reviewing and updating based on Finance Team recommendations 2/21 - in progress 3/14 - Teams review/IT and Teams assignment break out - APD Internal Tracker 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - Round 1 Plan has been executed - working to close final open items from internal tracker 4/10 - All Inventories are planned - but not executed yet with May Encumbrance clean up completion target and June completion plans for asset data. - leaving at 75% due to	Submission Incomplete	05/06/24

								actual inventory effort is in progress at this time and will NOT be completed until end of JUNE. 4/11 - finalizing input to sheets - review 4/12 for completion of all rubrics with inventory actions remaining outstanding 4/18 - ongoing effort with BA leading the documentation updates for inventories - asset and encumbrances 5/2 - teams review - Encumbrances target completion for cleanse - May 30 5/2 - Asset Managment - target completion for the physical location cleanse - May 30 - physical inventory of all assets - June 30 5/6 Selected "Not Applicable" for all columns for Customers and Grants rows: Data Readiness Evaluation through Current-State Data Readiness Status		
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT initiating the activities with new TD onboarding 2/27-APD IT Team is onboarding a new Technical support person to assist with focused IT support to include re-writes to scripting for interface of all APD ABS's 2/28 - new meeting review scheduled for 3/7 3/14 - IT Team onboard and focused - noted in internal tracker - working thru assignments/actions 3/31 - new APD position for Tech Support - moving thru all sheets after team updates for data impacts and updates from IT 4/8 - final reviews - 90% completed- working to close final open items from internal tracker - define the plan and establish IT team objectives for segments thru 1/2/3 4/18 - IT team review scheduled for 4/23 4/30 - IT team is completed with the Smartsheet - but the IT Team is 5/3 - TA working this task for completion - update on next IT call 5/13		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**	4/8 - Core Team meetings - /Hi 5's and All hands - information is shared thru out APD (Thursday Task Talk - 4/11) 4/18 - completed with documentation - comments column includes dates from all listings of meetings as discussed with RC - noted those documentations that can be shared 4/18 - dates completed in column - updated - with new add and notes- resubmitted - email to RC	Submission Complete	04/18/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	75% - Consolidating/Inputting Information for Submission		4/18 - review of internal APD defined survey deliverable with team calls next 2 weeks - reviewing with CORE team at APD 4/29 - being answered by teams - reviewing with teams on team calls - latest due date within APD 5/10 - Smartsheet form. 5/3 - All Teams provided Survey by EOD 5/3 - IT team separately to be provided by EOD 5/6 5/7 - reminder for teams completion - sent today		
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/09/24**	5/7 - Rose/Sponsor in review and signoff pending 5/9 - Rose signed off and sumitted		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 75

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 238

• Related Business Systems = 6

• Related Reports = 34

• Documentation Status:

- Complete = 238 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 9

• Criticality:

- High = 9 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 8 Partial = 1 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 480

• Associated Unique Uses = 1181

- Continued Use - Yes = 1094

- Continued Use - No = 57

• Associated Business Systems = 2

Implementation:

Impacted Agency Business Processes = 238

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 21 Medium = 6 Low = 62 None = 17 Uncertain = 22

• Level of Impact: Processes Changes

- High = 19 Medium = 10 Low = 24 None = 13 Uncertain = 62

• Level of Impact: Technology Changes

- High = 15 Medium = 4 Low = 8 None = 27 Uncertain = 74

• Level of Impact: Data Changes

- High = 17 Medium = 7 Low = 3 None = 22 Uncertain = 78

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 94

Cataloged Interfaces = 78

- Inbound Interfaces = 6

- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 8

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 8

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 8

Planned Interfaces = 14

- Inbound Interfaces = 3

- Outbound Interfaces = 11

Cataloged Reports = 112

• Criticality:

- High = 150 Med = 18 Low = 1 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 2

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 2 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	-Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams

People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Closed	6 (High/Medium)	- Implement standardized documentation procedures - 2/6 - Teams working with new Business Analyst to update and fully document to the PALM Process Documentation and narratives - 1st and 2nd qtr 2024	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024 4/24 - noted that the Business Process documentation has been updated and documented as aligned with Task requirements. This is an ongoing internal project effort in parallel with PALM asks.	04/24/24	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People	Resistance to change among employees	Open	4	Conduct change management training	Measurement:	02/06/24	PALM Team/APD Project

People Processes	Resistance to change among employees	Open	4 (Medium/Medium	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b intiatied with COA review	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams

APD Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Data	APD Finance G/L Team - questioning when there will be a final approved full PALM Chart of Accounts listing provided	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024	This is will be an on-going -December 2023 - new chart fields finalized and the APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team	03/29/24	APD Finance Team
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found -2/6 - BA start Date =	04/01/24	APD Sponsor and Finance Team

	fulfillment of tasks at this time - with the resources we will be able to catch up and move forward.				2/20 -2/6 - Tech Support pending 4/22 - update March hire of BA and April Hire of TA		
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted 4/22 - new organization chart has been drafted and will initiate a change in organizational structure - G/L will be updated as approvals are completed	06/28/24	APD Sponsor and Finance Team
People Processes Data	APD Finance G/L Team - final PALM Chart of Accounts listing provided for workbook	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024 - 2/6 - new task 513 - to accomplish Workbook initiatives for PALM - in progress 4/22 - The Task 513 Workbook has aided in the closure of COA structure and mapping efforts - closed to completed Task 513	This is will be an on-going APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team 2/29 - asset mgmt team is engaged for location inventory	03/29/24	APD Finance Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team 4/22 - the inventory clean up and alignment with G/L cleanse is in progress - not yet closed	07/01/24	APD AM Team - BA - PM - Core Team
People Processes Technology Data	PALM Business Process Modules DO NOT align with the naming convention on the new PALM Modules - this is a new learning issue after adjusting for team purposes	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Re-mapping - and will re-educate the teams to their PALM Module Name - REALLY causes "change management issues"	4/22 - new change - business process models vs PALM Modules names - they don't align and APD has renamed their teams based on the Business Process Models/Modules originally introduced.	06/28/24	APD Teams/CCN and SME's
People Processes Technology Data	APD Inventories - Asset and Encumbrances - Process Improvement	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working with teams to establish and document pro	4/22 - still in process - unable to finish based on the Task requirements and due date of 4/12 4/24 - Asset Team has issued the Inventory requirements for fiscal yr end - and with that the effort to close is targeted for full cleanse of ALL inventory by June 30, 2024 4/24 - Encumbrances - part of the YE Close.	07/01/24	Asset Mgmt and Encumbrances by the Disbursement team
People Processes Technology Data	APD is in the process of a Business System re-write to the ABC system and this will require a 2 x re-write for support as PALM is onboarded	Open	High - Impacts the ability of the agency to meet deadlines or milestones	ABC project is pending a hold to address current a	4/24 - the Business System requirements at APD are unique due to the clients services provided. Need to update is critical but the affect to do this 2xs is being measured. TBD on the outcome and IT decisions	12/30/24	APD IT Team
People	APD Organizational changes will change the alignment of the personnel within the agency - but no approvals are final and there remain accounting adjustments to support until the accounting structure can be corrected	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get DMS approvals thru	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity.	06/28/24	APD Agency as a whole

APD Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined

Technology Data	regulations with APD looking to gain information and support from the PALM teams as needed or required.				
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.		04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion.
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer		04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.

APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	03/07/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/04/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/05/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/06/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/07/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD Calendar updates to Teams	03/05/24	APD PM	Timeline Snapshot for the month of March and April - upcoming events and scheduled activities	Agency Updates - BA and PM Review
People Processes Technology Data	Weekly Core Team Status Report	04/18/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Email updates (Past/present week/future) Weekly	weekly: Jan - 4,11,18,25 Feb - 1,8,15,22,29 Mar - 7,14,21,28
People Processes Technology Data	Weekly Core Team Teams Call	04/18/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Teams Virtual Call review of updates (Past/present week/future) Weekly	Weekly: Jan - 4,25 Feb - 1,8,22,29 Mar - 7, 14, 21 Apr - 11, 18
People Processes Technology Data	Monthly Budget Team Meeting	04/02/24	CCN and SMEs	Budget Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: Budget and Possible Future Project - Monthly	Monthly: Mar 20
People Processes Technology Data	Monthly Accounts Receivable Team Meeting	03/25/24	CCN and SMEs	Accounts Receivable Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: A/R-Revenue Accting-Cash Control-Grants. Monthly	Monthly: Feb 21
People Processes Technology Data	Monthly Disbursements Team Meeting	04/10/24	CCN and SMEs	Disbursements Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: Disbursements Management Monthly	Monthly: 3/21
People Processes Technology Data	Monthly Asset Management Team Meeting	04/08/24	CCN and SMEs	Asset Mgt. Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Asset Accounting & Management - Monthly	Monthly: Mar13/Mar 21/Mar 26
People Processes Technology Data	Monthly Contract Team Meeting	03/26/24	CCN and SMEs	Contract Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Contracts and Possibly Projects - Monthly	Monthly: Feb 28
People Processes Technology Data	Monthly Payroll Team Meeting	04/02/24	CCN and SMEs	Payroll HR and Finance Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Payroll Management and System Access and Controls - Monthly	Monthly: Mar 20/Feb 28
People Processes Technology	Monthly Accounting and Financial Reporting Team Meeting	03/25/24	CCN and SMEs	Accounting Management and Financial Reporting Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum	Monthly: Mar 11

Data				Team represents Modules: Accounting Management and Financial Reporting- Monthly	
People Processes Technology Data	Monthly IT Team Meeting	04/09/24	CCN and SMEs	IT Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents APD IT Effort	Monthly: Mar 5, Mar 25, Apr 2, extra meeting s due to onboarding new TA
People Processes Technology Data	Monthly Inter/Intra - Facilities Team Meeting	04/11/24	CCN and SMEs	Tacachale/Sunland/DDDP Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Monthly: Apr 2,
People Processes Technology Data	Monthly Inter/Intra - Regions Team Meeting	03/19/24	CCN and SMEs	State/HQ-SE-SW-NE-NW-Suncoast-Southern-Central Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Monthly: Feb 29, Mar incorporated into facilities meeting
People Processes Technology Data	Weekly APD PALM Internal Team Meeting	04/15/24	Other	Primary PALM Team Status Call - PM/BA/TA - weekly	Review all - talk to status - align APD
People Processes Technology Data	Monthly / Bi-Monthly APD High Fives Email	04/08/24	Other	Distribution email to all CCN and SME's and Teams - choosing high five points of interest/information/updates/clarifications for teams to review - Monthly - if needed Bi-Monthly	Internal APD focused - top 5 things to notes/express/propose/inform agency CCN and SME's and sent at least 1 x month or if needed 2 x's
People Processes Technology Data	PALM Communications forward/share	04/17/24	Other	All CCN and SME's are subscribed to PALM Communication - Add on clarifications and separation of priority emails redistributed to teams as needed - random	Sharing and adding APD focus to PALM communications
People Processes Technology Data	DFS Communications forward/share	04/04/24	Other	Manage teams with DFS required information/surveys/inquiries - random	Taking the Lead on DFS PALM Focused inquiries for accountability arbitrary dates
People Processes Technology Data	APD Internal Team Process Manual Documents - Goals-Charter	04/05/24	End Users	ALL Teams - Internal Intiative to update and align Goals and Charter for PALM Team Module structure	APD is working with each team as a whole to update their internal process manual and this is created to establish the team efforts and goals. - arbitrary monthly team meetings - all dates from March 21 - April 5

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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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24
November - December 2023	Rose Salinas	rose.salinas@apdcares.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23

Helpful Links

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

CITRUS 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

March - April 2024

Agency Sponsor

Christine Marion

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 2
- Duplicate Filled Role = 12
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 73.75%

- Submitted Complete = 5
- Submitted Incomplete = 1
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 97.19%

- Submitted On Time = 25
- Submitted Late = 5
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	03/25/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	04/21/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/29/24**			04/29/24
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**	Everything that is available has been attached.	Submission Incomplete	05/13/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/02/24**		Submission Complete	
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 11/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 32

- Related Business Systems = 4
- Related Reports = 42
- **Documentation Status:**

- Complete = 31 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 4

- **Criticality:**

- High = 4 Med = 0 Low = 0 None = 0
- **Documentation Status:**

- Complete = 4 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 21
- Continued Use - No = 3
- **Associated Business Systems = 0**

Implementation:

Impacted Agency Business Processes = 32

• Related Business Process Groupings = 8

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 11 Low = 21 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 31 Medium = 0 Low = 1 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 2 Medium = 9 Low = 16 None = 5 Uncertain = 0

• Level of Impact: Data Changes

- High = 1 Medium = 2 Low = 28 None = 1 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 32

Cataloged Interfaces = 2

- Inbound Interfaces = 2

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Cataloged Reports = 54

• Criticality:

- High = 31 Med = 12 Low = 5 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 2

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

CITRUS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	The quality of audio on webinars and recordings is low. Our team does not feel it is receiving much needed information presented during these workshops	Open	9 (High/High)	Please see what you can do to upgrade the quality of webinars	Data Day was a disaster for us, and a loss of productivity as we had 4 team members relying on the webinar.	04/30/24	PALM Team
Processes	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).	Open	6 (Medium/High)	We will discuss with our new project manager, to determine how foreign currency payments will be handled through PALM	New Risk entered this period	04/29/24	C Marion
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings. Update as of Jan 2024: There have been no training or information sessions targeted for technical support. We are unsure of the role our technical support person will play in PALM. He has very little to do with FLAIR,	09/19/23	C Marion

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	The PALM team presents some workshops as webinars, but the technology is not very good. Audio is either choppy with echoes, or completely nonexistent.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	It is not possible for us to travel to Tallahassee for every meeting. The quality of the webinars is so low that it is not productive for our team to participate	Data Day was a huge disappointment, as our team will be responsible for a lot of these activities. Resolution must come from PALM Team. We hope that our new project manager can assist with this task, since the PALM project cannot provide a quality remote solution.	07/31/24	PALM

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR Funding for FY2024-25 included in Legislative budget, pending Governor approval. BAPS request for current year funding was approved and project manager has been contracted through staff augmentation, to start April 30, 2024.
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff is currently completing Task 513, which defines data fields for configuration in PALM
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.

People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins
People Processes Data	Vendor maintenance done outside of PALM in AOD	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	This assumption will remain until more information released

CITRUS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	DFS Data Webinar	03/19/24	Christine, Lucy, Dianne, Kay	DFS explains Data Cleansing process	
Data	Data Cleansing, Round 1	03/21/24	Dianne	Data cleansing begins with first DFS spreadsheet	This will be a continuing process, due April12
Data	Data Cleansing Activiites	04/09/24	Dianne, Lucy, DFS Staff	Clarify Data Cleansing process for file #1	Dianne has been working on the first data cleansing file. Met with DFS staff (Julia Collins-Okane) to clarify what should be included in the file
Data	Data CLeansing Activities	04/10/24	Dianne, Lucy	First data file sent to DFS for data clean up	Confirmed with Julia on 4/29/24 that data items in this file can be deleted.
People Processes Technology Data	PALM Touchpoint Meeting	03/21/24	All PALM CCN members	Review upcoming tasks, ask questions regarding Task513, see agenda for details	Awaiting answers from Project team in order to complete Task 513
People	Senior Staff Meeting	03/22/24	Christine	Update senior staff on status of project, FLAIR Replacement project administered funds	
People	Meet with new PM, to discuss outstanding Tasks, including those that need to be re-submitted	04/30/24	CCN Team, Matt C. (New PM)	Review project status, discuss tasks which need to be resubmitted	Matt will be on site for this introductory meeting
People Processes	Production Support Webinar	04/23/24	George, Christine, CCN	Webinar regarding IDP and SAM roles	
People Processes	Review Task 328, determine how to move tasks to proper format	04/30/24	Lucy, Matt, Christine	Matt to look at current business process documents	Matt to assist in formatting current business process documents before due date of May 10

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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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Christine Marion	cmarion@citrus.myflorida.com	05/02/24
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for COM
- 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

March - April 2024

Agency Sponsor

Tisha Womack

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 5
- Vacant Role = 1

RW Task Completeness



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

RW Task Completeness:

Score = 96.67%

- Submitted Complete = 5
- Submitted Incomplete = 0
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 95.31%

- Submitted On Time = 26
- Submitted Late = 3
- Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/11/24**	Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication. UPDATE AS OF 4/2/2024: Team meeting scheduled for 4/9/2024. Update as of 5/11/2024: Task Tracker update late due to internet and utilities outage as result of storm. Update as of 5/13/2024: task due date extended to 5/13/2024 due to severe weather on 5/10/24; Lisa / Tulani reviewed Smartsheet entries for completeness. Updates made to the Distribution Code smartsheet. Task submitted.		05/13/24
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Dean Modling has created a cleansing plan and reviewed with Tisha Womack (Sponsor), Lemuel Toro (Agency Liaison) and myself (Project Manager) to formulate an internal plan. Clean up work has started with our Grants Management team. UPDATE AS OF 4/2/2024: Dean (Lead SME) and Tulani (PML) will review task instructions to determine if task completion requirements can be / will be done by task due date of 4/12/2024.		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	Lisa Simpson reviewed data entered into Smartsheet as of 3/14/2024. Feedback was given to areas whose information was available during meeting. Team asked clarifying questions and advised to make updates as needed. UPDATE AS OF 3/25/24: Internal deadline extended to April 5th due to task team members in PALM Data Day and Design Meetings. However, team members are expected to have 8/11 Smartsheet items with value for their respective assignments. Project updates have been communicated to team via Microsoft Teams.	Submission Complete	04/30/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication. UPDATE AS OF 3/25/2024: Team meeting schedules on Friday, 3/29/2024 to review task requirements and determine best plan of action for completion. UPDATE AS OF 3/29/2024: Task tentatively complete; waiting to confirm Encumbrances selections. Confirmation due on or before Tuesday, April 2, 2024 5 pm.	Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.	Submission Complete	

N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/08/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			04/30/24
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24					
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 44

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 61

• Related Business Systems = 8

• Related Reports = 31

• Documentation Status:

- Complete = 22 Partial = 36 Not Started = 3

Implementation:

Impacted Agency Business Processes = 61

• Related Business Process Groupings = 8

- Planned Spreadsheet Uploads = 7

• Level of Impact: People Changes

- High = 3 Medium = 20 Low = 25 None = 7 Uncertain = 6

• Level of Impact: Processes Changes

- High = 5 Medium = 29 Low = 13 None = 2 Uncertain = 12

• Level of Impact: Technology Changes

- High = 15 Medium = 20 Low = 5 None = 7 Uncertain = 14

• Level of Impact: Data Changes

- High = 7 Medium = 31 Low = 3 None = 8 Uncertain = 12

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 61

Technology

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

Current-State:

Cataloged Business Systems = 26

• Criticality:

- High = 7 Med = 18 Low = 0 None = 1

• Documentation Status:

- Complete = 4 Partial = 22 Not Started = 0

Cataloged Interfaces = 15

- Inbound Interfaces = 15

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 23

• Segment I - Documentation Updates:

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 10

- Inbound Interfaces = -4

- Outbound Interfaces = 7

Data

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

Current-State:

Unique FLAIR Data Elements = 71

• Associated Unique Uses = 84

- Continued Use - Yes = 2

- Continued Use - No = 12

• Associated Business Systems = 2

Cataloged Reports = 373

• Criticality:

- High = 2 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 2

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

COM Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	Delegated some day-to-day activities to staff members not directly involved with PALM. This change allows CCN team members some time to work on PALM each week. UPDATE as of 4/29/2024: Lead SMEs currently training new resources to be independent.	04/29/24	Caroline (Tisha) Womack / Lemuel Toro
People	Lack of support for Life-to-Date Accounting and	Open	9 (High/High)	Create internal life-to-date reporting system	Commerce needs LTD	04/29/24	Lemuel Toro / Caroline

Processes Technology Data	Reporting				balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module 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.		(Tisha) Womack / Dean Modling / Ken Heim
Processes	The current schedule for review of Payroll Wave Business Models allows insufficient time for comprehensive agency review.	Closed	6 (Medium/High)	At present all we can do is await the publication of the meeting materials.	Risk closed.	03/08/24	Lisa Simpson
People	SMEs who will provide vital support to PALM project during Segment IV workshops/meetings may also be needed to complete Financial Statement and Legislative Budget Request (LBR) tasks during the May 2024 - September 2024 window.	Open	6 (Medium/High)	Identify SMEs and SME backup team members.	SMEs with new staff/resources are currently training staff on day-to-day activities, as well as PALM related support. Backup SMEs will be identified as soon as possible.	04/29/24	Lemuel Toro / Lisa Simpson
People	Staff turnover and retention rates negatively impact Commerce's ability to gain and retain talent beneficial to PALM project and agency	Closed	4 (Medium/Mediu	Leadership efforts to recruit agency resources to support Commerce business goals and PALM initiatives as needed.	Commerce has onboarded agency resources to teams impacted by PALM to help support day-to-day activities.	04/29/24	Caroline (Tisha) Womack / Human Resources

COM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Insufficient work hours available to fully support Commerce specific PALM initiatives because existing staff are at capacity with regular hours	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Currently awaiting legislative budget amendment approval	Legislative budget amendment approved	03/14/24	Caroline (Tisha) Womack (Sponsor)/ Lemuel Toro

COM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team

COM Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	FACTS Contract Clean Up	03/05/24	Contracts Management	Meeting Cancelled	
Data	FACTS Contract Clean Up	03/12/24	Contracts Management	Review data to clean up and talked about status on all programs. Talked about changing up the reporting and James and David will run reports on FACTS Master Log vs. FACTS.	
Data	FACTS Contract Clean Up	03/19/24	Contracts Management	1. Reviewed new excel X lookup formula for FACTS Master Log vs. FACTS Recon. David and James will implement this X lookup and run the report every Friday for Junior to use for FACTS vs. SERA Recon. 2. Junior is working on SERA Closed vs. FACTS Open Recon. Junior will emial all FACTS contract that need to be closed to James and David. 3. James and David are only have HCD program recon to process. 4. Michelle is contacting C&G Romona Turner regarding access for David, James, and Michelle to the C&G smartsheet of the Contracts routeing log. 5. David will make a list of issues they incounter when processing the FACTS uploads. 6. Issue David has with FACTS process is not having current contract manger on file. Michelle will get with Lisa to see if there is an active employee with current supervisor list we can reconile with FACTS Master Log.	
Data	FACTS Contract Clean Up	03/26/24	Contracts Management	1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts. 2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce. 3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field. 4. Junior will have fresh data on April 1st with 2 seperate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working. 5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.	

Data	FACTS Contract Clean Up	04/02/24	Contracts Management	Review / Update contracts clean up.	1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts. 2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce. 3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field. 4. Junior will have fresh data on April 1st with 2 seperate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working. 5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.
Data	FACTS Contract Clean Up	04/16/24	Contracts Management	Review / Update contracts clean up.	1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts. 2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce. 3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field. 4. Junior will have fresh data on April 1st with 2 seperate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working. 5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.
Data	FACTS Contract Clean Up	04/23/24	Contracts Management	Review / Update contracts clean up.	1. Junior and David is working on fresh data with SERA, Master Log, and FACTS. 2. Master Log is uptodate with status codes with FACTS. Assigned and active in FACTS. 3. R contracts: are Home Owners Aggreements. Talked with Ginger and Taylor. R contracts are not in FACTS they were created in Master Log for Tracking purposes. Michelle will ask Lemuel if we can change Master Log status to Tracking.
Processes Data	Task 517 Team Meeting	03/29/24	Assets, Customers, Grants, Encumbrances	Met to review Segment II resources, as well as identify and document conversion needs for Florida PALM implementation.	Team completed Conversion Inventory & Data Readiness Smartsheet columns.
People Processes	Task 515 Progress Monitoring Meeting	03/21/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Identify impacts and update agency business process documentation for Segments I & II	Reviewed task instructions and requirements; reviewed Smartsheet navigation
People Processes	Task 515 - 518 Status Review Meeting	03/25/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Review task instructions and requirements.	High level review of task instructions and requirements.
People Processes	Task 515 Work Session (PAWS)	03/28/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Work space to allow team members to work on or update Smartsheet information based on feedback.	Team members used time as a work session to work on implementation task.
People Processes Technology	General Services Team Meeting	03/07/24	General Services Team	Task 513 requirements	Team met to discuss task 513 requirements and necessary resources. Lisa gave team FLAIR Location Codes to assist in the completion of Asset Management (AR) portion of the Configuration Workbooks for Segments I and II.
Technology	Task 517 Team Meeting	03/29/24	Assets and Property, Customers, Grants, Open Encumbrances	Review task instructions and requirements	Team reviewed task instructions and requirements.

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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COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Tisha Womack	caroline.womack@commerce.fl.gov	05/11/24
January - February 2024	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	03/08/24
November - December 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	01/11/24
September - October 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Alan Edwards

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 100%

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

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above below 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/07/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/08/24**	Submitted 3/8/2024	Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**	Submitted on 3/11/2024		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/07/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 603

- Business Process Groupings = 13/13

Role Mapping = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 190

- Related Business Systems = 6
- Related Reports = 10

Technology

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

Current-State:

Cataloged Business Systems = 49

- **Criticality:**

- High = 27 Med = 13 Low = 6 None = 3

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 50

Training = TBD

- **Documentation Status:**

- Complete = 190 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 190

- Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 5

- **Level of Impact: People Changes**

- High = 0 Medium = 15 Low = 28 None = 0 Uncertain = 0

- **Level of Impact: Processes Changes**

- High = 0 Medium = 23 Low = 20 None = 0 Uncertain = 0

- **Level of Impact: Technology Changes**

- High = 0 Medium = 20 Low = 23 None = 0 Uncertain = 0

- **Level of Impact: Data Changes**

- High = 0 Medium = 18 Low = 25 None = 0 Uncertain = 0

- **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete = 43

- **Documentation Status:**

- Complete = 48 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

- Inbound Interfaces = 28

- Outbound Interfaces = 14

Implementation:

Business Systems Planned for Integration = 16

- **Segment I - Documentation Updates:**

- Complete = 3 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 12

- **Segment II - Documentation Updates:**

- Complete = 5 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 10

Planned Interfaces = 21

- Inbound Interfaces = 2

- Outbound Interfaces = 14

- Continued Use - No = 19

- **Associated Business Systems = 6**

Cataloged Reports = 221

- **Criticality:**

- High = 85 Med = 56 Low = 17 None = 51

Implementation:

Configuration Workbooks

- **Segments I & II**

- Started = 3 Not Started = 6

Conversions & Data Readiness

- Conversions Needed = 4

- Agency Data Outside of Primary Source System(s) = 0

- **Data Readiness/Cleansing Status:**

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DACS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	There is a mismatch between the Interface Layout and sample data files provided by the PALM team. It means that the sample data files are inconsistent with the interface layout. As the result, many times it's not possible to develop and test the interfaces.	Open	9 (High/High)	For the purposes of testing the interface, the sample data file is manually modified to fit the interface layout so the interface process could be tested. However, it means this is no longer a true test.	Reviewed Monthly	04/22/24	Rosemarie Zubler

DACS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DACS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
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.	05/01/2024 - 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	05/01/2024 - Will monitor as FL PALM releases additional information.
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	05/01/2024 - Will monitor as FL PALM releases additional information.
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	05/01/2024 - Will continue to monitor.

DACS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	FLAIR Data Cleanup	03/01/24	Enterprise wide	To ensure clean records for current use and for conversion to PALM	Ongoing. Date entered reflects start of reporting period.
Data	Task 514 Data Cleanup Activities Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisors	Review and discuss agency data cleanup activities, status and task approach feedback and data cleansing plan for monitoring for conversions.	No other comments or updates.
Data	Task 524 FDACS End User Readiness Survey	04/29/24	F&A Bureau Chief and Assistant Chief, PALM Director, PALM Project Manager	Review and validate FDACS Implementation End Users within F&A; discuss expectations and scope for end user survey.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Grants Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Grants Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Encumbrances Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Disbursements and Travel Supervisors	Review and discuss agency data cleanup activities for Encumbrances; task status and task feedback.	No other comments or updates.

			and Travel Supervisors, Purchasing Supervisors		
Processes Data	Task 514 Data Cleanup - Customers Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Revenue Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 514 Data Cleanup - Assets and Property Review Update	04/08/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Property and Financial Management Supervisors	Review and discuss agency data cleanup activities for Grants; task status and task feedback.	No other comments or updates.
Processes Data	Task 513 Configuration Workbooks Review Update	04/18/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisors	Review and discuss ongoing agency activities for Seg I and II Configuration Workbooks.	No other comments or updates.
People	PALM Planning Meeting	04/01/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager, Purchasing	Meeting to discuss the remaining PALM tasks, staff needs, data clean up identification and effort level, and team colloboration and partnership.	No other comments or updates.
People	PALM March 2024 Readiness Activities Review	04/01/24	OATS and Finance and Accounting	Meeting to discuss, clarify, and list the PALM Readiness activities that occurred during March 2024.	No other comments or updates.
People	PALM Task Status Update Meeting	04/01/24	OATS and Finance and Accounting	Meeting to discuss the status of the five PALM tasks due April 12, 2024.	No other comments or updates.
People	Review FDACS PALM Implementation Schedule	04/09/24	PALM Project Manager	Perform revisions and updates to the FDACS PALM Implementation Plan	No other comments or updates.
People	PALM Tasks Submission Review	04/12/24	PALM Project Manager, F&A PALM Director, and F&A Staff assistants	Meeting to review the instructions and completeness criteria for all PALM tasks due April 12, 2024	No other comments or updates.
People	Review Agency Communication Plan	04/16/24	F&A Bureau Chief and Assistant Chief, PALM Director	Reviewed agency Communications Plan for additional opportunities and methods for sharing PALM Updates	No other comments or updates.
People	PALM Workforce Readiness Plan Review	04/23/24	OATS, Finance & Accounting, Administration	Meeting to evaluate the FDACS PALM Workforce Readiness Plan, Review FDACS Implementation End User list, and review FDACS PALM Communication Plan.	No other comments or updates.
People	PALM Updates- Deeper Dive Information	04/26/24	OATS, PRT Developers, Application & Developer Director, PALM Project Manager	Review in greater detail the current PALM remediation and development work efforts.	No other comments or updates.
Processes	Process Review	03/01/24	Enterprise-wide	Ensure processes are as effective and efficient as possible for translation to PALM as appropriate	Ongoing. Date entered reflects start of reporting period.
Processes	DevOps Usage Meeting	03/04/24	OATS, PPMO, PRT	Meeting between PALM Project Manager, PPMO Manager, and Chief Technology Officer regarding the tracking of PALM Remediation activities	No other comments or updates.
Processes	PALM/PRT Business Operations	03/07/24	OATS, Admin, Finance and Accounting, PPMO, PALM Project Manager	Discussion and review of the FDACS bimonthly report and the process by which it is prepared ,vetted, and updated.	No other comments or updates.
Processes	Task 515 Reviewed Agency Business Processes	04/04/24	F&A Bureau Chief and Assistant Chief, PALM Director, Finance and Accounting Revenue Supervisors	Reviewed documented Agency Business Processes under lens of current tasks to reevaluate thoroughness for current/future task expectations.	No other comments or updates.
Processes	Q4 PALM Request For Funds Review	04/08/24	OATS, PPMO, PALM Project Manager	Meeting to review the Q4 Request for PALM Funds	No other comments or updates.
Processes	FPSC Production Support RoundTable Prep Meeting	04/16/24	PALM Director, Agency SAMS	Reviewed current SAM process and procedures for agency; developed questions for Production Support Round Table.	No other comments or updates.
Technology	AIMS JAD Session 3	03/01/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review AIMS screens and reports impacted during remediation in the Admin process	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT,
Technology	Developer Working Session	03/04/24	OATS, FDACS PALM Remediation Team	Meeting with PALM Remediation Team's developers to discuss compilation of forms using WINSCP or PUTTY.	No other comments or updates.
Technology	REV JAD Session 2	03/06/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review REV screens and forms impacted during remediation	No other comments or updates.
Technology	PALM FDACS Sharepoint &Dashboard Review	03/07/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Review draft Sharepoint Dashboard	No other comments or updates.
Technology	FDACS Draft Sharepoint/Dashboard Demo	04/05/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager	Meeting to present the draft Sharepoint/dashboard.	No other comments or updates.
Technology	FANS-AIMS Flair Testing Session	04/05/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Project Manager, FANS Technical Team	Session to test JSON file that will sucessfully load FANS data into AIMS	No other comments or updates.
Technology	Meeting with FDACS PALM Technical Liasion	04/09/24	PRT, PPMO, OATS	Meetingwith PRT and Agency Technical Liason to review Supplier details from PALM Segment III design workshop for AIMS Remediation	No other comments or updates.
Technology	FDACS PALM Monitoring Meeting	04/11/24	OATS, Admin, Finance and Accounting, PPMO	The purpose of this recurring meeting is for the team of internal FDACS resources to regroup and discuss project communications, project status, decision points, and review risks and issues.	Has occurred as needed. Date entered reflects last meeting occurrence of reporting period.
Technology	OR Code Information Gathering	04/15/24	PRT, PPMO, OATS, PALM Technical Liasion	Discussion to gather and compile a list of applications that use Organization(OR) codes for PALM Remediation at OATS Executive Management's request.	No other comments or updates.
Technology	Sprint Retrospectives and planning	04/16/24	PRT, OATS, Finance & Accounting	Conduct retrospective of ending sprint and plan for next sprint.	Occurs biweekly
Technology	AIMS Demo Mockup Presentation	04/17/24	PRT, PPMO, OATS, PALM Technical Liasion, Finance & Accounting, Administration, and Purchasing	A demo and presentation of a prototype created by combining the Items Details and Funds Codes screens in AIMS.	No other comments or updates.
Technology	PALM Biweekly Technical Meeting	04/18/24	OATS, Admin, Finance and Accounting, PPMO, FDACS PALM Remediation Team	Technical meeting with executive management giving a status update on what has been completed, what is currently being worked on with estimated completion dates, and what is on deck.	Occurs biweekly. Date entered reflects last occurrence
Technology	FANS to AIMS Status Meeting	04/18/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	The purpose of this recurring meeting is (1) FANS PALM Remediation status update (What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps (Goals for the next week)	Ongoing. Date entered reflects last meeting occurrence of reporting period.
Technology	PALM PRT Mid Sprint Planning	04/19/24	PRT, OATS, Finance & Accounting	A review of the current sprint's work and preview the next sprint's work items and activities.	Date entered reflects last occurrence.
Technology	COA Crosswalk Discussion	04/19/24	PRT Developers and PALM Project Managers	Meeting with PRT Developers regarding the status of COA Crosswalk deliverable for presentation to management.	No other comments or updates.
Technology	Weekly Touchpoint with CCN Technical Liasion	04/24/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	The purpose of this weekly meeting is to discuss any PALM technical updates, answer any questions from the PALM Remediation Team, and review any assistance needed.	Occurs weekly on Wednesdays. Date entered reflects last meeting occurrence of reporting period.
Technology	Weekly Summary Reporting	04/26/24	PRT, OATS, Finance &	Provide status of completed and ongoing PRT	Every Friday. Date entered reflects last occurrence. 9

			Accounting, Admin IT	deliverables/agency tasks; analyze implementation schedule progress; plan for next week	summaries during this reporting period.
Technology	Daily PRT Standups	04/30/24	PRT, Finance and Accounting, OATS, Admin IT	Conduct daily standups to provide update on technology tasks and deliverables, address risks, issues, assumptions, time exceptions, and blockers.	Occurs Daily. Date entered reflects last occurrence. 40 of these meetings have occurred during this reporting period. Work breakdown structure and deliverable progress monitoring; Project Management Liaison, Change Management Liaison,
Technology	Risks and Issue Management, monitoring Implementation Schedule, reviewing vacancies	04/30/24	PALM Management Workgroup	Consistently review and update Risks, Issues, Assumptions, Implementation Schedule, and vacancies	Primary: Project Management Liaison, Change Management Liaison Ongoing. Date entered reflects end of 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

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DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Alan Edwards	alan.edwards@fdacs.gov	05/08/24
January - February 2024	Alan Edwards	alan.edwards@fdacs.gov	03/11/24
November - December 2023	Alan Edwards	alan.edwards@fdacs.gov	01/11/24
September - October 2023	Alan Edwards	alan.edwards@fdacs.gov	11/09/23
July - August 2023	Alan Edwards	alan.edwards@fdacs.gov	09/11/23

Helpful Links

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

DBPR 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

March - April 2024

Agency Sponsor

Sally Huggins

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 7
- Vacant Role = 1

RW Task Completeness



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

RW Task Completeness:

Score = 66.67%

- Submitted Complete = 2
- Submitted Incomplete = 1
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 89.06%

- Submitted On Time = 20
- Submitted Late = 6
- Pending Submission = 4

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Asset clean up is still ongoing, see comments in Conversion Inventory workbook. Risk is bringing in data we may not need but I'd rather continue with cleansing effort up to conversion rather than hurriedly completing cleansing now. This task is complete.		
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				
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission				
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**	sponsor unavailable		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**05/01/24**	Did not have the time until today 5/1/24 to update agency risks & issues		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	Pending Resubmission	**04/19/24**		Submission Incomplete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/14/24**	Bimonthly report submitted by due date 5/13/24; forgot to update tracker		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 32

- Business Process Groupings = 13/13

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 7

- Related Business Systems = 10

Technology

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

Current-State:

Cataloged Business Systems = 11

- **Criticality:**

Data

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

Current-State:

Unique FLAIR Data Elements = 84

- **Associated Unique Uses = 85**

Role Mapping = TBD

Training = TBD

• Related Reports = 36

• Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 7

• Related Business Process Groupings = 6

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

- High = 5 Med = 2 Low = 1 None = 3

• Documentation Status:

- Complete = 10 Partial = 0 Not Started = 1

Cataloged Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 1

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

Planned Interfaces = 17

- Inbound Interfaces = 7

- Outbound Interfaces = 10

- Continued Use - Yes = 48

- Continued Use - No = 32

• Associated Business Systems = 37

Cataloged Reports = 55

• Criticality:

- High = 20 Med = 19 Low = 15 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 0 Not Started = 9

Conversions & Data Readiness

• Conversions Needed = 2

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 1 In Progress = 1 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Data	If we are not able to bridge the gap of institutional knowledge caused by the retirement of Accounting Systems Analyst, then details could be missed that impact DBPR's readiness	Open	9 (High/High)	Advertise position as soon as possible; hire new employee in time to overlap with retiring employee	Sessions to review Business Processes and assign applicable training have been conducted. 20240111 Work in progress to advertise John Mounts' position; new Revenue/Financial Reporting manager Lyndell Francis has started - in addition to state/accounting background, he also has IT background	01/11/24	Sally Huggins
People Processes Technology Data	Timing of Segment IV review & design workshops	Closed	9 (High/High)	Planning, planning, planning. We will need to send as many CCN and SME members as possible to make sure understanding of reviews and design is captured, but end of year finance & accounting activities take priority.	The timing and content of the Segment IV business process model reviews and design workshops is not ideal, as has been acknowledged by the project. Impacts will definitely be felt at smaller agencies, like DBPR. Escalated to an Issue.	03/08/24	Sally Huggins
People Processes Technology Data	If PALM does not provide efficient Data Warehouse tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete To Be Business Processes once we go live	Open	9 (High/High)	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps	Reached out to PALM RC to establish a game plan for mitigating this ASAP PALM Undefined To Be Business Processes and Data Repository unknown makes assessing remediation needs difficult	04/23/24	Thomas Richardson
People Processes Technology Data	If all tasks and related details are not recorded in the Project Schedule, then some tasks may slip through the cracks, and we may not be ready for PALM as scheduled	Open	6 (High/Medium)	If all tasks and related details are not recorded in the Project Schedule, then some tasks may slip through the cracks, and we may not be ready for PALM as scheduled	All current DFS PALM assigned have been assigned detailed tasks in the Project Schedule. 20240408 Project Manager is fleshing out and adding details to the Project Schedule. It is a work in progress.	04/08/24	Thomas Richardson
People Processes Technology Data	Completion of tasks	Closed	4 (Medium/Mediu	Mitigation - Work with reputable staff augmentation organizations to find experienced, qualified staff	Organizational Change Manager consultant and Project Manager Consultant have been onboarded.	04/02/24	Sally Huggins
People Processes Technology Data	If the Finance & Accounting staff's understanding of what project considers Agency Business System affects completion of tasks changes, assigned project Tasks may not be completed properly, which could impact DBPR's readiness	Open	4 (Medium/Mediu	Mitigation - Review Agency Business System information to ensure all relevant systems are included in the ABS Inventory (see Task 326, 504)	As early as Fall 2020, we were assuming everything was a business system but the guidance provided by the project at the time indicated that only systems that had a direct connection to FLAIR were considered an ABS, so we reported only very little systems. In our December 2023 Technology touchpoint,	02/29/24	Sally Huggins

					we learned that our original understanding was what the project is now considering an ABS, so we are playing catchup in identifying our AB systems.		
People Processes	If Decisions made by DBPR Leadership are not monitored and logged, then timely Decisions needed to stay on track may not be achieved	Open	4 (Medium/Mediu	Mitigation - Ensure all pending and completed Decisions are documented, tracked/managed, and recorded. Review as needed.	Project Manager has created a Decision log and is managing all Decisions on a weekly basis. These efforts appear in the Project Schedule on a weekly basis under Monitoring and Controlling.	04/08/24	Thomas Richardson
People Processes Technology Data	If DBPR Finance & Accounting staff cannot understand To Be Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the To Be Process Flows and that could lead to incomplete work flows	Open	4 (Medium/Mediu	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)		04/18/24	Thomas Richardson
People Processes Technology Data	If DBPR Finance & Accounting does not have someone that understands FEMA and the steps necessary to recoup expenditures, then DBPR may not be reimbursed for expenditures incurred for large DEM projects (or will receive a possible audit)	Closed	4 (Medium/Mediu	Mitigation - Ensure an OA is filed timely; work with Patty Broadway to ensure process compliance	Moved from DBPR PALM Readiness Project Risk Register to DBPR Enterrprise Risk Register and will be managed there.	04/18/24	Lyndell Francis
Processes	If we do not validate current DBPR Finance & Accounting processes as accurate and complete, then the future state (To Be) may not be accurate and efficient Open	Open	3 (High/Low)	Mitigation - Validate all current DBPR Process Flows	"Steps to review current Process Flows are under way. 20240408 OCM Manger is preparing for and coordinating related activities."	04/08/24	Gary Townsend
People Processes	If a DBPR Finance & Accounting current state Process Flow is not mapped to its corresponding future state Process Flow, then the process owner will not be prepared for day 1 processing in PALM	Open	3 (High/Low)	Mitigation - Validate all current DBPR Process Flows	Mappings are not 1 for 1 and are difficult. Tasks have been added to the Project Schedule to track and OCM lead will address. 20240408 OCM Manger is preparing for and reviewing current state process flows.	04/08/24	Gary Townsend
People Processes	If DBPR Finance & Accounting process owner resources are not available as needed, then the process flows may not be validated/developed, and this will impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Complete Stakeholder Register after identifying process owners and work with them to ensure availability	Staff have multiple daily responsibilities that will need to be coordinated.	04/08/24	Gary Townsend
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners	OCM Manger is working with the Project Manager to ensure all required tasks and deadlines are entered into the Project Schedule and managed accordingly.	04/08/24	Gary Townsend
Processes	If all new To Be Business Requirements are not captured, communicated, and reviewed by the technical team for feasibility, then DBPR future state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	See new Assumptions around RTMs and traceability. 20240408 OCM Manger is working with the Project Manager to ensure all requirements are identified and entered into the Requiremetns Traceability Matrix (RTM) template.	04/08/24	Thomas Richardson
Processes	If approved DMS Rule 60GG templates and processes are not utilized/followed, then this project will be out of compliance with State regulations and is subject to a failed audit	Open	3 (High/Low)	Mitigation - Ensure all currently approved Rule 60GG templates and processes are used for this project	Project Manager has created and stored all Rule 60GG deliverable templates for the Initiation and Planning Phases.	04/08/24	Thomas Richardson

DBPR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	If Timing of Segment IV review & design workshops interferes with end of year Finance & Accounting activities, then F&A Business operations could be adversely impacted	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Planning, planning, planning. We will need to send as many CCN and SME members as possible to make sure understanding of reviews and design is captured, but end of year finance & accounting activities take priority.	The timing and content of the Segment IV business process model reviews and design workshops is not ideal, as has been acknowledged by the project. Impacts will definitely be felt at smaller agencies, like DBPR.	09/30/24	Sally Huggins

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DBPR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	OCM and BPAR – Provided overview and introduced to DBPR staff OCM and Six Sigma methodologies and shared next steps to everyone to ensure proper AWARENESS as outlined in the PROSCI / ADKAR change management models and Six Sigma methodology model. (Ongoing)	04/18/24	Gary Townsend, CCN members		
People Processes Data	Conducted Transition meetings for retiring Accounting Systems Analyst	04/18/24	John Mounts, Gary Townsend, Thomas Richardson		

People Processes Technology Data	informational meeting for CCN members	03/05/24		update to CCN on tasks and readiness activities	
People Processes Technology Data	Task 521	03/11/24	Sally Huggins		completed task
People Processes Technology Data	Monthly Readiness touchpoint	03/19/24	Sally Huggins; John Mounts	Met with PALM RC's for monthly touchpoint meeting	
People Processes Technology Data	Contracted Services support began	04/02/24		Contracted services staff hired using administered funds started	
People Processes Technology Data	Participated in FL PALM Data Day Debrief session	04/02/24	All	Debrief of Florida PALM Data Day held on 3/26/24	
People Processes Technology Data	Established the official Project Name (DBPR PALM Readiness) and start and end dates	04/03/24	Sally Huggins; Thomas Richardson		
People Processes Technology Data	Established a Deliverable Tracker and documented all DBPR PALM Readiness deliverable details	04/16/24	Thomas Richardson		
People Processes Technology Data	Developed a Business Process Tracking document (includes all DBPR Business Functions, processes, Segment IDs, and mapping to PALM To Be Business Processes	04/19/24	Thomas Richardson, Gary Townsend		
People Processes Technology Data	Conducted a meeting with Project Sponsor, Project Manager, and Organizational Change Management Lead to discuss newly released PALM Tasks	04/19/24	Sally Huggins, Thomas Richardson, Gary Townsend		
People Processes Technology Data	Participated in a DBPR Working Session with the PALM Readiness Coordinator	04/22/24	Florida PALM RC's, Gary Townsend, Thomas Richardson		
People Processes Technology Data	Participated in three (3) Weekly Task Talk sessions	04/25/24	Thomas Richardson, Gary Townsend		
People Processes Technology Data	Revisited Task 328 and conducted analysis to update Business Processes and related details	04/26/24	Thomas Richardson, Gary Townsend, Sally Huggins		
People Processes Technology Data	Assigned Segment IDs to all DBPR Current-State Business Processes	04/26/24	Thomas Richardson		
People Processes Technology Data	OCM and BPAR - Scheduled and attended training sessions to transition John Mounts processes to logical personnel within DBPR (Completed)	04/30/24	Gary Townsend; John Mounts; CCN members		
People Processes Technology Data	Drafted the Work Breakdown Structure (WBS) and Project Schedule (not yet reviewed nor baselined); posted Excel and PDF weekly copies to Project Repository	04/30/24	Thomas Richardson		
People Processes Technology Data	Task 522	04/30/24	Sally Huggins		completed task
People Processes Technology Data	Completed 13 Action Items and documented in the Action Item Log	04/30/24	Thomas Richardson		
People Processes Technology Data	OCM and BPAR - Performed deep dive into DFS Florida Palm information to gain understand project scope, timelines, project tasks, Business and Systems process Changes and design of new system (Ongoing)	04/30/24	Gary Townsend		
People Processes Technology Data	OCM and BPAR – Assisted with task identification for DBPR Project Plan development. (Ongoing)	04/30/24	Gary Townsend; Thomas Richardson; Sally Huggins		
People Processes Technology Data	OCM and BPAR – Scheduled and conducted several Current State Process Flow validation sessions to ensure flows were accurate and complete and to prepare the process owners for upcoming To Be process flow analysis to ensure that the new flows (and Systems)are logical and will accomplish our processing needs, if not, we will capture our concerns and consult with team	04/30/24	Gary Townsend; CCN/SME's		
People	Task 512	03/01/24	Sally Huggins		completed task
People	Established a shared Project Repository and folder structure for all Project artifacts to be stored	04/03/24	Thomas Richardson		
People	Established and conducted Daily Checkpoint meeting with Project Sponsor, Project Manager, and Organizational Change Management Lead	04/03/24	Sally Huggins, Thomas Richardson, Gary Townsend	daily standup meetings	
People	Created and stored for use all Rule 60GG templates	04/05/24	Thomas Richardson		
People	Created other templates (Meeting Agenda, Meeting Minutes, etc.) and stored for use	04/05/24	Thomas Richardson		
People	Established and A Risk Register,	04/05/24	Thomas Richardson		

	Action Item Log, Issues Log, and Decision Log and a process for managing all RAID items				
People	Completed Rule 60GG Pre-Charter Risk&Complexity Assessment; posted to Project Repository	04/08/24	Thomas Richardson		
People	Established and conducted Biweekly DBPR PALM Readiness Project Meetings	04/10/24	CCN members		
People	Used the draft Project Schedule to manage Task activities	04/12/24	Thomas Richardson		
People	Completed Weekly Status reports and posted in the Project Repository	04/12/24	Thomas Richardson		
People	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	04/16/24	Sally Huggins, John Mounts, Lyndell Francis, Kris Burnside, Thomas Richardson, Gary Townsend		
People	Identified and documented new assumptions	04/18/24	Thomas Richardson		
People	Completed Rule 60GG Project Charter (using approved template and output from Task 500); posted to Project Repository	04/23/24	Thomas Richardson		
People	Completed Rule 60GG Stakeholder Register (using approved template); posted to Project Repository	04/25/24	Thomas Richardson		
People	Developed a tool to faciltate navigation of the shared Project Repository	04/26/24	Thomas Richardson		
People	Initiated Rule 60GG Project Management Plan (using approved template)	04/29/24	Thomas Richardson		
People	Completed Rule 60GG Initiation Gate Risk&Complexity Assessment; posted to Project Repository	04/30/24	Thomas Richardson		
People	Achieved Milestone Initiation Phase Complete	04/30/24	Thomas Richardson		
People	Identified and documented five (5) DBPR PALM Readiness Project Decisions	04/30/24	Thomas Richardson		
People	Documented, mitigated, and closed seven (7) Risks (documented in the Risk Register)	04/30/24	Thomas Richardson		

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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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24
November - December 2023	Tyler Russell	tyler.russell@myfloridalicense.com	01/12/24
September - October 2023	Tyler Russell	tyler.russell@myfloridalicense.com	11/09/23
July - August 2023	Tyler Russell	tyler.russell@myfloridalicense.com	09/13/23

Helpful Links

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

DCF 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

March - April 2024

Agency Sponsor

Chad Barrett

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 4
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 76.25%

- Submitted On Time = 16
- Submitted Late = 10
- Pending Submission = 4

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission		we have completed all the worksheets applicable to DCF in the configuration workbook as updates for Segments I and II except for organization codes and OA2. Team is still working on these two worksheets since DCF is creating all new organization codes and OA 2 codes.		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Teams are reviewing the data and update as needed for data readiness. weekly status updates are submitted by teams each week		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are meeting with each business area SMEs and team members to get updates on Segments I, II, and III and create a plan for changes, to processes, roles, and technology		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are meeting with each business area SMEs and team members to get updates on Segments I, II, and III and create a plan for changes, to processes, roles, and technology		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are meeting with each business area SMEs and team members to get updates on Segments I, II, and III and create a plan for changes, to processes, roles, and technology		
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**	added updates to agency activities and issues. No other updates needed		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/16/24**	we are increasing awareness and adding more team members to our task working groups. we have bi-weekly meetings on various PALM tasks and every business area is speaking about PALM to the users frequently.	Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/01/24**	submitted on 4/30	Submission Complete	
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	**05/01/24**	updated on 4/30		

People

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

Implementation:

Planned Florida PALM End Users = 181

• Business Process Groupings = 9/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 44

• Related Business Systems = 24

• Related Reports = 62

• Documentation Status:

- Complete = 5 Partial = 1 Not Started = 0

Implementation:

Impacted Agency Business Processes = 44

• Related Business Process Groupings = 1

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 11 Low = 0 None = 12 Uncertain = 0

• Level of Impact: Processes Changes

- High = 2 Medium = 9 Low = 0 None = 10 Uncertain = 0

• Level of Impact: Technology Changes

- High = 1 Medium = 2 Low = 7 None = 3 Uncertain = 8

• Level of Impact: Data Changes

- High = 1 Medium = 2 Low = 7 None = 3 Uncertain = 1

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 3 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 61

• Criticality:

- High = 29 Med = 2 Low = 5 None = 25

• Documentation Status:

- Complete = 7 Partial = 33 Not Started = 9

Cataloged Interfaces = 165

- Inbound Interfaces = 68

- Outbound Interfaces = 97

Implementation:

Business Systems Planned for Integration = 5

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 127

• Associated Unique Uses = 127

- Continued Use - Yes = 0

- Continued Use - No = 0

• Associated Business Systems = 1

Cataloged Reports = 106

• Criticality:

- High = 134 Med = 5 Low = 6 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 6

• Agency Data Outside of Primary Source System(s) = 2

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 6 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DCF Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Financial Leadership Distraction	Open	6 (Medium/High)	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Management Turnover - Key Personnel	Open	6 (High/Medium)	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Department Leadership Turnover	Open	4 (Medium/Mediu	Accept. Monitor political developments as they unfold and adapt, as needed.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Staff Turnover - Key Personnel	Open	4 (Medium/Mediu	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Sponsor Turnover	Open	3 (High/Low)	Mitigate. Ensure sponsor commitments and operational plans are well documented and rationale is well established.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Manager/Agency Liaison Turnover	Open	3 (High/Low)	Mitigate. Ensure project approach and status are well-documented.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Staff Turnover	Open	2 (Low/Medium)	Avoid. Ensure project staff responsibilities are well defined and documentation is up-to-date	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Management Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Staff Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam

DCF Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Cost Allocation Not Available in PALM. (See attachments)	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	TBD	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.	01/01/26	Joan Davis
Technology Data	SpeedKey functionality and ability to maintain at the agency level	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	DCF will work to get a better understanding of the speedkey functionality to maximize the use of speedkey to accurately capture encumbrance obligations, payments and minimize corrections to GL's.			

Processes Technology Data	DCF's journal distribution process	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	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 and are awaiting their response and a meeting to be set up with the PALM tech leads and design architect team. Several of our updates are dependent on the concerns being adressed.	waiting on PALM team response		DCF team

DCF Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	DCF will able to timely access the available Administered funds to support PALM readiness activities.	Logged	07/17/23	DCF-Departmentwide	This assumption is currently an open issue.
People Processes Technology	DCF's Project Sponsor will support the project by establishing and maintaining a project team that will manage the ongoing readiness activities and their associated dependencies.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF executive leadership 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	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF's project team possesses the necessary skills and expertise in the required disciplines to ensure project success.	Logged	07/17/23	DCF-Departmentwide	None.
People	DCF's hybrid product/project management framework approach combining predictive and agile methodologies is suitable for the project's objectives.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF business system owners will provide requirements for necessary system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	07/17/23	DCF-Departmentwide	None.
People	DCF project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet readiness requirements and project milestones.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF's Florida PALM project team can gain access to relevant documentation, specifications, and knowledge about the legacy enterprise systems and their data structures.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	State of Florida legacy enterprise systems have accessible data sources that can be utilized for extracting and integrating data into the Enterprise Data Warehouse.	Logged	07/17/23	DCF-Departmentwide	None.
Technology Data	DCF's Enterprise Data Warehouse architecture and infrastructure can accommodate the additional data and effectively handle the integration process.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes	The external schedule for implementation is determined by the DFS Florida PALM project. All key milestones and transition dates are provided by the larger PALM Project.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes	The 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	07/17/23	DCF-Departmentwide	None.

DCF Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Scheduled internal meetings around specific readiness activities - particularly documentation of impacts to Business Processes and Systems out of segments 1 - 3.	04/01/24	DCF Department-wide	Documentation of impacts to Business Processes and Systems out of segments 1 - 3	Several meetings held to date and will continue through next quarter as needed.

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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DCF Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Chad Barrett	chad.barrett@myflfamilies.com	04/30/24
January - February 2024	Chad Barrett	chad.barrett@myflfamilies.com	03/12/24
January - February 2024	Tony Lloyd	tony.lloyd@myflfamilies.com	03/08/24
November - December 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	01/11/24
September - October 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	11/15/23
July - August 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	09/12/23

Helpful Links

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

DEM 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

March - April 2024

Agency Sponsor

Luke Strickland

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 10
- Duplicate Filled Role = 4
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 96.56%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24					
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/16/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/30/24**	Correction made. Please see comment section for explanation.	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/08/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/29/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 32

- Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 35

- Related Business Systems = 3
- Related Reports = 21
- **Documentation Status:**

- Complete = 31 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 7

- **Criticality:**

- High = 6 Med = 0 Low = 0 None = 1
- **Documentation Status:**

- Complete = 2 Partial = 2 Not Started = 1

Data

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

Current-State:

Unique FLAIR Data Elements = 71

- **Associated Unique Uses = 71**

- Continued Use - Yes = 48
- Continued Use - No = 0
- **Associated Business Systems = 22**

Implementation:

Impacted Agency Business Processes = 35

• Related Business Process Groupings = 6

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 21 None = 14 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 9 Low = 7 None = 19 Uncertain = 0

• Level of Impact: Technology Changes

- High = 1 Medium = 2 Low = 5 None = 27 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 35 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 33

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 2

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 2 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Planned Interfaces = 6

- Inbound Interfaces = -1

- Outbound Interfaces = 6

Cataloged Reports = 41

• Criticality:

- High = 24 Med = 9 Low = 7 None = 1

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 0 Not Started = 9

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DEM Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Challenge in filling vacant positions in Finance & Accounting	Open	9 (High/High)	Utilize other Finance employees to assist when needed	No Change	12/24/23	Karen Peyton
People Processes	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.	Open	9 (High/High)	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.	Updated after the last meeting.	05/09/24	Karen Peyton
People	Ability to be fully devoted to the project because of unpredictable response activities related to natural disasters and other threats to the state and its citizens.	Open	4 (Medium/Mediu	Endeavor to utilize other staff members and/or employees from other agencies to assist	No Change	12/24/23	Karen Peyton
People Processes Data	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 above 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.	Open	4 (Medium/Mediu	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 accomodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered.	The volume of invoices that are processed by DEM (especially those related to disaster activity) could possibly exacerbate this issue.	05/09/24	Karen Peyton

DEM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DEM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The 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	09/06/23	FDEM	No change.

DEM Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Division wide PALM Readiness Survey	03/08/24	FDEM	Engaging awareness using a survey to gauge agency knowledge about Florida PALM	Update as of 3/8/2024

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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DEM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Luke Strickland	luke.strickland@em.myflorida.com	05/10/24
January - February 2024	Luke Strickland	luke.strickland@em.myflorida.com	03/11/24
November - December 2023	Luke Strickland	luke.strickland@em.myflorida.com	01/12/24
September - October 2023	Luke Strickland	luke.strickland@em.myflorida.com	11/09/23
July - August 2023	Luke Strickland	luke.strickland@em.myflorida.com	09/07/23

Helpful Links

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

DEP 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

March - April 2024

Agency Sponsor

Darinda McLaughlin

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 23
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 99.69%

- Submitted On Time = 29
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/10/24**	PALM has extended the date of this task to 4/12 from 3/24 - Ref Email dated 2/12/2024. PALM has extended the date to 5/10/2024 ref email dated 3/15/2024, with supplemental information		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/29/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress				
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				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	50% - In Progress				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	50% - In Progress				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 149

- Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 250

- Related Business Systems = 22
- Related Reports = 39
- **Documentation Status:**

- Complete = 250 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 44

- **Criticality:**

- High = 21 Med = 10 Low = 5 None = 8
- **Documentation Status:**

- Complete = 44 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 261

- **Associated Unique Uses = 264**

- Continued Use - Yes = 221

- Continued Use - No = 41

- **Associated Business Systems = 35**

Implementation:

Impacted Agency Business Processes = 250

• Related Business Process Groupings = 11

- Planned Spreadsheet Uploads = 3

• Level of Impact: People Changes

- High = 0 Medium = 3 Low = 76 None = 8 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 67 Low = 7 None = 13 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 11 Low = 38 None = 38 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 67 Low = 12 None = 8 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 87

Cataloged Interfaces = 67

- Inbound Interfaces = 57

- Outbound Interfaces = 10

Implementation:

Business Systems Planned for Integration = 30

• Segment I - Documentation Updates:

- Complete = 3 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 26

• Segment II - Documentation Updates:

- Complete = 9 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 20

Planned Interfaces = 12

- Inbound Interfaces = -2

- Outbound Interfaces = 11

Cataloged Reports = 380

• Criticality:

- High = 46 Med = 3 Low = 15 None = 31

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 4

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DEP Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	Unclear Requirements and Potentially Changing Requirements could affect the agency business system remediation schedule	Open	9 (High/High)	FDEP needs to have sufficient knowledge of the changes to its financial systems and allow for adjustments to the implementation schedule for unplanned changes/updates to requirements and design.	Without finalized interface specifications, the application team may have limited visibility into the expected changes in the data formats and structures. This ambiguity can lead to misinterpretation or incorrect implementation of the new PALM interfaces. Additionally, there is the potential that previous design specifications could change as a result of subsequent discoveries in later design segments. - Design Specifications should be completed for all process areas by Segment IV. DEP is monitoring this risk.	11/13/23	Brady Schmidt
People Processes	Based on the current PALM schedule, training delivery of processes is slated to begin at the same time as PALM UAT (User Acceptance Testing). There is a risk to the agency that the testers will not have a complete understanding of all the details of each process in time for them to participate in a UAT. Testers may not be able to understand all the nuances of the work end-to-end process they are supposed to be testing without full knowledge. This could potentially not only lead to ineffective testing results, but could possibly cause more confusion. If certain assumptions that were made by the agency on a particular process are no longer valid post-training, this could potentially lead to rework of agency documented procedures, and changes to ABS systems.	Open	9 (High/High)	Use of the Knowledge Center and specifications received from Design sessions should help to some extent in understanding the processes. Once details of screen design functionality is available, the teams can get a better grasp of the end-to-end process flow.	Discussed this at the PALM Touchpoint meeting in April 2024.	04/02/24	Bento Eyles and Steve Waters
People Processes Technology	Risk to loss of knowledge due to staff turnover	Open	6 (High/Medium)	Ensure job-specific processes are properly documented.	FDEP has engaged the Division/District/Office staff throughout the department and is documenting key business processes to ensure knowledge sharing is continuing.	11/13/23	Lydia Griffin & Steve Waters
People Processes Technology Data	The finalization and end-to-end walkthroughs of the business processes and screen flows pertaining to PALM functionality are now scheduled for early October through the Design Recap sessions. Since the business processes were staggered iteratively to the agencies with several missing pieces due to a design segmentation approach, and with high-level draft screenshots, there is little opportunity currently for agency personnel to have a walkthrough of the "end-to-end finalized business process workflows and screen flows" with finalized screen designs and functionality descriptions, which are now planned for October through the Design Recap sessions or as and when PALM indicates that designs have been locked down.	Open	6 (High/Medium)	PALM has added a 3 day Segment Recap Workshop in October. DEP will monitor this risk and continue to seek details of what will be received in advance of and during the Recap sessions from PALM.	The FDEP PALM project team brought this to the attention of the PALM Readiness coordinator for review. Further confirmation from PALM as to what details will be provided at the October Recap sessions is awaited. Risk monitoring will continue. The FDEP PALM project team will also work closely with agency personnel to apprise them of changes to designed processes, workflow,	02/27/24	Bento Eyles and Steve Waters

	The agency has to understand these final designs and then finalize agency business systems and understand how the changes affect the inputs to, and outputs from, PALM, while understanding how defined reporting may be affected. There is a risk of delay to agency business system updates unless the final designs are submitted by PALM well in advance of UAT, to allow sufficient time for agency business system changes to occur and be tested prior to PALM UAT activities.				procedures, screen flows and reports as they are confirmed and published by PALM to the agencies.		
Processes Technology Data	DEP needs details regarding PALM's Data refresh strategy in advance of UAT to allow DEP to test Agency Business systems (ABS) in advance of the UAT test Cycle and prepare accordingly for UAT. If PALM does not clarify their data refresh plans, DEP assumes the following risks: - inaccurate test results due to outdated data data, - not having data that accurately simulates real-world scenarios, - inability to test time-sensitive features, - inefficient use of team members' time leading to waste (time spent waiting on refresh or creating new tests at the last minute), - ineffective scheduling of test activities, - inefficient or ineffective data integrity and flow between DEP systems and PALM (is the correct data transferred and updated at the right time, and are any necessary translations occurring as designed, and is there data loss or corruption), and - inability to effectively assess the scalability of the solution.	Open	6 (High/Medium)	DEP will monitor this risk and continue to seek details of what will be received from PALM and by when.	The risk was brought forward for discussion at the PALM Touchpoint meeting on 3/13/2024 and PALM has responded that they will be working on this in a future data strategy update relating to test data refreshes.	03/13/24	Steve Waters and Dan Zimmerman
Processes Technology Data	Increased Risk of Application Update Errors	Open	4 (Medium/Mediur	Sufficiently documented business system processes and accurate sample data is necessary to ensure reduced risk of application errors. Testing applications thoroughly will mitigate this risk.	Rushing the update process or making assumptions without proper interface specifications and sample data can increase the risk of errors and inconsistencies. It may result in data integration issues, data loss, or inaccurate data processing, which can impact the reliability and functionality of the application.	11/13/23	Brady Schmidt

DEP Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	SME Process & Business System Knowledge	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Catalog Desktop Procedures, Document Business System functionality and interfaces.	FDEP Project Team continues to facilitate information gathering and identifying financial data impacts. The results will be used for future planning of PALM implementation.	07/01/25	Lydia Griffin, Steve Waters
People Processes Technology Data	Identifying changes to processes and business systems as a result of a staggered design segmentation approach which can potentially change designs after the fact is hindering the ability of key business and technical resources to reach a decision or agreement about resulting impacts to agency business processes and systems due to known "unknowns".	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Identifying key requirements now while keeping an open mind to potential changes down the road and structurally delineating future state requirements into known vs. unknown may help in building incremental build components and requirements for agency business systems and processes.	FDEP Project team continues to share latest PALM designs with DAS, Division SMEs and CCN Leads to help them identify potential changes to business processes based on published Segment designs from the PALM project. Technical SMEs are also working to identify potential changes to systems based on everything currently published by PALM. Changed resolution date to 12/30/2024 on conclusion of Change Analysis phase of PALM.	12/30/24	Bento Eyles and Steve Waters

DEP Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	SME Process & Business System Knowledge	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	FDEP Project Team has facilitated information gathering and identifying financial data impacts. - DEP is conducting process reviews and SMEs are attending PALM Design reviews to gain knowledge of PALM processes. - SMEs are being tasked with documenting changes to the existing processes based on knowledge of PALM.
People Processes Technology Data	PALM Project Implementation Schedule	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	In planning, the success of FDEP's implementation schedule is contingent upon the timely receipt of information from the PALM Project team.
People Processes Technology Data	DEP cannot complete system remediation until the following conditions are fulfilled: 1) ALL applicable PALM Design Segment tasks related to said applications is completed. i. Process specifications ii. Interface specifications iii. Configuration Workbooks iv. Conversions v. Report specifications 2) DEP OTIS Requirement and Design Specs are completed	Logged	02/14/24	Division/District/Office Business Systems remediation, processes and project management, PALM Team	Discussed at the PALM Touchpoint meeting on 2/14/2024 and 3/13/2024 with PALM. - Agency shared that their remediation approach is based on phases, and the concern of having to do remediation re-work with major changes to occur after final design has been shared. - Monitoring of Design Segment updates is continuing, need confirmation that final screen designs will also be available to the agency as and when locked down by PALM, and in advance of the Design Recap workshop sessions proposed in October 2024.

	2) DEP OTIS Requirement and Design Specs are completed 3) Majority of the DEP Tier II and III applications to be remediated require DEP to have completed the data mapping with PALM specifications and process requirements. 4) Some Tier III applications are dependent on new design specifications for Tier I and II systems.				- Updated based on Touchpoint meeting notes from 4/10/24

DEP Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Property/Asset Analysis	04/30/24	Division/District/Office Staff	Identify depreciated assets, in an effort to clean-up property records.	7/1-8/31/2023 - During the reporting period an analysis was performed to list depreciated assets for consideration of write-off. 9/1-10/31/2023 - continuing to gather data for write-off. 11/1-12/31/2023 - confirmed with DFS regarding agency requirements and potential impacts to financial statements. We will continue to identify potential records for write-off and handle according to policy. Now managed under separate PALM Task RW514. Completed with submission of PALM-RW-514.
People Processes Technology Data	FDEP Individual Agency Business System (I-ABS) Test Plan	04/30/24	OTIS CCN Technical Leads	Develop a test plan for Agency Business Systems to be remediated for Seg I	Agency staff are working on the development of an agency test strategy and test plans by process areas. Completed-First draft, review in progress.
People Processes Technology Data	PALM related Application Design Activities	03/08/24	OTIS CCN Technical Leads	The DEP OTIS team is developing application design and linkage documents to support the analysis and changes planned for each system as additional interfaces and documents are provided by PALM.	Ongoing analysis and documentation as PALM releases additional information in each design segment. Completed for Segment I.
People Processes Technology Data	PALM related Application Design Activities	04/30/24	OTIS CCN Technical Leads	The DEP OTIS team is developing application design and linkage documents to support the analysis and changes planned for each system as additional interfaces and documents are provided by PALM.	Ongoing analysis and documentation as PALM releases additional information in each design segment. Completed design and documentation for ABS systems for Segment II.
People Processes Technology Data	DEP RAID Log maintenance	04/30/24	DEP Core Team	To manage logging of risks, assumptions, issues, and decisions for the DEP PALM project. This document also tracks key Action items for the team from the Weekly Planning sessions.	Updated the document with identified risks this period, to include revisions to the initial documented entries from earlier in the project. Ongoing tracking of Action Items. These risks were shared at the PALM Touchpoint meetings.
People Processes Technology Data	PALM Segment III Design Workshop Reviews	04/16/24	DEP PALM Core Team and DEP DAS CCNs and SMEs	Design Workshop review meetings with DAS CCNs and SMEs to identify updates, changes, and issues as it relates to current agency processes.	Conducted with Administrative Services Managers via in person meetings during the month of April. Completed.
People Processes Technology Data	DEP PALM SharePoint Content Update	04/30/24	DEP PALM Core Team, DEP DAS CCNs, DEP Program Area CCNs	Updated SharePoint page showcasing specific content relevant to FA& staff and agency CCN.	Completed.
People Processes Technology Data	DEP-specific PALM tagline added to email signatures of Division of Administrative Services staff for PALM awareness.	04/19/24	DEP PALM Core Team, DEP DAS CCNs, DEP Program Area CCNs, End Users	Email was sent with instructions on how to load the new tagline to signatures.	Completed.
Processes Technology Data	Agency Business System Review with Division and Finance and Accounting stakeholders	03/06/24	DEP DAS CCNs, DEP Program Area End Users	Gather information on specific uses and requirements from different stakeholders on the DEP CRA business system to identify remediation requirements.	Second meeting held on 4/5/2024. Completed.
People Processes	OTIS Technical Team Progress for PALM Readiness Tasks - ADM Sprint 176, 177, 178	03/08/24	Division of Administrative Services and OTIS Staff	This Sprints included mandated, enterprise initiatives and application enhancements requests for CRA, PEAS, FIN-Maintenance, FIN-ARCollections, FIN-ProjectReview, FIN-YES and the PALM project.	These were 3 week sprints completed during this reporting period. Completed
People Processes Technology	Update of the DEPNet website with additional content and new design	04/30/24	DEP PALM Core Team, DEP DAS CCNs, DEP Program Area CCNs	As part of OCM activities, updating pf the web page to bring awareness to new PALM content.	Added links to new PALM content, DEP PALM presentations and reference information. Completed.

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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DEP Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	05/09/24
January - February 2024	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	03/11/24
November - December 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	01/10/24
September - October 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	11/13/23
July - August 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	09/11/23

Helpful Links

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

DFS 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

March - April 2024

Agency Sponsor

Scott Fennell

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 4
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 92.5%

- Submitted On Time = 25
- Submitted Late = 2
- Pending Submission = 3

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	Technology	**504**	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		Design details needed from PALM Design Segments II, III, and IV in order to complete ABS design impacts. DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.		
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
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		DFS completing in task 515 in 2 phases. Phase 1 complete and have identified the impacts and the BPM per process. Now reviewing step details of the Seg 1 & 2 process to document changes. This task will be late as we are documenting the process changes by step (step 3 - 5).		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		Design details needed from PALM Design Segments III and IV in order to complete ABS design impacts. DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/01/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/27/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24			Build will not start until design is complete. Build scheduled from August - December 2024.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/05/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24			Build will not start until design is complete. Build scheduled from August - December 2024.		
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 374

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 416

• Related Business Systems = 12

• Related Reports = 43

• Documentation Status:

- Complete = 416 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 416

• Related Business Process Groupings = 12

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 3 None = 1 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 2 None = 1 Uncertain = 1

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 2 None = 1 Uncertain = 1

• Level of Impact: Data Changes

- High = 0 Medium = 3 Low = 0 None = 1 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 2

Technology

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

Current-State:

Cataloged Business Systems = 68

• Criticality:

- High = 16 Med = 5 Low = 0 None = 47

• Documentation Status:

- Complete = 31 Partial = 0 Not Started = 0

Cataloged Interfaces = 121

- Inbound Interfaces = 100

- Outbound Interfaces = 21

Implementation:

Business Systems Planned for Integration = 20

• Segment I - Documentation Updates:

- Complete = 0 Updating = 10 Evaluating = 0 Not Started = 0 Not Needed = 9

• Segment II - Documentation Updates:

- Complete = 0 Updating = 2 Evaluating = 0 Not Started = 0 Not Needed = 17

Planned Interfaces = 12

- Inbound Interfaces = 5

- Outbound Interfaces = 7

Data

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

Current-State:

Unique FLAIR Data Elements = 419

• Associated Unique Uses = 1301

- Continued Use - Yes = 1064

- Continued Use - No = 47

• Associated Business Systems = 19

Cataloged Reports = 385

• Criticality:

- High = 252 Med = 76 Low = 38 None = 45

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DFS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	ENTERPRISE A&A: The Project timeline is very conservative regarding flexibility, and A&A's involvement is critical for project success. Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&A change management and internal preparation for A&A preparedness activities have already started, but having adequate resources will be key to successful implementation.	Open	9 (High/High)	• Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations. • 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. • 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. • A&A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY.	Still monitoring	10/11/23	Renne Hermeling
People	ENTERPRISE A&A: Resource impacts due to A&A operational staff spending a significant amount of time performing Project related tasks. This pulls resources from operations, increases workloads, and causes stress and an increased chance of employee burnout. • 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. • 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.	Open	9 (High/High)	• Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities. • 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. • Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team. • Work with Human Resources to properly document team members who should be classified as SES staff. • 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 EFT applications, as examples.	Still monitoring	10/11/23	Renne Hermeling
People	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.	Open	9 (High/High)	• 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. • Use of dedicated back-up CCN Liaisons will aid in the short-term continuity.	Monitoring	02/19/24	Alexandra Weimorts
Technology	Florida PALM design release dates for	Open	6	• Develop initial agency business system future-state	Still monitoring	10/20/23	Stacey Pollock

	Segments III, IV, and Data Warehouse will decrease the build time for impacted agency business systems. This may impact the ability for applicable agency business systems to be ready for interface testing by January 2025.		(Medium/High)	designs as much as possible based on Segment I and II design information made available by the Florida PALM Project. Update ABS designs as soon as Segment III, IV, and Data Warehouse design information becomes available from the Florida PALM Project. • Work with Division/Office management to allow dedicated technical and functional resources to be available for agency business systems remediation efforts when design information is released.			
Processes	ENTERPRISE TREASURY: The consolidation of Disbursements bank accounts will cause changes in file transmissions, transaction volumes, pricing, and reconciliation processes. Bank account configurations in Florida PALM will need to be updated to reflect this change. Transaction volumes will potentially increase, which will cause an increase in monthly costs. Reconciliation processes will shift to the Division of Treasury, which will increase workload and potentially require additional positions.	Closed	6 (Medium/High)	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered. Conversations were had between Treasury, A&A, and PALM. Issue has been resolved with no impact to billing.	Closed out	04/17/24	Sarah Dugan
Technology	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. 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.	Open	6 (High/Medium)	• 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. • 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.	Still monitoring	10/20/23	Stacey Pollock
Processes	ENTERPRISE A&A: The Statewide Cost Allocation Plan (SWCAP) process changes: • Business Process Changes will impact actual agency costs that are currently reported in SWCAP • Process to identify and report the costs reported within the plan will change. • Significant changes to the SWCAP or incorrect reporting of SWCAP costs could result in inaccurate management decisions. • Inadequate reporting could result in loss of Federal funding if costs are deemed ineligible.	Open	6 (High/Medium)	• Work with agencies to reasonably identify processes that will be impacted and estimate changes to costs that will be allocated. • Identify reporting that will be needed and work with Florida PALM project to ensure needed reports are available and tested.	Still monitoring	10/11/23	Renne Hermeling
Processes	ENTERPRISE A&A: Planning for some critical activities has not been done. Until these plans have been developed, A&A cannot adequately determine needed resources, time and effort. • Cutover planning • FLAIR retirement planning • Stabilization period planning • Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll • Financial Reporting mappings and data rollup	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project and seek resources through staff aug. additional FTE or contracts as needs are discovered.	Still monitoring	10/11/23	Renne Hermeling
Processes	ENTERPRISE TREASURY: The current Concentration Account contract ends in March of 2026. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM. 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. They will also need to receive and distribute new depository supplies to their locations.	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	Still monitoring	12/13/23	Sarah Dugan
Processes	ENTERPRISE TREASURY: Discussions relating to the status of outstanding warrants at the cutover from December 2025 to January 2026 has not been finalized and could, potentially, have impacts to warrant recipients and reconciliation processes.	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants. • 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.	Still monitoring	01/25/24	Sarah Dugan
Technology	Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities could cause delays in the ABS Remediation timeline.	Open	4 (Medium/Mediur	• Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline. • Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration.	Still monitoring	10/20/23	Stacey Pollock
People	ENTERPRISE A&A: • All bureaus within the division will have significant process changes. • 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. • Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output. • Due to the unique activities that A&A performs at an enterprise level, reduced performance could have a negative impact on agencies.	Open	4 (Medium/Mediur	• Prepare staff through regular change management engagements. • Perform knowledge transfer on why things are done so we can ensure better understanding of future processes. •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. • Monitor staffs' engagement. • Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps. • Review organizational charts and identify succession planning or knowledge transfers for known gaps. • A&A has contracted with two People Soft experienced resources to help with implementation activities, including identifying staffing model changes and process changes.	Still monitoring	10/11/23	Renne Hermeling
People	ENTERPRISE A&A:	Open	4	• Continue to work closely with the Florida PALM	Still monitoring	10/11/23	Renne Hermeling

Processes Technology Data	A&A serves all other agencies, therefore our processes are at risk from external impacts: • Agencies – All A&A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for implementation, 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. • Project – There may be changes in Project directions or decisions that negative affect A&A that would cause an increase of time and resources or provide confusion and lack of clarity among A&A's expectations. • Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&A's operations.		(Medium/Mediur	Project to identify areas where significant training will be needed for agency staff. • A&A OFFE team make outreach with agencies to determine training needs for skills that will be needed in Florida PALM users. • Participate with all FFMIS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon. • Assist agencies with readiness tasks such as data analysis and cleansing. • Develop contingency plans for agencies that are not prepared for Florida PALM implementation. • Monitor activities, changes in rules and regulations, and agencies competencies. • Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible. • A&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.			
Processes	ENTERPRISE TREASURY: 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.	Open	4 (Medium/Mediur	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	Still monitoring	12/13/23	Sarah Dugan
Technology	Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation activities. 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.	Open	4 (Medium/Mediur	• Communicate the Florida PALM timelines with third-party vendors. • Provide information and advisory support to the functional area(s) related to remediation activities and timelines. • Provide advisory support if needed related to interfaces, interface field mapping, and possible functional changes.	Monitoring	02/27/24	Stacey Pollock

DFS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DFS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	Based on the Florida PALM implementation timeline established through the execution of Amendment #8, the Go-Live date for the Florida PALM solution is expected to occur on January 6, 2026.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.
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	Added as a new entry to the Assumptions Log.
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	Added as a new entry to the Assumptions Log.

DFS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	OFB Florida PALM Prep Meeting-Org/EO	03/22/24	OFB staff	This is the first in a series of meetings with OFB staff to provide a foundation to then build the Florida PALM information on - Overview of Org & EO.	Entered as new Readiness Activity
People Processes Data	OFB Florida PALM Prep Meeting - FLAIR 29-Account Code what is	04/05/24	OFB staff	This is the second in a series of meetings with OFB staff to provide a foundation to then build the Florida PALM information on - "What is a FLAIR 29 Digit Account Code"	Entered as new Readiness Activity
People Processes Data	OFB Florida PALM Prep - Trivia Questions	04/19/24	OFB staff	Trivia Questions to review previous session content to engage and reinforce the knowledge	Entered as new Readiness Activity
People Processes Data	A&A - PTCM (OFFE) Active Training Resources	04/30/24	A&A Staff	Training team held Florida PALM Navigation Training, and FLAIR Fundamental training to A&A staff to help users understand more about today to help them align with the Florida PALM in the future. 6 class scheduled in two-hour blocks spaced out the last 2 weeks of April 2024. FLAIR Fundamentals classes were held in March.	Entered as new Readiness Activity
People Processes Data	A&A - Bureau of Auditing	04/30/24	Auditing Staff	Kim Holland is currently working on modifying A&A's audit plan to help A&A adapt to future activities. While working through the future state, she is identifying and mapping roles to teams, gaps in process flows or things we need to consider, and where the greatest impacts will be for her teams.	Entered as new Readiness Activity
People Processes Technology Data	DWC Florida PALM Knowledge Transfer meeting	04/09/24	DWC POCs	Plan resources and approached to complete RW tasks.	Entered as new Readiness Activity
People Processes Technology Data	Conduct standing weekly CCN meetings	04/29/24	CCN & Agency Sponsor	Share project activities status, project communication wrap-ups and allow CCN members an opportunity to ask questions, make suggestions and provide feedback. Prepare recurring agenda in SmartSheet and use to capture minutes and actions. Strategize on Florida PALM RW Task assignments that impact the Division stakeholders.	Entered as new Readiness Activity

People Processes Technology Data	A&A - Bureau of Vendor Relations - Bureau discussions with end users	04/30/24	Vendor Relations staff	Bureau is conducting regular weekly meetings to discuss new processes and how Florida PALM is going to change the way suppliers and ACH activities will be performed and managed.	Entered as new Readiness Activity
People Processes Technology Data	A&A - Bureau of State Payrolls	04/30/24	BOSP Staff	Within BOSP, leadership is having regular weekly Business Process review meetings to go through the Business Process Models and any Functional Design documents that are created and associated with the BPM. Additionally, they have been having the GAII's review FD documents and ask questions to understand the process as it will exist in the future. This has been helpful to incorporate them since they are more the users of the system and can also think about the processes, they do today versus how it is being proposed to work in the future. BOSP has adapted the approach that the more they can include their staff, the better they feel about the transition to a new system, and they also feel involved with the project by being able to contribute to the reviews of the FD's.	Entered as new Readiness Activity
People Processes Technology Data	A&A - PTCM (OFFE)	04/30/24	OFFE Staff, PTCM, AA staff	The Office of Florida Financial Education has spent the last month or so developing a timeline and approach for our enterprise training team to start learning and cross training the training team on Florida PALM business process models. The object is to plan to spend the next 6 months review business process models and requirements so the team will get familiar with the concepts and processes that Florida PALM is bringing. Each business process grouping will be assigned a Projects, Training, and Change Management (PTCM) primary and backup SME – and these SMEs will lead team conversations. Our goal is to have peer lead conversations with SME created assessments (knowledge checks) that are confirmed by Arnetta, Anne, and me. This will be a fluid process – but our goal is for the team to get comfortable with the process changes, roles, and terminology so when we're asked to support training, it won't be so foreign to A&A end users.	Entered as new Readiness Activity
People Processes Technology Data	A&A - Florida PALM Transition Team SME Meetings	04/30/24	A&A Staff	The Transition Team continues to meet with A&A SMEs to understand bureau concerns, to hear feedback about how the FD meetings are going, and to understand any roadblocks that can be addressed or eliminated.	Entered as new Readiness Activity
People Processes Technology Data	A&A - Bureau of Auditing	04/30/24	Auditing Staff	The Bureau of Auditing has been meeting weekly with the teams to share information they have learned through the FD meetings to help staff understand process changes and how things will be different.	Entered as new Readiness Activity
People Processes Technology Data	A&A - Florida PALM Transition Team - Weekly Updates	04/30/24	A&A Staff	The Transition Team provides a weekly email for all SMEs within the Division which identifies all FLP meetings (internal and external), as well as FD reviews and feedback that are due to the Project. This helps our staff stay on track and know the expectations and where support is needed.	Entered as new Readiness Activity
People Processes Technology Data	DWC provided a quarterly update to division supervisor/management team	04/30/24	DWC Senior management	Keep division leadership abreast of Florida PALM happenings	Entered as new Readiness Activity
People Processes Technology Data	OIT SME Meeting	03/04/24	OIT SMEs	To disseminate knowledge on Florida PALM design and business processes and to discuss questions or concerns	Entered as new Readiness Activity
People Processes Technology Data	DRM Management Update Meetings	04/08/24	DRM Management	03/07 meeting topics included FL PALM tasks, Segment III BPM review meeting notes, 03/06 Origami FL PALM Integration meeting, confidential payments, Origami contacts conversion review, OCM planning, CCN Town Hall, and 03/01 DRM training. 04/08 meeting topics included FL PALM tasks, Segment III Design Workshops meeting notes, Segment IV planning, FL PALM Data Day notes, March POC meeting, Origami FL PALM Integration meeting, Origami contacts conversion review, and OCM planning.	Entered as new Readiness Activity
People Processes Technology Data	DRM Project Tracking Meetings	04/30/24	DRM SMEs	03/04, 03/05, 04/02, and 04/30 meetings to update the FL PALM project tracking log	Entered as new Readiness Activity
People Processes Technology Data	DWC Leadership Status meeting	04/30/24	DWC Senior Management	Provided a quarterly update to division supervisor/management team	Entered as new Readiness Activity
Processes Data	DRM Property Valuation Report Requirements	04/24/24	DRM Management, DRM SMEs	Meeting to discuss the FL PALM requirements for creating functionality in the Asset Management & Reporting module to record and report asset valuations to DRM. Response from FL PALM: This report is for agencies, not DRM. The goal is to provide information as it pertains to building contents. We are aware that this report will likely not contain all information needed by agencies for the DRM reporting requirements but can assist with the compilation. This report will not replace the DRM required reporting from state agencies, it's just a tool that can be leveraged. If there is information DRM is aware of that we should include to assist agencies, please let us know and we'll incorporate.	Entered as new Readiness Activity
Processes Data	DWC/ PSDA Scheduled all the SME BPM Review meetings.	03/15/24	DWC POCs, Segment 1 and 2 SMEs and ABS	Distributed all the documentation in both paper and electronic formats for the SME BPM Review meetings.	Entered as new Readiness Activity
Processes Data	DWC/ PSDA PALM Business Process Review	03/18/24	DWC SMEs and ABS	Review and Understand BPM Models	Entered as new Readiness Activity
Processes Technology Data	DRM Origami FL PALM Integration Meetings	03/20/24	ABS staff & DRM SMEs	03/06 and 03/20 meetings to cover the following FL PALM integration topics (known before Seg III): - The FL PALM Design Phase/Timelines (FL PALM & OIT) - Required fields (COA, contract numbers, invoice date fields, voucher/journal IDs, and supplier information) - Warrant Cancellations - Suppliers (walked through current processes and conversion activities) Origami is using this information to put together a level of effort to establish a project team.	Entered as new Readiness Activity
Processes Technology Data	DRM & DFS OIT ABS Remediation Design Meeting | Origami	04/18/24	DRM SMEs, DFS OIT, CCN, ABS	Meeting to discuss: • Florida PALM Interfaces Confirmation • Status of Remediation Efforts	Entered as new Readiness Activity

Data				• Status of Remediation Efforts • Discuss Potential Questions for Florida PALM • Discuss OIT Integration Team Assistance • Discuss Next Steps / Follow-Up Meetings	
Processes Technology Data	DRM Supplier Meetings	04/29/24	DRM SMEs, ABS, DRM Management, CCN, BVR, A&A, OIT, FL PALM	03/14 DRM SMEs met to review the API020 Outbound Supplier Data interface layout. 03/20 meeting with DRM SMEs and DRM Management to discuss confidential DRM payments/suppliers. 03/22 meeting with DRM SMEs and DRM Management to discuss A&A response to DRM concerns for API020. 04/15 meeting with DRM SMEs and DRM Management to prepare for 04/17 meeting. 04/17 meeting with CCN, BVR, A&A, OIT, and FL PALM to discuss Account Codes for DRM CRA Reimbursement, DRM Confidential Claimant Payments, and DRM Supplier Registration/Change Requests/Outbound Supplier File. 04/29 DRM meeting to recap topics covered during 04/17 meeting.	Entered as new Readiness Activity
Technology Data	DRM Contacts Conversion to FLAIR VS	04/22/24	DRM SMEs, DRM Contract Management, TFMS	03/28 meeting with DRM SMEs and DRM Contract Management to discuss the Defense Attorney contacts that do not have a Substitute W-9 on file with the State of Florida. 04/22 meeting to discuss findings from Origami contacts conversion review.	Entered as new Readiness Activity
People	OCM Planning - Groups and dates, Workforce Readiness Plan	04/11/24	DFS, OIR, OFR	Updating the Workforce Readiness Plan to reflect finer details on OCM activities and how to successfully use the ADKAR method to readiness.	Entered as new Readiness Activity
People	Meeting to discuss Sponsor Snapshot approach to Agency Leadership	04/11/24	DFS Leadership	Discuss approach, design and content for a leadership communication that will go out monthly to keep leaders engaged with what staff are doing.	Entered as new Readiness Activity
People	Presentation to CCN to build on OCM	04/15/24	CCN	Presented PPT to CCN on the Law of Diffusion	Entered as new Readiness Activity
People	Development of OCM Master Plan	04/19/24	DFS, OIR, OFR	Develop activities to support the OCM Plan that will engage, prepare and address stakeholder concerns.	Entered as new Readiness Activity
People	Discuss CCN expectations with Treasury Director	04/19/24	Treasury	Share expectations of CCN role and responsibilities	Entered as new Readiness Activity
People	Development of ADKAR (Awareness & Desire) Assessment Survey for endusers	04/22/24	DFS, OIR, OFR	Develop 10 A&D questions for use at Roadshow/kick off	Entered as new Readiness Activity
People	Presentation on Roadshow objectives in OCM	04/22/24	CCN	Continue to expose and educate CCN members on the importance of OCM and the Road show intent.	Entered as new Readiness Activity
People	Developing CCN Stakeholder SP site	04/24/24	CCN and stakeholders	Meet with Web team to develop a stakeholder page that can provide self-serve information on Implementation activities. Having a location that stakeholders can frequent will expand knowledge, reduce fear and encourage project transparency	Kick off was 3/5 then weekly thereafter. Entered as new Readiness Activity
People	Prepare Stakeholder Road show presentation	04/24/24	DFS, OIR, OFR	Discuss approach, design, and content for the May Road Shows	Entered as new Readiness Activity
People	Create schedule for Agency-wide Road shows to end-users	04/26/24	DFS, OIR, OFR	Mapped out Road show groupings for DFS/OIR/ORF. Goal to have small (no more than 30) users to Road show. Identified 10 unique groups that will be used to send surveys and Road show invites to in May. Roadshow purpose is to head off any fears the enduser might have and to encourage engagement thru questions.	Entered as new Readiness Activity
People	Create Communications Plan for end-users	04/26/24	DFS, OIR, OFR	Communications Plan will target Commumications by ADKAR group.	Stated 3/18 and weekly thereafter. Entered as new Readiness Activity
People	Presentation to POC and SME on OCM	04/30/24	DFS, OIR, OFR	Leading select SME's thru Change Management activities and training to educate the importance of OCM and their role to impact the end users.	Entered as new Readiness Activity
People	DWC/ PSDA PALM Business Process Review	03/22/24	DWC SMES and ABS	Meeting held, 3/13, 3/18, 3/19, 3/20, 3/21, & 3/22. Review and Update understand of BPM and how will impact team and ABS.	Entered as new Readiness Activity
People Processes	Conduct Monthly Point of Contact meeting with Division/Offices	03/25/24	DFS, OIR, OFR Point of Contacts and Subject Matter Experts	Share project activities status, project communication wrap-ups and allow POCs an opportunity to ask questions, make suggestions and provide feedback	Topics: What Motivates you, PalmCast #14 Desire, Reviewed RW Task Current and Future, Shared expectations of division involvement in Florida PALM, Segment III BPM Meetings.
People Processes	OFB Disbursements Staff Meeting	04/09/24	OFB-BFS-Disbursements	Shared knowledge center COA values. Reviewed/discussed information shared during OFB Florida PALM Prep meetings.	Entered as new Readiness Activity
People Processes	Conduct Weekly PMP meeting	04/26/24	Agency Liaison and PM Liaison	Expanding the DFS Implementation Plan	Met 4/5, 4/12, 4/19, 4/26
People Processes	DRM FL PALM Trainings	04/23/24	DRM's Trust Fund Management Section	03/01/24 training on Chart of Accounts, Disbursements Management (vouchers & payments), and overview of the Knowledge Center 04/23/24 training on FL PALM impacts to current processes, prompt payment calculations, suppliers, and warrant cancellations. Also included Chart of Accounts quiz.	Entered as new Readiness Activity
Processes	Discuss processes and impact to DWC	03/11/24	DWC POCs	Discuss processes and impact to DWC	Entered as new Readiness Activity
Processes	DWC/ PSDA PALM Task Kickoff with SMEs	03/12/24	DWC SME staff	To explain and level set SME on the RW task direction for cotask completion.	Entered as new Readiness Activity
Processes	DWC/ PSDA PALM Working meeting, multiple CCN Tasks	03/14/24	DWC POCs	Strategize with Chief on how to release tasks so that SMEs understand what is being asked	Entered as new Readiness Activity

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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DFS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Scott Fennell	scott.fennell@myfloridacfo.com	05/13/24
January - February 2024	Scott Fennell	scott.fennell@myfloridacfo.com	03/05/24
November - December 2023	Scott Fennell	scott.fennell@myfloridacfo.com	01/12/24
September - October 2023	Scott Fennell	scott.fennell@myfloridacfo.com	11/13/23
July - August 2023	Steven Fielder for Scott Fennell	steven.fielder@myfloridacfo.com	09/07/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Heather DiGiacomo

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 10
- Duplicate Filled Role = 2
- Vacant Role = 2

RW Task Completeness



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

RW Task Completeness:

Score = 90.00%

- Submitted Complete = 2
- Submitted Incomplete = 0
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 90.94%

- Submitted On Time = 20
- Submitted Late = 6
- Pending Submission = 4

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	50% - In Progress		DJJ has identified discrepancies in the FLAIR ORG Code and FLAIR ORG Titles provided in the Smartsheet. This impacts the completion of the Organization Configuration Workbook. Due to Data dependencies, this also impacts the Accounts Receivable Module Configurations. Location Definition and Area ID Value are large inventories are planned to be completed by the Business Unit by COB May 10th.		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Plan development underway, analysis underway for Open Encumbrances, exploring automation to analysis of Assets inventory, Grants analysis pending.		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Impact spreadsheet has been completed, but business processes require updates. Business Analyst sat with Business Units assisting with updating and/or correcting the business processes. Gaps have been identified. A Business Process Template has been developed and implemented.		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		Agency Business System Inventory is being updated; this consists of a full update to the inventory that was initially provided.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress		Due to the ABS Inventory being updated, the interface activities are also impacted. We must understand how the databases and ABSs are currently connected together and to FLAIR; as well as how the data that is being consumed is being used so that interfaces can be selected appropriately. Business Units have identified Interfaces that would provide the information needed for certain ABS to continue to function in the same manner they do currently; however, an analysis needs to be completed to verify if PALM functionality would replace the functionality of the ABS and therefore some of those interfaces would not be needed.		
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Additional information is being gathered based on Task 516 before further work will continue in Task 519.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/13/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress		Survey developed and deployed.		
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Additional data elements have been added to the drafted Data Cleansing Plan.		
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				

						Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Meetings pending with IT and Business Units to discuss PALM Interfaces, PALM Reports, data consumption, and business purposes for all Segments to-date.		
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/14/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Updates made to Assumptions, Issues, Risks, and Agency-Specific Readiness.		

People

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

Implementation:

Planned Florida PALM End Users = 99

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 97

• Related Business Systems = 3

• Related Reports = 15

• Documentation Status:

- Complete = 97 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 97

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 50 Uncertain = 1

• Level of Impact: Processes Changes

- High = 13 Medium = 10 Low = 20 None = 7 Uncertain = 1

• Level of Impact: Technology Changes

- High = 0 Medium = 1 Low = 1 None = 6 Uncertain = 43

• Level of Impact: Data Changes

- High = 0 Medium = 1 Low = 3 None = 3 Uncertain = 44

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 43 Complete = 8

Technology

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

Current-State:

Cataloged Business Systems = 11

• Criticality:

- High = 9 Med = 0 Low = 1 None = 1

• Documentation Status:

- Complete = 10 Partial = 0 Not Started = 0

Cataloged Interfaces = 16

- Inbound Interfaces = 12

- Outbound Interfaces = 4

Implementation:

Business Systems Planned for Integration = 8

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 3 Not Needed = 5

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 3 Not Started = 1 Not Needed = 4

Planned Interfaces = 7

- Inbound Interfaces = 1

- Outbound Interfaces = 5

Data

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

Current-State:

Unique FLAIR Data Elements = 76

• Associated Unique Uses = 76

- Continued Use - Yes = 75

- Continued Use - No = 1

• Associated Business Systems = 4

Cataloged Reports = 515

• Criticality:

- High = 131 Med = 613 Low = 2 None = 1

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 3 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DJJ Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	CCN role vacancies. Require a primary for Training Liaison, and backups for Project Management and Business Liaisons.	Open	9 (High/High)	Positions and funds have been approved effective 10/1, to recruit and hire skilled personnel dedicated to the FL PALM project.	Consorted effort in progress to fill open positions.	03/11/24	Jay Nayana
People Processes Technology Data	Assigned tasks not accurately completed	Open	9 (High/High)	Owner to review with BA and get guidance for completion	BA has been working with Business Units continuously to address the gaps in previously submitted tasks.	03/28/24	Morgan Helton
People Processes Technology Data	Tasks completion not meeting deadline	Open	9 (High/High)	BA and ARC to work more closely with SMEs and chiefs to ensure assigned tasks are on track for completion. Seeking dedicated SMEs for PALM.	Tasks 514, 515, 516, and 518 where not submitted by the due date, April 12th. Task 513 will not be completed by the due date of May 10th.	03/28/24	Morgan Helton
Processes Data	After the tasks have been further itemized, 35% of the tasks are behind and not started. Most of this is due to one task being dependent on data from completion of another task.	Open	9 (High/High)	BA working with chiefs & SMEs on the tasks to ensure deadline is met	Waiting on Task 326 ABS Inventory to be completed before work on Tasks 516 and 518 interfaces and ABS documentation can start.	04/17/24	BU SMEs, BU Chiefs, BA
People Processes	End of Year and Dual Year time constraints in addition to increasing PALM tasks and PALM task remediation.	Open	9 (High/High)	Exploring response options.		04/30/24	F&A and Budget Chiefs
Technology Data	IT system dependency – With systems down, SMEs are unable to access ABS data and info needed to complete certain tasks.	Open	6 (Medium/High)	BA is attempting to find an alternative solution for data dependency for task completion with state enterprise systems while IT is addressing the underlying system issues.	IT is attempting provide the F&A and Budget Chiefs workaround access to data for the tasks.	04/19/24	Morgan Helton
People	External Audits present a risk for consuming time and personnel that would have been tasked toward FL PALM activities	Open	4 (Medium/Mediu	Ensure that if an external audit is assigned to a specific bureau that analysis is conducted to gauge the impact against current and upcoming tasks. Internal audits may offer some flexibility toward deadlines and	No audits impacting this period.	01/29/24	Jay Nayana

				may offer some flexibility toward deadlines and resources that should be explored.			
People	Low percentage of SME time committed to PALM could result in inability to complete assigned tasks by deadlines	Open	4 (Medium/Medium)	Ensure sufficient SME's time is allocated to PALM project	PMO is assisting Business Units in completing tasks.	03/28/24	BU Chiefs
People	Changes in CCN or SMEs present a risk for incomplete knowledge transfer and potential lack of authority or leadership depending on the scale of the change.	Open	2 (Medium/Low)	Ensure project information is shared throughout CCN and SME stakeholder pools in the event of a vacancy. Utilize backups whenever possible to avoid taxing individual resources.	No changes for this period.	03/11/24	Jay Nayana

DJJ Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Subject Matter Expert (SME) time constraints.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Recruit and hire skilled personnel to achieve objectives and tasks for the FL PALM project. DJJ has implemented a discretionary spending plan to augment salaries for positions within the Department, including FL PALM related positions.	July - August 2023, this issue will be on-going until the staffing issue can be resolved. September - October 2023, ongoing. November - December 2023, ongoing. January - February 2024, hired two SMEs in Finance and Accounting.	06/30/24	Jay Nayana
People Processes	Completed tasks not accurate	Open	High - Impacts the ability of the agency to meet deadlines or milestones	SMEs and Chiefs to work with BA and attend all applicable PALM meetings and design workshops.	BA continues to assist SMEs and Chiefs to complete tasks accurately.	04/12/24	BU SMEs
Technology	Task 326 (Update Current State Agency Business System Inventory and Documentation) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	BA to gather information on Agency Business Systems (ABS); then systematically identify the data elements and processes those ABSs are used for so it can be determined if PALM remediation is necessary. Results will be presented to CCN upon competition.	BA is coordinating meetings and interviews with Business, Functional, and IT system owners of all ABS.	05/24/24	Morgan Helton
Processes Technology Data	Task 327 (Complete Reports Inventory) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	BA to review Task 327 and develop a plan to rework the requirements for Task 327. Report Inventory that was provided initially did not meet the requirements of the original task. This task is being reworked.	As Business Units work through updating Task 328/515 Documenting Current Agency Business Processes, within the template is a field to capture reports utilized which will help with the updates and validations of Task 327.	04/24/24	F&A, Budget, General Services
Processes	Task 328 (Document Current Agency Business Processes) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	SMEs, Chiefs, and BA to rework this task.	To assist SMEs to complete this and future related tasks, a Business Process documentation template has been developed, explained, and provided to them.	06/28/24	BU Chiefs and BA
People Processes	Better and sufficient of understanding of PALM tasks needed for SMEs and BU chiefs to completed assigned tasks	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	BA to conduct knowledge transfer sessions to chiefs and SMEs with specific example of task completion.		04/29/24	Morgan Helton
Technology Data	Task 514 (Complete Data Readiness Analysis and Data Cleansing Activities for Segment I and II) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	BA to reach out to sister agencies and PALM RC for examples of Data Plans to help the agency begin development of the required data plan. BA to reach out to DFS on mitigation efforts to obtain agency data due to failures in ABS at this current time.	BA reached out and gathered information needed for completing this task. Work on planning and cleansing in progress.	05/10/24	BA, F&A, Budget, and General Services
Processes Data	Task 515 (Identify Change Impacts and Update Agency Business Progress Documentation for Segments I and II) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	SMEs, Chiefs, and BA to update the existing Business Processes in their current form with as much applicable information within the given timeframe.	To assist SMEs to complete this and future related tasks, a Business Process documentation template has been developed, explained, and provided to them.	05/24/24	BA and BU Chiefs
Processes Technology Data	Task 516 (Update Agency Business System Documentation for Segment II) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	BA to complete ABS Inventory and infrastructure mapping so IT can focus on the ABS that are impacted by Segment II Interfaces as provided in Task 518.	Waiting on Task 326 to be completed.	06/21/24	IT, Contracts, General Services Chiefs, BA
Technology Data	Task 518 (Update Florida PALM Interface Inventory for Segment II) not completed	Open	High - Impacts the ability of the agency to meet deadlines or milestones	BA to complete ABS Inventory and infrastructure mapping. BA completed a PALM Interface and PALM Reports crosswalk to review with IT and the BUs to ensure interfaces are appropriate and needed. Meeting yet to be scheduled.	Waiting on Task 516 to be completed.	05/10/24	Mark Shubrick
People Processes Technology	Not enough SME time to work on PALM tasks, which is affecting timely completion of DJJ tasks for the PALM team	Open	Low - All impacts not listed as Critical or High	Set aside enough time each day for SMEs to work PALM tasks. Bring in OPS staff to free up SMEs to work on PALM tasks	SMEs setting aside time to work on PALM tasks.	04/30/24	BU Chiefs
People Processes	Task 505 (Update Florida PALM Interface Inventory for Segment I) not completed	Open	Low - All impacts not listed as Critical or High	BA to complete ABS Inventory and infrastructure mapping so IT can focus on the ABS that are impacted by Segment I Interfaces.	BA completed a crosswalk of Interfaces and reports for IT and SMEs to review and discuss for all segments to-date. Meetings to be scheduled.	05/31/24	Mark Shubrick
People	Task 500 (Agency Specific Project Charter) not created	Closed	Low - All impacts not listed as Critical or High	Create a Project Charter.	Project Charter completed.	04/23/24	Godfrey Ekata
People	Business Analyst (BA) shortage	Open	Low - All impacts not listed as Critical or High	Secure adequate funding for vacancies, prepare appropriate advertising, review applicant pool with hopeful qualified applicants, interview, make offer, and onboard by July 1.	Ad placed to hire 2 resources	07/01/24	Olu Oyewole
People Processes Data	Task 501 (Create Agency Specific Implementation Schedule) needs review and possible updating	Closed	Low - All impacts not listed as Critical or High	Obtain License for Microsoft Project to gain access to the file for editing and completion.	Licensure obtained.	04/19/24	Godfrey Ekata
People	Task 503 (Create a Workforce Readiness Plan) needs review and possible updating	Closed	Low - All impacts not listed as Critical or High	Obtain License for Microsoft Project to gain access to the file for editing and completion.	Licensure obtained.	04/18/24	Godfrey Ekata
People Processes Technology Data	Of the tasks due in April 2024, 35% of them not yet started, 27% of them are in progress, and 38% are completed.	Open	Low - All impacts not listed as Critical or High	BA working with chiefs & SMEs on the tasks to ensure the deadline for them is met.	Certain tasks are reliant on the completion of previous tasks which are currently being reworked.	06/28/24	BU Chiefs, BU SMEs, and BA

DJJ Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes Technology	FL PALM Voucher processes/systems will be able to replace current voucher system (Axiom Pro).	Logged	08/01/23	Marcia Haye, Evelyn Jacobs	FL PALM will not replace DJJ's current document management system (Axiom Pro).
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Haye	Correct.
People	Availability of adequate resources (SMEs) dedicated to work on required PALM tasks.	Logged	04/17/24	All	Business Units are experiencing staffing shortages which impact PALM Tasks.
People	PMO would be fully staffed.	Logged	04/17/24	All	PMO not fully staffed.
Technology	Software licenses would be available for PMO staff to manage the project.	Logged	04/17/24	Godfrey Ekata, Morgan Helton	PM has received the Software license for Microsoft Project.
Processes	Previously worked and submitted PALM tasks would have been complete and accurate.	Logged	04/17/24	SMEs, PMO	PMO working with SMEs to update and/or correct previous tasks that are incomplete or inaccurate.
Processes Technology Data	PALM will not provide the same reporting capabilities that current ABS provide.	Logged	04/17/24	F&A and Budget	A full analysis of actual reports utilized, PALM interfaces selected, and PALM reports offered is required to substantiate this assumption.
People	DJJ PMO can drive the implementation of the PALM Project with four team members.	Logged	04/17/24	PMO	Ad placed for the two vacancies.
People	There is a commitment to the project goals from all stakeholders.	Logged	04/23/24	All	All stakeholders are committed.
Processes Technology	The project schedule will be used to establish and monitor the nature and progress of tasks supporting defined milestones and deliverables.	Logged	04/23/24	PMO	This has been implemented.
People Processes Technology Data	The current FLAIR system will function until PALM is implemented in production.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, Grants	PMO learned that the two systems will not run concurrently.
People Technology	There is a sufficient talent pool within the budget from which to hire state staff resources.	Logged	04/23/24	PMO, F&A, General Services	DJJ received budget for PALM related activities.
People Processes Technology	There will be sufficient engagement by DJJ's resources knowledgeable about agency business processes and technical capabilities.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, Grants, Revenue	
Processes	The PALM team will stick with implementation schedule and will not deviate.	Logged	04/23/24	PMO	
Processes	The PALM team will determine the PALM-related tasks to be performed by DJJ staff to support the design and build of PALM.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts	PALM periodically assigns tasks to DJJ for completion.
People Processes Technology	The PALM team will provide sufficient and adequate guidance to DJJ's requirements for PALM.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, PMO	PALM's Readiness Coordinator's have proved to be adequate and responsive resources for questions and assistance when needed.
Processes	DJJ SMEs understand and document their internal processes and modify them where possible to accommodate PALM functionalities.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, Grants, Revenue	The initial documentation has gaps that are being corrected.
Processes Technology Data	DJJ understands and will document the current state of its technical architecture and business systems and modify to integrate with the financial management solution.	Logged	04/23/24	IT	PMO is working with IT staff to understand its system architecture and how the databases and ABS interfaces/functions interact.
Technology	DJJ has the budget needed to perform tasks assigned.	Logged	04/23/24	Budget, IT	
People	Staff will require accounting knowledge in order to adequately operate in certain modules of PALM.	Logged	05/09/24	F&A, Budget	SME within F&A is concerned that knowledge of accounting principles is required to understand the functionality of PALM.

DJJ Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Corrected the Task 512 and resubmitted.	03/11/24	Agency Liaison	The data on the smartsheet has been corrected and resubmitted today.	March 2024
People Processes Technology Data	DJJ End Users PALM Townhall and Updates	04/18/24	SMEs, Agency Liaison, PM, current FLAIR end users	Introduction to PALM, future communications, roadmap, training, etc.	Introduction of PALM to all end users, SMEs, and CCN. Message was well received and well attended.
People Processes Technology Data	Monthly DJJ/PALM Readiness Touchpoint Meeting	04/22/24	SMEs, Agency Liaison, PM, PALM Readiness Coordinators	Discuss outstanding tasks, submitted tasks, and upcoming tasks	Discussed overdue tasks, plan for completion, utilizing the comments in the task tracker, and keeping the Assumptions, Issues, and Risks logs more current.
People Processes Technology Data	Budget Bi-Weekly PALM Check In	04/29/24	Chief, SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks and assignees	Discussed overdue PALM tasks and upcoming due Task 513.
People Processes Technology Data	F&A Bi-Weekly PALM Check In	04/30/24	Chief, SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks and assignees	Discussed overdue PALM tasks and upcoming due Task 513.
People Processes Technology Data	F&A Raise you Palms to Bring in the New Ice Cream Social	04/30/24	F&A Chief, F&A End Users, PM, Agency Liaison, Budget Chief, and Budget End Users	PM to provide PALM implementation objectives and schedule, Q&A session to follow.	Interactive discussion and Q&A with participants.
People Technology Data	IT Bi-Weekly PALM Check-In	04/04/24	IT SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Discussed Tasks 516 and 518, how they connected, what was needed from the business units exactly and in what format.
People	Agency On-boarded new Project Manager for PALM	03/01/24	PMO	Mr. Godfrey Ekata will be the new PALM Project Manager.	March 2024
People	Onboarded the new Agency Liaison for PALM	03/11/24	PMO	Morgan Helton is the new PALM Agency Liaison	March 2024
People	KT with General Services, new PM and Agency Liaison	03/14/24	General Services SME, PM, and Agency Liaison	Knowledge Transfer of current PALM activities and general information	March 2024
People	KT with F&A Reconciliation	03/14/24	SME, PM, and Agency Liaison	Knowledge Transfer of current PALM activities and general information	March 2024
People	Workshops Prep	03/20/24	SMEs, Agency Liaison, PM, and Champion Network	Overview of upcoming workshops and expectations	
People	Bi-Weekly PALM Check In Meetings	03/20/24	SMEs, Agency Liaison, PM	Bi-Weekly Check In with Business Units on PALM Tasks and open discussion on any challenges or needs of the SMEs on PALM issues	All bi-weekly meetings have been scheduled.
People	F&A Bi-Weekly PALM Check In	03/21/24	F&A SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Discussed each task and reviewed the outcomes and answered follow up questions from participants.
People	Budget Bi-Weekly PALM Check-In	03/21/24	Budget SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	BA suggested that Revenue/Grants management have representation in SME, discussed which tasks where there was an F&A and Budget overlap that Budget preferred to take lead.
People	General Services Bi-Weekly PALM Check-In	03/21/24	General Services SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	General Services expressed concern with reporting and viewing capabilities into PALM. Need to provide them the Task Talk from Thursday 3/21/2024

					talk from Thursday 3/21/2024.
People	Contracts Bi-Weekly PALM Check-In	03/21/24	Contracts SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Determined that Contracts was not fully represented. Requested that Contract Management SME be added.
People	IT Bi-Weekly PALM Check-In	03/21/24	IT SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Determined there may have been missed opportunities for integrations and/or upgrades for current business systems with PALM. Conducting research to verify this theory.
People	Contracts Bi-Weekly PALM Check-In	04/01/24	Contracts SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees	Discussed Tasks 517 and 514, process documentation, and set up a subsequent meeting to touch on Procurement and Contract Mgmt. within DJJ.
People	Budget Bi-Weekly PALM Check-In	04/02/24	Budget SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Reviewed Task 515 Process Workbook, Task 518 interfaces, and forthcoming Design workshops.
People	F&A Bi-Weekly PALM Check In	04/02/24	F&A SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees, Prep for Design Workshop, next Bi-weekly meeting	Reviewed all open tasks in detail and set up subsequent discussions for additional assistance.
People	F&A Bi-Weekly PALM Check In	04/16/24	Chief, SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees	Discussed plan for tasks not submitted on April 12th.
People	Budget Bi-Weekly PALM Check In	04/17/24	Chief, SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees	Discussed plan for tasks not submitted on April 12th.
People	General Services Bi-Weekly PALM Check In	04/17/24	Chief, SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees	Discussed plan for tasks not submitted on April 12th.
People Processes	Budget PALM Pulse Check	04/09/24	Chief, Agency Liaison, PM	Check in on status of PALM tasks due April 12	Check in on PALM Tasks due on April 12th.
People Processes	General Services PALM Pulse Check	04/09/24	Chief, Agency Liaison, PM	Check in on status of PALM tasks due April 12	Check in on PALM Tasks due on April 12th.
People Processes	F&A PALM Pulse Check	04/10/24	Chief, SMEs, Agency Liaison, PM	Check in on status of PALM tasks due April 12	Check in on PALM Tasks due on April 12th.
People Processes	F&A PALM Pulse Check	04/11/24	Chief, SMEs, Agency Liaison, PM	Check in on status of PALM tasks due April 12	Check in on PALM Tasks due on April 12th.
People Processes Technology	PMO Team Introduction to SMEs	03/20/24	SMEs (All), Agency Liaison, PM, and Champion Network	PMO's plan and strategy for implementing PALM at DJJ	Business Units represented: PMO, Budget, F&A-Disbursements, Reconciliation, AR, General Services, IT, HR. Shared project plan and overview of the collaborative workspace in Teams and Tasks organized in a Planner Board, excellent discussion and questions from participants.
People Technology	IT Bi-Weekly PALM Check-In	04/18/24	SMEs, Agency Liaison, PM	Detailed discussion of PALM tasks, assignees	Discussed plan for tasks not submitted on April 12th.

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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DJJ Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Heather DiGiacomo	heather.digiacomo@fldjj.gov	05/14/24
January - February 2024	Heather DiGiacomo	heather.digiacomo@fldjj.gov	03/11/24
November - December 2023	Heather DiGiacomo	heather.digiacomo@fldjj.gov	01/12/24
September - October 2023	Heather DiGiacomo	heather.digiacomo@fldjj.gov	11/09/23
July - August 2023	Heather DiGiacomo	heather.digiacomo@fldjj.gov	09/11/23

Helpful Links

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

DLA 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

March - April 2024

Agency Sponsor

Sabrina Donovan

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 6
- Vacant Role = 4

RW Task Completeness



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

RW Task Completeness:

Score = 50.00%

- Submitted Complete = 2
- Submitted Incomplete = 2
- Completed After Submission = 3

RW Task Timeliness



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

RW Task Timeliness:

Score = 92.19%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 5
- Meetings Missed = 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	**04/05/24**	Modified the changes and updated the spreadsheet on 05/06/2024	Submission Incomplete	05/06/24
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	**04/12/24**	Completed the Current State Business Process Spreadsheet on 04/17/24. Spreadsheet uploads removed 04/19/2024.	Submission Incomplete	04/19/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/22/24**	Modified the changes and updated the spreadsheet on 05/06/2024	Submission Complete	05/06/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/29/24**	Conversion spreadsheet updated on 04/17/2024	Submission Complete	04/21/24
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/05/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/23/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/22/24**		Submission Complete	04/22/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**		Submission Complete	
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 27

- Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 67

- Related Business Systems = 5
- Related Reports = 9
- **Documentation Status:**

- Complete = 53 Partial = 9 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 13

- **Criticality:**

- High = 9 Med = 0 Low = 1 None = 3
- **Documentation Status:**

- Complete = 10 Partial = 3 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 39
- Continued Use - No = 3
- **Associated Business Systems = 15**

Implementation:

Impacted Agency Business Processes = 67

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 7

• Level of Impact: People Changes

- High = 0 Medium = 1 Low = 31 None = 2 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 10 Low = 21 None = 1 Uncertain = 2

• Level of Impact: Technology Changes

- High = 1 Medium = 5 Low = 25 None = 1 Uncertain = 2

• Level of Impact: Data Changes

- High = 0 Medium = 30 Low = 1 None = 0 Uncertain = 3

• Segments I & II Documentation Update Status

- Not Started = 5 In Progress = 28 Complete = 1

Cataloged Interfaces = 19

- Inbound Interfaces = 0

- Outbound Interfaces = 19

Implementation:

Business Systems Planned for Integration = 6

• Segment I - Documentation Updates:

- Complete = 5 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 5 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 10

- Inbound Interfaces = -5

- Outbound Interfaces = 8

Cataloged Reports = 176

• Criticality:

- High = 21 Med = 1 Low = 86 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 5

• Agency Data Outside of Primary Source System(s) = 2

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 1 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DLA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Ability to complete tasks completely and timely	Closed	9 (High/High)	Initiating solicitation for staff augmentation to assist with business analysis and project management	RFP for business analyst posted 11/03/2023, RFP for project manager posted 11/06/2023. Candidate applications reviewed and will be scheduling interviews for business analyst. We will be postponing a decision on the project manager for now. 02/15/2024- Business analyst has been on-boarded, but is still becoming familiar with the agency and the project.	03/11/24	Sabrina Donovan
People Technology	Loss of technical CNN participant	Open	9 (High/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	Position is still vacant. 04/23/2024 position is still vacant	02/26/24	Sabrina Donovan
Processes Technology	Changes to project scope potentially impacts agency planned mitigation.	Open	9 (High/High)	Review BPM's for changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	Review continues 04/23/2024 this is is a continuing risk.	03/11/24	Sabrina Donovan
Technology Data	The Finance & Accounting Microsoft Access applications that are used daily by staff must be modified in time for PALM interface testing.	Open	9 (High/High)	Agency will submit a funding request with a workplan and budget issue for two developers to program a replacement application that is compatible with PALM data.	New Risk.	04/23/24	Sabrina Donovan
People Technology	Technical Documentation: Lack of technical knowledge and/or documentation related to business systems and interfaces being impacted by the project.	Closed	4 (Medium/Mediu	Staff Aug business analyst to assist with gathering requirements.	Staff aug has been on-boarded, but is still becoming familiar with agency and the project. Additional staff aug will begin 03/25/2024.	03/11/24	Sabrina Donovan

DLA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Reengineer FLAIR accounting interfaces to Florida PALM.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation to review data formats and interface options to determine optimal solution.	Continuing issue. 04/23/2024 - this is a continuing issue.	01/31/25	Sabrina Donovan
People Processes Technology	Software Integration Issues: Planned software integration may not work as expected, leading to re-design and re-work.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation in design workshops and UAT.	Continuing issue. 04/23/2024 - this is a continuing issue.	01/31/25	Sabrina Donovan
Processes	Need ability to make corrections to closed reporting period	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option	new issue moved from risk-I don't think this has a resolution. 04/23/2024 - still need to understand the transaction correction process in Florida PALM.	01/31/25	Darlene Faris
Data	Need the ability to request Activities to the Activity ChartField for use with the Project-related ChartFields or provide a list to DFS for updating the Activity ChartField.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Prepare a draft list to send to DFS for updating PALM.	New Issue	05/10/24	Sabrina Donovan
Processes	In order to process accounts receivable transactions into our ABS we must be able to use a Filler field of 10 to 12 alpha/numeric characters to add an identifier.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option from PALM.	New Issue	05/14/24	Darlene Faris
People	Availability of Finance & Accounting SMEs: Due to workload and competing priorities SMES may not be available.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	When the staff aug business analyst is engaged, interviews will need to be scheduled to minimize work disruption.	Scheduling of Segment IV workshops coincides with year-end activities,	01/31/25	Sabrina Donovan

	This may result in extending the overall schedule, and adding cost to the budget.				resulting in reduced availability. 04/23/2024 - this is a continuing issue.		

DLA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting	no change
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	no change

DLA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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DLA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	05/13/24
January - February 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/11/24
November - December 2023	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	01/10/24
September - October 2023	John Guard	john.guard@myfloridalegal.com	11/08/23
July - August 2023	John Guard	sabrina.donovan@myfloridalegal.com	09/11/23

Helpful Links

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

DMA 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

March - April 2024

Agency Sponsor

Col. Adam Curry

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 97.81%

- Submitted On Time = 25
- Submitted Late = 5
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/07/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/18/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/02/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 22

- Business Process Groupings = 10/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 24

- Related Business Systems = 4
- Related Reports = 14
- **Documentation Status:**

- Complete = 24 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 5

- **Criticality:**

- High = 2 Med = 3 Low = 0 None = 0
- **Documentation Status:**

- Complete = 2 Partial = 0 Not Started = 2

Data

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

Current-State:

Unique FLAIR Data Elements = 94

- **Associated Unique Uses = 97**
- Continued Use - Yes = 71
- Continued Use - No = 22
- **Associated Business Systems = 2**

Implementation:

Impacted Agency Business Processes = 24

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 24 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 24 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 11 None = 13 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 24 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 24

Cataloged Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 2

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 1

Planned Interfaces = 4

- Inbound Interfaces = 1

- Outbound Interfaces = 3

Cataloged Reports = 48

• Criticality:

- High = 28 Med = 12 Low = 6 None = 1

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DMA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Non-participation to complete task.	Closed	9 (High/High)	Continue communiation.	Mar/Apr	03/15/24	Kevin Creech
Technology	Awaiting information about new tracking system to replace Quickbooks	Open	6 (High/Medium)	LBR request was denied. Wokring with PALM to develop either an interface or spreadhsheet upload.	Mar/Apr 24	01/09/24	Jack McAlpine

DMA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Data	Non participation.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Continued communication with department supervisors. Ensure leadership involvement.	Mar/Apr 24 - improvment from involvment with Staff.	07/30/24	Jack McAlpine
People Processes	Budget Administrator and Finance Supervisor are in the process of training several new personnel.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To bring staff up to date with current processes within the Finance and Accounting Office.	Mar/Apr 24 Continue to train staff	06/30/24	Trixy Pacetti
People Processes Technology Data	Continued training of new staff members in additional to required training for budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Will resolve with time.	Mar/Apr 24 Continue to train staff	06/30/24	Trixy Pacetti
People	Behind on tasks	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Agency is behind on starting the tasks due on 4/12. Expecting ramp up the week of 3/4.	Jan/Feb	04/12/24	Jack McAlpine
People Processes Technology Data	Start planning process for 2-3 week downtime of system when FLAIR converts to PALM	Open	High - Impacts the ability of the agency to meet deadlines or milestones	DMA Staff must plan and implement downtime process necessary for the potential FLAIR offline due to converstion to PALM.	Mar/Apr 24	07/31/25	Kevin Creech
Technology	Quickbooks Replacement	Open	Low - All impacts not listed as Critical or High	It appears the request for a Quickbooks database will end up being denied based on previous offers from House and Senate. The agency will plan on moving forward with Quickbooks.	Mar/Apr 24 - Continue to work with PALM support on whether to have Quickbooks interface with PALM or provide a spreadsheet upload.	08/30/24	Jack McAlpine
Processes Data	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.	Open	Low - All impacts not listed as Critical or High	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.	Mar/Apr	07/05/24	Brad Bowman
Processes Data	FLAIR Pending table vs PALM staging table	Open	Low - All impacts not listed as Critical or High	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.	Mar/Apr	07/05/24	Brad Bowman

DMA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
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.	Jan/Feb
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	Mar/Apr 24
Technology	The agency has submitted an LBR for Project Manager to help manage implementation of Florida PALM and travel to Tallahassee for meetings.	Removed	04/29/24	All agency business systems	Mar 24 - Funds received for PM

People Processes Data	The agency is expecting Florida PALM funding in the 3rd quarter of Fiscal Year 2023-24.	Removed	04/29/24	Agency stakeholder and systems processess.	Mar 24 - Funds received for PM
People Data	The agency is still gathering information on funding for Project Manager	Removed	04/29/24	Agency stakeholder and systems processes	Mar 24 - PM hired
People Processes	The agency is current discussing the hiring process for Project Manager.	Removed	04/29/24	Agency stakeholder and systems processes	Mar 24 - PM hired
People Processes Technology Data	Project Manager is still not hired.	Removed	04/29/24	Agency stakeholder and systems processes and progression.	Mar 24 - PM hired

DMA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Established PALM Sync Meetings with DMA	03/26/24	Collaborative	Provide a checkpoint and status from all respective sections	Mar
People Processes Technology Data	Request for review of Tasks 514-518 sent to Dora Thomas for a review prior to deadline.	04/04/24	Informational and Consultative	Ensure processes are correctly aligned with the PALM	Apr
People Processes Technology Data	Reviewed and updated Assumptions, Issues and Risks.	04/29/24	Informational and Consultative	Continue to track necessary concerns and provide leadership with an overall assessment of the project.	Apr 24
People Processes Technology Data	DMA touchpoint review with Dora	04/24/24	Collaborative	Provided overall feedback on project from PALM Team.	Apr 24
People Processes Technology Data	Sent awareness and survey email out to State Users	04/25/24	Informatinal and Consultative	Provide feedback from State User on the PALM conversiton.	Apr 24

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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DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Timothy Smith	timothy.j.smith53.nfg@army.mil	05/01/24
January - February 2024	COL Adam Curry	adam.m.curry.mil@army.mil	03/06/24
November - December 2023	Adam M. Curry	adam.m.curry.mil@army.mil	01/11/24
September - October 2023	Adam Curry	timothy.j.smith53.nfg@army.mil	11/08/23
July - August 2023	Timothy Smith	timothy.j.smith53.nfg@army.mil	09/11/23

Helpful Links

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

DMS 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

March - April 2024

Agency Sponsor

Katie Parrish

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 4
- Vacant Role = 3

RW Task Completeness



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

RW Task Completeness:

Score = 85.71%

- Submitted Complete = 6
- Submitted Incomplete = 0
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 99.38%

- Submitted On Time = 28
- Submitted Late = 2
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	04/17/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/29/24**	Interfaces complete to date. May revise some based on Seg III and Seg IV.	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/06/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/25/24**	DMS PALM Project Risk and Complexity Assessment attached to this row. Risks, Issues, and Assumptions SmartSheets reviewed and updated with the CCN and Enterprise Partners.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**	Katie Parrish, Agency Sponsor, reviewed and approved submission of the dashboard on her behalf by Evelyn Harrison, Agency Liaison.		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 87

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 60

Technology

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

Current-State:

Cataloged Business Systems = 12

Data

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

Current-State:

Unique FLAIR Data Elements = 143

- Business Process Groupings = 11/13

Role Mapping = TBD

Training = TBD

- Related Business Systems = 9
- Related Reports = 33
- **Documentation Status:**

- Complete = 60 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 60

- Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 4

- **Level of Impact: People Changes**

- High = 0 Medium = 19 Low = 31 None = 8 Uncertain = 1

- **Level of Impact: Processes Changes**

- High = 1 Medium = 20 Low = 30 None = 8 Uncertain = 0

- **Level of Impact: Technology Changes**

- High = 3 Medium = 15 Low = 31 None = 10 Uncertain = 0

- **Level of Impact: Data Changes**

- High = 4 Medium = 17 Low = 30 None = 8 Uncertain = 0

- **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 2 Complete = 57

- **Criticality:**

- High = 5 Med = 2 Low = 0 None = 5

- **Documentation Status:**

- Complete = 11 Partial = 0 Not Started = 1

Cataloged Interfaces = 55

- Inbound Interfaces = 40

- Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 4

- **Segment I - Documentation Updates:**

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

- **Segment II - Documentation Updates:**

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 3

Planned Interfaces = 10

- Inbound Interfaces = 0

- Outbound Interfaces = 5

- **Associated Unique Uses = 1303**

- Continued Use - Yes = 205

- Continued Use - No = 43

- **Associated Business Systems = 5**

Cataloged Reports = 108

- **Criticality:**

- High = 91 Med = 18 Low = 3 None = 0

Implementation:

Configuration Workbooks

- **Segments I & II**

- Started = 4 Not Started = 5

Conversions & Data Readiness

- Conversions Needed = 2

- Agency Data Outside of Primary Source System(s) = 0

- **Data Readiness/Cleansing Status:**

- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DMS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	The requirement of Speedkeys for transactions can pose a problem for several of our enterprise systems. if the speedkeys are still hardcoded and unable to be changed once entered there is an additional risk of user error both on the entry of the speedkey and the selection.	Open	6 (Medium/High)	This topic was recently brought up in our monthly PALM Touchpoint with the DMS RC. DMS is seeking additional information on requirements.	Logged April 25, 2024	04/25/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Reports are available. Plan for report identification and testing.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Functionality, Will PALM deliver the functionality needed for DMS operations?	Open	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees. PALM is addressing this risk.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Reviewed again Dec 20 - no change. Reviewed again April 24, 2024. Re-opened. Continuing to monitor.	02/22/24	Finance and Administration / Jennifer Gaines
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Continuing to monitor. Reviewed again Dec 20 - no change. Continuing to monitor. Reviewed again Feb 22 - no change. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/02/23	Finance and Administration / Sandy Watson
People Processes Technology Data	Variable risks at this time with People First. People First is currently working on its next-generation solution and plans to issue an ITN in early 2024. The current contract expires August 2026 and the platform reaches end of life in Dec 2027. The primary risks are converging timelines, and limited information on the level of remediation necessary for PF/PALM integration.	Open	6 (High/Medium)	PALM integration will be addressed in current People First Solution and required in the next generation solution. DMS will work in good faith to request and dedicate appropriate resources to ensure effective coordination of efforts between People First and PALM and will plan for contingencies within the requirements of the next generation solution.	Logged April 22, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Updated Dec 15, 2023. Reviewed again April 24, 2024. Continuing to monitor.	12/15/23	People First / Stephen Eaton
People Processes Technology	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System,	Open	4 (Medium/Mediu	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.	Logged Nov 6, 2023 Reviewed again Dec	11/07/23	Division of Retirement / Megan Biederman

Data	Changes to People First System)			Continuing to monitor Class Code implications.	20, 2023 and updated mitigation. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. Class Code System changes could create high impact for Retirement Interface Files.		
People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Mediu	Roll out sandbox test capabilities as sections are completed for Agencies to test. Sandbox environment is not secure for testing - PALM needs to work on true test environment. Sandbox status has not changed. PALM is addressing this risk.	Logged April 21, 2023. Reviewed again September 6, 2023. Reviewed again Nov 3, 2023. Mitigation notes updated. Reviewed again Dec 15, 2023. No change. Continuing to monitor. Reviewed again Feb 2 2024. No change. Continuing to monitor. Reviewed again April 24, 2024. No change. Continuing to monitor.	11/03/23	Division of State Group Insurance / Jason Ottinger
People Processes	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to 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.	Open	4 (Medium/Mediu	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20. No change. Continuing to monitor. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/06/23	STMS / Matt Giglio
People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.	Open	3 (High/Low)	Programming needs to be completed to allow for flexibility so funds can be released timely. Need more details on how this will work in PALM.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/06/23	STMS / Matt Giglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/06/23	STMS / Matt Giglio
Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Open	2 (Medium/Low)	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 have been initiated. Still early in the process. CCN and Enterprise Partners are currently collaborating.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 19, 2023 and closed. Reviewed again and reopened April 24, 2024.	12/19/23	STMS / Matt Giglio

DMS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	The Florida PALM Team has decided to not provide a webservice/real time interface for budget pre-check or vouchers. This does not match up to current FLAIR functionality and presents a significant risk in increasing payment cycle time, which has direct impact on agencies' ability to meet prompt payment requirements.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The recommended proposed solution is for the Florida PALM team to provide a budget pre-check and voucher webservice/real time interface, in addition to the Combo Edit Check and Encumbrance webservice they have already offered.	Interface: There are also impacts to emergency operations invoice payment in the event a vendor needs to be paid quickly to secure emergency supplies or services during Emergency Operations Center (EOC) activation.	07/01/24	State Purchasing / Tyler Brown

					Reviewed again April 24, 2024. Continuing to monitor interface design progress. Will evaluate the end of the fiscal year.		
People Processes Technology Data	Promised piece of $20M administered funds not being provided. System remediation and FLAIR clean up can not move forward without funding.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Release of funds to agencies is the proposed solution. New LBRs are currently in development. Waiting for session completion for 2024 or signature of the GAA.	Resources: Funding is a major factor to the success or failure of this effort. Reviewed again on Dec 20, 2023. No change. Reviewed again Feb 22, 2024. No change. Continuing to monitor. Reviewed April 24, 2024. Funding provided for fiscal year 24/25. Closed this issue. Will readdress the budget in the next fiscal year.	04/24/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change.	12/01/25	Florida Retirement System / Megan.Biederman
People Processes Technology Data	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.	Open	Low - All impacts not listed as Critical or High	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 use the FLAIR system if PALM was not working.	Reviewed 2022 entry. Re-entered April 19, 2024. Outstanding currently. Confident that PALM will address and work with FRS to resolve.	12/01/25	Florida Retirement System / Megan.Biederman

DMS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division. Reviewed again on Dec 27. No change. Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox. Reviewed again April 24, 2024. No change. Intend to address this general assumption in more detail with the End User Survey Analysis.

DMS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	03/05/24	Agency Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	FRS: Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Work Group Session	03/05/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.
People Processes Technology Data	PALM Bi-Monthly Report	03/06/24	Agency Sponsor, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and approve PALM Bi-Monthly report for Jan-Feb 2024. Review, complete and approve the Commitment Control (KK) DMS Allotments Budget Structure Control survey.	PALM Bi-Monthly Reporting Dashboard review. Agency Sponsor briefing.
People Processes Technology Data	PALM Ops Planning	03/06/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Plan and organize April 12 PALM Tasks.	Planning and review to identify SMEs and organize tasks.
People Processes Technology Data	Retirement: Pre Meeting FRS Segment III Design Review Working Session	03/07/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Discuss items before meeting with PALM on Segment III items.	FRS: addenda files from other agency processes with FLSDU
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	03/08/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
People Processes Technology Data	PALM Briefing	03/08/24	Agency Liaisons, Project Management Liaisons	Purpose: Review and brief FRS PM on April 12 PALM Tasks.	Planning and review to identify FRS SMEs and organize tasks.
People Processes Technology	PALM Briefing	03/12/24	Agency Liaisons, Project Management Liaisons	Purpose: Overview of DMS CCN and Enterprise Partners roles in the PALM Project for the new PALM IV&V Contract Manager.	

Data					
People Processes Technology Data	Retirement: Task 515	03/13/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 515	
People Processes Technology Data	Retirement: Task 513, 514, and 517	03/13/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 513, 514, and 517	
People Processes Technology Data	PALM Briefing	03/13/24	Agency Liaisons, Project Management Liaisons	Purpose: Overview of DMS CCN and Enterprise Partners roles in the PALM Project for the new PALM IV&V Contract Manager.	
People Processes Technology Data	Retirement: Task 513	03/14/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 513 with Jennifer Gaines	
People Processes Technology Data	Retirement: Task 515	03/14/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 515	
People Processes Technology Data	PALM Project Status Review	03/14/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review PALM Project status. Determine if additional OIT SMEs are needed.	
People Processes Technology Data	PALM Work Group Session	03/14/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	03/15/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
People Processes Technology Data	Retirement: Task 518/Touch Point Meeting	03/18/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 518, prepare for touchpoint meeting	
People Processes Technology Data	Retirement: Task 515	03/18/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Work on Task 515.	
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	03/19/24	Agency Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	FRS: Recurring bi-weekly status meeting.
People Processes Technology Data	Retirement: Task 515	03/19/24	Project Management Liaisons, SMEs, CCN	Work on Task 515.	
People Processes Technology Data	DSGI PALM Workshop	03/21/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Work through current PALM tasks – due thru June.	Workshop requested by and for DSGI to refocus and reset.
People Processes Technology Data	PALM Work Group Session	03/21/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.
People Processes Technology Data	PALM Work Group: Task 515 - Identify Change Impacts for Seg I & II	03/22/24	Agency Liaisons, Project Management Liaisons	Purpose: Review and complete the additional fields associated with Task 515 and the DMS Current-State Business Processes Smartsheet.	
People Processes Technology Data	Retirement: Pre-Segment III Design Workshops	03/25/24	Project Management Liaisons, Change Management Liaisons, SMEs, OIT/Production Support/Technical	Met with internal team to discuss the upcoming workshops for the week, ensure team knew where the materials were, the subjects being covered, appropriate people were attending, and if any questions need to be asked regarding the material.	
People Processes Technology Data	Retirement: Task 513	03/27/24	Project Management Liaisons, SMEs, CCN	Work on Task 513	
People Processes Technology Data	Retirement: Task 515 Cross Walk	03/27/24	Project Management Liaisons, SMEs, CCN	Build a Cross Walk for Task 515 to work on documentation.	
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	03/29/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
People Processes Technology Data	Retirement: Post-Segment II Design Workshops	03/29/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Met with internal team to discuss the workshops from that week, anything learned that should be shared across the team and anything interesting that came up. Any questions asked or any concerns that came out of it.	
People Processes Technology Data	PALM Interfaces, etc.	03/29/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review interfaces and explore the PALM Knowledge Center with OIT.	
People Processes Technology Data	Retirement: Pre-Segment III Design Workshops	04/01/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production	Met with internal team to discuss the upcoming workshops for the week, ensure team knew where the materials were, the subjects being covered, appropriate people were attending, and if any questions need to be asked regarding the material.	

			Support/Technical		
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	04/05/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns	
People Processes Technology Data	Retirement: Post-Segment III Design Workshops	04/05/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Met with internal team to discuss the workshops from that week, anything learned that should be shared across the team and anything interesting that came up. Any questions asked or any concerns that came out of it.	
People Processes Technology Data	PALM Work Group Session	04/05/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.
People Processes Technology Data	PALM Tasks Review	04/08/24	Agency Liaisons, Project Management Liaisons	Purpose: Continue work on all PALM tasks and associated SmartSheets due April 12.	Special work group meeting scheduled for FMS. Meeting invitation forwarded as needed to appropriate SMEs.
People Processes Technology Data	Retirement: PALM: Task 516	04/09/24	Project Management Liaisons, OIT/Production Support/Technical	Work on Task 516.	
People Processes Technology Data	PALM Work Group Session	04/11/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting. This meeting focused on confirming completion of all tasks due April 12: 514 and 517: DMS Conversion Inventory 515: Update Business Processes 516: Update Business Systems 518: Complete Interface Inventory
People Processes Technology Data	PALM Project Management Discussion	04/12/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Discuss PALM team alignment and OIT roles.	Meeting requested by OIT Project Manager.
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	04/16/24	Agency Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	FRS: Recurring bi-weekly status meeting.
People Processes Technology Data	Retirement: Identifying and Reviewing Risks	04/17/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	To identify risk associated with PALM in regards to the Division of Retirement.	FRS: Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	PALM Work Group Session	04/18/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	04/19/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns	
People Processes Technology Data	PALM Work Group Session	04/24/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting. This week's focus: Task 522: Manage Agency Risks – due April 30 Task 513: Configuration Workbooks – due May 10
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	04/26/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns	
Technology Data	PALM Smartsheet Review of Interfaces	04/02/24	Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review interfaces and explore the PALM Knowledge Center with OIT.	Weekly OIT meeting focused specifically on PALM.
Technology Data	PALM Smartsheet Review of Interfaces	04/09/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review interfaces and explore the PALM Knowledge Center with OIT.	Weekly OIT meeting focused specifically on PALM.
Technology Data	PALM Smartsheet Review of Interfaces	04/16/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review interfaces and explore the PALM Knowledge Center with OIT.	Weekly OIT meeting focused specifically on PALM.
Technology Data	PALM Smartsheet Review of Interfaces	04/23/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Review interfaces and explore the PALM Knowledge Center with OIT.	Weekly OIT meeting focused specifically on PALM.
Processes	Retirement: API015 – Inbound Supplier Load	03/20/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Discuss outstanding questions regarding API015 that were take aways from previous meeting.	
Processes	Retirement: Meeting with KPMG on Task 515	03/26/24	Project Management Liaisons, SMEs, CCN	Discuss assistance with Task 515 Documentation with KPMG.	

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

DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Katie Parrish	eric.thiele@dms.fl.gov	05/14/24
March - April 2024	Katie Parrish	evelyn.harrison@dms.fl.gov	05/13/24
January - February 2024	Katie Parrish	katie.parrish@dms.fl.gov	03/06/24
November - December 2023	Katie Parrish	katie.parrish@dms.fl.gov	01/11/24
September - October 2023	Katie Parrish	katie.parrish@dms.fl.gov	11/08/23
July - August 2023	Katie Parrish	evelyn.harrison@dms.fl.gov	09/11/23

Helpful Links

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

DOAH 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

March - April 2024

Agency Sponsor

Megan Silver

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 96.25%

- Submitted Complete = 6
- Submitted Incomplete = 0
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 97.19%

- Submitted On Time = 27
- Submitted Late = 2
- Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**04/29/24**		Submission Complete	05/09/24
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	05/02/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**02/14/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/05/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**02/14/24**		Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/29/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/08/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 11

- Business Process Groupings = 11/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 26

- Related Business Systems = 0
- Related Reports = 19
- **Documentation Status:**

- Complete = 26 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 2

- **Criticality:**

- High = 2 Med = 0 Low = 0 None = 0
- **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 2

Data

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

Current-State:

Unique FLAIR Data Elements = 73

- **Associated Unique Uses = 143**

- Continued Use - Yes = 49
- Continued Use - No = 39
- **Associated Business Systems = 0**

Implementation:

Impacted Agency Business Processes = 26

• Related Business Process Groupings = 6

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 1 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 1 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Cataloged Reports = 52

• Criticality:

- High = 11 Med = 25 Low = 17 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOAH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Due to the staff's previous experience with system implementation, the staff's level of engagement regarding transitioning to new financial system may be low or non-existent.	Open	6 (High/Medium)	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.	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff are assisting with completing PALM tasks. CNN Members and SMEs participated in the Segment III meetings.	07/05/23	Patricia Kenyon
People	Due to the limited number of positions, staff may not be fully trained / confident to perform their accounting functions in PALM on Go LIve Date.	Open	3 (High/Low)	DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided. SMEs have participated in Segment III meetings and will continue to participate in Segment IV meetings.	Agency Liaison has integrated PALM awareness discussion during staff meetings. Accounting staff members are actively participating in completing PALM tasks. Accounting staff have been shown the PALM Knowledge Center and will review the information regarding their business processes.	07/05/23	Patricia Kenyon

DOAH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Accountant II position has become vacant which has created additional workload for our team.	Open	Low - All impacts not listed as Critical or High	Fill the vacant position. All team members are assisting in completing the daily functions.	Will review the 2nd top applicant resume and contact them to see if still interested in position.	05/31/24	Patricia Kenyon

DOAH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Staff will be able to function in PALM on Go Live Date	Logged	09/08/23	Budget, HR and Accounting staff	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. Some of the CCN Members and end users participated in Segment III Workshop Meetings. Accounting Staff have been introduced to the PALM Knowledge Center to understand more of the changes in their respective business processes.

DOAH Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

DOAH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Megan S. Silver	megan.silver@doah.state.fl.us	05/08/24
January - February 2024	Megan S. Silver	megan.silver@doah.state.fl.us	03/11/24
November - December 2023	Megan S. Silver	megan.silver@doah.state.fl.us	01/10/24
September - October 2023	Megan S. Silver	megan.silver@doah.state.fl.us	11/09/23
July - August 2023	Megan S. Silver	megan.silver@doah.state.fl.us	09/11/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Suzanne Pridgeon

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 5
- Vacant Role = 2

RW Task Completeness



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

RW Task Completeness:

Score = 71.43%

- Submitted Complete = 5
- Submitted Incomplete = 2
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 92.19%

- Submitted On Time = 25
- Submitted Late = 5
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	**04/12/24**		Submission Incomplete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/08/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Incomplete	04/29/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 88

- Business Process Groupings = 13/13

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 30

- Related Business Systems = 5

Technology

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

Current-State:

Cataloged Business Systems = 26

- **Criticality:**

Data

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

Current-State:

Unique FLAIR Data Elements = 443

- **Associated Unique Uses = 574**

Role Mapping = TBD

Training = TBD

• Related Reports = 0

• Documentation Status:

- Complete = 29 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 30

• Related Business Process Groupings = 5

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 22 Medium = 3 Low = 3 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 30

- High = 23 Med = 0 Low = 0 None = 1

• Documentation Status:

- Complete = 7 Partial = 1 Not Started = 9

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 9

• Segment I - Documentation Updates:

- Complete = 0 Updating = 6 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 0 Updating = 5 Evaluating = 0 Not Started = 0 Not Needed = 1

Planned Interfaces = 6

- Inbound Interfaces = 1

- Outbound Interfaces = 4

- Continued Use - Yes = 124

- Continued Use - No = 3

• Associated Business Systems = 6

Cataloged Reports = 84

• Criticality:

- High = 83 Med = 13 Low = 1 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 6

• Agency Data Outside of Primary Source System(s) = 5

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 6 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Technology Data	Not meet due date for Task 519 Segment 1 remediation	Open	6 (Medium/High)	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New Risk	05/07/24	PM and technical Staff
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Mediu	DOE will refill positions as quickly as possible to stop any delays.	No Change	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team {anyone working on PALM}). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Mediu	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Mediu	Pending	New Risk	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Mediu	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Mediu	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	New risk	01/12/24	DIT and Aware technical teams
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	New risk	01/30/24	AWARE Team

DOE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Processes Technology Data	Task 504 and 505 not completed by PALM schedule deadline.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Add additional resource to the project and more communication with the project teams.	Technical BA started on 02/26/2024 with the DTI team.	04/01/24	DOE Executives
Data	Task 514 incomplete	Open	Low - All impacts not listed as Critical or High	Team is currently working to complete the cleanse		05/30/24	Business unit

DOE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change

Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023

DOE Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	AWARE DBS/VR to PALM status/interface discussions	03/06/24	AWARE DBS/VR technical team, DBS Business, Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Processes Data	DTI PALM files meeting	03/06/24	DTI Staff, Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Processes Data	AWARE Mapping Meeting	03/13/24	AWARE Functional and technical staff	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Processes Data	PALM Data Cleanse Meeting	04/12/24	PM and department heads.	Discuss Data cleanse plan and start the cleanse of data.	
People Processes Technology Data	PALM files and PPM Process	03/04/24	PM and DTI BA's	Discussion on PALM file layouts into the PPM Process	
People Processes Technology Data	AWARE VR Mapping meeting	03/07/24	AWARE technical team	MAPPING API002	
People Processes Technology Data	PALM Database setup	04/01/24	DTI, DOE Application team, DOE DBA's and PALM PM	The setup of database for PALM Files	
People Technology Data	Design of Database Table	04/15/24	PM, BA Staff, DBA and Apps DEV	This meeting is to facilitate future discussions between Apps DEV and DBA for providing technical solutions for creating the database tables and implementing the primary key/foreign key relationships	
Processes Data	PALM Dicussion	04/22/24	PM and BA	PPM, Applications and Business process	
Processes Technology Data	DTI Weekly Status report	03/20/24	DTI Staff, DEL Technical, Comptroller, Deputy Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
Processes Technology Data	RIMS TO AWARE meeting	03/29/24	AWARE PM, AWARE DBA's Comptroller, Deputy Comptroller and PALM PM	File Mapping	
Processes Technology Data	DTI Weekly Status report	04/03/24	DTI Staff, DEL Technical, Comptroller, Deputy Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
Processes Technology Data	DTI Weekly Status report	04/11/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
Processes Technology Data	DTI Weekly Status report	04/17/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
Technology Data	DEL Application Meeting	03/20/24	DEL Technical Team and PALM PM	Talk about DEL Application and how it interacts with FLAIR	
People	PALM Status Meeting	03/01/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	
People	PALM Status Meeting	03/08/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	
People	ORG code Configuration Meeting	03/12/24	Functional staff and PM	Mapping Organizational Codes	
People	Weekly status Meeting	03/15/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	
People	ORG code Configuration Meeting	03/15/24	Functional staff and PM	Mapping Organizational Codes	
People	PALM Status Report	03/22/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	
People	Asset Management Meeting	04/01/24	Asset Management Functional Management and PALM PM	discuss TRAC system and reports that is needed from FLAIR.	
People	PALM Status Report	04/12/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People	PALM Status Meeeting	04/26/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Processes	Business process meeting with Procurement	04/09/24	Project manager and Procurement Manager	Update Business processes on procurement for PALM Task	
People Processes	Comptroller Office Business Processes	04/09/24	Project Manager, Comptroller, Deputy Comptroller and management staff	Update the processes for the Comptroller's office for PALM Task	
People Processes	Local funds meetings	04/10/24	Project manager and Comptroller's department heads	Identify local fund for PALM conversion.	
People Processes Technology	DTI and DELPALM files meeting.	03/14/24	DTI Staff, DEL Technical, Comptroller, Deputy Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Processes Technology	Asset Management TraQ system	04/15/24	PM, Deputy Comptroller, Asset Manager, and IT support Staff	Determine the FLAIR engagement with the system and determine if remediation is needed.	
Processes Technology	PALM Status Report	03/29/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	
Processes Technology	PALM Status Report	04/05/24	Project Manager, Comptroller and Deputy Comptroller	Provide PALM status.	

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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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Matt Kirkland	matt.kirkland@fldoe.org	05/13/24
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24
November - December 2023	Matt Kirkland	matt.kirkland@fldoe.org	01/10/24
September - October 2023	Matt Kirkland	matt.kirkland@fldoe.org	11/08/23
July - August 2023	Matt Kirkland	matt.kirkland@fldoe.org	09/08/23

Helpful Links

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

DOEA 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

March - April 2024

Agency Sponsor

Randy Pupo

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 2
- Duplicate Filled Role = 12
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 8
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 56.88%

- Submitted On Time = 8
- Submitted Late = 12
- Pending Submission = 10

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 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
	People	**328**	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Still working to document processes across division. RFQ in process to hire temporary staff to assist in compiling procedures and cross walking to PALM.		
	N/A	**500**	Create Agency Specific Project Charter	10/02/23	12/15/23					
	N/A	**501**	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			Implementation schedule baseline still being constructed. PM processes in the works.		
	N/A	**502**	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23					
	People	**503**	Create Workforce Readiness Plan	10/16/23	12/15/23					
	N/A	**507**	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	25% - Beginning Initial Internal Meetings and Information Gathering		Implementation schedule baseline still being constructed.		
	N/A	**510**	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	50% - In Progress		Asset and KK workbook complete. Need to meet with Budget director and RC about tree structure decision.		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Working to document processes for data clean up and management of the data in the future. Due to high volume and lack of time and resources data will not be completely cleansed by 4/12.		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Staff will be available mid May to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	No business systems interacting with FLAIR.	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/25/24**	Working to document processes for data clean up and management of the data in the future. Due to high volume and lack of time and resources data will not be completely cleansed by 4/12.	Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	No interface needs.	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**04/12/24**	Business system related, no anticipated remediation.	Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/29/24**	Working on reflecting current risks and issues. Staffing shortages within previous weeks caused for delay.		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24			Implementation schedule baseline still being constructed.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/29/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress		Survey has been shared with end date of May 24th. Will analyze after.		
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Staff will be available mid May to compile and organize procedures in order to crosswalk to PALM processes.		

N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	**04/29/24**	No business systems interacting with FLAIR.	Submission Complete	
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	**04/29/24**	No interface needs.	Submission Complete	
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission		Business system related, no anticipated remediation.		
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/14/24**	Due to storm related delays task was submitted late.		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 27

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 16

• Related Business Systems = 5

• Related Reports = 4

• Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 16

• Related Business Process Groupings = 0

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 1 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 2 Medium = 1 Low = 0 None = 0 Uncertain = 1

• Level of Impact: Technology Changes

- High = 0 Medium = 2 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 1 Uncertain = 1

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 5

• Criticality:

- High = 0 Med = 0 Low = 0 None = 2

• Documentation Status:

- Complete = 0 Partial = 1 Not Started = 0

Cataloged Interfaces = 7

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

• Associated Unique Uses = 75

- Continued Use - Yes = 49

- Continued Use - No = 0

• Associated Business Systems = 6

Cataloged Reports = 37

• Criticality:

- High = 9 Med = 3 Low = 7 None = 17

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 2 Not Started = 1 Not Applicable 0

Reports = TBD

Agency Reported

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

DOEA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	no change to previous items	Open	6 (High/Medium)	Limited resources continue to create issues	ongoing	01/16/24	Glenn Elmer
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Mediu	Review processes, look to a business system that could automate current manual processes. Could be easier to integrate the business system to Palm.	Business system has been selected and undergoing customization.	12/01/23	Glenn Elmer
Technology	lack of internal business system could result in an additional workload on an already limited staff.	Open	4 (Medium/Mediu	currently evaluating potential business systems to implement	System selected. Customization currently underway.	12/01/23	Glenn Elmer
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Mediu	As vacancies occur, targeting candidates with increased technological skills.	ongoing	12/01/23	Glenn Elmer

DOEA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Current business system is manual input. is and will continue to be a workflow issue.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	currently evaluation existing systems in other agencies. hope to be able to secure one with minimal configuration needs.	System has been selected and is currently undergoing customization	12/31/23	Glenn Elmer
People	staffing level limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.	Only $40,000 secured. Does not provide sufficient funding to begin to address needs. Delays will result in	12/01/23	Glenn Elmer
People	Staff limitations still exist	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue to identify options. Solution has not been identified.	Issue remains	07/01/24	Glenn Elmer

DOEA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOEA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Data cleansing activities and the level of clean up necessary discussed within multiple areas.	03/25/24		To determine the need of various data that has accumulated in the system regarding various org codes, duplicate suppliers, etc.	Will be ongoing until final conversion
Data	Sorting through property data and beginning clean up, speaking with others involved to plan for managing the data.	04/09/24	Asset Management	Establish procedures for maintaining clean up of data	
Data	Retrieved report to identify and cleanse encumbrance data	04/05/24		Establish procedures for maintaining clean up of data	Will need to look closer at fiscal year end to ensure all CY encumbrances were closed properly
People Processes Technology Data	Meeting with PALM representative to go over overdue and upcoming tasks. Shared the extent of the workload within agency and that PALM preparation is being conducted as time allows with daily responsibilities . Discussed ways to share the workload and conversations that can be had to help complete certain tasks.	04/11/24		Sharing the risks and issues our agency is encountering when attempting to be engaged in PALM Activities.	
Processes Data	Worked with asset management to understand locations and need for location IDs. Shared recent PALM Workshop information	04/05/24		Business process changes and how they will impact his team	
People	Educated members in budget, purchasing and property management on the implementation and affect PALM will have within their units	03/14/24		Readiness of the people and how their process may change.	Ongoing and more in depth until 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

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DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit	elmere@elderaffairs.org	03/13/24
November - December 2023	Curtis Barker	elmere@elderaffairs.org	01/16/24
September - October 2023	Curtis Barker	elmere@elderaffairs.org	11/15/23
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23

Helpful Links

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

DOH 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

March - April 2024

Agency Sponsor

Robert Herron

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 15
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 84.29%

- Submitted Complete = 5
- Submitted Incomplete = 0
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 99.69%

- Submitted On Time = 29
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/08/24**	DOH will not be configuring anything for Area ID and OA2		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**03/26/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/07/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/04/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/04/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/04/24**		Submission Complete	04/04/24
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**	Submitted on 03/07		03/11/24
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**	Updated Risks with Segment IV dates. Reviewed Issues and made updates to Project Schedule.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/15/24**		Submission Complete	04/18/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/08/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 457

- Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 62

- Related Business Systems = 10
- Related Reports = 27
- **Documentation Status:**

- Complete = 62 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 58

- **Criticality:**

- High = 58 Med = 0 Low = 0 None = 0
- **Documentation Status:**

- Complete = 58 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 629

- **Associated Unique Uses = 646**

- Continued Use - Yes = 0
- Continued Use - No = 0
- **Associated Business Systems = 1**

Implementation:

Impacted Agency Business Processes = 62

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 3

• Level of Impact: People Changes

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 47 Medium = 0 Low = 0 None = 15 Uncertain = 0

• Level of Impact: Data Changes

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 62

Cataloged Interfaces = 39

- Inbound Interfaces = 21

- Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 50

• Segment I - Documentation Updates:

- Complete = 50 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 46 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 4

Planned Interfaces = 15

- Inbound Interfaces = 3

- Outbound Interfaces = 8

Cataloged Reports = 653

• Criticality:

- High = 947 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 2

• Agency Data Outside of Primary Source System(s) = 2

• Data Readiness/Cleansing Status:

- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	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.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.	N/A	02/14/22	PALM & DOH
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.	N/A	02/14/22	PALM & DOH
People Processes Technology Data	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.	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.	N/A	04/30/24	PALM & DOH
Processes	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.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information. Meeting set up with DFS the week of 4/29 and 05/06	N/A	04/30/24	PALM & DOH
Processes	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.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	N/A	08/16/23	PALM & DOH
Technology	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.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	N/A	08/21/23	PALM & DOH
Processes	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	N/A	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	N/A	02/14/22	PALM & DOH
People Processes Technology	The training timeframe given will 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.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	N/A	09/25/23	PALM & DOH
Technology	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	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	N/A	02/14/22	PALM & DOH
Processes	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.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	N/A	10/18/23	PALM & DOH
People Processes	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	Open	6 (High/Medium)	DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH	2/21/2024	02/21/24	PALM & DOH

	when we went live with the Statewide Travel Management System (STMS), our trips were sampled for 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.						
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 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.	Open	4 (Medium/Mediu	DOH needs to know how this will work in PALM	N/A	10/18/23	PALM & DOH

DOH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	06/28/23	All DOH systems	PALM Project has identified all impacted enterprise applications.
People Processes Technology Data	PALM will maintain the project “On schedule”	Logged	06/28/23	All DOH systems	DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule.
People Processes	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	02/14/24	DOH staff	DOH PALM team has addressed this with the RC in our Readiness Meeting

DOH Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	Creation of Encumbrance, Payable, and Receivable Session	03/13/24	PM, TL, BA, EAS, Devs, SME	Discussion to clarify business processes surrounding encumbrances, payables, and receivables.	
People Processes Technology Data	CPBVS and EAS Application Review	03/04/24	PM, TL, BA, EAS	Clarify responsibilities regarding PALM remediation	
People Processes Technology Data	Technical Solution FDD Session: DDD	03/04/24	DDD Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the DCPS application was discussed
People Processes Technology Data	Technical Solution FDD Session: LEIDS	03/06/24	MQA Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the LEIDS application was discussed
People Processes Technology Data	DOH PALM_FIRS Budget Meeting	03/07/24	FIRS Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the FIRS Budget module was discussed
People Processes Technology Data	DOH PALM_AFAM Meeting	03/19/24	AFAM Team, PM, TL, BA, Devs	Held discussion regarding AFAM processes and what to expect going forward with PALM remediation.	
People Processes Technology Data	DOH PALM_DDD Meeting	04/08/24	PM, TL, BA, EAS, DDD Team	Discussion of DDD Roadmap application and conversions.	
People Processes Technology Data	DOH PALM_CORTNE Meeting	04/23/24	CORTNE Team, BA, PM, TL	Discuss PALM impacted ABSs and finalize remediation responsibilities.	
People Processes Technology Data	Asset Management System - PALM Working Session	04/24/24	PM, TL, EAS, Asset Management SME	Create understanding between ABS team and DOH PALM team regarding Remediation	
People Processes Technology Data	DOH PALM_CONMAN Meeting	04/24/24	CONMAN Team, BA, PM, TL	Create understanding between ABS team and DOH PALM team regarding Remediation	
People Processes Technology Data	DOH PALM_CORTNE Meeting	04/30/24	CORTNE Team, BA, PM, TL	Create understanding between ABS team and DOH PALM team regarding Remediation	
Processes Data	Data Mapping Session (Input Files)	03/08/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks
Processes Technology Data	Qlik-DOH PALM: Cadence Meeting	04/22/24	Qlik Team, TL, PM	Create understanding between ABS team and DOH PALM team regarding Remediation	
Technology Data	Data Mapping Session (Input Files)	03/01/24	PM, TL, BA, EAS	Complete data mapping for PALM Interface API002	Similar meetings to occur over several weeks
Technology Data	Data Mapping Session (FDW)	03/06/24	PM, TL, BA, EAS	Accomplish data mapping for FDW application	Meetings to occur over several weeks.

Technology Data	Data Mapping Session (Input Files)	03/15/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks
Technology Data	AFAM Meeting	03/21/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	03/28/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	04/04/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	Data Mapping Session (Input Files)	04/05/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks. Went over all of the PALM impacted ABSs to finalize remediation responsibilities.
Technology Data	AFAM Meeting	04/11/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	04/18/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	Data Mapping Session (FDW)	04/24/24	PM, TL, BA, EAS	Accomplish data mapping for FDW application	Meetings to occur over several weeks
Technology Data	AFAM Meeting	04/25/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
People	County Health Department Conference	04/10/24	PM, Bureau Chief, End Users	Annual CHD Conference	PM & Bureau Chief gave presentation regarding changes to PALM impacted applications.
People	FIRS WBS	04/11/24	PM, Bureau Chief, Jennie Bishop	Review WBS based on PALM schedule	PM revised the FIRS WBS and reviewed it with Jennie Bishop, David Loe and Curtis Barker
People Processes	DOH Core Meeting	03/06/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH Core Meeting	03/13/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH PALM Executive Steering Committee	03/25/24	Key Stakeholders and PM	•Set expectation for the DOH PALM ESC meeting •Provide PALM Project Updates •Provide DOH PALM Updates	
People Processes	DOH Core Meeting	04/17/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH Core Meeting	04/24/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH PALM Executive Steering Committee	04/26/24	Key Stakeholders and PM	•Set expectation for the DOH PALM ESC meeting •Provide PALM Project Updates •Provide DOH PALM Updates	Reviewed and Updated Curtis Barker and ESC

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:
March - April 2024	Robert Herron	robert.herron@flhealth.gov	05/08/24
January - February 2024	Robert Herron	robert.herron@flhealth.gov	03/07/24
November - December 2023	Robert Herron	robert.herron@flhealth.gov	01/08/24
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23

Helpful Links

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

DOL 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

March - April 2024

Agency Sponsor

Becky Ajhar

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 6
- Vacant Role = 2

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 96.56%

- Submitted On Time = 27
- Submitted Late = 1
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
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.		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		Updating current state business system 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.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/07/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 25

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 49

• Related Business Systems = 3

• Related Reports = 5

• Documentation Status:

- Complete = 91 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 49

• Related Business Process Groupings = 2

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 5 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 7

• Criticality:

- High = 7 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 28

- Outbound Interfaces = 2

Implementation:

Business Systems Planned for Integration = 6

• Segment I - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 5

Planned Interfaces = 16

- Inbound Interfaces = 6

- Outbound Interfaces = 8

Data

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

Current-State:

Unique FLAIR Data Elements = 70

• Associated Unique Uses = 70

- Continued Use - Yes = 29

- Continued Use - No = 0

• Associated Business Systems = 0

Cataloged Reports = 76

• Criticality:

- High = 0 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOL Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	The Florida Lottery's new Claims and Payment system (CAPs) is scheduled to go live on July 27, 2024. The implementation of Lottery's CAPs may impact PALM training activities. The new CAPs will be replacing the current system known as Fortune.	Open	3 (Low/High)	Develop a proactive strategy for the upcoming launch of the new CAPs; will focus on early communication, training for PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	Ongoing	09/07/23	Chris Rorison

DOL Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOL Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Florida PALM will design and be able to record DOL manual payments currently handled outside of FLAIR today. 30.5 Manage Payments 30.5.1 Record Manual Payments	Logged	12/11/23	Disbursements	FLAIR screenshots of recording retailer incentives for manual payments
People Processes	Florida PALM Payroll Processing will be able to process refunds on Insurance Benefits (overpayments)	Logged	01/25/24	People First	

DOL Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes	Palm task review meetings - Lottery team	03/04/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Update and review current tasks (514, 515, 516, 517, 518, 519) Review Readiness Status Report (task 521) Review current risks and discuss/update implementation schedule (task 522)	
People Processes	Palm task review meetings - Lottery team	03/18/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin	Update and review progress for tasks 514, 515, 516, 517, 518, and 519	
People Processes	Palm task review meetings - Lottery team	04/10/24	Chris Rorison, Meghan Gregg, Stella	Update and review progress for tasks 514, 515, 516, 517, 518, and 520	
People Processes	Palm task review meetings - Lottery team	04/12/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin	Follow up task review session to discuss tasks 514, 515, 516, 517 and 518. Identify pending items in order to complete all tasks	
People Processes	Palm task review meetings - Lottery team	04/15/24	Chris Rorison, Meghan Gregg, Stella Bargas	Review new task 523	
People Processes	Palm task review meetings - Lottery team	04/29/24	Chris Rorison, Stella Bargas, Debbie Martin	Discuss tasks 515, 516, and 522	

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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DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Rebecca Ajhar	ajharb@flalottery.com	05/10/24
January - February 2024	Rebecca Ajhar	ajharb@flalottery.com	03/08/24
November - December 2023	Rebecca Ajhar	ajharb@flalottery.com	01/14/24
September - October 2023	Rebecca Ajhar	ajharb@flalottery.com	11/09/23
July - August 2023	Rebecca Ajhar	ajharb@flalottery.com	09/08/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for DOR
- 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

March - April 2024

Agency Sponsor

Clark Rogers

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 15
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 57.14%

- Submitted Complete = 4
- Submitted Incomplete = 3
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 91.88%

- Submitted On Time = 26
- Submitted Late = 4
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	**04/12/24**		Submission Incomplete	
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	**04/12/24**		Submission Incomplete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Incomplete	05/01/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Remediation of Agency Business Systems have multiple dependencies (RADS is being migrated to SUNTAX, getting data from the data warehouse, and not being able to remediate SAP systems without having all segments rolled out).		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/08/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**05/01/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress				
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 101

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 227

• Related Business Systems = 8

• Related Reports = 43

• Documentation Status:

- Complete = 218 Partial = 2 Not Started = 5

Implementation:

Impacted Agency Business Processes = 227

• Related Business Process Groupings = 11

- Planned Spreadsheet Uploads = 6

• Level of Impact: People Changes

- High = 19 Medium = 5 Low = 53 None = 2 Uncertain = 3

• Level of Impact: Processes Changes

- High = 17 Medium = 9 Low = 43 None = 2 Uncertain = 9

• Level of Impact: Technology Changes

- High = 16 Medium = 13 Low = 43 None = 9 Uncertain = 0

• Level of Impact: Data Changes

- High = 13 Medium = 9 Low = 29 None = 4 Uncertain = 26

• Segments I & II Documentation Update Status

- Not Started = 33 In Progress = 37 Complete = 8

Technology

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

Current-State:

Cataloged Business Systems = 32

• Criticality:

- High = 31 Med = 1 Low = 0 None = 0

• Documentation Status:

- Complete = 32 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 17

- Outbound Interfaces = 13

Implementation:

Business Systems Planned for Integration = 26

• Segment I - Documentation Updates:

- Complete = 23 Updating = 3 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 26 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 21

- Inbound Interfaces = 4

- Outbound Interfaces = 10

Data

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

Current-State:

Unique FLAIR Data Elements = 439

• Associated Unique Uses = 838

- Continued Use - Yes = 392

- Continued Use - No = 0

• Associated Business Systems = 9

Cataloged Reports = 205

• Criticality:

- High = 218 Med = 16 Low = 16 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 4

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Legislation enacted in the 2024 legislative session that creates new taxes or modifies existing taxes may impact GTA's ability to complete remediation to SUNTAX on 2024/2025 due to staff augmentation resources being involved in system modifications to implement new legislation.	Open	6 (High/Medium)	Request funding to contract for additional GTA staff augmentation resources in FY23/24, FY24/25 and FY25/26.	A budget amendment was submitted for staff augmentation resources for Florida PALM agency business system remediation. Additional staff augmentation resources may be needed for system modifications to implement new legislation. Funding was received for FY23/24.	11/02/23	Laura Dukes, Budget Officer; Lisa Morgan, GTA Budget Liaison
Processes Data	DOR collects and distributes funds to 16 other state agencies. We are going to request that they provide the business unit specific ChartField values needed to effect those collections and distributions within PALM. Due to individual agency readiness activities, data from one or more of those agencies may not be available and could result in DOR not being able to collect and distribute their funds to them.	Open	6 (High/Medium)	Coordinate with other agencies to gather, confirm and validate ChartField data.	Discussed with DOR's Readiness Coordinator and other Florida PALM porject staff during November 2023 Touchpoint meeting.	11/02/23	Steve Welch, GTA PMO
People	Natural Gas project #006277 for GTA has an implementation date of January 2026, same time as PALM financials wave implementation date, and could create a resource issue.	Open	4 (Medium/Mediu	Plan efficiently with the resources provided.	Continue monitoring risk. We plan to kick-off this project Fall 2024 to ensure we have sufficient time for all projects. Updated risk owner and backup.	11/02/23	Catherine Barber, GTA; Andrea Hunter, GTA, Backup Owner
People	The GTA E-services project may be conducted at the same time agency business system remediation is conducted.	Open	4 (Medium/Mediu	Plan efficiently with the resources provided. This project will begin in July 2024. Staff augmentation resources to support Florida PALM activities have been requested for FY24/25.	Continue monitoring risk.	10/17/23	David Potter, GTA - BTO
People Processes	DOR-GTA receives wages from DMS (DOR Batch Job ZUD105) from all state agencies to process Quarterly filing requirements for Re-employment tax. The ORG Codes are listed on each Location for each State Agency and the individual employee is linked to that specific location by the org code.	Open	3 (High/Low)	Need to continue to receive this file from DMS in order to process RT collections for Commerce.	New Risk, also logged as an assumption.	02/29/24	Wynette Davis, Steve Welch
Technology	RADS system is being migrated to SAP (SUNTAX) at the same time SUNTAX will need to be remediated for PALM interfacing. Interface testing begins January 2025 and UAT is planned for April 2025 and full integration testing planned for July 2025. RADS migration to SUNTAX will need to be completed and remediated for PALM by July 2025.	Open	3 (High/Low)	We have a new contracted SAP developer to work on system remediation for PALM migration and can help with RADS migration to SUNTAX. Many of the same resources working on RADS migration are also involved in ABS remediation.	New Risk	03/26/24	Miranda McClure, Steve Welch

DOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes	DOR-GTA receives wages from DMS (DOR Batch Job ZUD105) from all state agencies to process Quarterly filing requirements for Re-employment tax. The ORG Codes are listed on each Location for each State Agency and the individual employee is linked to that specific location by the org code.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	2/29/24: Request that this information be sent from DMS as is done currently.	Issue opened February 2024	05/31/24	Wynette Davis
Processes	DOR GTA will not know if they will be using OA 1 or OA 2 values until Segment IV inter/intra unit transaction section is rolled out. Currently we are not listing any values for the Other Accumulators for GTA, but will only know for sure until after Segment IV.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have included all OA 1 and OA 2 values for CSP who was the only Program that used OCA values in FLAIR and will list the other values for OAs if GTA needs them after Segment IV is released.	Issue opened May 2024	08/30/24	Miranda McClure

DOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	The current PALM Chart of Accounts (COA) structure will not be changed.	Logged	07/01/23	All agency business systems	DOR will begin agency business system remediation in FY23/24.
People	Administered funds will be available for use in procuring staff augmentation resources for agency business system remediation.	Logged	07/13/23	All agency business systems	During July, DOR submitted a budget amendment requesting funds for staff augmentation to perform project management and IT consulting activities for agency business system remediation and pre-remediation evaluation activities. Funds were approved and released for FY23/24.
People Processes	DOR-GTA receives wages from DMS (DOR Batch Job ZUD105) from all state agencies to process Quarterly filing requirements for Re-employment tax. The ORG Codes are listed on each Location for each State Agency and the individual employee is linked to that specific location by the org code.	Logged	02/27/24	General Tax Administration	Need to continue to receive this file from DMS in order to process RT collections for Commerce.
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.	Needed before UAT so that the new COA data may be utilized in UAT to validate agency business system remediations.
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.	Data cleansing needed and new COA data available for UAT. Also, old data must be purged from People First prior to first live payroll in PALM to avoid errors in payroll processing.

DOR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Processes Data	Ensure that People First is included in the Department's data cleansing activities.	03/08/24	People First and all agency business systems that receive FLAIR/PALM data from People First	Ensure that agency business systems receiving organization codes from People First receive only cleansed data.	3/8/24: New activity.

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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DOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Clark Rogers	shannon.segers@floridarevenue.com	05/08/24
January - February 2024	Clark Rogers	shannon.segers@floridarevenue.com	03/08/24
November - December 2023	Clark Rogers	shannon.segers@floridarevenue.com	01/11/24
September - October 2023	Clark Rogers	shannon.segers@floridarevenue.com	11/09/23
July - August 2023	Clark Rogers	shannon.segers@floridarevenue.com	09/11/23

Helpful Links

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

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

March - April 2024

Agency Sponsor

Jennifer Kennedy

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 9
- Duplicate Filled Role = 5
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 93.33%

- Submitted Complete = 4
- Submitted Incomplete = 0
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 74.06%

- Submitted On Time = 15
- Submitted Late = 8
- Pending Submission = 7

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	N/A	**500**	Create Agency Specific Project Charter	10/02/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	N/A	**501**	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	N/A	**502**	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	People	**503**	Create Workforce Readiness Plan	10/16/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	N/A	**510**	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24					
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	05/08/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	05/08/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/08/24**			03/08/24
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update	04/15/24	07/12/24					

N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24						
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24						
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24						
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24						
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24						
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24				
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24						

People

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

Implementation:

Planned Florida PALM End Users = 15

• Business Process Groupings = 10/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 10

• Related Business Systems = 1

• Related Reports = 21

• Documentation Status:

- Complete = 7 Partial = 2 Not Started = 1

Implementation:

Impacted Agency Business Processes = 10

• Related Business Process Groupings = 5

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 9 In Progress = 0 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 4

• Criticality:

- High = 1 Med = 0 Low = 0 None = 1

• Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 3 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 3

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 67

• Associated Unique Uses = 138

- Continued Use - Yes = 0

- Continued Use - No = 0

• Associated Business Systems = 2

Cataloged Reports = 241

• Criticality:

- High = 0 Med = 0 Low = 1 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 1 Not Started = 8

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Current staff have little knowledge of the details of current Access Database being used to extract transaction data.	Open	6 (Medium/High)	Department currently exploring options for hiring staff with extensive Access experience to fill knowledge gaps.	The Department has received Administered funds for the purposes of preparations for Florida PALM. These funds are intended to be used for hiring a project manager and consultant to assist with agency efforts.The Department has chosen to redirect efforts to hire additional staff by bringing on OPS staff to assist with project management and system implementation. Currently the Department has three candidates who are currently going through the interview process.	03/08/24	Antonio Murphy

DOS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	05/14/24
January - February 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	03/08/24
November - December 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	01/12/24
September - October 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	11/09/23
July - August 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	09/08/23

Helpful Links

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

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

March - April 2024

Agency Sponsor

Al Carter

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 13
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 87.19%

- Submitted On Time = 19
- Submitted Late = 9
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/08/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission	**04/29/24**	ETA by July 2024.		05/08/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		ETA by July 2024 - RFQ in process		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/29/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/29/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/29/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**04/29/24**		Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**04/15/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress		Agency is following the timelines for requirements as posted by the PALM Executive Committee. Agency will further refine this schedule upon hiring of a Project Manager. Procurement is underway.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/14/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 61

- Business Process Groupings = 12/13

Role Mapping = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 102

- Related Business Systems = 2
- Related Reports = 39

Technology

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

Current-State:

Cataloged Business Systems = 2

• Criticality:

- High = 1 Med = 1 Low = 0 None = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

• Associated Unique Uses = 70

- Continued Use - Yes = 48

Training = TBD

- **Documentation Status:**

- Complete = 20 Partial = 59 Not Started = 2

Implementation:

Impacted Agency Business Processes = 102

- Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 1

- **Level of Impact: People Changes**

- High = 0 Medium = 0 Low = 102 None = 0 Uncertain = 0

- **Level of Impact: Processes Changes**

- **High = 0 Medium = 0 Low = 100 None = 2 Uncertain = 0**

- **Level of Impact: Technology Changes**

- High = 0 Medium = 0 Low = 0 None = 102 Uncertain = 0

- **Level of Impact: Data Changes**

- High = 0 Medium = 0 Low = 102 None = 0 Uncertain = 0

- **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 51 Complete = 34

- **Documentation Status:**

- Complete = 0 Partial = 2 Not Started = 0

Cataloged Interfaces = 3

- Inbound Interfaces = 3

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 2

- **Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

- **Segment II - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Planned Interfaces = 0

- Inbound Interfaces = -1

- Outbound Interfaces = 0

- Continued Use - No = 0

- **Associated Business Systems = 0**

Cataloged Reports = 49

- **Criticality:**

- High = 41 Med = 3 Low = 5 None = 0

Implementation:

Configuration Workbooks

- **Segments I & II**

- Started = 4 Not Started = 5

Conversions & Data Readiness

- Conversions Needed = 3

- Agency Data Outside of Primary Source System(s) = 0

- **Data Readiness/Cleansing Status:**

- Complete = 0 In Progress = 3 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DVA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	Setup and Integration Staffing	Open	9 (High/High)	Agency is seeking to hire contract personnel to support the setup and integration of FLORIDA PALM within the Agencies overall structure. This is an unfunded mandate and the Agency critically needs these assets to support a successful transition of this system. The Agency submitted a Legislative Budget Request to secure funding mitigate this shortfall.	No subject matter expertise in local area. Agency is challenged to hire its internal staffing shortages. 8 March: Received solicitation documents from DBPR and will use them to develop solicitations for Agency. 14 May 2024: Reviewing question responses from Vendor but initial assessment is the vendor is not qualified to do the work we require.	05/14/24	Al Carter, Chief of Staff
Processes Technology	PeopleFirst Payroll integration may be impacted as we are unclear how this interface will work.	Open	6 (Medium/High)	Monitor PeopleFirst updates to ensure we can adapt to any new dependencies that may evolve.	No change. 14 May 2024: No change; monitoring continues.	05/14/24	Al Carter, Chief of Staff
People	Contracting and Procurement	Open	6 (High/Medium)	Our Agency is unique and may require system remediation as a product of implementation as our processes and procedures change as federal, state, and local statutes, laws, and administrative codes change. FDVA may have to redesign or retool existing business processes and designs. This could impact the Agency meeting its deliverables to its clients and impact the overall implementation of the project statewide.	Continuous process. Agency continues to work with FLAIR, MATRIXCARE and the like to determine if PALM will seamlessly transition these programs in part of totally based on our Agency day-to-day requirements.. Agency met with one Vendor and provided questions for validate vendors ability to perform Project Management function. Based on initial responses to questions, indications are that it is doubtful the vendor can meet Agency requirements.	05/09/24	Al Carter, Chief of Staff
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with FLAIR-end is a risky proposition given the unknown compatibility issues with other systems and business processes our Agency employs to conduct its day-to-day operations.	Open	6 (High/Medium)	Mimic FLAIR functionality exactly or as close to this standard as possible. If there are deviations from FLAIR functionality, there should be extensive retesting and training, hopefully a year ahead of implementation. Agencies are limited in staff, support and available resources for the implementation and the execution following implementation. Allowing some lead time prior to implementation to prepare may reduce inherent risks.	In progress. 14 Apr 2024: Vendor, based on questions provided may not be able to provide the assistance our Agency needs. If this solicitation is not fruitful, this will significantly impact our timeline and ability to complete required and recommended tasks.	05/14/24	Agency Fiscal, Finance & Accounting, and Billing
People Processes	Agency size and small administrative staff has a few people having multiple roles.	Open	4 (Medium/Mediur	Staff will have to be flexible and OPS personnel may be required to augment existing staff to get project implemented.	Information Technology staff working to hire personnel to work the PALM infrastructure transition while simultaneously working its telephony and network infrastructure project. 8 Mar 2024: Agency is undertaking a telephone and infrastructure upgrade simultaneously as we work through PALM integration matters, making it difficult to	03/08/24	Dr. Teresa Stillwell/Romelle Dials

					making it difficult to focus limited Information Technology resources.		
People Technology	IT staff has limited knowledge of the FLORIDA PALM system and will take time to get trained up, especially given their existing Agency requirements.	Open	4 (Medium/Mediur	We will have to grow IT Staff experience as we move through the implementation process.	Ongoing. Internal staff working to learn PALM nuances on top of revamping the Agencies telephone and network infrastructure statewide, with only 9 IT personnel. Agency has drafted and will be submitting a FY 2025/26 Legislative Budget Request for additional IT personnel to support PALM integration.	04/25/24	Al Carter, Chief of Staff
Processes Data	FLAIR and FLORIDA PALM data will be different in its representation which may cause challenges when performing data analysis functions.	Open	4 (Medium/Mediur	Staff will incur extra time and possible productivity lag when trying to crosswalk and translate data.	14 May 2024. Down two key team members during this reporting period, which slowed productivity. We have no 100% dedicated assets to this project as we are one person deep in most of our functional areas and those assets must do their day-to-day job as well as work through the PALM activies.	05/14/24	Al Carter, Chief of Staff
People Processes	Staff Turnover. Agency staff turnover while decreasing, still remains over 16% in the Administrative areas mostly impacted by FL PALM.	Open	4 (Medium/Mediur	We continue to put out job announcements and canvas local colleges and universities. The respective candidates respond that State salaries are too low. We don't have to sufficient Agency budget to increase salaries to support our existing requirements, not to mention this increased workload. Reaching out to other Agencies to see what their strategies are, beyond contracting personnel.	Reached out to DoH on 7 March 2024 to determine what options they are using beyond contracting and to gain insights into the strategies they used to remediate infrastructure shortfalls. 14 May 2024: Job announcements continue to be reposted but to date, no bites in our immediate and surrounding areas.	05/14/24	Al Carter, Chief of Staff - Coordinator

DVA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Personnel to support the implementation of FLORIDA PALM within the Agencies procecesses	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request resources via the Legislative Budget Request process.	Legislative budget requests are granted at the end of the Legislative Session which occurs during the first week of May, but if approve, are effective 1 July of the next fiscal year.	08/30/24	Al Carter, Chief of Staff
People Processes Data	Submitted a contract solicitation for a Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Solicitation done week of April 17, 2024. Will hopefully select an appropriate vendor to meet Agency needs.	Only one Vendor replied to procurement, and Agency is not confident the vendor can meet Agency needs.	05/31/24	Al Carter, Chief of Staff

DVA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Funding will be approved/provided by the Florida Legislature to secure personnel needed to support the Agencies PALM transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	Requested in Agency LBR as of August 15, 2023
Technology	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	TBD after funding is secured. Procuring a vendor who can provide a Project Manager to oversee/support PALM integration O/A April 25, 2024.
People Processes Data	FDVA Executive leadership, including Project Sponsor, will support the project by providing resources, access to systems and stakeholders and by supported the organizational change management strategy created by the project team.	Logged	09/18/23	Agency wide	State provided resources, but not timely to allow Agency to secure project management and contract support staff resources. Those agencies undergoing the initial implementation were able to secure contract staff with PALM and related accounting staff. Current solicitations have yielded only one vendor, who at initial glance may not be qualified to do the work.
People Processes Technology Data	FDVA project stakeholders, involved parties, project team, and other involved parties will be available to provide support, feedback, and review of material to meet readiness requirements and project milestones.	Logged	09/18/23	Agency wide	Missing project manager and some key IT and related accounting vendors to support this impending implementation. Working through this process.
People Processes Technology Data	The State level Florida PALM project team will provide key information identifying the functionality, business processes, and timeline of the larger project, in a timely manner, to facilitate timely planning and execution.	Logged	09/18/23	State and Agency implementation team.	Agency continues to work with the assigned readiness coordinator to meet tasks. Our unique functions limit the amount of assistance that Ms. Thomas can render. Hopefully with the eventual hiring of a Project Manager, we will meet deployment objectives.

DVA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Florida PALM Data Cleansing	03/27/24	Select Agency Liaisons		
People Data	Communicated with Sheetal Shidhaye (DoH) to coordinate and receive workforce Readiness plan and project deliverables, work breakdown structure, and Integration and Remediation doucments	03/07/24	Admin (Fiscal and Finance and Accounting and Information Technology	Obtain documents for Agency comparison and use	
People Data	Received DBPR Solicitation Documents from Dora Thomas - Readiness Coordinator -to use as a guide for Agency solicitaitons	03/08/24	Agency Wide	Develop Agency Solicitations	

People Processes Technology Data	Agency Sponsor and select team members attended Florida PALM data day workshop	03/26/24	Agency Sponsor and select Agency Liaisons	Develop Agency workbooks.	Did not have sound for 1/2 the workshop and during the second half of the workshop, sound was horrible.
People Processes Technology Data	Attended Sponsor Summit	04/11/24	Agency Wide	Determine agency status, shortfalls, issues, and possible solutions	Agency meeting most of the expectations given its limited resources to meet State implementation requirements.
People Processes Technology Data	Initiated an ITN for a Project Coordinator.	04/17/24	Agency wide	Secure a vendor with PALM and Agency specific experience ('FLAIR and MATRIXCARE)	
Processes Data	Attended Segment III Design Workshop: Asset accounting and Management	03/28/24	Select Agency Liaisons		
Processes Technology Data	Met With Dora Thomas - Readiness Coordinator on Workspace issues and workspace updates	03/15/24	Agency Sponsor	Update workspace Activity areas	
Technology Data	Attended Segment III Design Workship: Disbursement Management	03/27/24	Select Agency Liaisons		
People	Select Staff developed Project Coordinator Questions for contract with responses due back on 1 May 2024.	04/24/24	Agency wide		
People Processes	Met with DoH Sponsor to discuss Integration Issues and Strategies	03/07/24	Admin (Fiscal and Finance and Accounting and Information Technology	Obtain best practices to deal with personnel shortages and tight timelines	Robert Herron - Director of Administration (DoH) provided great feedback and offered to share data.
People Processes	Worked on PALM Contract Staff	04/02/24	Agency wide	Determine if there are any contract vendors that can provide support to Agency for PALM implementation.	

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:
March - April 2024	Alfred D. Carter	al.carter@fdva.fl.gov	05/09/24
January - February 2024	Alfred D. Carter	al.carter@fdva.fl.gov	03/07/24
November - December 2023	Alfred D. Carter	al.carter@fdva.fl.gov	01/09/24
September - October 2023	Alfred D. Carter	al.carter@fdva.fl.gov	11/15/23
July - August 2023	Alfred D. Carter	al.carter@fdva.fl.gov	09/18/23
July - August 2023	Linda Rizzo	linda.rizzo@fdva.fl.gov	09/11/23

Helpful Links

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

EOG 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

March - April 2024

Agency Sponsor

Dawn Hanson

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 12
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 98.75%

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 98.75%

- Submitted On Time = 29
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/13/24**		Submission Complete	
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/09/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**03/25/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**03/25/24**		Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/05/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/25/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**		Submission Complete	04/18/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/07/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 8

- Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 151

- Related Business Systems = 1
- Related Reports = 41
- **Documentation Status:**

Technology

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

Current-State:

Cataloged Business Systems = 1

- **Criticality:**

- High = 0 Med = 0 Low = 0 None = 1

- **Documentation Status:**

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 77**

- Continued Use - Yes = 30
- Continued Use - No = 26

- Complete = 151 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 151

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 6 Medium = 21 Low = 28 None = 9 Uncertain = 3

• Level of Impact: Processes Changes

- High = 14 Medium = 17 Low = 23 None = 10 Uncertain = 3

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 67 Uncertain = 0

• Level of Impact: Data Changes

- High = 26 Medium = 21 Low = 14 None = 6 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 68

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

Planned Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 1

• Associated Business Systems = 1

Cataloged Reports = 146

• Criticality:

- High = 39 Med = 39 Low = 62 None = 6

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

EOG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes Technology Data	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.	Open	9 (High/High)	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.	Updated after most recent meetings.	04/16/24	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	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 is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	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.	No change.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency reources.	Open	4 (Medium/Mediu	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	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 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.	Open	4 (Medium/Mediu	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 accomodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered.	No change.	01/23/24	Kelley Sasso
People Processes	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.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso
People Processes Technology	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 transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	No change.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need. The EOG will test PALM's inventory solution during UAT to determine if it will meet our agency's needs.	No change.	04/16/24	Kelley Sasso
Technology	Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open	1 (Low/Low)	No risks determined at this time.	No change.	10/31/23	Kelley Sasso
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso

EOG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

EOG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.
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	01/23/24	All Administrative Services.	Discussed with D. Thomas on 1/19/2024.

EOG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Participated in PALM business workflow design workshops	03/29/24	All Administrative Services		
People Processes	Emailed/shared summaries of payroll and/or financial wave business process meetings.	04/18/24	All Administrative Services	Provided a summary of relevant topics and links to FL PALM website to accounting and payroll/personnel staff.	

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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EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	05/06/24
January - February 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/05/24
November - December 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/11/24
September - October 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/23
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Gina Giacomo

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 95.63%

- Submitted On Time = 27
- Submitted Late = 1
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		We have completed cleanup for FCOR's organization codes.		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		We have contracted with KPMG to assist with this task. We require TASK 328 to be completed. KPMG has completed meetings for the Business Process for Payroll, Account Management & Financial Reporting, Inter/Intraunit Transaction, Revenue Account, Contracts (3/25). KPMG is still working on narratives and flows at this point, and they just finished up an assessment with Acct Management and Financial reporting. This task will not be completed until KPMG finishes their process.		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**02/27/24**	FCOR doesn't have any ABS systems to update documentation.	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	FCOR doesn't have any ABS systems to update the interfaces	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Updated to 50% per the Project Manager.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/24/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/09/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Planned Florida PALM End Users = 15

• Business Process Groupings = 6/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 11

• Related Business Systems = 0

• Related Reports = 12

• Documentation Status:

- Complete = 11 Partial = 0 Not Started = 0

Current-State:

Cataloged Business Systems = 0

• Criticality:

- High = 0 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Current-State:

Unique FLAIR Data Elements = 72

• Associated Unique Uses = 221

- Continued Use - Yes = 183

- Continued Use - No = 10

• Associated Business Systems = 4

Cataloged Reports = 17

• Criticality:

- High = 8 Med = 8 Low = 1 None = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 3 Not Started = 6

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 2 In Progress = 1 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FCOR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Data Analysis (Analyzing the patterns involved in data for the downstream system which the agency is currently working) which would impact remediation of the system by the deadline.	Open	9 (High/High)	Might Impact TASK 519, might not meet deadline (6/28).Need more information regarding Data fields involved in PALM to get a good understanding.	The current interfaces with PALM might not give a good insight regarding the Data fields.	02/21/24	David Eskin

FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	David Eskin, FDC Finance and Accounting/Systems Reporting
People Processes	Lack of Clear Instructions and Frequent Changes in Task Guidance	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance	TBD	01/06/26	Erica Starling, Financial Administrator

FCOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	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	Organizational Change Management (OCM) Lead was onboarded and started working 05/06/2024.
People Processes Technology	FCOR'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	Currently still relevant.
People Processes Technology	FCOR 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	Continually updating as needed.
People Processes Technology	FCOR will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating as needed.

FCOR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	AMC001 – Asset & Property Conversion	04/26/24	FCOR Budget and Finance & Accounting	To clean up the FCOR Property Master File	Asset & Property Conversion has been finalized to 100%.
Data	ARC001 - Customers Conversion	04/12/24	FLAIR Users	Data Cleansing and conversion required for the file.	Account Receivables: Data has been finalized to 100%.
Data	OCA & Organization Code	03/25/24	FLAIR Users	Data Cleansing and conversion required for the file.	Inactivated some organization codes
People	FCOR Voucher Catalog and PALM Discussion	03/04/24	Agency Liaisons and CCN staff	To discuss the changes coming with FL PALM with our vendor for Axiom Pro	
People	KPMG/FCOR PALM Support Business Process Discussion	03/05/24	Back Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Standup meeting to discuss all the documentation provided and to discuss the next step to start setting up meetings with each area to go through their current processes	

			staff	their current processes	
People	KPMG Weekly Meeting	03/13/24	Project Sponsor, Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Payroll Management Business Processes	03/18/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Payroll documentation provided	
People	KPMG Meeting on Account Management and Financial Business Processes	03/19/24	Agency Liaison, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Account Management and Financial Reporting documentation provided	
People	PALM Meeting	03/19/24	Agency Liaison and the new Organizational Change Manager	Meeting to discuss upcoming presentation during our monthly FL PALM meeting	
People	PALM Project Touch Base	03/19/24	Project Manager, Business Analysts, Agency Liaisons, Data Analyst and Backup Agency Sponsor	Meet and greet to talk with newly assigned Project Manager and to get her up to speed and to meet the new Data Analyst assigned to the FL PALM project	
People	PALM Task Meeting	03/20/24	Agency Liaison and the Business Analysts	Meeting to discuss the upcoming tasks and to discuss where we are on each task for upcoming Touchpoint meeting	
People	KPMG Weekly Meeting	03/20/24	Project Sponsor, Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Inter/IntraUnit Business Processes	03/21/24	Agency Liaisons, CCN staff, Business Analyst and additional KPMG staff	Meeting to discuss the Inter/IntraUnit documentation provided	
People	KPMG Meeting on Revenue Accounting Business Processes	03/21/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Revenue Accounting documentation provided	
People	KPMG Meeting on Contracts Management Business Processes	03/21/24	Agency Liaison, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Contracts Management documentation provided	
People	PALM Project Meeting	03/22/24	Project Manager, Business Analysts, Agency Liaisons, and Data Analyst	Meeting to assess and gauge the technical skills required for the FL PALM project	
People	KPMG Meeting on Grants & Revenue Business Processes	03/22/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Grants & Revenue documentation provided	
People	KPMG Meeting on Banking Business Processes	03/25/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Banking documentation provided	
People	KPMG Meeting on Grants Management Business Processes	03/25/24	Agency Liaison, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Grants Management documentation provided	
People	KPMG Meeting on Accounts Receivable Business Processes	03/27/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Accounts Receivable documentation provided	
People	KPMG Meeting on Budget Management and Cash Control Business Processes	03/29/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Budget Management and Cash Control documentation provided	
People	KPMG Meeting on Asset Accounting and Management Business Processes	03/29/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Asset Accounting and Management documentation provided	
People	KPMG Meeting on Disbursement Management Business Processes	03/29/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Disbursement Management documentation provided	
People	CCN PALM Monthly Standing Meeting	03/29/24	Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	PALM Task Meeting	04/01/24	Agency Liaison, Business Analysts and Data Analyst	Meeting to discuss the upcoming tasks that are due 4/12/24	
People	Discussion on Task 513	04/02/24	FDC/FCOR Agency Liaisons, FMBC SMEs, Property SMEs, FCOR SMEs, and a FL PALM Expert	To discuss the completion of the Location Definition for Asset Management in the configuration workbook in Smartsheet for FDC and FCOR for Task 513	
People	KPMG Weekly Meeting	04/03/24	Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Disbursement Management Business Processes – Part 2	04/03/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Disbursement Management documentation provided	
People	KPMG Meeting on Data Cleanup	04/08/24	Backup Agency Sponsor, Agency Liaison, Financial Reporting SME and two KPMG staff	Meeting to discuss hiring KPMG to assist with FDC/FCOR's data cleanup	
People	PALM Task Meeting	04/08/24	Agency Liaison, Business Analysts and Data Analyst	Meeting to discuss status of all upcoming tasks that are due 4/12/24 and the BARS remediation efforts	
People	Task 518 Meeting	04/09/24	Business Analysts, Data Analyst and CCN staff	Meeting to review Segment II Interfaces for completion of Task 518 due 4/12/24	
People	KPMG Weekly Meeting	04/10/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	KPMG Meeting on Account Management & Financial Reporting Questions	04/11/24	Agency Liaison, CCN staff, and additional KPMG staff	Meeting to debrief and answer additional questions on the Account Management and Financial Reporting business processes	
People	Debrief with Project Manager	04/12/24	Project Manager, Backup Agency Sponsor and Agency Liaisons	Meeting to discuss her transition into the Project Manager role and to provide a status of her progress	
People	KPMG Workshop on Revenue Accounting Business Processes	04/16/24	CCN staff and additional KPMG staff	Workshop to discuss the Revenue Accounting processes and ask additional questions	
People	KPMG Weekly Meeting	04/17/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	Task 519 Meeting	04/18/24	Backup Agency Sponsor, Agency Liaisons, Business Analysts, and Data Analyst	Meeting to review Task 519 and plan an approach to Remediate the Agency Business Systems	
People	CCN PALM Monthly Standing Meeting	04/19/24	Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	KPMG Meeting on Asset Management and Financial Reporting Business Processes	04/22/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Asset Management and Financial Reporting business processes	
People	KPMG Meeting on Asset Management Business Processes	04/24/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Asset Management business processes	

People	KPMG Weekly Meeting	04/24/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	KPMG Meeting on Disbursement Management Business Processes	04/24/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Disbursement Management business processes	
People	KPMG Payroll Management Deliverables Overview	04/25/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to provide an overview of the draft payroll documentation	
People	KPMG Meeting on FCOR Budget Reversion Process Workshop	04/26/24	Agency Liaisons, CCN staff, and additional KPMG staff	Meeting to discuss additional questions about the FCOR Budget reversions process	
People	Data Cleanup	04/30/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to talk through and document the as-is HR related payroll processes	
Processes	Continuous updates to desktop procedures library and documentation of our current state reports, agency business systems, and interfaces.	04/30/24	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To ensure our current state desktop procedures library is up to date and document our current state reports, business systems and interfaces	Currently in Progress.
Processes	RFQ awarded funding to obtain consulting services.	04/30/24	Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC and FCOR's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions FDC/FCOR currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	KPMG started working from 02-06-2024 and are currently working on documenting Inventory, catalog and all the existing business roles, business process and business technology involved in the operation of FCOR. KPMG is currently creating the narratives and had an ETA of 5/10/24.
Technology	RFQ awarded funding to obtain consulting services	04/30/24	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC/FCOR Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	KPMG started working from 02-06-2024 and are currently working on documenting Inventory, catalog and all the existing business roles, business process and business technology involved in the operation of FCOR. KPMG is currently creating the narratives and had an ETA of 5/10/24.

Agency Sponsor Confirmation

FCOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Gina Giacomo	karencarter@fcor.state.fl.us	05/09/24
January - February 2024	Gina Giacomo	ginagiacomo@fcor.state.fl.us	03/08/24
November - December 2023	Gina Giacomo	karencarter@fcor.state.fl.us	01/03/24
September - October 2023	Gina Giacomo	ginagiacomo@fcor.state.fl.us	11/13/23
July - August 2023	Gina Giacomo	mary.quinsey@fdc.myflorida.com	09/08/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Mark Tallent

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 4
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 90.94%

- Submitted On Time = 25
- Submitted Late = 2
- Pending Submission = 3

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	**328**	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		We have contracted with KPMG in February to map out all of FDC/FCOR business processes and complete narratives and flows by June 2024. KPMG has been holding weekly and as needed meetings with SME's regarding current business processes. Currently we have received one narrative to review on one of our processes.		
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		SME's are still working on these configurations of the location codes and have been holding meetings to facilitate the completion of this task. We expect to have this task completed by the due date of 5/10.		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		We've updated the current data cleansing process, Assets, Revenues, Grants, General Ledgers. FDC F&A is currently deciding on contracting with someone to support and accelerate our data cleansing efforts, we will require more time to complete this task. We are also working with DFS on the FLAIR Master Balance File Cleanup. We have completed the A/R data cleansing (4/11).		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		We have contracted with KPMG to assist with this task. We require TASK 328 to be completed. KPMG has completed meetings for the Business Process for Payroll, Account Management & Financial Reporting, Inter/Intraunit Transaction, Revenue Account, Contracts (3/25). KPMG is still working on narratives and flows at this point, and they just finished up an assessment with Acct Management and Financial reporting. This task will not be completed until KPMG finishes their process.		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**05/10/24**	This ties into TASK 518. Have already reviewed the interfaces, and got approval from the PALM Readiness team, and reconfirmed once more with David Eskin, once more during a recent meeting (4/12). Updates have been made by Project Manager.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	This is connected to TASK 514, and requirements for Data Cleansing. Need to review with Leonor to complete this task.	Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	We confirmed in the monthly FDC touchpoint meeting on 3/20 that all interfaces chosen were good. Followed up with David Eskin on 4/9 that all interfaces selected were still good to go and no changes were required.	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Pending/More likely not going to meet the deadline based on the amount of remediation efforts, and David Eskin even reconfirmed it during last PALM Monthly Touchpoint meeting with Vince (3/1), we are still assessing the remediation efforts, and schedule meetings with David Eskin assess any BRD for any/all of the business systems pertaining to Segment I. Met with our FL PALM Business Analyst 4/19/24 and he and the team on working on prioritizing the remediation efforts and will be		

								taking the lead on this task. Updated to 50% per the Project Manager on 4/24/24.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/07/24**	Bimonthly Agency Readiness Status Report Submitted with the Approval of Agency Sponsor.		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/24/24**	Had closed out most of the pending risks, except for risk with one Risk on Data Analysis. We did keep 1 Issue open, and created a new issue (4/10). PM added one more assumption.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**	We are currently assessing the scope of this TASK as our former OCM/Primary CCN is no longer with us. We do have documentation files that can support us in completing this before due date, but uncertain if we want to go with the former OCM's approach (4/11).	Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**	Due to power outages caused by the storm - this task is being submitted late.		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 131

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 266

• Related Business Systems = 13

• Related Reports = 58

• Documentation Status:

- Complete = 151 Partial = 86 Not Started = 29

Implementation:

Impacted Agency Business Processes = 266

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 26

• Criticality:

- High = 11 Med = 6 Low = 5 None = 4

• Documentation Status:

- Complete = 13 Partial = 11 Not Started = 1

Cataloged Interfaces = 33

- Inbound Interfaces = 30

- Outbound Interfaces = 3

Implementation:

Business Systems Planned for Integration = 23

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 6 Not Needed = 6

• Segment II - Documentation Updates:

- Complete = 4 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 8

Planned Interfaces = 12

- Inbound Interfaces = 1

- Outbound Interfaces = 11

Data

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

Current-State:

Unique FLAIR Data Elements = 73

• Associated Unique Uses = 222

- Continued Use - Yes = 183

- Continued Use - No = 10

• Associated Business Systems = 2

Cataloged Reports = 234

• Criticality:

- High = 211 Med = 11 Low = 2 None = 11

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 1 In Progress = 2 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FDC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Data Analysis, and the downstream task (will make 1st year difficult) remediation of the data.	Open	9 (High/High)	Impact TASK 519, might not meet deadline (6/28). Need more data info (Data fields) involved with PALM to get a good understanding. Management is considering hiring a technical (programmers), to support the remediation efforts	PALM Interfaces are not a useful approach.	02/22/24	David Eskin
People Technology Data	There is still a lot of efforts needed to be complete in terms of data cleansing, we are still below 50%. And Uncertain if we will be hitting the deadline by 4/12	Closed	4 (Medium/Mediu	Management is looking to hire another team from other agencies to support with the data cleansing efforts. We do now have a Data Analyst that can support the work, and may be involve in some of the	The strategies can help us with try to meet the target deadline for TASK 514/517, but not	04/01/24	Renita Lowell

				aspects of cleansing. F&A Leadership is working to staff data cleansing with knowledgeable resources using staffing contracts.	guaranteed as it depends on when the team is able to be onboarded and implement their efforts.		

FDC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup. Cross training will be completed during the project to ensure operational resiliency.	The Planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date – January 2026.	06/30/25	David Eskin, Finance and Accounting/Systems Reporting
People Processes	Lack of Clear Instructions and Frequent Changes in Task Guidance	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance.	TBD	01/06/26	Erica Starling, Financial Administrator

FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	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	FDC's Organizational Change Management (OCM) Lead was onboarded and started working 05/06/2024.
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	Currently still relevant.
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	Continually updating, as needed.
People Processes Technology	FDC will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Currently still working on Task 328.
People Processes Technology	FDC Change Champion Network will assess the impact of Identify Change Impacts and Update Agency Current State Business Process.	Logged	02/16/24	All agency business systems and CCN roles	Should start working on TASK 515
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.	

FDC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	AMC001 - Asset & Property Conversion	04/17/24	FLAIR Users	Data Cleansing and conversion required for the file.	Projects: The Financial Reporting Section has begun deactivating all projects capitalized by Hurricanes Michael and Irma. Additionally, those projects capitalized in fiscal years 21-22, 22-23, and 23-24 will be deactivated. Pending identification of the rest of capital projects to be inactivated. The agency has projects since the 1980s that are not inactive. Building Number: Currently working on identify the missing building numbers. Location: Property currently working to update the missing locations.
Data	ARC001 - Customers Conversion	04/12/24	FLAIR Users	Data Cleansing and conversion required for the file.	Account Receivables: There are items from prior years that need to be addressed. All accounts receivables are handled outside the AR module. Data has been finalized to 100%.
Data	GMC001 - Grants Conversion	04/12/24	FLAIR Users	Data Cleansing and conversion required for the file.	Grants: It was identified the list of grants that need inactivation. 4/12/24 Identification of pseudo grant and reason for federal/assistance balances analysis was performed. Continue analysis of pseudo grant data for proposing new coding and reporting to budget.
Data	OCA & Organization Code	04/12/24	FLAIR Users	Data Cleansing and conversion required for the file.	It was identified the OCAs without activity. List was provided to budget for their review and returned by Budget on 4/15/24. We identified organization codes without activity. List was provided to budget 4/11/24 and Budget returned it on 4/23/24.
People	FDC Voucher Catalog and PALM Discussion	03/04/24			
People	KPMG Weekly Meeting	03/05/24	Back Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Standup meeting to discuss all the documentation provided and to discuss the next step to start setting up meetings with each area to go through their current processes	
People	KPMG Meeting on Payroll Management Business Processes	03/13/24	Project Sponsor, Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Account Management and Financial Business Processes	03/18/24	Agency Liaisons, CCN staff, Business Analyst and additional KPMG staff	Meeting to discuss the Payroll documentation provided	
People	PALM Meeting	03/19/24	Agency Liaison, CCN staff, Business Analyst and additional KPMG staff	Meeting to discuss the Account Management and Financial Reporting documentation provided	
People	PALM Project Touch Base	03/19/24	Project Manager, Business Analysts, Agency Liaisons, Data Analyst and Backup Agency Sponsor	Meet and greet to talk with newly assigned Project Manager and to get her up to speed and to meet the new Data Analyst assigned to the FL PALM project	
People	PALM Task Meeting	03/20/24	Agency Liaison and the Business Analysts	Meeting to discuss the upcoming tasks and to discuss where we are on each task for upcoming Touchpoint meeting	
People	KPMG Weekly Meeting	03/20/24	Project Sponsor, Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Inter/IntraUnit Business Processes	03/21/24	Agency Liaisons, CCN staff, Business Analyst and additional KPMG staff	Meeting to discuss the Inter/IntraUnit documentation provided	
People	KPMG Meeting on Revenue Accounting Business Processes	03/21/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Revenue Accounting documentation provided	
People	KPMG Meeting on Contracts Management Business Processes	03/21/24	Agency Liaison, CCN staff, Business Analyst, and	Meeting to discuss the Contracts Management documentation provided	

			additional KPMG staff		
People	PALM Project Meeting	03/22/24	Project Manager, Business Analysts, Agency Liaisons, and Data Analyst	Meeting to assess and gauge the technical skills required for the FL PALM project	
People	BARS Internal Discussion	03/22/24	Data Analyst, Agency Liaison, and OIT staff	Discussion on our possible options for our ABS system (BARS) and to provide files and folder access to the Data Analyst	
People	Budget and F&A Meeting	03/22/24	Backup Agency Sponsor, Agency Liaisons, and CCN staff	Met to discuss Organization structure, OCA cleanup and pseudo grants with the Budget office for the FL PALM project	
People	KPMG Meeting on Grants & Revenue Business Processes	03/22/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Grants & Revenue documentation provided	
People	OCM Dry Run for our Monthly Meeting	03/25/24	OCM and & Agency Liaison	Meeting to go through OCM's presentation for our monthly meeting	
People	KPMG Meeting on Project Management Business Processes	03/25/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Project Management documentation provided	
People	KPMG Meeting on Banking Business Processes	03/25/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Banking documentation provided	
People	KPMG Meeting on Grants Management Business Processes	03/25/24	Agency Liaison, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Grants Management documentation provided	
People	Easter Hunt for FL PALM Knowledge Survey	03/25/24	Sent to all F&A staff in Central Office	Created a scavenger hunt using the Knowledge Center to engage the stakeholders and the prize was an Easter basket	
People	KPMG Meeting on Accounts Receivable Business Processes	03/27/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Accounts Receivable documentation provided	
People	Grants Management Procedures Meeting	03/28/24	Business Analysts, and Grants SMEs	Meeting to discuss documenting the Grants Management process for the FL PALM project	
People	KPMG Meeting on Budget Management and Cash Control Business Processes	03/29/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Budget Management and Cash Control documentation provided	
People	KPMG Meeting on Asset Accounting and Management Business Processes	03/29/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Asset Accounting and Management documentation provided	
People	KPMG Meeting on Disbursement Management Business Processes	03/29/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Disbursement Management documentation provided	
People	CCN PALM Monthly Standing Meeting	03/29/24	Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	PALM Task Meeting	04/01/24	Agency Liaison, Business Analysts and Data Analyst	Meeting to discuss the upcoming tasks that are due 4/12/24	
People	BARS Reports Internal Discussion	04/01/24	Data Analyst and Agency Liaison	Discussion on our reports pulled into Excel from our ABS system (BARS) for our Data Mapping from the backend	
People	Discussion on Task 513	04/02/24	FDC/FCOR Agency Liaisons, FMBC SMEs, Property SMEs, FCOR SMEs, and a FL PALM Expert	To discuss the completion of the Location Definition for Asset Management in the configuration workbook in Smartsheet for FDC and FCOR for Task 513	
People	KPMG Weekly Meeting	04/03/24	Agency Liaisons, CCN staff and Project Manager of KPMG and additional KPMG staff	Weekly touchpoint meeting with KPMG who is currently mapping our business processes	
People	KPMG Meeting on Disbursement Management Business Processes – Part 2	04/03/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss the Disbursement Management documentation provided	
People	Agency Business System (OpenGov) Demo	04/05/24	Backup Agency Sponsor, Agency Liaisons, Data Analyst and Budget SMEs	Demo provided by Budget so we could see what needs to be remediated	
People	KPMG Meeting on Data Cleanup	04/08/24	Backup Agency Sponsor, Agency Liaison, Financial Reporting SME and two KPMG staff	Meeting to discuss hiring KPMG to assist with FDC/FCOR's data cleanup	
People	PALM Task Meeting	04/08/24	Agency Liaison, Business Analysts and Data Analyst	Meeting to discuss status of all upcoming tasks that are due 4/12/24 and the BARS remediation efforts	
People	Task 518 Meeting	04/09/24	Business Analysts, Data Analyst and CCN staff	Meeting to review Segment II Interfaces for completion of Task 518 due 4/12/24	
People	KPMG Weekly Meeting	04/10/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	Budget Meeting	04/10/24	Backup Agency Sponsor, Agency Liaisons, F&A SMEs and Budget SMEs	Meeting to discuss all things FL PALM	
People	KPMG Meeting on Account Management & Financial Reporting Questions	04/11/24	Agency Liaison, CCN staff, and additional KPMG staff	Meeting to debrief and answer additional questions on the Account Management and Financial Reporting business processes	
People	Budget Task 513 Meeting	04/12/24	Backup Agency Sponsor, Agency Liaisons, F&A SMEs and Budget SMEs	Meeting to discuss the Organization task and to check the status of the OCA review in regards to Task 513 & Task 514	
People	Debrief with Project Manager	04/12/24	Project Manager, Backup Agency Sponsor and Agency Liaisons	Meeting to discuss her transition into the Project Manager role and to provide a status of her progress	
People	KPMG Workshop on Revenue Accounting Business Processes	04/16/24	CCN staff and additional KPMG staff	Workshop to discuss the Revenue Accounting processes and ask additional questions	
People	KPMG Weekly Meeting	04/17/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	OIT Project Team & Budget Meeting	04/18/24	Agency Liaison, OIT Project Manager, Business Analysts and Budget SMEs	Meeting to discuss OpenGov for remediation and to get a demo	
People	Task 519 Meeting	04/18/24	Backup Agency Sponsor, Agency Liaisons, Business Analysts, and Data Analyst	Meeting to review Task 519 and plan an approach to Remediate the Agency Business Systems	
People	CCN PALM Monthly Standing Meeting	04/19/24	Agency Sponsor, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	KPMG Meeting on Asset Management and Financial Reporting Business Processes	04/22/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Asset Management and Financial Reporting business processes	
People	KPMG Meeting on Asset Management Business Processes	04/24/24	CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Asset Management business processes	

People	KPMG Weekly Meeting	04/24/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	KPMG Meeting on Disbursement Management Business Processes	04/24/24	Agency Liaisons, CCN staff, Business Analyst, and additional KPMG staff	Meeting to discuss additional questions about the Disbursement Management business processes	
People	KPMG Payroll Management Deliverables Overview	04/25/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to provide an overview of the draft payroll documentation	
People	KPMG Meeting on FCOR Budget Reversion Process Workshop	04/26/24	Agency Liaisons, CCN staff, and additional KPMG staff	Meeting to discuss additional questions about the FCOR Budget reversions process	
People	KPMG FDC HR Payroll Process Workshop	04/29/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to talk through and document the as-is HR related payroll processes	
People	Data Cleanup	04/30/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to talk through and document the as-is HR related payroll processes	
People	Design BARS Survey	04/30/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to design the BARS survey to determine how it is being used and if remediation is needed	
Processes	Continuous updates to desktop procedures library and documentation of our current state reports, agency business systems, and interfaces.	04/30/24	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To ensure our current state desktop procedures library is up to date and document our current state reports, business systems and interfaces	Currently in Progress.
Processes	RFQ awarded funding to obtain consulting services.	04/30/24	FDC's Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions) and the Commission's Finance and Accounting Section. Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department and the Commission currently maintain, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality	KPMG started working from 02-06-2024 and are currently working on documenting Inventory, catalog and all the existing business roles, business process and business technology involved in the operation of FDC. KPMG is currently creating the narratives and had an ETA of 5/10/24.
Technology	RFQ awarded funding to obtain consulting services.	04/30/24	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality	KPMG started working from 02-06-2024 and are currently working on documenting Inventory, catalog and all the existing business roles, business process and business technology involved in the operation of FDC. KPMG is currently creating the narratives and had an ETA of 5/10/24.
Technology	BARS Internal Discussion	03/22/24	Data Analyst, Agency Liaison, and OIT staff	Discussion on our possible options for our ABS system (BARS) and to provide files and folder access to the Data Analyst	
Technology	BARS Reports Internal Discussion	04/01/24	Data Analyst and Agency Liaison	Discussion on our reports pulled into Excel from our ABS system (BARS) for our Data Mapping from the backend	
Technology	Agency Business System (OpenGov) Demo	04/05/24	Backup Agency Sponsor, Agency Liaisons, Data Analyst and Budget SMEs	Demo provided by Budget so we could see what needs to be remediated	
Technology	OIT Project Team & Budget Meeting	04/18/24	Agency Liaison, OIT Project Manager, Business Analysts and Budget SMEs	Meeting to discuss OpenGov for remediation and to get a demo	
Technology	Design BARS Survey	04/30/24	Agency Liaisons, Payroll SMEs, Project Manager of KPMG and additional KPMG staff	Meeting to design the BARS survey to determine how it is being used and if remediation is needed	

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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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Mark Tallent	mark.tallent@fdc.myflorida.com	05/13/24
January - February 2024	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/24
November - December 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	01/03/24
September - October 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	11/08/23
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23

Helpful Links

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

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

March - April 2024

Agency Sponsor

Charlotte Fraser

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Completeness:

Score = 80.00%

- Submitted Complete = 4
- Submitted Incomplete = 1
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 96.88%

- Submitted On Time = 28
- Submitted Late = 0
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Remediation in progress.		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	**04/12/24**	Remediation in progress.	Submission Incomplete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Remediation in progress.		
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**	Task complete		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	75% - Consolidating/Inputting Information for Submission		Survey administered; closes on 5.10.24. 5.3.24 Survey reminder sent. Survey extended by a day due to office closure on 5/10. Reminder sent to staff.		
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/08/24**	Task complete		
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		

People

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

Implementation:

Planned Florida PALM End Users = 40

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 276

• Related Business Systems = 14

• Related Reports = 59

• Documentation Status:

- Complete = 206 Partial = 36 Not Started = 36

Implementation:

Impacted Agency Business Processes = 276

• Related Business Process Groupings = 12

- Planned Spreadsheet Uploads = 3

• Level of Impact: People Changes

- High = 21 Medium = 80 Low = 28 None = 9 Uncertain = 6

• Level of Impact: Processes Changes

- High = 57 Medium = 57 Low = 15 None = 7 Uncertain = 8

• Level of Impact: Technology Changes

- High = 62 Medium = 22 Low = 12 None = 38 Uncertain = 7

• Level of Impact: Data Changes

- High = 81 Medium = 34 Low = 5 None = 10 Uncertain = 9

• Segments I & II Documentation Update Status

- Not Started = 116 In Progress = 2 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 21

• Criticality:

- High = 14 Med = 0 Low = 0 None = 7

• Documentation Status:

- Complete = 2 Partial = 10 Not Started = 7

Cataloged Interfaces = 46

- Inbound Interfaces = 24

- Outbound Interfaces = 22

Implementation:

Business Systems Planned for Integration = 16

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 3 Not Started = 0 Not Needed = 13

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 3 Not Started = 0 Not Needed = 13

Planned Interfaces = 3

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 73

• Associated Unique Uses = 193

- Continued Use - Yes = 68

- Continued Use - No = 108

• Associated Business Systems = 11

Cataloged Reports = 123

• Criticality:

- High = 97 Med = 14 Low = 45 None = 22

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 1 In Progress = 1 Not Started = 1 Not Applicable 0

Reports = TBD

Agency Reported

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

FDLE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Lack of understanding and process for granting and rescinding PALM access to the entire agency workforce who would need to access salary documents previously housed in Employee Information Center (EIC).	Open	6 (Medium/High)	Mitigate this risk.	Researching how to best resolve.	04/29/24	Terri Speed
Processes Technology	The new "Account" COA field will be replacing the GL and Object codes.	Closed	6 (High/Medium)	Once information is relayed from PALM, we will have to analyze how this will affect remediation of RAMS.	Review and crosswalk Accounts provided for Revenue and Expenditure	04/26/24	Terri Speed / Ajay Katta
People	Onboarding new resources continues to be a challenge, despite having the funding to support the role(s)	Open	6 (High/Medium)	Risk ACCEPTANCE.	Owner will continue to follow up with Department background process team. 4/26/24 AK: PALM Program Manager and RAMS Functional Consultant have been on boarded. Project Manager background check completed and awaiting joining on 5/6/24. RAMS Technical Consultant selection completed and background check paperwork in progress.	04/26/24	Andrew Gutsch
Data	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Open	4 (Medium/Mediur	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	None	07/01/23	Mike Moore
Technology	Development and Test instances of affected agency business systems are not available.	Closed	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring 4/26/24 AK: PALM DEV and TEST instances have been created. This risk has been mitigated.	04/26/24	Andrew Gutsch
People	If funding is not approved, we will be unable to hire/retain additional technical and project management staff.	Closed	3 (High/Low)	LBR requests have been submitted for funding to hire/retain staff required to complete the project.	Awaiting close of FY 24/25 legislative session. 4/26/24 AK: Funding has been approved for all of project management staff	04/26/24	Becky Bezemek / Charlotte Fraser
Technology Data	FDLE uses Object code for various purposes. PALM is replacing this with Account. As a result it will be challenging to reconcile RAMS with PALM and get details at transaction type level.	Open	3 (High/Low)	New chart of accounts and transaction types have to be setup to fulfill PALM and FDLE accounting requirements.	Analyzing PALM account codes provided to determine if additional fields need to be utilized.	10/31/23	Terri Speed / Andrew Gutsch
Processes Technology Data	New hardware, hardware OS and EBS application upgrade will not be completed as planned	Open	3 (High/Low)	Coordinating with multiple teams and testing extensively on all the new instances to ensure upgrade project is completed.	Oracle EBS system (RAMS) hardware and software upgrade is work in progress	02/29/24	Andrew Gutsch
People	RAMS PALM PM and ERP Technical Consultant not onboarded	Open	3 (High/Low)	PM background check completed and tentative start date is 5/6. Interviews for ERP Technical resource completed and waiting on background check	PALM work being managed by using existing resources	04/24/24	Andrew Gutsch

People Processes Technology	Current systems have high visibility and are available to end customers 24/7. There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	2 (Medium/Low)	Project Manager will identify cutover schedule for all affected applications and provide detailed plans much before PALM go-live date.	Pending Project Manager being hired	10/31/23	Andrew Gutsch
People	New consultants and existing team do not have much knowledge of PALM and its impact.	Open	2 (Medium/Low)	Project Manager will need a plan to update everyone on PALM technical and functional features based on which teams can prepare.	Pending Project Manager being hired	10/31/23	Andrew Gutsch

FDLE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes	Several Tasks were rejected	Open	Low - All impacts not listed as Critical or High	Working to remediate the tasks.	Meeting with RC to clarify direction	05/10/24	Angela Willis-Clay

FDLE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will be approved for funding to support readiness activities.	Logged	07/01/23	Office of Information and Technology Systems Office of Financial Management Agency business systems	Pending FY 24/25 Legislative Session
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.	Logged	07/01/23	Agency business systems	Monitor information as provided by PALM.
Data	PALM will provide similar funtionality as ABS Open Reports 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	Monitor information as provided by PALM.
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	Monitor information as provided by PALM.

FDLE Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	PALM Configuartion Discussion	04/26/24	Office of Financial Management	Discuss org, OA1 and OA2 configurations and possible revisions	Five members attended for two hours.
People Data	RW Task 524 - End User Survey Meeting	04/24/24	Office of Financial Management	Discuss End User Survey	Three members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	03/11/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	03/19/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	04/02/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Six members attended for thirty minutes.
People Processes Data	Internal Agency Status Meeting	04/29/24	Office of Financial Management Office of Information Technology Services	Recurring bi-monthly internal status meeting to discuss project updates, upcoming tasks and tasks due dates.	Seven members attended for thirty minutes.
People Processes Data	Segment III Design Workshop: Disbursement Management	03/27/24	Office of Financial Management Office of Information Technology Services	To review the updates and discuss the changes to better prepare FDLE.	Nine members attended for eight hours.
People Processes Data	Segment III Design Workshop: Asset Accounting and Management	03/28/24	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Four members attended for eight hours.
People Processes Data	Segment III Design Workshop: Account Management and Financial Reporting; Budget Management and Cash Control	04/04/24	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Ten members attended for eight hours.
People Processes Data	RW Task 515 - Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	04/05/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Eleven members attended for thirty minutes.
People Processes Technology Data	PALM Data Day	03/26/24	Office of Financial Management Office of Information Technology Services	Provide overviews of data resources, discuss actionable steps towards agency data readiness, and set expectations for the future of data related activities.	Nine members attended for eight hours. Three members attended virtually.
People Processes Technology Data	Segment III Design Workshop: Revenue Accounting and Accounts Receivable	04/03/24	Office of Financial Management Office of Information Technology Services	To review the updates and discuss the changes to better prepare FDLE.	Five members attended for eight hours.
People Processes Technology Data	Production Support Round Table	04/23/24	Office of Financial Management Office of Information Technology Services	This Round Table will provide an opportunity for Security Access Managers (SAMs) and Identity Providers (IDPs) subject matter experts to meet the Florida PALM Production Support Team, gain insight into their current support roles and ask questions.	Seven members attended for one hour.
People Technology Data	March FDLE/PALM Readiness Touchpoint Meeting	03/20/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York and Alise Fields	Eight members attended for one hour.
People Technology Data	April FDLE/PALM Readiness Touchpoint Meeting	04/25/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Alise Fields.	Ten members attended for one hour.
People Technology Data	Thursday Task Talk -	03/07/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People Technology Data	Thursday Taks Talk - Configuration Workshop Updates	03/14/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People Technology Data	Thursday Taks Talk - Configuration Workshop Updates	03/21/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.

People Technology Data	Thursday Task Talk - Task 523: Share Florida PALM Updates	04/11/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People Technology Data	Thursday Task Talk - Task 524, 527, 528, and 530	04/18/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People Technology Data	Thursday Task Talk - Knowledge Center Resources, Mindful Task Management and Reaching Key Milestones	04/25/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People	Weekly Internal PALM Meeting	03/05/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	03/12/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	03/19/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/02/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/09/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/16/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/23/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Weekly Internal PALM Meeting	04/29/24	Office of Financial Management	Project Mananger and Angency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Advisory Council	03/25/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Three members attended for two hours.
People	Advisory Council	04/09/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for one hours.
People	Florida PALM Accounts Receivable and Revenue Accounting	04/03/24	Office of Financial Management Office of Information Technology Services	Reviewed information related to below: 50.1 Set Up and Maintain Customer 60.1 Enter and Maintain Receivables 60.2.2 AR Deposits	Seven members from both ITS and OFM teams attended these meetings.
People Processes	ITS PALM Documentation	04/29/24	Office of Financial Management Office of Information Technology Services	Discuss project documentation and needed IT updates.	Four members attended for one hour.
People Processes	FDLE Smartsheet Worksheet Clean Up	03/22/24	Office of Financial Management	Discussion with both RC's regarding Smartsheet	One member attended for an hour.
People Technology	Upgrade of Oracle EBS Application and Hardware	04/24/24	Office of Information Technology Services	To upgrade - * Oracle EBS application from R12.2.9 to R12.2.12. * Hardware OS from RHEL7 to RHEL8 * Replace existing Hardware	Upgrade of application and hardware will enable FDLE to work on latest version of application for all PALM related software customizations and also ensure work is done on supported hardware with necessary licenses.

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:
March - April 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	05/08/24
January - February 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/11/24
November - December 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	01/12/24
September - October 2023	Mike Moore	mikemoore@fdle.state.fl.us	11/13/23
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23

Helpful Links

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

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

March - April 2024

Agency Sponsor

Lisa Saliba

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 27
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 81.56%

- Submitted On Time = 16
- Submitted Late = 12
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	50% - In Progress		Working on feedback from Budget Control and making progress filling configuration sheets. More to follow, likely to complete by		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Completed as much as possible with current Segment information. Needing Segment IV feedback for completion, GL Account information, Budget information, Vendor information, and more. Completion target date of 9/27.		
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		FDOT deadline to be updated		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/28/24**	Completed as much as possible with current Segment information	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	Completed as much as possible with current Segment information	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**05/01/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/18/24**	Smartsheet recommendation will be shared. Please copy the completed row with Description of Communication to additional rows and select the Stakeholder group to support that the email went to all, CCN, SME, End Users, and leadership.	Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Planning to complete as much as possible with current Segment information. Needing Segment IV feedback for completion. Completion target date of 9/27.		
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**		Submission Complete	
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 221

• Business Process Groupings = 11/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 54

• Related Business Systems = 35

• Related Reports = 43

• Documentation Status:

- Complete = 19 Partial = 26 Not Started = 0

Implementation:

Impacted Agency Business Processes = 54

• Related Business Process Groupings = 12

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 5 Medium = 19 Low = 5 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 23 Medium = 0 Low = 6 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 4 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 31 Complete = 23

Technology

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

Current-State:

Cataloged Business Systems = 290

• Criticality:

- High = 138 Med = 36 Low = 13 None = 8

• Documentation Status:

- Complete = 28 Partial = 170 Not Started = 1

Cataloged Interfaces = 119

- Inbound Interfaces = 47

- Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 207

• Segment I - Documentation Updates:

- Complete = 0 Updating = 12 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

- Complete = 17 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 24

- Inbound Interfaces = 12

- Outbound Interfaces = 11

Data

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

Current-State:

Unique FLAIR Data Elements = 92

• Associated Unique Uses = 92

- Continued Use - Yes = 18

- Continued Use - No = 1

• Associated Business Systems = 3

Cataloged Reports = 215

• Criticality:

- High = 87 Med = 72 Low = 33 None = 23

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 1 Not Started = 8

Conversions & Data Readiness

• Conversions Needed = 4

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FDOT Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Impacted asset inventory inconsistencies cause problems in planning remediation efforts.	Open	9 (High/High)	Control - Regularly reviewing asset impact and assessing priority to asset for planning purposes	No comment this period	11/01/23	Brian Boyd
Data	The new "Account" CoA field will be replacing the GL and Object codes. FDOT needs the specifications for how to cross walk GL and object codes to account in PALM. Delay in this information delays our ability to remediate our systems.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Major schedule changes in PALM solution would impact our remediation efforts.	Open	9 (High/High)	Accept - Monitor PALM schedule and adjust FDOT schedule as needed	No comment this period	11/01/23	Brian Boyd
Processes	Delay or loss of planned funding for the program	Open	9 (High/High)	Avoid - Document program funding requirements and communicate with FDOT leadership, Governor's office, and House/Senate staff.	Received funding, and actively monitoring	11/01/23	Brian Boyd
Technology	Timeliness of PALM Nightly Batch Files and Data Warehouse Updates	Open	9 (High/High)	Transfer - Expecting the PALM solution to have timely or as needed batch files and Data Warehouse needs are available in agency or from interfaces until DW is fully available.	Outstanding question looking for guidance in Segment IV	11/01/23	Brian Boyd
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FDOT is unable to accurately define impacts to our systems without complete specifications on the interfaces for supplier functionality, commitment control module, and project grants module.	Open	9 (High/High)	Monitor / Quantify - Reviewing and notifying of interface consistency as we prepare to remediate for PALM.	Shared concerns and reviewing feedback	11/01/23	Brian Boyd
Technology	Vendor specifications are incomplete. FDOT TVI uses TIN and Seq # for vendors; Supplier is the new name for vendor and Traveler is new name for sub vendors. FDOT needs additional specifications on vendor functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Technology	MFMP revisions and impact on TVI is unknown. FDOT needs additional specifications on MFMP changed functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Delay of budget release on LBR funds preventing change orders for staff augmentation purchase orders.	Open	9 (High/High)	Acceptance- Document program funding requirements and communicate with FDOT leadership, Governor's office, and House/Senate staff.	No comment this period	11/01/23	Brian Boyd
Processes	Scope changes in PALM solution	Open	9 (High/High)	Mitigation- Monitor PALM scope and adjust FDOT scope as needed	No comment this period	11/01/23	Brian Boyd
Processes Technology	Capability to upload Excel Spreadsheets to PALM will be replacing existing FLAIR emulator scripting processes.	Open	9 (High/High)	Mitigation	No comment this period	02/20/24	Brian Boyd
Data	If project category is included on a voucher, does it need project category to match on the distribution line of a purchase order (encumbrance)?	Open	9 (High/High)	Mitigation	Identified this period	03/07/24	Brian Boyd
Data	PALM has provided incomplete information for Object code impacts expansion option. Lots of places in code. What do we replace with ?	Open	9 (High/High)	Mitigation	Attempting to conduct partial remediation where able, but	03/07/24	Brian Tippel

					additional efforts identified when systems need to be revisited at future segment intervals.		
Processes Technology Data	Florida PALM is not providing ERD's or DDL files.	Open	9 (High/High)	Strategize - Considering building needed database infrastructure within agency with heightened risk of future changes causing greater effort.	Work continuing and will involve more manual steps since PALM will not be providing ERD or DDL files. Increase work on resource. Increase risk with manual entry.	04/02/24	Brian Boyd
Processes	Issues not resolved in a timely manner	Open	6 (High/Medium)	Conduct monthly RAID meetings and promptly escalate issues to FDOT leadership and PALM leadership	No comment this period	11/01/23	Brian Boyd
People	Limited qualified staff availability for requirements gathering, application remediation, remediation testing, and other critical activities	Open	6 (High/Medium)	Request LBR funding for staff augmentation	Actively seeking and hiring qualified personnel.	11/01/23	Brian Boyd
Processes Data	Need revenue, expenditure, and balance sheet account code mappings for inter and intra agency funds transfer to begin data conversion preparation.	Open	6 (High/Medium)	Mitigation	Identified this period	03/07/24	Brian Boyd
Processes Data	The concept of splitting up the new PALM Accounting system into reviewable Segments is not reasonably workable with many ABS's since systems were architected from broader financial/functional perspectives. This may cause delay in remediation completion of systems as they wait for future segments to provide answers/guidance towards full remediation.	Open	6 (High/Medium)	Mitigation	Attempting to conduct partial remediation where able, but additional efforts identified when systems need to be revisited at future segment intervals.	03/07/24	Brian Boyd
Processes	Scope and schedule alignment of individual department remediation efforts with FPST.	Open	4 (Medium/Mediu	Mitigation- Monitor scope and schedule changes of individual efforts. Reassign resources as needed to avoid schedule changes. Carefully evaluate proposed scope changes.	No comment this period	11/01/23	Brian Boyd
Processes	Inconsistent processes and standards across FDOT business units could impact efforts to perform remediation for PALM impacts	Open	4 (Medium/Mediu	Evaluate opportunities for process standardization	No comment this period	11/01/23	Brian Boyd

FDOT Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Interface layouts contain errors.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Notify PALM and work to gain clarity and accuracy on interface layouts.	Contact_Sequence_Num	05/31/24	Brian Tippel
Data	Interface schema relationship details not provided in layouts, samples, or knowledge center.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Reaching out to PALM technical staff to gain guidance on entity relationship diagrams.	Identified this period	05/31/24	Mark Rissinger
Technology	The New 8.6 GEN COM Bridge and HIS windows server have been built. Efforts are underway to migrate to the Dev and Test environments for additional testing. Errors have been encountered and the Department is working through a resolution.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Continue efforts to finalize migration.	Resolved this period.	03/01/24	Brian Wilson

FDOT Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	The Florida PALM Project implementation will replace current FLAIR functionality only and will not encompass the agency specific financial planning and analysis requirements of FDOT.	Logged	06/30/23	FDOT Florida PALM End Users FDOT Application Owners	Readiness Workplans will be provided by Florida PALM over the three years of the implementation process to provide guidance on the tasks and activities that are needed for the Financials and Payroll implementation waves.
Processes	The Readiness Workplan activities direct/guide the FPST Program work and tracks the progress of department specific tasks.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	Changes in the scope and/or schedule of RW activities impact the FPST Program activities.
Technology	The Florida PALM detail schedule specific to sequencing of design activities for PeopleSoft module functionality and interface designs will be available in July 2023.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	As of 1/1/24, we are still waiting for a detailed schedule. The recently provided Agency Implementation Roadmap and updates to the Readiness Workplan lack the necessary detail.
Processes	FPST work efforts meeting the FDOT guidelines for project classification will be managed as projects and follow the established project management standards mandated by 60GG-1, F.A.C.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	No comment this period
Processes	FPST work efforts classified as operations and maintenance (O&M) will follow the established standards for O&M activities.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	No comment this period
People	Adequate staffing, equipment, software, and hardware are primary drivers of the department's FPST Program activities.	Logged	06/30/23	Executive FPST Program Sponsors Chief Information Officer	No comment this period
Processes	Sufficient recurring Legislative Budget Request (LBR) funding will be released to complete FPST efforts.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	Funding received December, 2023
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.	Logged	06/30/23	Executive FPST Program Sponsors	No comment this period
Processes	Additional appropriation is required to successfully complete required remediation efforts to align with the Florida PALM January 2026 implementation date for the Financial and Payroll Waves.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	No comment this period
Processes	FDOT has extensive dependencies on Solution Design deliverables from the Florida PALM Project.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	The current Florida PALM schedule has several to-be-determined schedule placeholders. FDOT needs schedule detail specific to the Florida PALM solution modules to accurately map dependencies and activities for remediation efforts.

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.	Logged	06/30/23	Executive FPST Program Sponsors	No comment this period
Technology	Expansion Options being replaced by Speed Keys will require interface and design guidance with adequate availability for review and integration.	Logged	11/01/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	No comment this period
People Technology	Excel spreadsheet uploads will be easily entered into PALM by business users.	Logged	02/20/24	FDOT End Users	Capability will need to be tested and training, if workable, provided.
People Processes Technology Data	Employees will not need PALM logins to access W2s and Paystubs or to update W4 information.	Logged	03/07/24	Everyone	Payroll concern
Processes Technology Data	GL last two digits are expense classifications, needed in PALM, expecting solution. Assumption is PALM will give us solution to capture expense classification.	Logged	04/05/24	Everyone	
Data	Previous year adjustments report exclusion needed, PALM expected to provide	Logged	04/05/24	Everyone	
Technology Data	CFDA number storage location needed in PALM for expenditure of grants	Logged	04/05/24	FDOT Florida PALM Agency Liaisons FPST Program Managers	workaround would be to leverage OA fields and create data relationships.

FDOT Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	RW Task 526 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	FDOT Florida PALM System Transition Team	Review Segment III resources for change impacts to agency data and evaluate current state data readiness. Update agency data cleansing plan and complete data cleansing activities.	Reviewing and being assigned
Data	RW Task 529 - Update Florida PALM Conversion Inventory for Segment III	04/29/24	FDOT Florida PALM System Transition Team	Review Segment III resources; identify and document conversion needs for Florida PALM implementation.	Reviewing and being assigned
People Processes Technology Data	Bi-Weekly Payroll Analysis Stand Up	04/01/24	FDOT Florida PALM System Transition Team, SME's	A bi-weekly meeting series to check in on status of PPS PALM analysis documentation and any roadblocks.	March-May 2024 bi-weekly
People Processes Technology Data	FPST Internal Workgroup Meetings	03/15/24	FDOT Florida PALM System Transition Team	Weekly workgroup meetings are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness.	March-May 2024 weekly.
People Processes Technology Data	Payroll Distribution analysis workgroups	04/26/24	FDOT Florida PALM System Transition Team, SMEs	Analysis of PPS Payroll system for current state, PALM impacts, and to-be state.	Continued analysis of Personnel Payroll System during reporting period March-May 2024 with emphasis on data tables for development environment.
People Processes Technology Data	PPS System Analysis Stand Up	03/01/24	FDOT Florida PALM System Transition Team, SME's	A regular occurring bi-weekly stand up to discuss where we are with the Florida PALM remediation needed for the PPS system.	Occurs bi-weekly, March-May 2024.
People Processes Technology Data	RW Task 527 - Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	FDOT Florida PALM System Transition Team	Review Segment III resources; identify changes to people, process, technology, and data and update current state business process documentation.	In progress
People Processes Technology Data	Technology Transformation Weekly Status Review Meetings	03/14/24	FDOT Florida PALM System Transition Team	Weekly, half-hour sessions to review Transformation status report for the PALM remediation support effort.	Continued weekly through reporting period
People Processes Technology Data	Weekly FDOT Planning and Stand Up Meeting	03/08/24	FDOT Florida PALM System Transition Team, SME's	weekly stand up covering all areas of the program.	March-May 2024 weekly.
People Technology Data	Weekly Application Services System Remediation Stand Up	04/01/24	FDOT Florida PALM System Transition Team	A weekly meeting series to check in on the status and roadblocks for the GEN code analysis and remediation.	March-May 2024 weekly
Processes Technology Data	Continued analysis of the current use of Expansion Option and Expansion Set by the Department's computing assets to transition to the Florida PALM Speed Charts/SpeedKey and Speed Types (a.k.a. Accounting Tags) functionality.	04/01/24	FDOT Florida PALM System Transition Team, subject matter experts	Reduce the number of Speed Chart and Speed Types that will be required in the Florida PALM solution. Discussion on the design of the 10 character SpeedKey name, and how they will be used in applications.	Continued discussions during reporting period March-May 2024
Processes Technology Data	Landing Zone internal workgroups and implementations	03/11/24	FDOT Florida PALM System Transition Team, SMEs	Landing Zone internal workgroups and implementations	Landing zone development continued through reporting period March-May 2024
Processes Technology Data	Meeting with Vendors to consider options for accelerating PALM readiness through technology solutions.	04/17/24	FDOT Florida PALM System Transition Team	Consider and evaluate technology solutions that may increase quality, reduce overall effort, and support steps towards PALM remediation.	Met with vendors during reporting period March-May 2024
Processes Technology Data	RW Task 530 - Update Florida PALM Interface Inventory for Segment III	04/15/24	FDOT Florida PALM System Transition Team	Review Segment III resources; identify and document interface needs for Florida PALM implementation.	In progress
Processes Technology Data	RW Task 531 - Remediate Agency Business Systems based on Segment II	04/29/24	FDOT Florida PALM System Transition Team	Complete agency business system internal build and unit testing activities based on agency business system documentation updates for Segment II.	Reviewing and being assigned
Technology Data	3 New 8.6 GEN COM Bridge and HIS windows servers built. Implemented HIS and GEN Version 8.6 scheduled on 3/16	03/16/24	FDOT Florida PALM System Transition, Florida Department of Transportation	Resolved ongoing technical issues impacting the Florida PALM System Transition with this upgrade.	
Technology Data	Expansion Option Analysis	04/05/24	FDOT Florida PALM System Transition Team, SME's	In-depth analysis of DB2, mainframe, and Azure tables for Expansion Option impacts.	April & May 2024.
Technology Data	Florida PALM Data Day	03/26/24	PALM End Users	Provide overviews of data resources, discuss actionable steps towards agency data readiness, and set expectations for the future of datarelated activities	
Technology Data	Implementation of Account COA in test server environment	03/15/24	FDOT Florida PALM System Transition Team	Implementation of Account COA in test server ZUNIT01 environment	Ongoing March-May 2024.
Technology Data	Infrastructure Tasks	04/01/24	FDOT Florida PALM System Transition Team	Chart of Account analysis, Data structure changes, data cleansing for legacy Chartfield attributes	March-May 2024.
Technology Data	Meetings/Collaboration to Draft PALM Environment Needs	04/19/24	FDOT, FDOT Florida PALM System Transition Team, 3rd party vendors- NWRDC, Ensono		

Technology Data	Org Code Analysis	04/05/24	FDOT Florida PALM System Transition Team, SME's	In-depth analysis of DB2, mainframe, and Azure tables for Org Code impacts.	April & May 2024.
People	FPST Resource and Reporting activities	04/08/24	FDOT Florida PALM System Transition Team	Resource and reporting efforts. Spend plan for OIT FPST resources. Planning for next fiscal year. March-May ongoing activity.	
People	FPST Spend Plan activities	03/14/24	FDOT Florida PALM System Transition Team	Spend plan for OIT FPST resources.	
People	Onboard new resources	04/02/24	FDOT Florida PALM System Transition Team	onboarding to FPST project	March-May 2024
People	PALM Budget Planning Meeting for FY 24 and FY 25	03/20/24	FDOT Florida PALM System Transition Team	PALM Budget/ resource Planning Meeting for FY 24 and FY 25	
People	RW Task 512 - Identify Future Florida PALM End Users	04/01/24	FDOT Florida PALM System Transition Team	Submit list of all agency end users who will need access to Florida PALM at implementation.	Completed initial list of FLAIR users on 4/1, working to expand and update as we proceed.
People	RW Task 523 - Share Florida PALM Updates	04/08/24	FDOT Florida PALM System Transition Team, Florida PALM end users	Share Florida PALM updates and agency progress with key agency stakeholders.	Completed 4/18
People	RW Task 524 - Complete and Submit End User Readiness Survey Analysis	04/15/24	FDOT Florida PALM System Transition Team, Florida PALM end users	Administer end user readiness survey and submit data analysis.	In progress, draft created and under review.
People	SOW Drafting and Hiring Activities for Additional FPST resources	03/29/24	FDOT Florida PALM System Transition Team	SOW Drafting and Hiring Activities for Additional FPST resources. March-May 2024.	
People	Statewide IT Meeting PALM presentations	04/30/24	FDOT Florida PALM System Transition Team, Florida PALM End Users	Communicate awareness, status, and guidance of PALM project and paths to remediation.	Shared PALM introductory information and detailed COA guidance with expanded IT personnel at Statewide IT Meeting.
People	Weekly OOC - BSSO Staff Meeting	03/20/24	FDOT FPST Team FDOT PALM End Users	Provide status update on readiness task and remediation status	Met weekly during reporting period
People Processes	Created FDOT Workforce Readiness team	03/20/24	FDOT Florida PALM System Transition Team; FDOT End Users	Conduct workforce related efforts for communication, direction, training, and associated deliverables towards analysis of resources, efforts, and knowledge gaps.	Team led by FDOT Office of Change Management
People Processes	PALM Communications Plan Creation Meetings	04/11/24	FDOT Florida PALM System Transition Team	Review high level communication to be sent to stakeholders, and a communication to districts to identify and update technology assets in Compass system.	Draft version of Communication Plan being finalized and to be reviewed
People Processes	Workforce Readiness Team Monthly Pulse Check Meetings	03/20/24	FDOT Florida PALM System Transition Team; FDOT End Users	Evaluate progress and direction for workforce related efforts toward remediation and preparation for PALM	Met monthly March-May
People Processes Technology	Continue bi-weekly meeting series for Florida PALM RW Tasks Update.	04/12/24	FDOT Florida PALM System Transition Team	Bi-weekly meeting with OOCand OIT program and project managers to assign and review efforts for RW task completion.	Met during reporting period March-May 2024
People Processes Technology	FL PALM Interfaces Weekly Meeting	04/01/24	FDOT Florida PALM System Transition Team	Weekly meeting with vendor, to review work items related to interfaces.	March-May 2024
People Processes Technology	Florida PALM FDOT Touchpoint Agenda Meeting	04/04/24	FDOT Florida PALM System Transition Team	prepare for PALM touchpoint meeting.	March-May 2024
People Processes Technology	Florida PALM Segment III Design Workshops	03/27/24	PALM End Users	Review Segment III Designs from PALM.	3/27-4/4/24.
People Processes Technology	Florida PALM/FDOT touchpoint meeting	03/29/24	FDOT Florida PALM System Transition Team, Florida PALM	This is a recurring monthly Florida PALM Readiness touchpoint meeting between your agency's Change Champion Network (CCN) and your Readiness Coordinator, Felicia Hall. You have been invited to this meeting because your agency has identified you as a Primary or Back-up CCN member to support Florida PALM related activities.	March-May 2024
People Processes Technology	PALM Production Support Round Table Meeting	04/23/24	PALM End Users, Agency Security Access Managers (SAM) and Identity Providers (IDP)	This Round Table will provide an opportunity for Security Access Managers (SAMs) and Identity Providers (IDPs) subject matter experts to meet the Florida PALM Production Support Team, gain insight into their current support roles and ask questions.	Looking forward to future sessions to continue discussion of security handling, management, and auditing of user access in PALM
Processes	Azure DevOps Technical user story review	04/01/24	Subject Matter experts, Florida PALM System Transition Team	Discuss user stories	Regularly conducted for various ABS, such as RPS, CFM, PCM, ARI, and others
Technology	Continued the analysis, planning, and development efforts for the Department's Electronic Estimate Disbursement (EED) system.	03/29/24	FDOT Florida PALM System Transition Team, End Users, SME's	Assess business continuity risks with the current architecture, identify major system dependencies, and inform the assessment of future state solutions to modernize EED.	Weekly EED project meeting series Tuesdays March-May 2024.
Technology	Launch Pad planning and development	04/12/24	FDOT Florida PALM System Transition Team, Florida PALM end users	Location for data packages to be collected and sent to PALM Inbound interfaces.	Planning and development efforts continued March-May 2024.
Technology	RW Task 528 - Update Agency Business System Documentation for Segment III	04/15/24	FDOT Florida PALM System Transition Team	Review Segment III resources; update agency business system documentation including functional requirements, technical requirements, and test cases.	In progress

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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FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Lisa Saliba	lisa.saliba@dot.state.fl.us	05/13/24
January - February 2024	Lisa Saliba	lisa.saliba@dot.state.fl.us	03/11/24
November - December 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	01/12/24
September - October 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	11/12/23
July - August 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	09/07/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Lisa Mustain

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 87.14%

- Submitted Complete = 3
- Submitted Incomplete = 0
- Completed After Submission = 4

RW Task Timeliness



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

RW Task Timeliness:

Score = 94.06%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 4
- Meetings Missed = 3

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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/14/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/04/24**		Submission Complete	05/01/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	05/06/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	05/01/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/04/24**		Submission Complete	05/01/24
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**04/01/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**05/02/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**05/01/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 14

- Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 29

- Related Business Systems = 8
- Related Reports = 51
- **Documentation Status:**

- Complete = 27 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 8

- **Criticality:**

- High = 8 Med = 0 Low = 0 None = 0
- **Documentation Status:**

- Complete = 5 Partial = 2 Not Started = 1

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 48
- Continued Use - No = 17
- **Associated Business Systems = 4**

Implementation:

Impacted Agency Business Processes = 29

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 29 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 16 Medium = 13 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 28 Medium = 1 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 28 Medium = 1 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 9

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 4

• Segment I - Documentation Updates:

- Complete = 1 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

- Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Planned Interfaces = 31

- Inbound Interfaces = 14

- Outbound Interfaces = 16

Cataloged Reports = 63

• Criticality:

- High = 56 Med = 3 Low = 6 None = 2

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 6

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 3 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FGCC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Our configuration workbooks are out of date and there is no set timetable for when they will be refreshed	Open	9 (High/High)	FGCC has requested that our workbooks get refreshed and that we establish a regular schedule to refresh them so that as we make updates to FLAIR the workbooks will also get updated		05/02/24	Rob Stoner
Technology	FGCC is exploring options to acquire a new licensing systems and this system will likely not be complete in time to perform testing with Florida PALM.	Open	6 (High/Medium)	FGCC currently is requesting in FY 24-25, 10 million dollars to provide a licensing solution that will take the place of Versa Regulation. The Palm project and this new application will need to coordinate heavily.	Monthly.	09/11/23	Lisa Mustain, Director of Administration
Technology	The Current State Business Process smartsheet does not have columns for both spreadsheet uploads and PALM Interfaces. Therefore, we do not have the ability to track and report progress for our business systems that may use PALM Interfaces	Open	4 (Medium/Mediu	FGCC has requested that the smartsheets be updated to allow this capability		05/02/24	Rob Stoner
Technology Data	When do not have an estimated time frame of when we will be able to test both upload and download PALM Interfaces	Open	4 (Medium/Mediu	FGCC has asked for an update on when we can expect to be able to test an upload interface file and when we will be able to test a download interface file with our test/conversion data		05/02/24	Rob Stoner
Technology	Conversion Inventory and Data Readiness smartsheet does not allow for us to identify those data types that will have conversion data from both FLAIR and Agency Business systems. Currently, the smartsheet treats the option as one or the other and we anticipate some conversion from both	Open	4 (Medium/Mediu	FGCC has requested that the smartsheet be updated to allow this capability		05/02/24	Rob Stoner
Technology	Conversion Inventory and Data Readiness smartsheet utilizes a column called Agency Maintain Data Source. Due to the fact that each data source requires a date evaluation, cleanliness plan, and data montioring, this column seems to be the same as Agency Business Systems but the smartsheet does not link to the business systems smartsheet.This makes it difficult to identify and track progress associated to data source clean up and business system remediation.	Open	4 (Medium/Mediu	FGCC would like to get clarification on the distinction between an Agency Business System and an Agency Maintained Data Source as well as insight into how to track how data from agency systems that is not in the primary sources gets converted into PALM.		05/02/24	Rob Stoner

FGCC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FGCC lacks the appropriate staffing levels to fully support readiness activities.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	FGCC has requested Administered Funds.	FGCC is recruiting additional staffing.	04/01/24	Brice Kayiranga, Chief of Financial Support Services

FGCC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FGCC will be able to access the available Administered Funds to support readiness activities.	Logged	02/29/24	All agency business systems.	12/14/2023 Update: Appropriation received. 02/29/2024 Update: FGCC is actively recruiting a Project Manager for the implementation of Florida PALM at FGCC. 03/12/2024 Update: FGCC conducted interviews for the Project Manager position during the week of March 8th.
Technology	FGCC will have a replacement for Versa Regulation by PALM go live	Logged	11/13/23	Revenue Management	Ongoing.
Technology	DBPR will continue to update and keep FGCC abreast on any modifications or remediations, if any, of Versa Regulation.	Logged	01/10/24	Revenue Management	Ongoing.
Processes Technology Data	FGCC will establish an agency consolidated financial database that will serve as a single repository for historical FLAIR data as well as ongoing PALM data	Logged	04/11/24	All agency business systems	Ongoing

FGCC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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FGCC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Lisa Mustain	lisa.mustain@flgaming.gov	05/13/24
January - February 2024	Lisa Mustain	brice.kayiranga@flgaming.gov	03/12/24
November - December 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	01/12/24
September - October 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	12/07/23
July - August 2023	Lisa Mustain	lisa.mustain@flgaming.gov	09/11/23

Helpful Links

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

FLHSMV 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

March - April 2024

Agency Sponsor

Steve Burch

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Completeness:

Score = 84.29%

- Submitted Complete = 5
- Submitted Incomplete = 1
- Completed After Submission = 1

RW Task Timeliness



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

RW Task Timeliness:

Score = 93.75%

- Submitted On Time = 25
- Submitted Late = 4
- Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	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.		
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
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	**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	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/02/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/02/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**04/30/24**		Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**	Sponsor confirmation was submitted on 3/8/2024, however, we forgot to update the task tracker to mark this task completed by the due date.		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/26/24**	Met with CCN to discuss any changes to risk, issues, assumptions, and agency specific tasks		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/24/24**	Task has been resubmitted. Attachments were added to each meeting.	Submission Complete	04/29/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress		Submitted Survey to FLAIR Users		
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/07/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Planned Florida PALM End Users = 51

• Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 149

• Related Business Systems = 4

• Related Reports = 53

• Documentation Status:

- Complete = 58 Partial = 20 Not Started = 52

Implementation:

Impacted Agency Business Processes = 149

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 24 Medium = 14 Low = 38 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 22 Medium = 12 Low = 32 None = 10 Uncertain = 0

• Level of Impact: Technology Changes

- High = 18 Medium = 14 Low = 36 None = 7 Uncertain = 0

• Level of Impact: Data Changes

- High = 28 Medium = 11 Low = 37 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 5 In Progress = 68 Complete = 3

Current-State:

Cataloged Business Systems = 6

• Criticality:

- High = 4 Med = 2 Low = 0 None = 0

• Documentation Status:

- Complete = 4 Partial = 2 Not Started = 0

Cataloged Interfaces = 5

- Inbound Interfaces = 3

- Outbound Interfaces = 2

Implementation:

Business Systems Planned for Integration = 2

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Planned Interfaces = 3

- Inbound Interfaces = 0

- Outbound Interfaces = 2

Current-State:

Unique FLAIR Data Elements = 92

• Associated Unique Uses = 155

- Continued Use - Yes = 85

- Continued Use - No = 4

• Associated Business Systems = 3

Cataloged Reports = 165

• Criticality:

- High = 94 Med = 18 Low = 49 None = 23

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FLHSMV Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	HSMV processes large volume of data through its FAME application (Revenue Distribution, WEX, Goodyear, PRIDE, etc.). It is imperative that the interfaces work properly when designed.	Open	3 (High/Low)	HSMV has been working with the Florida PALM team to identify which interface files should be used to send and obtain data between FAME and Florida PALM. HSMV has mapped its current FLAIR interface file to the Florida PALM interface file. HSMV will begin building a new interface file in early 2024 in preparation for interface testing in late 2024.	No change	09/01/23	Steve Burch / Mike Alexander / Nate Seabrooks
Technology	HSMV uses a mainframe application to process Hireback payroll outside of People First. HSMV needs to have the ability to process payments to multiple FHP Troopers for Hireback jobs worked at different hourly rates.	Open	3 (High/Low)	HSMV has met with Florida PALM staff to understand how Hireback pay will be processed. Florida PALM is looking at creating an interface that will be used by HSMV. HSMV is waiting to see the Payroll Business Processes to better understand how Hireback will work.	No change	09/01/23	Mike Alexander / Aquila Franklin

FLHSMV Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	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.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	HSMV will attempt to fill these positions.	Received approval to fill 5 vacancies. Two positions have been filled. Three additional positions have become vacant that have not been approved to be filled. There is one position that is anticipated to be vacant in May 2024 due to staff retirements.	07/01/24	Steve Burch / Mike Alexander

FLHSMV Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	Florida PALM will provide similiar functionality as FLAIR@HSMV	Logged	08/31/23	All Accounting and Budgeting areas of HSMV	HSMV relies heavily on FLAIR@HSMV to query FLAIR data on a daily basis. Without a process to easily query data, it will have a significant impact on HSMV staff.
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	Selected State Agencies, Not for Profit and, local governmental entities.	No Change
Processes	Vouchers will not be produced or required by DFS for auditing purposes. FLHSMV will need to determine how to create vouchers for retention outside of Florida PALM.	Logged	10/31/23	Accounts Payable Section	State Agencies are required to produce vouchers for DFS audit and retain for documenting purposes.

FLHSMV Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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FLHSMV Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Steve Burch	steveburch@flhsmv.gov	05/07/24
January - February 2024	Steve Burch	steveburch@flhsmv.gov	03/08/24
November - December 2023	Steve Burch	steveburch@flhsmv.gov	01/12/24
September - October 2023	Steve Burch	steveburch@flhsmv.gov	11/07/23
July - August 2023	Steve Burch	steveburch@flhsmv.gov	09/08/23

Helpful Links

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

FSDB 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

March - April 2024

Agency Sponsor

Tracie Snow

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 44.44%

- Submitted Complete = 4
- Submitted Incomplete = 5
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 97.5%

- Submitted On Time = 27
- Submitted Late = 3
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 4
- Meetings Missed = 3

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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**04/10/24**	We will not need agency specific configurations	Submission Incomplete	05/10/24
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/03/24**	Our agency data is FLAIR and is ready	Submission Incomplete	05/10/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/03/24**	We use FLAIR directly and do not have agency interfaces	Submission Incomplete	05/10/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/03/24**	We use FLAIR directly and do not have agency interfaces	Submission Incomplete	05/10/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/03/24**	We do not have any specific document conversion needs	Submission Incomplete	05/10/24
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/03/24**	We use FLAIR directly and do not have agency interfaces	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**04/03/24**	NA- We do not use interfaces to FLAIR and will not need them for PALM	Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**04/03/24**	Agency sponsor will review upon return from vacation		
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/03/24**	We are ready to use PALM when it is available		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/17/24**	Shared with Agency Sponsor, stakeholders, end users	Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/15/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 11

- Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 7

- Related Business Systems = 1
- Related Reports = 65
- **Documentation Status:**

- Complete = 7 Partial = 0 Not Started = 0

Technology

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

Current-State:

Cataloged Business Systems = 1

- **Criticality:**

- High = 0 Med = 0 Low = 0 None = 1
- **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 47
- Continued Use - No = 1
- **Associated Business Systems = 1**

Implementation:

Impacted Agency Business Processes = 7

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 7 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 7 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 7 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 7 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 7

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Cataloged Reports = 64

• Criticality:

- High = 42 Med = 24 Low = 0 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 7

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 7 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FSDB Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	Loss of FLAIR EO field	Open	4 (Medium/Medi	Mitigation seems unlikely since PALM will not have an equivalent EO field that we used for grant reporting. Some off system method of tracking data for reporting will be needed.	NA	01/30/24	J wester
Processes	Loss of On Demand payments	Open	4 (Medium/Medi	It is unknown what can take the place of on demand payments.	NA	01/30/24	J wester

FSDB Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FSDB Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

FSDB Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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FSDB Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Tracie C. Snow	snowt@fsdbk12.org	05/15/24
January - February 2024	Tracie C. Snow	snowt@fsdbk12.org	03/18/24
November - December 2023	Tracie C. Snow	snowt@fsdbk12.org	01/10/24
September - October 2023	John Wester for Tracie Snow	westerj@fsdbk12.org	11/14/23
September - October 2023	Tracie C. Snow	snowt@fsdbk12.org	11/14/23
July - August 2023	Tracie C. Snow	snowt@fsdbk12.org	09/07/23

Helpful Links

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

FWC 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

March - April 2024

Agency Sponsor

Jessica Crawford

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 100.00%

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

RW Task Timeliness



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

RW Task Timeliness:

Score = 95.31%

- Submitted On Time = 28
- Submitted Late = 0
- Pending Submission = 2

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	**328**	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		We are done with current agency business process documentation associated with Segments 1, 2, and 3. We are currently targeting May 31st to have Segment 4 complete.		
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/10/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		We expect to have our data cleansing associated with Assets done by end of May and the Grants cleanup done by August		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**02/23/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/06/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/29/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/15/24**		Submission Complete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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				
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	**05/07/24**	We do not have any agency business systems associated with Segment 3, they are all in 1, 2, and 4.		
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	**05/08/24**			
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	**05/07/24**	We do not have any agency business systems associated with Segment 3, they are all in 1, 2, and 4. As a result, we have no interfaces for Segment 3.		
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/08/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	50% - In Progress				

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Planned Florida PALM End Users = 945

• Business Process Groupings = 5/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 114

• Related Business Systems = 3

• Related Reports = 3

• Documentation Status:

- Complete = 40 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 114

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 5 Medium = 0 Low = 26 None = 8 Uncertain = 0

• Level of Impact: Processes Changes

- High = 8 Medium = 12 Low = 10 None = 8 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 8 Low = 23 None = 8 Uncertain = 0

• Level of Impact: Data Changes

- High = 2 Medium = 22 Low = 7 None = 8 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 38

Current-State:

Cataloged Business Systems = 11

• Criticality:

- High = 6 Med = 4 Low = 0 None = 1

• Documentation Status:

- Complete = 11 Partial = 0 Not Started = 0

Cataloged Interfaces = 8

- Inbound Interfaces = 8

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 7

• Segment I - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 6 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 2

- Inbound Interfaces = -1

- Outbound Interfaces = 2

Current-State:

Unique FLAIR Data Elements = 113

• Associated Unique Uses = 750

- Continued Use - Yes = 700

- Continued Use - No = 0

• Associated Business Systems = 34

Cataloged Reports = 41

• Criticality:

- High = 32 Med = 8 Low = 1 None = 2

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 6

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

FWC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Limited subject matter expert (SME) availability	Open	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	No change	11/06/23	Laurie Kershaw
People	Team Attrition	Open	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	No change	11/06/23	Laurie Kershaw
People	Resistance to change	Open	4 (Medium/Mediu	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact	No change	11/06/23	Laurie Kershaw
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FWC is unable to accurately define impacts to our systems without complete specifications on the interfaces.	Open	4 (Medium/Mediu	1. FWC Analysis and design is being based on calculated assumptions	We reduce the risk rating on this item since most of the interfaces have been designed.	11/06/23	Laurie Kershaw

FWC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FWC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FWC will be able to access the available Administered funds	Logged	07/03/23	All agency business systems	No change

FWC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology	Verbally update SLT and ELT	03/01/24	Florida PALM users	Verbally update SLT and ELT	Complete
People Processes Technology	Send summary email to SLT and ELT	03/01/24	Florida PALM users	Send summary email to SLT and ELT	Complete
People Processes Technology	Send participants survey email	03/04/24	Florida PALM users	Send participants survey email	Complete
People Processes Technology	Complete Workforce Gap Analysis Survey	03/20/24	Florida PALM users	Complete Workforce Gap Analysis Survey	Complete
People Processes Technology	Send email reminder to all surveyees	03/11/24	Florida PALM users	Send email reminder to all surveyees	Complete
People Processes Technology	Send email reminder to surveyees, SLT, ELT, BLT, FMT	03/18/24	Florida PALM users	Send email reminder to surveyees, SLT, ELT, BLT, FMT	Complete
People Processes Technology	**Complete Task 513 Complete Configuration Workbooks for Segments I and II**	04/12/24	Florida PALM users	Complete Task 513 Complete Configuration Workbooks for Segments I and II	In Process

People Processes Technology	Commitment Control	03/05/24	Florida PALM users	Commitment Control	Complete
People Processes Technology	Discuss at FMT meeting	03/04/24	Florida PALM users	Discuss at FMT meeting	Complete
People Processes Technology	Update decision in Smartsheet	03/05/24	Florida PALM users	Update decision in Smartsheet	Complete
People Processes Technology	Asset Management	03/27/24	Florida PALM users	Asset Management	In Process
People Processes Technology	Perform initial cleanup on the FWC Location Definition worksheet	03/15/24	Florida PALM users	Perform initial cleanup on the FWC Location Definition worksheet	Complete
People Processes Technology	Perform a status check on initial cleanup of the FWC Location Definition worksheet	03/08/24	Florida PALM users	Perform a status check on initial cleanup of the FWC Location Definition worksheet	Complete
People Processes Technology	Determine if FWC Area ID will be utilized	03/18/24	Florida PALM users	Determine if FWC Area ID will be utilized	Complete
People Processes Technology	Finalize FWC Location Definition worksheet	03/29/24	Florida PALM users	Finalize FWC Location Definition worksheet	In Process
People Processes Technology	Update FWC Area ID Values, if applicable	04/12/24	Florida PALM users	Update FWC Area ID Values, if applicable	Complete
People Processes Technology	General Ledger	03/15/24	Florida PALM users	General Ledger	In Process
People Processes Technology	Update FWC Organization workbook	03/15/24	Florida PALM users	Update FWC Organization workbook	In Process
People Processes Technology	Update FWC Budgetary Value Combination Edit workbook	03/29/24	Florida PALM users	Update FWC Budgetary Value Combination Edit workbook	In Process
People Processes Technology	Update FWC Other Accumulator 1 (OA1) workbook	03/26/24	Florida PALM users	Update FWC Other Accumulator 1 (OA1) workbook	Complete
People Processes Technology	Update FWC Other Accumulator 2 (OA2) workbook	03/26/24	Florida PALM users	Update FWC Other Accumulator 2 (OA2) workbook	Complete
People Processes Technology	Accounts Receivable	03/26/24	Florida PALM users	Accounts Receivable	In Process
People Processes Technology	Update FWC Distribution Code	04/05/24	Florida PALM users	Update FWC Distribution Code	In Process
People Processes Technology	**Complete Task 514 Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II**	04/11/24	Florida PALM users	Complete Task 514 Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	In Process
People Processes Technology	Identify obsolete, incomplete, or inaccurate property data	03/06/24	Florida PALM users	Identify obsolete, incomplete, or inaccurate property data	In Process
People Processes Technology	Review Property Master File and identify duplicate entries, missing information, and inconsistencies	03/20/24	Florida PALM users	Review Property Master File and identify duplicate entries, missing information, and inconsistencies	In Process
People Processes Technology	Develop plan to remove duplicate entries	03/25/24	Florida PALM users	Develop plan to remove duplicate entries	In Process
People Processes Technology	Identify missing data and determine the impact on inventory accuracy	03/28/24	Florida PALM users	Identify missing data and determine the impact on inventory accuracy	In Process
People Processes Technology	Implement strategies to fill in missing data through manual entry or mass upload	04/02/24	Florida PALM users	Implement strategies to fill in missing data through manual entry or mass upload	In Process
People Processes Technology	Establish consistent naming conventions and formats for Location and description fields	04/08/24	Florida PALM users	Establish consistent naming conventions and formats for Location and description fields	Not Started
People Processes Technology	Train users responsible for maintaining the asset inventory on data entry standards	04/09/24	Florida PALM users	Train users responsible for maintaining the asset inventory on data entry standards	Not Started
People Processes Technology	Provide guidelines for updating and verifying data regularly	04/10/24	Florida PALM users	Provide guidelines for updating and verifying data regularly	Not Started
People Processes Technology	Conduct spot checks and sampling to verify accuracy in order to maintain data through conversion process	04/11/24	Florida PALM users	Conduct spot checks and sampling to verify accuracy in order to maintain data through conversion process	Not Started
People Processes Technology	GMC001 - Grants Conversion	03/01/24	Florida PALM users	GMC001 - Grants Conversion	In Process
People Processes Technology	Create a data cleansing plan for GMC001 - Grants Conversion	03/01/24	Florida PALM users	Create a data cleansing plan for GMC001 - Grants Conversion	Complete
People Processes Technology	Task Due	04/12/24	Florida PALM users	Task Due	Not Started
People Processes Technology	**Complete Task 515 Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II**	04/12/24	Florida PALM users	Complete Task 515 Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	Complete
People Processes Technology	Meeting to identify business processes	03/08/24	Florida PALM users	Meeting to identify business processes	Complete
People Processes Technology	Segment 1	03/08/24	Florida PALM users	Segment 1	Complete
People Processes Technology	10.1 Set up and Maintain Chart of Accounts - Update business process documentation	03/08/24	Florida PALM users	10.1 Set up and Maintain Chart of Accounts - Update business process documentation	Complete
People Processes Technology	20.1 Enter and Process Budget Journals - Update business process documentation	03/08/24	Florida PALM users	20.1 Enter and Process Budget Journals - Update business process documentation	Complete
People Processes Technology	30.3 Enter and Process Vouchers - Update business process documentation	03/08/24	Florida PALM users	30.3 Enter and Process Vouchers - Update business process documentation	Complete

Technology					
People Processes Technology	Segment 2	03/08/24	Florida PALM users	Segment 2	Complete
People Processes Technology	10.2 Enter and Process Journals - Update business process documentation	03/08/24	Florida PALM users	10.2 Enter and Process Journals - Update business process documentation	Complete
People Processes Technology	30.2 Establish and Maintain Encumbrances - Update business process documentation	03/08/24	Florida PALM users	30.2 Establish and Maintain Encumbrances - Update business process documentation	Complete
People Processes Technology	30.4 Process Payments - Update business process documentation	03/08/24	Florida PALM users	30.4 Process Payments - Update business process documentation	Complete
People Processes Technology	30.5 Manage Payments - Update business process documentation	03/08/24	Florida PALM users	30.5 Manage Payments - Update business process documentation	Complete
People Processes Technology	40.1 Acquire and Set Up Assets - Update business process documentation	03/08/24	Florida PALM users	40.1 Acquire and Set Up Assets - Update business process documentation	Complete
People Processes Technology	40.3 Set Up and Maintain Asset Controls - Update business process documentation	03/08/24	Florida PALM users	40.3 Set Up and Maintain Asset Controls - Update business process documentation	Complete
People Processes Technology	60.2 Deposit and Apply Receipts - Update business process documentation	03/08/24	Florida PALM users	60.2 Deposit and Apply Receipts - Update business process documentation	Complete
People Processes Technology	90.2 Create and Maintain Grants - Update business process documentation	03/08/24	Florida PALM users	90.2 Create and Maintain Grants - Update business process documentation	Complete
People Processes Technology	90.3 Create and Maintain Contracts - Update business process documentation	03/08/24	Florida PALM users	90.3 Create and Maintain Contracts - Update business process documentation	Complete
People Processes Technology	Mark Task Complete in Smartsheet	04/10/24	Florida PALM users	Mark Task Complete in Smartsheet	Complete
People Processes Technology	Task Due	04/12/24	Florida PALM users	Task Due	Complete
People Processes Technology	**Complete Task 516 Update Agency Business System Documentation for Segment II**	04/12/24	Florida PALM users	Complete Task 516 Update Agency Business System Documentation for Segment II	Complete
People Processes Technology	Complete Grant Cost Sheet documentation updates	03/29/24	Florida PALM users	Complete Grant Cost Sheet documentation updates	Complete
People Processes Technology	Update FMTS information, if needed	03/15/24	Florida PALM users	Update FMTS information, if needed	Complete
People Processes Technology	Meeting to Update RMS	03/04/24	Florida PALM users	Meeting to Update RMS	Complete
People Processes Technology	Meeting to Update CLS & GOF	03/04/24	Florida PALM users	Meeting to Update CLS & GOF	Complete
People Processes Technology	Mark task complete in Smartsheet	03/05/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Task Due	04/12/24	Florida PALM users	Task Due	Complete
People Processes Technology	**Complete Task 518 Update Florida PALM Interface Inventory for Segment II**	03/29/24	Florida PALM users	Complete Task 518 Update Florida PALM Interface Inventory for Segment II	Complete
People Processes Technology	Complete Grant Cost Sheet documentation updates	03/29/24	Florida PALM users	Complete Grant Cost Sheet documentation updates	Complete
People Processes Technology	Meeting to Update RMS	03/04/24	Florida PALM users	Meeting to Update RMS	Complete
People Processes Technology	Meeting to Update CLS & GOF	03/04/24	Florida PALM users	Meeting to Update CLS & GOF	Complete
People Processes Technology	Mark task complete in Smartsheet	03/05/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Business team to provide OIT clarifying requirements for voucher system	03/29/24	Florida PALM users	Business team to provide OIT clarifying requirements for voucher system	Complete
People Processes Technology	**Complete Task 521 Submit Bimonthly Agency Readiness Status Report**	03/11/24	Florida PALM users	Complete Task 521 Submit Bimonthly Agency Readiness Status Report	Complete
People Processes Technology	Update Smartsheet	03/06/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Sign Smartsheet	03/08/24	Florida PALM users	Sign Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	03/11/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	**Complete Task 522 Manage Agency Specific Implementation Schedule, Risks and Issues**	03/01/24	Florida PALM users	Complete Task 522 Manage Agency Specific Implementation Schedule, Risks and Issues	Complete
People Processes Technology	Update Smartsheet	03/01/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	04/29/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	**Complete Task 523 Share Florida PALM Updates**	04/08/24	Florida PALM users	Complete Task 523 Share Florida PALM Updates	Complete
People Processes Technology	Task Assigned	04/08/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Provide Updates	04/09/24	Florida PALM users	Provide Updates	Complete

People Processes Technology	Mark task complete in Smartsheet	04/15/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Task Due	04/19/24	Florida PALM users	Task Due	Complete
People Processes Technology	**Complete Task 524 Complete and Submit End User Readiness Survey Analysis**	04/15/24	Florida PALM users	Complete Task 524 Complete and Submit End User Readiness Survey Analysis	In Process
People Processes Technology	Task Assigned	04/15/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Provide Numerical Analysis to Hunter	04/15/24	Florida PALM users	Provide Numerical Analysis to Hunter	Complete
People Processes Technology	Provide Response Analysis to Hunter	04/17/24	Florida PALM users	Provide Response Analysis to Hunter	Complete
People Processes Technology	Determine if additional surveys need to be sent	04/24/24	Florida PALM users	Determine if additional surveys need to be sent	In Process
People Processes Technology	**Complete Task 526 Complete Data Readiness Analysis and Data Cleansing Activities for Segment III**	04/29/24	Florida PALM users	Complete Task 526 Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	In Process
People Processes Technology	Task Assigned	04/29/24	Florida PALM users	Task Assigned	Completed
People Processes Technology	Evaluate the readiness of the current data, within the primary source systems and the agency business system, if applicable	04/29/24	Florida PALM users	Evaluate the readiness of the current data, within the primary source systems and the agency business system, if applicable	In Process
People Processes Technology	**Complete Task 527 Identify Change Impacts and Update Agency Business Process Documentation for Segment III**	04/15/24	Florida PALM users	Complete Task 527 Identify Change Impacts and Update Agency Business Process Documentation for Segment III	In Process
People Processes Technology	Task Assigned	04/15/24	Florida PALM users	Task Assigned	Completed
People Processes Technology	**Complete Task 528 Update Agency Business System Documentation for Segment III**	04/15/24	Florida PALM users	Complete Task 528 Update Agency Business System Documentation for Segment III	Completed
People Processes Technology	Task Assigned	04/15/24	Florida PALM users	Task Assigned	Completed
People Processes Technology	Review Agency Business System Documentation Associated with Segment 3	04/16/24	Florida PALM users	Review Agency Business System Documentation Associated with Segment 3	Completed
People Processes Technology	Update Smartsheet	04/17/24	Florida PALM users	Update Smartsheet	Completed
People Processes Technology	**Complete Task 529 – Update Florida PALM Conversion Inventory for Segment 3**	04/29/24	Florida PALM users	Complete Task 529 – Update Florida PALM Conversion Inventory for Segment 3	In Process
People Processes Technology	Task Assigned	04/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	APC001 – Suppliers (Tanya/Rachel)	04/30/24	Florida PALM users	APC001 – Suppliers (Tanya/Rachel)	In Process
People Processes Technology	ARC002 – Open Accounts Receivable (Erik)	04/30/24	Florida PALM users	ARC002 – Open Accounts Receivable (Erik)	In Process
People Processes Technology	CTC001 – Contracts (Rachel)	04/30/24	Florida PALM users	CTC001 – Contracts (Rachel)	In Process
People Processes Technology	**Complete Task 530 Update Florida PALM Interface Inventory for Segment III**	04/15/24	Florida PALM users	Complete Task 530 Update Florida PALM Interface Inventory for Segment III	Completed
People Processes Technology	Task Assigned	04/15/24	Florida PALM users	Task Assigned	Completed
People Processes Technology	Review Agency Business System Documentation Associated with Segment 3	04/16/24	Florida PALM users	Review Agency Business System Documentation Associated with Segment 3	Completed
People Processes Technology	**Complete Task 531 Remediate Agency Business Systems based on Segment II**	04/29/24	Florida PALM users	Complete Task 531 Remediate Agency Business Systems based on Segment II	In Process
People Processes Technology	Task Assigned	04/29/24	Florida PALM users	Task Assigned	Completed
People Processes Technology	Remediate CLS	04/30/24	Florida PALM users	Remediate CLS	In Process
People Processes Technology	Remediate GOF	04/30/24	Florida PALM users	Remediate GOF	In Process
People Processes Technology	Remediate RMS	04/30/24	Florida PALM users	Remediate RMS	In Process
People Processes Technology	Remediate RATS	04/30/24	Florida PALM users	Remediate RATS	In Process
People Processes Technology	Remediate Property	04/30/24	Florida PALM users	Remediate Property	In Process

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:
March - April 2024	Jessica Crawford	jessica.crawford@myfwc.com	05/08/24
January - February 2024	Jessica Crawford	jessica.crawford@myfwc.com	03/06/24
November - December 2023	Jessica Crawford	jessica.crawford@myfwc.com	01/08/24
September - October 2023	Jessica Crawford	jessica.crawford@myfwc.com	11/08/23
July - August 2023	Jessica Crawford	laurie.kershaw@myfwc.com	09/08/23

Helpful Links

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

JAC 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

March - April 2024

Agency Sponsor

Alton L. "Rip" Colvin, Jr.

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Completeness:

Score = 50.00%

- Submitted Complete = 2
- Submitted Incomplete = 2
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 73.75%

- Submitted On Time = 17
- Submitted Late = 10
- Pending Submission = 3

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	**328**	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		04/30/2024 Anticipate that this task will be complete by 08/01/2024		
Indirect	People	**512**	Identify Future Florida PALM End Users	01/16/24	03/01/24	Pending Resubmission	**04/30/24**		Submission Incomplete	
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission		05/13/2024 - Done except for Org Codes		
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**05/02/24**	submitted 4/30/2024		
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Will begin working on this task on 05/14/2024		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	There were no Segment II activities which affect our Interface Inventory	Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**	There we no Segment II activities which affect our Interface Inventory	Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/11/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/25/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Incomplete	05/13/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/03/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Planned Florida PALM End Users = 236

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 121

• Related Business Systems = 4

• Related Reports = 21

• Documentation Status:

- Complete = 8 Partial = 73 Not Started = 26

Implementation:

Impacted Agency Business Processes = 121

• Related Business Process Groupings = 6

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Current-State:

Cataloged Business Systems = 10

• Criticality:

- High = 8 Med = 1 Low = 0 None = 1

• Documentation Status:

- Complete = 7 Partial = 0 Not Started = 1

Cataloged Interfaces = 5

- Inbound Interfaces = 4

- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 9

• Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 7

• Segment II - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 6

Planned Interfaces = 5

- Inbound Interfaces = 2

- Outbound Interfaces = 3

Current-State:

Unique FLAIR Data Elements = 97

• Associated Unique Uses = 97

- Continued Use - Yes = 68

- Continued Use - No = 1

• Associated Business Systems = 5

Cataloged Reports = 142

• Criticality:

- High = 57 Med = 63 Low = 26 None = 1

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 1 Not Started = 8

Conversions & Data Readiness

• Conversions Needed = 1

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 0 Not Started = 0 Not Applicable 1

Reports = TBD

Agency Reported

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

JAC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Low acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	Mitigate: The agency is preparing a change management plan. Additionally, the agency has started a series of meetings to involve the JROs and keep them informed of the project progress and current status.	The JAC met with all JROs between March 6 and April 12.	04/29/24	Rip Colvin, Executive Director
Data	The access to data must be segregated by each Judicial-Related Office (JRO) to ensure that JROs can only see their information. This is critical to protect indigent defendants' rights and the defense's trial strategies.	Open	6 (High/Medium)	Transfer: The agency has been discussing mitigation options with the PALM team.	We had an excellent meeting with the Florida PALM team on 02/19/2024. We believe they understand our concerns and will work toward a resultion.	04/29/24	Rip Colvin, Executive Director
People	Availability of staff to work on the project/Limited qualified staff	Open	6 (High/Medium)	Mitigate: The agency is looking at ways to supplement current staff.	The agency has 5 Technical Writers working. We plan on adding additional staff to assist in completing other tasks.	04/29/24	JAC Directors
Processes Technology	Delays in PALM information will create delays in remediating our processes	Open	6 (High/Medium)	Accept: The agency will continue to monitor information received	No new comments	04/29/24	JAC Directors
People Processes Technology Data	Funding insufficient for project costs	Open	6 (High/Medium)	Mitigate: The agency will continue to look at projected costs and request needed funding	The legislature granted our FY 2024-2025 request in the GAA. We continue to be mindful of funding needs. We will prepare an LBR for FY 2025-26	04/29/24	Rip Colvin, Executive Director
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	Mitigate: The agency is initiating discussions with internal partners to create a new org code structure with a goal of implementing on July 1, 2025	The JAC has almost finalized our org code plan.	04/29/24	Dina Kamen
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	3 (High/Low)	Avoid: The agency needs to engage the business system vendor to discuss new chartfields once the agency has additional technical information	The JAC has formed a PALM/BOMS Advisory Council. This Council will be the go-between for this effort. A liaison has been appointed.	04/29/24	Kathy LaCorte
People Processes	Replacement or major upgrade of PeopleFirst involving the same team members as the PALM Project	Open	3 (High/Low)	Mitigate: The agency will review all available information regarding this potential new contract and then plan accordingly.	No new comments	04/29/24	Jamie Johnson
Data	Data my not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	Avoid; The agency is preparing a plan for Data Cleansing	The agency plans on hiring an OPS to perform data cleanins	04/29/24	Nona McCall
Processes	Downtime during transition	Open	2 (Medium/Low)	Mitigate: The agency will create a plan to minimize this risk such as front loading work in December 2025.	Item to create a plan added to the Agency's Implementation Plan for August 2025.	04/29/24	Dina Kamen and Jamie Johnson
Data	Data may not be sufficiently cleansed at go-live due to the JACs inability to adjust FLAIR records which are no longer active in FLAIR. DFS manages these records, and there is not guidance on how DFS will eliminate these records prior to go-live.	Open	2 (Medium/Low)	Transfer: The agency will continue to discuss this issue with DFS staff and react to their guidance	DFS has begun to remediate.	04/29/24	Nona McCall
Processes	PALM fails to integrate properly with other state-owned systems such as PeopleFirst, STMS, and PCard Works	Open	2 (Medium/Low)	Accept: The agency will continue to monitor information being received from the PALM team and other agencies.	No new comments	04/29/24	Nona McCall

JAC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

JAC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will have sufficient funding in FY 2023-2024 and receive funds via the LBR process for FY 2024-2025.	Logged	09/01/23	All processes and systems	The FY 2024-25 amended LBR request was included in the GAA. We are hopefully that this amount will be sufficient to cover FY 2024-25 costs.
People Processes Technology	Program governance will provide timely decisions and issue resolution	Logged	11/13/23	All stakeholders	The agency continues to monitor those decisions for which we need more information
People Processes Technology Data	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 delay	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project. Additionally, the agency is looking into acquiring contracted or OPS staff to assist with the workload
People Processes Technology Data	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project.

JAC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	Meeting to create a plan for overdue tasks	03/07/24	CCN	Create a plan to get caught up on our PALM tasks	
People Processes Data	Meeting with Technical Writers	03/19/24	SME's	To provide updates on the status of the project	
People Processes Data	Monthly Touchpoint Meeting	03/22/24	CCN	To discuss IT and interfaces.	
People Processes Data	Discussion with Executive Director	03/27/24	CCN	Discuss observations from the 6 regional workshops and activities that might be done in the future	
People Processes Data	Meeting with Technical Writers	04/08/24	SME's	To discuss our progress and project what it will take to finish this project.	
People Processes Data	JAC Action Items Meeting	04/11/24	CCN, SME's	Create a plan to get caught up with JAC's Readiness Coordinator (Dora)	
People Processes Data	Status of Tasks Meeting	04/23/24	CCN & Directors	To discuss the status of delinquent Tasks with Dora	
People Processes Data	Meeting with Technical Writer	04/26/24	SME's	Discuss Technical Writers expectations of JAC staff	
People Processes Technology Data	Brief Executive Director	03/19/24	CCN including the ED	Brief Executive Director on Budget and other items	
People Processes Technology Data	PALM Workshop	03/21/24	JRO's	To provide the JRO's in the Orlando area information regarding PALM	
People Processes Technology Data	PALM/BOMS Advisory Council First Meeting	04/09/24	CCN, JAC Financial Staff, CIP	Create an PALM/BOM Advisory Council; Elect a Chair; Adopt a Charter; plan how to bring CIP into the PALM project	
People Processes Technology Data	CCN Meeting	04/29/24	CCN	To discuss Risks and Issues for the bi-monthly report	
People	Webinar	03/18/24	Project Management Liaison	Learn about organizational change	
People Processes	Finalized PowerPoint for JRO meetings	03/05/24	CCN	Final readiness for JRP meetings	
People Processes	PALM Workshop	03/06/24	JRO Northern FL Staff	Communicate PALM updates to future end users	
People Processes	PALM Workshop	03/11/24	JRO SW Florida Staff	Communicate PALM updates to future end users	
People Processes	PALM Workshop	03/13/24	JRO East Coast Florida Staff	Communicate PALM updates to future end users	
People Processes	PALM Workshop	03/14/24	JRO SE Florida Staff	Communicate PALM updates to future end users	
People Processes	PALM Workshop	03/20/24	JRO NE Florida Staff	Communicate PALM updates to future end users	
People Processes	PALM Workshop	03/21/24	JRO Orlando Area Staff	Communicate PALM updates to future end users	
People Processes	Meeting with Technical Writers	04/01/24	SME's	To discuss our progress and project what it will take to finish this project.	
People Processes	Virtual Workshop	04/12/24	JRO Staff	Present workshop via Zoom to JRO staff who were not able to attend in-person workshops	
People Processes Technology	Advisory Council Meeting	04/16/24	JAC Financial staff, CIP	To discuss further the role of the Advisory Council	
People Processes Technology	Advisory Council Meeting	04/19/24	CIP & BOMS	Second meeting same week for Advisory Council	
People Technology	Meeting with Technical Writers	04/11/24	TW's	To discuss the issues with Citrix, Zoom & any other software/apps	
People Technology	Meeting with the Technical Writers	04/23/24	SME's	Information exchange with the Technical Writers	
Processes	Discuss creating a RAID Log	03/28/24	CCN	Discuss whether creating a RAID log would benefit the JAC	

Processes	On-Board three additional Technical Writers	04/15/24	SME's	On-board new Technical Writers to speed up the documentation process	

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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JAC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	05/03/24
January - February 2024	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/11/24
November - December 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	01/11/24
September - October 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	11/13/23
July - August 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	09/11/23

Helpful Links

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

LEG 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

March - April 2024

Agency Sponsor

Lisa Swindle

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 80.00%

- Submitted Complete = 4
- Submitted Incomplete = 1
- Completed After Submission = 0

RW Task Timeliness



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

RW Task Timeliness:

Score = 90.63%

- Submitted On Time = 22
- Submitted Late = 7
- Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 11
- Meetings Missed = 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**03/25/24**	Ongoing. Leg team will continue its efforts in ensuring the requirements of this task is complete prior to conversion. We hope to provide an anticipated completion date ASAP		05/13/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Ongoing. Leg team is currently reviewing and updating our business processes and related impacts. Updates will be reported accordingly		
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**	Ongoing. Leg team continues to monitor and evaluate data cleaning activities and will continue to update our progress throughout this process	Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/11/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/04/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/22/24**	Internal meeting held on 4/22/2024 - updates made to Risks & Issues and Workforce Readiness Plan.		
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	Pending Resubmission	**04/18/24**	Regular meetings are being held in accordance with the Workforce Readiness Plan to keep all Leg Stakeholders updated on project progress.	Submission Incomplete	
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/15/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Planned Florida PALM End Users = 54

• Business Process Groupings = 10/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 119

• Related Business Systems = 13

• Related Reports = 24

• Documentation Status:

- Complete = 119 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 119

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 2

• Level of Impact: People Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Current-State:

Cataloged Business Systems = 17

• Criticality:

- High = 10 Med = 1 Low = 1 None = 1

• Documentation Status:

- Complete = 12 Partial = 1 Not Started = 0

Cataloged Interfaces = 9

- Inbound Interfaces = 3

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 7

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7

Planned Interfaces = 2

- Inbound Interfaces = -2

- Outbound Interfaces = 2

Current-State:

Unique FLAIR Data Elements = 136

• Associated Unique Uses = 143

- Continued Use - Yes = 14

- Continued Use - No = 0

• Associated Business Systems = 14

Cataloged Reports = 77

• Criticality:

- High = 42 Med = 23 Low = 6 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 1

• Agency Data Outside of Primary Source System(s) = 0

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 1 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

LEG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not posses, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hirer F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

LEG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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 Notice | Report Abuse

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Brendan Jones	jones.brendan@leg.state.fl.us	05/15/24
January - February 2024	Lisa Swindle	mentillo.mike@leg.state.fl.us	03/04/24
November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	01/12/24
September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	11/09/23
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23

Helpful Links

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

PSC 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

March - April 2024

Agency Sponsor

Apryl Lynn

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 9
- Vacant Role = 2

RW Task Completeness



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

RW Task Completeness:

Score = 83.75%

- Submitted Complete = 5
- Submitted Incomplete = 1
- Completed After Submission = 2

RW Task Timeliness



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

RW Task Timeliness:

Score = 94.38%

- Submitted On Time = 21
- Submitted Late = 9
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 2
- Meetings Missed = 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	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/08/24**		Submission Complete	05/08/24
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	04/30/24
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	04/12/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/10/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	**04/29/24**		Submission Complete	
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/12/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/29/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**	FL PALM communication was sent to stakeholders. The communication was initially attached to task tracker on 4/19/2024, but should have been attached to workbook, which was done 4/30/2024. Waiting for PALM to take out of incomplete status.	Submission Incomplete	05/08/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/08/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 10/13

Role Mapping = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 13

- Related Business Systems = 0
- Related Reports = 1

Technology

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

Current-State:

Cataloged Business Systems = 5

- **Criticality:**

- High = 0 Med = 1 Low = 0 None = 4

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**

- Continued Use - Yes = 11

Training = TBD

- **Documentation Status:**

- Complete = 13 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 13

- Related Business Process Groupings = 6

- Planned Spreadsheet Uploads = 0

- **Level of Impact: People Changes**

- High = 0 Medium = 0 Low = 10 None = 0 Uncertain = 0

- **Level of Impact: Processes Changes**

- High = 0 Medium = 0 Low = 10 None = 0 Uncertain = 0

- **Level of Impact: Technology Changes**

- High = 0 Medium = 0 Low = 2 None = 8 Uncertain = 0

- **Level of Impact: Data Changes**

- High = 0 Medium = 0 Low = 0 None = 10 Uncertain = 0

- **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete = 10

- **Documentation Status:**

- Complete = 3 Partial = 1 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

- **Segment I - Documentation Updates:**

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

- **Segment II - Documentation Updates:**

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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

- Continued Use - No = 37

- **Associated Business Systems = 3**

Cataloged Reports = 10

- **Criticality:**

- High = 6 Med = 2 Low = 2 None = 0

Implementation:

Configuration Workbooks

- **Segments I & II**

- Started = 3 Not Started = 6

Conversions & Data Readiness

- Conversions Needed = 2

- Agency Data Outside of Primary Source System(s) = 0

- **Data Readiness/Cleansing Status:**

- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

PSC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Training and understanding how to work in FL PALM	Open	4 (Medium/Mediu	Will determine as we get closer to the finished product.	January	01/22/24	Katisha Mobley
Technology	Updating any agency business systems that we enter FLAIR data into	Open	4 (Medium/Mediu	Will determine as we get closer to the finished product.	January	01/22/24	Katisha Mobley

PSC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

PSC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

PSC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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PSC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Apryl Lynn	alynn@psc.state.fl.us	05/08/24
January - February 2024	Apryl Lynn	alynn@psc.state.fl.us	03/11/24
November - December 2023	Apryl Lynn	alynn@psc.state.fl.us	12/27/23
September - October 2023	Apryl Lynn	alynn@psc.state.fl.us	11/20/23
September - October 2023	Katisha Mobley	kmobley@psc.state.fl.us	11/13/23
July - August 2023	Katisha Mobley	kmobley@psc.state.fl.us	09/11/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- 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

March - April 2024

Agency Sponsor

Eric Maclure

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 15
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness



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

RW Task Completeness:

Score = 92.86%

- Submitted Complete = 4
- Submitted Incomplete = 0
- Completed After Submission = 3

RW Task Timeliness



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

RW Task Timeliness:

Score = 96.56%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Submission = 0

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Data	**513**	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	Data	**514**	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Processes	**515**	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	05/03/24
N/A	Technology	**516**	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	05/03/24
Indirect	Technology	**517**	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
Indirect	Technology	**518**	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	**04/12/24**		Submission Complete	
N/A	Technology	**519**	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	**521**	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	**03/06/24**			
N/A	N/A	**522**	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	**04/30/24**			
N/A	People	**523**	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	**04/19/24**		Submission Complete	05/03/24
N/A	People	**524**	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
N/A	Data	**526**	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	**527**	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	**528**	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	**529**	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					
Indirect	Technology	**530**	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24					
N/A	Technology	**531**	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24					
N/A	N/A	**532**	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	**05/13/24**			
N/A	N/A	**533**	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24					

People

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

Implementation:

Planned Florida PALM End Users = 115

- Business Process Groupings = 13/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 32

- Related Business Systems = 5
- Related Reports = 32
- **Documentation Status:**

Technology

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

Current-State:

Cataloged Business Systems = 5

- **Criticality:**

- High = 3 Med = 2 Low = 0 None = 0

- **Documentation Status:**

Data

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

Current-State:

Unique FLAIR Data Elements = 72

- **Associated Unique Uses = 72**

- Continued Use - Yes = 48

- Continued Use - No = 0

- Complete = 31 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 32

• Related Business Process Groupings = 11

- Planned Spreadsheet Uploads = 3

• Level of Impact: People Changes

- High = 0 Medium = 3 Low = 15 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 7 Low = 11 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 7 Low = 11 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 0 Low = 17 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 18

- Complete = 5 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 4

• Segment I - Documentation Updates:

- Complete = 0 Updating = 2 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 6

- Inbound Interfaces = 0

- Outbound Interfaces = 3

• Associated Business Systems = 6

Cataloged Reports = 48

• Criticality:

- High = 3 Med = 27 Low = 6 None = 9

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

SCS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Allocation to Object Code, State Courts does not allocate to the Object Code level. This would be a severe impact to the Legislative Branch. Not only our process would be hugely impacted but also our need for additional FTE	Open	9 (High/High)	We have verbalized to FL PALM the impact of this proposed change to the Legislative Brance. We are waiting for updates on the proposed design			Budget
Processes	Warrant cancellation, On Demand and Salary refunds.	Open	9 (High/High)	We do not use			Human Resources
People	Additional/adequate human resources for accounting roles	Open	6 (Medium/High)	Prepare LBR to request additional funding or FTE. Cross train employees to asume different work responsibilities.	This was discussed during our last touchpoint meeting 12/12/23	12/12/23	Finance & Accounting Chief and Budget Cheif
Technology Data	Data conversion integrity	Open	6 (High/Medium)	Working with PALM to see what resources will be provided to the agencies.	This was discussed during our 12/12/23 Touch Point meeting that we need assistance to convert our ORG Code listings.	12/13/23	F&A, OIT and HR
Technology	Purchasing of new services and acquiring additional resources	Open	4 (Medium/Mediu	Looking for the appropriate products and services	Funding was received and resources are being identified to prioritize spending.	12/15/23	OIT/Technical Liasian
People	Training for all stakeholders at deployment.	Open	4 (Medium/Mediu	We will take advantage of all available training provided by PALM. Update our process and procedures			Finance & Accounting
Processes	Proper documentation of current processes and procedures.	Open	2 (Medium/Low)	In the process of updating and documenting all our processes.	Processes were updated to complete FL PALM TASK 328	11/30/23	SCS
People Technology Data	Our Agency planned to develop a cloud environment for remediating the Transaction History, Payroll, and Contracts/Tracker applications; however this has been delayed due resource allocation needs.	Open	2 (Medium/Low)	Training for employees to use the new development/Cloud environment. We will need to be monitored for best practice to train and implement this tool to help us remediate our business systems.			OIT
People	Ongoing Communication about project	Open	1 (Low/Low)	Working on a communication plan. Task 523 has required us to document our communications. We are increasing our communication efforts.	Planned bi-monthly SCS communication beginning 2024. Intranet updates. As PALM implementation comes closer, we will create a mass communication SCS campaign.		Finance & Accounting
Technology Data	Business system development and integration	Open	1 (Low/Low)	We develop as best as possible			Finance & Accounting, OIT

SCS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Data conversion with our ORG Code Listing to COA	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	As soon as possible, we will begin the conversion process from FLAIR Accounts to COA	This was discussed with Readiness coordinator to see what recourse	12/12/23	Finance & Accounting
Processes Data	SCS does not utilize HRIS for timesheet reporting, this apart of the payroll life cycle in PALM	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request our attendance and reporting software (ARS) to interface with PALM for reporting time and attendance			Human Resources
Processes Data	HRIS payroll reports not utilized to send data to PALM	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Request payroll reports for SCS to be generated - LWOP, missing timesheet reports, over and under payment report			Human Resources
Processes	Entering OPS paper timesheets, Shift and On-call payments into People First manually in the Alternate Time Entry screen	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Request approval for OPS employees be allowed to use the HRIS system to submit timesheets.			Human Resources

Processes	LWOP entered as Unpaid hours in Alternate Time Entry screen when notified timely	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We are still trying to figure out how this change will affect us. We are anticipating updates from FL PALM			Human Resources
People Processes Technology Data	We have built our Business (Invoice Management System) to interface with FLAIR with a batch upload file. We have not tested this output extract due to a MOU yet to be provided by DFS.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We will follow up with DFS to get an MOU signed so we can move forward with testing.			OIT and Finance and Accounting
People Technology	Our Agency planned to develop a cloud environment for remediating the Transaction History, Payroll, and Contracts/Tracker applications; however this has been delayed due resource allocation needs.	Open	Low - All impacts not listed as Critical or High	Havining resources availableto build the			OIT

SCS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	Additional One-Time Payment function in HRIS will function the same	Logged		Separating, retiring, DROP entry, Overtime recipients	

SCS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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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SCS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Eric W. Maclure, State	macluree@flcourts.org	05/10/24
January - February 2024	Eric W. Maclure, Interim	macluree@flcourts.org	03/06/24
November - December 2023	Eric W. Maclure, Interim	macluree@flcourts.org	12/28/23
September - October 2023	Eric W. Maclure, Interim	macluree@flcourts.org	11/13/23
July - August 2023	Carlington Brown	brownd@flcourts.org	09/12/23