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	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation

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

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

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

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

Change Champion Network:

• Unique Filled Role = 7

• Duplicate Filled Role = 4

• Vacant Role = 3

RW Task Completeness:

Score = 85.71%

• Submitted Complete = 6

• Submitted Incomplete = 0

• Completed After Submission = 1

RW Task Timeliness:

Score = 99.38%

• Submitted On Time = 28

• Submitted Late = 2

• Pending Submission = 0

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	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation:	**Current-State:**	**Current-State:**	**Current-State:**
Planned Florida PALM End Users = 87	Cataloged Business Processes = 60	Cataloged Business Systems = 12	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

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

Critical Operational Elements	Risk Description	Status	Impact	Solution/Mitigation	Reporting Period Comments or Updates	Date	Impacted Stakeholder(s) and/or System(s)
					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 Data	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** *

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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