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

Reporting Period

March - April 2025

Agency Sponsor

Christine Marion

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 89.35%

• Submitted On Time = 19

• Submitted Late = 12

• Pending Resubmission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 95.08%

• Submitted On Time = 47

• Submitted Late = 15

• Pending Resubmission = 4

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 82.00%

• Submitted Complete = 19

• Submitted Incomplete = 2

• Completed After Submission = 9

Other Task Completeness

Other Task Completeness:

Score = 73.06%

• Submitted Complete = 22

• Submitted Incomplete = 7

• Completed After Submission = 7

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

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

Change Champion Network:

• Unique Filled Role = 5

• Duplicate Filled Role = 9

• Vacant Role = 0

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

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25			Due to budget constraints and the pending changes to Florida PALM's schedule, Citrus is delaying starting remediation efforts until May 2025.		
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	Pending Resubmission	04/16/25		Submission Incomplete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25					
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		Citrus anticipates this task to be delayed to match the new timeline.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/17/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/17/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/17/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	50% - In Progress				
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25	PALM Status update provided to Citrus Commission in public meeting 3/26/25. Weekly touchpoint meetings held for status updates.	Submission Incomplete	05/12/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25					

Direct	Data	**571**	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25				

<table>
<tr><th>People</th><th>Processes</th><th>Technology</th><th>Data</th></tr>
<tr>
<td>The staff and stakeholders affected by your agency's transition to Florida PALM.</td>
<td>The sequence of procedures to accomplish a business objective.</td>
<td>The applications or tools used to process, track, or report on financial operations.</td>
<td>Information used in or produced from an agency's financial business operations.</td>
</tr>
</table>

People

Implementation:

Planned Florida PALM End Users = 9

• Business Process Groupings = 11/13

Identified Subject Matter Experts = 6

Processes

Implementation:

Impacted Agency Business Processes = 32

• Related Business Process Groupings = 9/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 2

Planned Interfaces = 12

- Inbound Interfaces = 0

- Outbound Interfaces = 12

Data

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #2: Groupings

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• **Org Security Rule = Agencywide**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• **Optional Conversions**

- Accounts Receivable = Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Not Needed

- Grants = Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

CITRUS Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	02/28/25		Staffing/Resource Availability	Funding Alignment	Decreasing	9 (High/High)	Certain Readiness Tasks are delayed until remediation can be accomplished. It is anticipated that Citrus will be able to complete these tasks by Fall 2025.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	02/28/25		Deployment/Cutover	Design Misalignment	Stable	9 (High/High)	Citrus is working to resolve the reporting issues we anticipate through the use of interfaces from PALM.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	02/28/25		Business Process Change	Foreign Currency Transactions	Stable	6 (Medium/High)	Citrus is working with Treasury and CFO's office to identify possible solutions. Still to be identified is method for reporting foreign currency payments in FACTS.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	09/19/23		Staffing/Resource Availability	New IT Staff	Decreasing	2 (Low/Medium)	IT staff is quickly coming up to speed with Citrus business systems and the needs going forward with the implementation of PALM. More meetings/workshops targeted to the technical liaisons would be beneficial.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.

CITRUS Issues

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

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People	The leadership of the Department of Citrus will support the project by providing resources, access to systems and stakeholders, and by supporting the organizational change management strategy created by the project team.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes Technology	The Legislature will appropriate and timely release General Revenue funding for contracted services for Agency support of the PALM project and those resources are available to perform the work assigned to them as scheduled.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Assumption transferred from archived sheet.
People Processes Technology Data	The timeline of the project is subject to the independent DFS Florida PALM project and all key milestones and transition dates are provided by the larger PALM Project.	Logged	05/12/25	PALM Project Team, Citrus Accounting Dept, CCN's	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	Citrus business process owners will provide input for necessary process mapping efforts with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Technology	Citrus business system owners will provide requirements for necessary system modifications with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	Citrus project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet project milestones.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
Technology	Citrus stakeholders have a clear understanding of the benefits and limitations of low-code development and are supportive of its implementation.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Technology	The project team has access to relevant documentation, specifications, and knowledge about the legacy systems and their data structures.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	The DFS Florida PALM project team will provide a PALM UAT environment to all CCN members, SMEs, and End Users prior to go-live. The Department will be given sufficient time to test and practice critical transactions before go-live in this dedicated testing environment.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Assumption transferred from archived sheet.
People Processes	The DFS Florida PALM project will provide key information identifying the functionality, business processes, and timeline	Logged	08/30/24	PALM Project Team, Citrus Accounting Dept, CCN's	Assumption transferred from archived sheet.

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

CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Christine Marion	cmarion@citrus.myflorida.com	05/12/25
January - February 2025	Christine Marion	cmarion@citrus.myflorida.com	03/03/25