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DOH Status Report Dashboard

Reporting Period

March - April 2025

Agency Sponsor

Robert Herron

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 100%

Submitted On Time = 35

Submitted Late = 0

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 85.71%

Submitted Complete = 18

Submitted Incomplete = 0

Completed After Submission = 17

Other Task Completeness:

Score = 87.38%

Submitted Complete = 29

Submitted Incomplete = 2

Completed After Submission = 11

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

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

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

Change Champion Network:

Unique Filled Role = 16

Duplicate Filled Role = 0

Vacant Role = 0

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

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

								3) Coding to reflect and make changes has started but will not complete by 03/14 (Task end date)*		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/21/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	01/16/25		Submission Complete	01/16/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/12/25		Submission Complete	
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					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25	Updated 2 records per Dora's email.	Submission Complete	03/20/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/21/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/05/25	Updated the Mitigation and If Impact becomes an issue column. These columns were not required at the initial submission.	Submission Complete	05/08/25
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/06/25		Submission Complete	05/06/25
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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: Planned Florida PALM End Users = 457 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 14	Implementation: Impacted Agency Business Processes = 62 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 3	Implementation: Business Systems Planned for Integration = 53 Planned Interfaces = 132 - Inbound Interfaces = 30 - Outbound Interfaces = 102	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #3: Family - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not 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 = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = 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.

DOH 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	04/22/25		Agency Business System	Awaiting confirmation and finalized configurations, conversions, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Stable	9 (High/High)	We are creating DOH's FDW	Discussed in the COR meeting conducted on April 29, 2027

Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Decreasing	9 (High/High)	DOH is reading all the available information on knowledge center to understand Payroll changes.	Discussed in the COR meeting conducted on April 29, 2028
Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Stable	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	Discussed in the COR meeting conducted on April 29, 2029
Open and Monitoring	04/22/25		Business Process Change	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Stable	9 (High/High)	DOH will wait for the Organization codes to be set up by DFS	The volume of Organizational code changes and additions for DOH is rather large and may put stress on DFS resources.
Open and Monitoring	04/22/25		Training User Acceptance Testing	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Increasing	9 (High/High)	DOH resources will attend the in-person trainings	Discussed in the COR meeting conducted on April 29, 2029
Open and Monitoring	04/22/25		Business Process Change	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Increasing	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability. DOH resources are also reviewing current Grants reports start to end again.	Discussed in the COR meeting conducted on April 29, 2030
Open and Monitoring	04/22/25		Business Process Change	PALM eliminating the IBI field for DOH	Stable	9 (High/High)	DOH is working on a work-around to address this issue.	Discussed in the COR meeting conducted on April 29, 2031
Open and Monitoring	04/22/25		Post Implementation	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Stable	9 (High/High)	DOH will await the changes in policies and procedures	Discussed in the COR meeting conducted on April 29, 2033
Open and Monitoring	04/22/25		Business Process Change	"Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in May - June 2026 when PRP is to process in July 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between May-June 2026 when we go to PALM July 2026? • If only the balances are rolling over to PALM, then what about the voucher details? This is specific for Payroll Reallocation, but this will be true for all Vouchers."	Stable	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	Discussed in the COR meeting conducted on April 29, 2034
Open and Monitoring	04/22/25		Business Process Change	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management	Stable	9 (High/High)	DOH will await the changes in policies and procedures	Discussed in the COR meeting conducted on April 29, 2035

				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.				
Open and Monitoring	04/22/25		Interface Deployment/Cutover	Missing or Incomplete information - Clear understanding and instructions from the Project team to the agency to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.	Stable	9 (High/High)	DOH is in constant touch with the Readiness Coordinator to understand / clarify instructions	Discussed in the COR meeting conducted on April 29, 2036
Open and Monitoring	04/22/25		Deployment/Cutover	PALM Go-Live planned during hurricane season	Increasing	9 (High/High)	This may cause possible delays to Go-Live	Discussed in the COR meeting conducted on April 29, 2037
Open and Monitoring	04/22/25		Interface Conversion/Configuration	DOH PALM ABS are required to create test data (Agency Business Systems need more than the 5 rows of data provided by PALM), we could miss scenarios during testing. The sample data provided in the interface files is not accurate.	Increasing	9 (High/High)	DOH is converting a couple of months of old data	Discussed in the COR meeting conducted on April 29, 2038
Open and Monitoring	04/22/25		Staffing/Resource Availability	Go-Live is planned at Year End, this will not give enough time for DOH staff to complete Year end activities, PALM Testing, and completing various activities for Go-Live.	Increasing	9 (High/High)	DOH SMEs will struggle to make time for year-end activities as well as PALM testing and various Go-Live tasks.	Discussed in the COR meeting conducted on April 29, 2039
Open and Monitoring	04/22/25		Training User Acceptance Testing	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Increasing	6 (High/Medium)	DOH is working on creating Foundational trainings and involved in UAT Pre-requisite meetings with DFS team.	Discussed in the COR meeting conducted on April 29, 2026
Open and Monitoring	04/22/25		Training	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.	Stable	6 (High/Medium)	DOH training team is currently working on metrics to create a UAT plan to manage trainings for all PALM users.	Discussed in the COR meeting conducted on April 29, 2032
Open and Monitoring	04/07/25		Business Process Change Training User Acceptance Testing	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Increasing	3 (High/Low)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in August 2025. Upon delivery of this we will remove the risk.	Discussed in the COR meeting conducted on April 29, 2025

DOH 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
Open	05/01/25		High - Impacts the ability	Training	Changes to PALM website, PALM tasks, and the Interface files: Our agency is taking a lot of effort to educate and train technical and non-technical staff. Constant changes disrupts processes and it takes time to find the same information and retrain staff. For e.g., DOH staff got used to receiving emails for Interface and Report updates, now we have	Resources will check PALM site and Change Log every week	06/30/26	Discussed in the CORE meeting conducted on April 29, 2025

2 or 3 resources who
will check the Change
Log every so often

DOH 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 Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	05/01/25	DOH Finance and Accounting	Discussed in the CORE meeting conducted on April 29, 2025
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	05/01/25	DOH PALM Project team	Discussed in the CORE meeting conducted on April 29, 2026
People Processes Technology Data	Enterprise entities like AG/G's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period	Logged	05/01/25	DOH Finance and Accounting	Discussed in the CORE meeting conducted on April 29, 2027

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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DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Robert Herron	robert.herron@flhealth.gov	05/02/25
January - February 2025	Robert Herron	robert.herron@flhealth.gov	03/06/25