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Dawn Hanson

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

• 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 = 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.

EOG 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	10/31/23		Deployment/Cutover Staffing/Resource Availability	Limited Staff	Stable	9 (High/High)	EOG will monitor transactions and will use UAT for training.	No Additional comments.
Open and Monitoring	02/17/25		Post Implementation Staffing/Resource Availability Training	Limited Staff - Timing	Stable	9 (High/High)	The EOG will monitor staff workload, and will utilize UAT as a training period.	No Additional comments.
Open and Mitigating	12/31/24		Business Process Change Post Implementation	DEM - Separation General	Stable	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. System configuration will be tested during UAT to determine what will be policy or procedure driven changes vs. what will require additional PALM knowledge or staff resources.	No Additional comments.
Open and Monitoring	08/23/24		Business Process Change Post Implementation	DEM - Separation InterUnit Transactions	Stable	6 (Medium/High)	The EOG has reported the issue and made suggestions to FL PALM as potential solutions. EOG will document errors (should they occur) to the project during UAT.	No Additional comments.
Open and Mitigating	06/06/24		Training	Nomenclature	Stable	6 (Medium/High)	The EOG will work to highlight terminology/naming differences and provide documents to mitigate risk of confusion.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Role Mapping Staffing/Resource Availability	Limited Staff - Roles and Workflow	Stable	6 (High/Medium)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals. DFS policies will most likely still require the spreadsheet upload to be reviewed and approved prior to upload. While this may mitigate some risks, the transactions will still bottleneck to one or two	No Additional comments.

							employees knowledgeable in the specific transactions.	
Open and Mitigating	06/06/24		Business Process Change Post Implementation	DEM - Separation Warrant Management	Stable	6 (High/Medium)	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. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Staffing/Resource Availability Training	Limited Staff - Processing Changes	Stable	2 (Medium/Low)	The EOG will monitor staff workload and will utilized UAT as a training period for all staff. EOG will monitor reports and instructional/policy documents provided by the Department of Financial Services and the FL PALM team.	No Additional comments.
Open and Monitoring	10/31/23		Post Implementation Training User Acceptance Testing	Statewide System Revisions/	Stable	2 (Medium/Low)	EOG will monitor all tasks and attempt to report issues to all relevant parties.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Training	Attachments	Stable	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 Additional comments.

EOG 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

EOG 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	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	04/18/25	Administrative Services	Originally logged 10/31/2023 - no change. This is still a valid assumption.	
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	04/18/25	Administrative Services	Last update to this assumption was 1/23/2024 - no change. This is still a valid assumption.	
People Processes Technology Data	EOG assumes that ALL transactions and functions will be available for User Acceptance Testing to allow for full learning opportunities will prior to system go-live.	Logged	04/18/25	Administrative Services	No additional comments.	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

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