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CITRUS Status Report Dashboard

Reporting Period

May - June 2026

Agency Sponsor

Shannon Shepp

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 90%

Submitted On Time = 35

Submitted Late = 14

Pending Submission = 2

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 84.38%

Submitted Complete = 34

Submitted Incomplete = 5

Completed After Submission = 9

Other Task Completeness:

Score = 72.88%

Submitted Complete = 49

Submitted Incomplete = 17

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
Indirect	People	688	Update UAT Plan	12/08/25	01/09/26	Pending Resubmission	01/09/26		Task Closed - Submission Incomplete	
N/A	People	607	Update Training Plan	04/06/26	06/05/26	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	713	Confirm Supplier Records	04/20/26	05/22/26	100% - Submitted	05/21/26		Submission Complete	
Direct	Data	698	Complete Data Cleansing in Preparation for Dry Run 2	04/20/26	06/17/26	25% - Beginning Initial Internal Meetings and Information Gathering		6/19 FH: NOT SUBMITTED/ TASK CLOSED		
N/A	N/A	677	Submit Bimonthly Agency Readiness Status Report	05/01/26	05/11/26	100% - Submitted	05/11/26		Submission Complete	
Indirect	N/A	678	Submit Monthly Progress Report - Testing, Training	05/01/26	05/29/26	100% - Submitted	06/01/26		Task Closed - Submission Incomplete	
Indirect	Data	699	Maintain Configuration and Conversion Workbooks	05/01/26	05/29/26	Pending Resubmission	05/29/26		Submission Incomplete	
Indirect	People	700	Maintain Role Mapping Worksheet	05/01/26	05/29/26	Pending Resubmission	05/29/26		Submission Incomplete	
N/A	Processes	602	Update Agency Business Process Documentation	05/04/26	10/30/26	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	604	Create Agency-Specific Learning Materials to Support End Users	05/04/26	10/30/26	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	701	Submit Configuration and Conversion Workbooks	06/01/26	06/17/26	100% - Submitted	06/17/26		Submission Complete	
Direct	People	702	Submit Role Mapping Worksheet	06/01/26	06/26/26	100% - Submitted	06/26/26		Submission Complete	
Indirect	N/A	679	Submit Monthly Progress Report - Testing, Training	06/01/26	06/30/26	75% - Consolidating/Inputting Information for Submission	07/07/26		Task Closed - Submission Incomplete	
Indirect	N/A	619	Update Agency Readiness Certification #3	06/22/26	07/10/26	50% - In Progress				
Indirect	Technology	586	Create Agency Deployment Plan and Cutover Checklist to Prepare for Go-Live	06/29/26	09/11/26	50% - In Progress				
N/A	N/A	680	Submit Bimonthly Agency Readiness Status Report	07/01/26	07/10/26	100% - Submitted	07/08/26			
Indirect	N/A	681	Submit Monthly Progress Report - Testing, Training, Cutover	07/01/26	07/31/26	50% - In Progress				
Indirect	Data	703	Maintain Configuration and Conversion Workbooks	07/01/26	07/31/26	50% - In Progress				
Indirect	People	704	Maintain Role Mapping Worksheet	07/01/26	08/21/26	50% - In Progress				

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	Primary Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments
Open and Monitoring	02/28/25		Business Process Change	Design Misalignment	Stable	9 (High/High)	Florida PALM designs fail to take into account the reporting and business needs of the agencies, requiring each agency to develop alternative solutions to meet their existing business needs currently met by FLAIR.	Citrus is working to resolve the reporting issues we anticipate through the use of interfaces from PALM.	Lack of reporting to our governing body.	This risk is still valid for the reporting period.
Open and Monitoring	03/10/26		Role Mapping	Separation of Duties	Stable	9 (High/High)	Citrus has a smaller staff than is possible to use role mapping to establish separation of duties.	Citrus will develop a plan for compensating controls and submit it to A&A for approval by 6/26/26.	Possible audit findings. Issues using Florida PALM.	This risk is still valid for the reporting period.
Open and Monitoring	02/28/25		Business Process Change	Foreign Currency Transactions	Stable	6 (Medium/High)	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).	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.	If the issues is not resolved, information in FACTS could be incomplete/inaccurate.	This risk is still valid for the reporting period.
Open and Monitoring	02/28/25		Staffing/Resource Availability	Funding Alignment	Decreasing	3 (High/Low)	The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed.	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.	This is a risk we re monitoring, and we do not anticipate it becoming an issue.	This risk is still valid for the reporting period.

CITRUS Issues										
Status	Date Opened	Date Closed	Priority	Primary Issue Category	Issue Title	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments	

CITRUS Assumptions										
Critical Operational Elements		Assumption			Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)		Reporting Period Comments for May - June 2026	
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		This assumption is still valid for the reporting period.	
People	Processes	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		This assumption is still valid for the reporting period.	
People	Processes	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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
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		This assumption is still valid for the reporting period.	
People	Processes	The DFS 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	08/30/24	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	
Processes	Technology	The DFS Florida PALM project team will provide a reporting solution at go-live to support the business needs of the Department.			Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	
Processes	Data	The DFS Florida PALM project team will provide information regarding the data fields to support all Chart of Accounts values Citrus currently uses (such as OCA's).			Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	
Technology		The DFS Florida PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.			Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	
People		The DFS Florida PALM project team will provide both in-person, on-line, and recorded training for CCN's, SMEs, and all accounting staff.			Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	
People	Processes	Key tasks, such as user maintenance, vendor maintenance, vendor payment registration, etc. will be done outside of PALM in their respective enterprise systems, e.g. AOD, STMS, VIP, etc.			Logged	02/09/24	PALM Project Team, Citrus Accounting Dept, CCN's		This assumption is still valid for the reporting period.	

Agency Sponsor Confirmation

Fields marked with an asterisk (*) are required.

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:
May - June 2026	Shannon Shepp	sshepp@citrus.myflorida.com	07/08/26
March - April 2026	Rosa Walsh	rwalsh@citrus.myflorida.com	05/11/26
January - February 2026	Rosa Walsh	rwalsh@citrus.myflorida.com	03/10/26