

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for FSDB](#)
[Readiness Workplan](#)

FSDB Status Report Dashboard

Reporting Period

May - June 2026

Agency Sponsor

Tracie Snow

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



Direct Impact Task Timeliness:

Score = 95.4%

Submitted On Time = 42

Submitted Late = 8

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.24%

Submitted On Time = 76

Submitted Late = 25

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:

Score = 76.00%

Submitted Complete = 30

Submitted Incomplete = 8

Completed After Submission = 12

Other Task Completeness



Other Task Completeness:

Score = 81.51%

Submitted Complete = 48

Submitted Incomplete = 10

Completed After Submission = 15

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:

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

- Unique Filled Role = 5
- Duplicate Filled Role = 10
- 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	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	01/09/26	Pending Resubmission	09/12/25	Stories uploaded	Task Closed - Submission Incomplete	12/19/25	
Indirect	People	688	Update UAT Plan	12/08/25	01/09/26	Pending Resubmission	01/07/26		Task Closed - Submission Incomplete		
N/A	People	607	Update Training Plan	04/06/26	06/05/26	100% - Submitted	06/03/26	Version II and supplement files	Submission Incomplete	06/17/26	
Direct	Data	713	Confirm Supplier Records	04/20/26	05/22/26	100% - Submitted	04/23/26	Confirmed	Submission Complete	05/05/26	
Direct	Data	698	Complete Data Cleansing in Preparation for Dry Run 2	04/20/26	06/17/26	Pending Resubmission	06/17/26		Submission Incomplete		
N/A	N/A	677	Submit Bimonthly Agency Readiness Status Report	05/01/26	05/11/26	100% - Submitted	05/15/26		Task Closed - Submission Incomplete		
Indirect	N/A	678	Submit Monthly Progress Report - Testing, Training	05/01/26	05/29/26	100% - Submitted	05/29/26		Task Closed - Submission Incomplete	06/03/26	
Indirect	Data	699	Maintain Configuration and Conversion Workbooks	05/01/26	05/29/26	100% - Submitted	05/29/26		Submission Complete		
Indirect	People	700	Maintain Role Mapping Worksheet	05/01/26	05/29/26	100% - Submitted	05/29/26		Submission Complete		
N/A	Processes	602	Update Agency Business Process Documentation	05/04/26	10/30/26	25% - Beginning Initial Internal Meetings and Information Gathering		Most documents are SOP drawn directly from the FLAIR manuals, we have not yet had a need for PALM specific SOPs.			
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		We do not have agency business systems so training material is that provided by PALM in the Knowledge Center, Learning Materials Matrix, and LMS.			
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	06/17/26		Submission Complete		
Indirect	N/A	679	Submit Monthly Progress Report - Testing, Training	06/01/26	06/30/26	100% - Submitted	06/25/26	Waiting for sponsor to signoff	Submission Complete	06/30/26	
Indirect	N/A	619	Update Agency Readiness Certification #3	06/22/26	07/10/26	100% - Submitted	07/08/26				
Indirect	Technology	586	Create Agency Deployment Plan and Cutover Checklist to Prepare for Go-Live	06/29/26	09/11/26						
N/A	N/A	680	Submit Bimonthly Agency Readiness Status Report	07/01/26	07/10/26	100% - Submitted	07/08/26			07/09/26	
Indirect	N/A	681	Submit Monthly Progress Report - Testing, Training, Cutover	07/01/26	07/31/26						
Indirect	Data	703	Maintain Configuration and Conversion Workbooks	07/01/26	07/31/26						
Indirect	People	704	Maintain Role Mapping Worksheet	07/01/26	08/21/26						

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.

FSDB 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	06/02/25		Conversion/Configuration	Local fund loss	Increasing	9 (High/High)	Local funds hold over \$36.0 million dollars in donations. PALM has proposed eliminating these local funds which will remove them from the CAFR. and Agency GL.	DFS A&A proposes to combine local funds into the GR funds as a solution, separated by a unique speed key.	Commingling of funds for different purposes is not a good idea as proposed. Maintaining a local fund apart from other funds is the real solution.	No update
Open and Monitoring	11/12/25		Conversion/Configuration	Missing Admin Fund	Increasing	9 (High/High)	Admin Fund 4890-20-2-021007 is missing from dropdown tabs	We will need the Admin Fund to be present in PALM to be able to transfer between State funds.	Loss of the Admin fund will make temporary inter State fund transfers difficult to track.	No update
Open and Monitoring	01/30/24		Conversion/Configuration	Loss of EO field	Stable	6 (Medium/High)	Mitigation seems unlikely since PALM will not have an EO field that is used for grant reporting.	None as of yet	Loss of consistent grant reporting	No update
Open and Monitoring	01/30/24		Conversion/Configuration	Loss of on demand payments	Stable	6 (Medium/High)	It is unknown what can take place of on demand payments	None as of yet	Inability to create on demand payments	No update
Open and Monitoring	03/13/26		Conversion/Configuration	Review of the error file for assets in Mock 4 identified missing room numbers needed to conduct annual inventory.	Increasing	6 (Medium/High)	Mock 4 testing revealed that tangible asset locations are not transferring	PALM has the capability to data parse asset data to import room locations into PALM	Annual tangible asset inventory will be hampered by not knowing which room the tangible items were in last time as a starting point.	PALM IT will not import room numbers from FLAIR so they will have to be manually input for over 4 thousand assets.
Open and Monitoring	03/13/26		Conversion/Configuration	Review of the error file for assets in Mock 4 identified that some older buildings did not transfer to PALM that should have.	Increasing	6 (Medium/High)	Mock 4 testing revealed that some buildings and associated asset dollars are not transferring to PALM	PALM needs to transfer all assets and associated dollars to ensure a paper loss to the state does not occur on go live day for PALM.	Some assets of the State of Florida will go missing if not transferred correctly.	PALM IT reports that historical funds no longer in use are causing the error. A solution is to update the fund to a current use fund but that will cause a loss of historical data.
Open and Monitoring	04/22/26		Conversion/Configuration	Trial Balance Reports	Increasing	4 (Medium/Medium)	The Standard Trial Balance reports in PALM do not track with those in FLAIR.	Within PALM reports are unreliable at this stage. PALM must resolve and provide useful reports.	We need accurate trial balance reports to be able to produce accurate financial statements.	No update
Open and Monitoring	06/03/26		Conversion/Configuration	More than half of land assets are not converting into PALM	Increasing	4 (Medium/Medium)	AMR069, Detailed Asset Listing is missing data and reports over \$1Billion in net book value for FSDB	Within PALM reports are unreliable at this stage. PALM must resolve and provide useful reports.	We need accurate trial balance reports to be able to produce accurate financial statements.	PALM IT is working on it

FSDB Issues									
Status	Date Opened	Date Closed	Priority	Primary Issue Category	Issue Title	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments
Open	06/02/25		High - Impacts the at	Conversion/Configuration	Local fund	PALM proposes to eliminate local fund 20-8-082109, 20-8-84301, and 71-8-084209 which collectively hold over \$33.3 million dollars in Agency managed donations owned by the State. These local funds have been authorized and in use for well over 20 years and are needed to manage received donations. We expect them to be active in PALM.	PALM must convert these funds when converting from FLAIR to avoid the loss of \$33.3 million dollars from State assets not being reported in the CAFR.	During conversion	No update
Open	01/30/24		High - Impacts the at	Conversion/Configuration	Loss of OCA/EO fields	Use of FLAIR OCA/EO fields are more effective than speedkeys and help collect data in a more cohesive manner.	None likely	None planned	No update
Open	01/30/24		High - Impacts the at	Conversion/Configuration	Loss of on demand payments	It is unknown what can take place of on demand payments	No replacement evident	None planned	No update
Open	11/12/25		High - Impacts the at	Conversion/Configuration	Administrative fund is missing in workbooks.	DFS directed us to use the Admin fund to hold the local funds dollars during conversion	Absent the Admin fund, we have no place to co-locate the Endowment funds in during conversion.	None planned	No update
Open	10/01/25		High - Impacts the at	Conversion/Configuration	Grant fields are missing from FACTS extract and cannot be updated.	Available grant fields in PALM are not current resulting is most missing that are already in FACTS.	RC is pursuing PALM tech staff on uploading the most current data extract from FACTS.	TBD	No update
Open	04/22/26		High - Impacts the at	Conversion/Configuration	PALM standard Trial Balance reports do not track with FLAIR reports.	Review of the within PALM trial balance reports indicates it is not yet tracking with FLAIR.	PALM IT is reviewing	TBD	No update
Open	06/03/26		High - Impacts the at	Conversion/Configuration	More than half of land assets are not converting into PALM	Review of report AMR069 reveals that material amounts of land assets are not converting to PALM.	PALM IT is reviewing	TBD	PALM IT is working
Open	03/13/26		Low - All impacts not	Conversion/Configuration	Assets are not loading	Review of the error file	PALM IT is reviewing	TBD	PALM IT will not load room

					with room numbers in PALM	for assets in Mock 4 identified missing room numbers needed to conduct annual inventory.			numbers from FLAIR. We will have to do it manually.
Open	03/13/26		Low - All impacts not	Conversion/Configuration	Some older buildings are not loading into PALM	Review of the error file for assets in Mock 4 identified that some older buildings did not transfer to PALM that should have.	PALM IT is reviewing	TBD	PALM IT states the fund in the asset entry is not valid which is causing the error. FSDB funds that have been inactivated over time are the source. The presumed correction is to use a current fund in the asset card to overcome the error which would cause a loss of historical data.

FSDB Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for May - June 2026	

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

[Privacy Policy](#) | [Report Abuse](#)

FSDB Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2026	Tracie C. Snow	snowt@fsdbk12.org	07/09/26
March - April 2026	Tracie C. Snow	snowt@fsdbk12.org	05/15/26
January - February 2026	Tracie C. Snow	snowt@fsdbk12.org	03/10/26