

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for DOH
- Readiness Workplan

DOH Status Report Dashboard

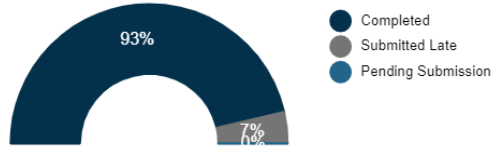
Reporting Period

November - December 2023

Agency Sponsor

Robert Herron

Readiness Workplan Tasks



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

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 13
- Submitted Late = 1
- Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/01/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/13/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/08/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/13/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/13/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/10/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/10/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	11/06/23	
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	11/20/23	Reviewed the Payroll process and workflow with HR on October 9, 2023
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/10/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/10/24	Reviewed and Updated

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Processes

The sequence of procedures to accomplish a business objective.

Technology

The applications or tools used to process, track, or report on financial operations.

Data

Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 0



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

Participation:

- Meetings Attended = 4
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 62

- Related Business Systems = 10
- Related Reports = 27
- Documentation Status:**
- Complete = 62 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 58

- Criticality:**
- High = 58 Med = 0 Low = 0 None = 0
- Documentation Status:**
- Complete = 58 Partial = 0 Not Started = 0

Cataloged Interfaces = 39

- Inbound Interfaces = 21
- Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 50

- Segment I - Documentation Updates:**
- Complete = 50 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

- Segment II - Documentation Updates:**
- TBD

- Segment III - Documentation Updates:**
- TBD

- Segment IV - Documentation Updates:**
- TBD

Planned Interfaces = 10

- Inbound Interfaces = 3
- Outbound Interfaces = 5
- Spreadsheet Uploads = 2

Current-State:

Unique FLAIR Data Elements = 629

- Associated Unique Uses = 646**
- Continued Use - Yes = 0
- Continued Use - No = 0
- Associated Business Systems = 1**
- Cataloged Reports = 653**
- Criticality:**
- High = 947 Med = 0 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

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

DOH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	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.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.	N/A	02/14/22	PALM & DOH
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.	N/A	02/14/22	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in June-July 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.	N/A	07/19/23	PALM & DOH
Processes	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.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information.	N/A	08/11/23	PALM & DOH
Processes	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.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	N/A	08/16/23	PALM & DOH
Technology	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.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	N/A	08/21/23	PALM & DOH
Processes	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.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	N/A	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	N/A	02/14/22	PALM & DOH
People Processes Technology	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.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	N/A	09/25/23	PALM & DOH
Technology	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	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	N/A	02/14/22	PALM & DOH
Processes	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.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	N/A	10/18/23	PALM & DOH
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 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.	Open	4 (Medium/Medium)	DOH needs to know how this will work in PALM	N/A	10/18/23	PALM & DOH

DOH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	06/28/23	All DOH systems	PALM Project has identified all impacted enterprise applications.
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	06/28/23	All DOH systems	DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule.

DOH Agency-Specific Readiness Activities

Critical				Impacted Stakeholder(s)		

Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period	Comments or Updates
People Processes Technology Data	Segment II - Business Process Models	12/05/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None	
People Processes Technology Data	Segment II - Business Process Models	12/06/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None	
People Processes Technology Data	Segment II - Business Process Models	12/07/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None	
People Processes Technology Data	Task 328 Meeting	11/08/23	SME and PM	Completed Task 328	Task Submitted	
People Processes Technology Data	Task 328 Submission meeting	11/08/23	PM and SMEs	Completed Task 328 updates for Reports and systems	Submitted Task 328	
People Processes Technology Data	Survey Meetings to complete and Submit surveys	12/14/23	PM and SMEs	Meeting with SMEs to complete Surveys	Survey submission	
People	Project Management Liaison Meeting	10/26/23	Project Manager	To collaborate and learn from other Agency PMs strategies and tools	PALM Collaboration Meeting at DCF	
People	DOH Readiness Touchpoint Meeting	12/20/23	Executive Stakeholders	To meet the PALM Readiness team for PALM Project updates	Touchpoint meeting with Readiness Co-ordinator	
People	Executive Steering Meeting	12/13/23	Agency Sponsor	Attended Advisory Steering Meeting	Updated Core team	
People	Advisory Council Meeting	12/13/23	Agency Sponsor	Attended Advisory Council Meeting	Updated Core team	
People	Advisory Council Meeting	11/15/23	Agency Sponsor	Attended Advisory Council Meeting	Updated Core team	
People	Executive Steering Meeting	11/15/23	Agency Sponsor	Attended Advisory Steering Meeting	Updated Core team	
People Processes	DOH Core Meeting	11/08/23	Key Stakeholders and PM	<ul style="list-style-type: none"> Monitor progress against project plan Review and approves changes to project plans (resources, scope, goals, cost estimates) Advise on project planning and implementation strategies Make strategic decisions related to project deliverables prioritization and approvals Review and suggest solutions for issues critical to project success Assist in resolving project conflicts Assist and guide on resource allocation 	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.	
People Processes	DOH Core Meeting	11/15/23	Key Stakeholders and PM	<ul style="list-style-type: none"> Monitor progress against project plan Review and approves changes to project plans (resources, scope, goals, cost estimates) Advise on project planning and implementation strategies Make strategic decisions related to project deliverables prioritization and approvals Review and suggest solutions for issues critical to project success Assist in resolving project conflicts Assist and guide on resource allocation 	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.	
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People Processes	DOH Budget Allotments Meeting	12/20/23	SME's and DOH PALM	To understand DOH budget allotment process and give possible options of completing this in PALM	Discussion with PALM	
People Processes	Review PALM Data with CORTNE Applications	12/28/23	DOH PIT team and CORTNE technical team	Review PALM design Seg I and give PALM updates to CORTNE team	Reviewed design documents	
People Processes	FIRS Resource Transition Meeting	12/20/23	FIRS Technical Resource and Key stakeholders	Review the need and spend plan for FIRS resources and	Updated Spend Plan to accommodate FIRS resources.	
People Processes Technology	Financial As-Is meeting - Reconciliation and Corrections Processings As-Is	11/06/23	PM, BA and SME's	To document As-Is	Documented and Reviewed as is with the team	
People Processes Technology	Financial As-Is meeting - PCard Disbursements As-Is	11/17/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team	
People Processes Technology	Financial As-Is meeting - Cell Phone Verification System As-Is	11/27/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team	
People Processes Technology	Financial As-Is meeting - Financial Reporting	11/29/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team	
People Processes Technology	Financial As-Is meeting - CJT and CommLine As-Is	12/04/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team	

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 *

DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Robert Herron	robert.herron@flhealth.gov	01/08/24
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23

Commit

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