

Helpful Links

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

EOG Status Report Dashboard

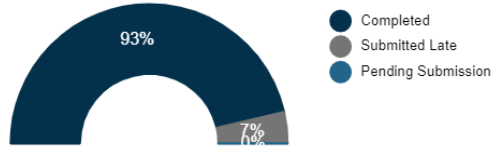
Reporting Period

November - December 2023

Agency Sponsor

Dawn Hanson

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	12/13/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	11/27/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	11/27/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	11/27/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/07/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/13/23	
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	11/29/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/09/24	

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 = 3
- Duplicate Filled Role = 12
- 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 = 151

- Related Business Systems = 1
- Related Reports = 41
- Documentation Status:**
 - Complete = 150 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 1

- Criticality:**
 - High = 0 Med = 0 Low = 0 None = 1
- Documentation Status:**
 - Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

- Segment I - Documentation Updates:**
 - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1
- Segment II - Documentation Updates:** TBD
- Segment III - Documentation Updates:** TBD
- Segment IV - Documentation Updates:** TBD

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0
- Spreadsheet Uploads = 0

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 77**
 - Continued Use - Yes = 30
 - Continued Use - No = 26
- Associated Business Systems = 1**
- Cataloged Reports = 146**
- Criticality:**
 - High = 39 Med = 39 Low = 62 None = 6

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.

EOG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes Technology Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	Open	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries.	New.	10/31/23	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	New.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	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.	New.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources.	Open	4 (Medium/Medium)	The EOG will monitor staff workload.	New.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software does not properly interface due to EOG specific item numbering.	Open	4 (Medium/Medium)	The EOG will discuss this issue with any providers as appropriate.	New.	10/31/23	Kelley Sasso
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	Updated/clarified wording and critical operational elements.	10/31/23	Kelley Sasso
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	New.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need.	New.	10/31/23	Kelley Sasso
Technology	Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open	1 (Low/Low)	No risks determined at this time.	Updated/clarified wording.	10/31/23	Kelley Sasso
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	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.	Updated/clarified wording.	10/31/23	Kelley Sasso

EOG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	The EOG currently has no pending issues.	Closed	Low - All impacts not listed as Critical or High	The EOG currently has no pending issues.	Removed duplicate issue	10/31/23	Kelley Sasso

EOG 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	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.

EOG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Participated in PALM business workflow design workshops	12/05/23	All Administrative Services		

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 *

EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/11/24
September - October 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/23
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23

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