

**Helpful Links**

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# CITRUS Status Report Dashboard

**Reporting Period**

November - December 2025

**Agency Sponsor**

Rosa Walsh

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

## RW Task Timeliness

## RW Task Completeness

**Direct Impact Task Timeliness**

**Other Task Timeliness**

**Direct Impact Task Completeness**

**Other Task Completeness**



**Direct Impact Task Timeliness:**

Score = 89.11%

- Submitted On Time = 30
- Submitted Late = 14
- Pending Submission = 1

**Other Task Timeliness:**

Score = 90.35%

- Submitted On Time = 61
- Submitted Late = 21
- Pending Submission = 1

**Direct Task Completeness:**

Score = 78.41%

- Submitted Complete = 28
- Submitted Incomplete = 5
- Completed After Submission = 11

**Other Task Completeness:**

Score = 77.96%

- Submitted Complete = 37
- Submitted Incomplete = 9
- Completed After Submission = 8

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 = 9
- 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
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	Pending Resubmission	05/27/25		Task Closed - Submission Incomplete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	Pending Resubmission	04/16/25		Submission Incomplete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	Pending Resubmission		The Change Analysis Tool provided by Florida PALM does not conform to the methodology selected by Citrus. As such, we have deferred this task indefinitely and will complete the required analysis as part of the completion of Task 574.	Task Closed - Submission Incomplete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25			Citrus has delayed this task to begin until September 2025 due to budget and operational constraints. Citrus is using only outbound interfaces, and their completion does not pose a risk to the overall project timeline. 11/13/25 RC set status back to 25%. Pending resubmission is not an accurate account of task status.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	01/09/26	100% - Submitted	08/07/25	Per the task instructions, Citrus is using Option 3: Agency-specific format which is attached to this tracker.	Submission Incomplete	01/08/26
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet.	07/14/25	12/19/25	100% - Submitted	12/19/25		Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	11/07/25	100% - Submitted	10/28/25	Citrus updated Conversion Inventory to reflect full completion of activities on 11/7/25.	Submission Complete	11/07/25
Direct	Data	661	Update Conversion Field Mapping	08/11/25	11/05/25	100% - Submitted	10/28/25		Task Closed - Submission Incomplete	
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	11/05/25	100% - Submitted	10/29/25		Task Closed - Submission Incomplete	
N/A	N/A	627	Submit Bimonthly Agency Readiness Status Report	11/03/25	11/10/25	100% - Submitted	11/07/25		Submission Complete	
Indirect	N/A	667	Submit Monthly Progress Report - Testing	11/03/25	11/25/25	100% - Submitted	11/20/25		Submission Complete	
Indirect	N/A	668	Submit Monthly Progress Report - Testing	12/01/25	12/30/25	100% - Submitted	12/19/25		Submission Complete	
Direct	Technology	592	Agency IdP SMEs Add End Users to Agency's Identity Provider	12/08/25	01/09/26	100% - Submitted	12/18/25		Submission Complete	
Indirect	People	688	Update UAT Plan	12/08/25	01/09/26	100% - Submitted	01/09/26			
Indirect	N/A	606	Update Agency Readiness Certification #2	12/15/25	01/09/26	100% - Submitted	01/09/26			
N/A	N/A	671	Submit Bimonthly Agency Readiness Status Report	12/29/25	01/14/26	100% - Submitted				

Indirect	N/A	669	Submit Monthly Progress Report - Testing	01/05/26	01/30/26	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	597	Complete Data Cleansing Based on Mock Conversion 4	01/12/26	03/13/26	50% - In Progress				
N/A	People	670	Share Florida PALM Updates	01/12/26	01/23/26	25% - Beginning Initial Internal Meetings and Information Gathering				

### 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 for Nov. - Dec. 2025
Open and Monitoring	02/28/25		Staffing/Resource Availa	Funding Alignment	Stable	9 (High/High)	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 valid for this reporting period.
Open and Monitoring	02/28/25		Business Process Chang	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 valid for this reporting period.
Open and Monitoring	02/28/25		Business Process Chang	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 valid for this reporting period.
Open and Monitoring	09/19/23		Training	New IT Staff	Decreasing	2 (Low/Medium)	Citrus has newer IT staff with no knowledge of PALM.	IT staff is quickly coming up to speed with Citrus business systems and the needs going forward with the implementation of PALM. More meetings/workshops targeted to the technical liaisons would be beneficial.	IT systems not capable of meeting the needs of PALM implementation.	This risk is valid for this 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 for Nov. - Dec. 2025

#### CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for Nov. - Dec. 2025
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.
People Processes Technology	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.
People Processes Technology Data	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.
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.
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.
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.
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.
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.
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.

People Processes Technology Data	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.
Processes Technology Data	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.
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.
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.
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.
People Processes Technology Data	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.

### 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 \*

### CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2025	Rosa Walsh	rwalsh@citrus.myflorida.com	01/15/26
September - October 2025	Rosa Walsh	rwalsh@citrus.myflorida.com	11/12/25
September - October 2025	Rosa Walsh	rwalsh@citrus.myflorida.com	11/07/25
July - August 2025	Rosa Walsh	rwalsh@citrus.myflorida.com	09/10/25
May - June 2025	Christine Marion	cmarion@citrus.myflorida.com	07/10/25