

Helpful Links

- Dashboard Snapshots
- Knowledge Center
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- Readiness Workplan

DBPR Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Sally Huggins

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 = 93.6%

- Submitted On Time = 41
- Submitted Late = 8
- Pending Submission = 0

Other Task Timeliness:

Score = 94.4%

- Submitted On Time = 69
- Submitted Late = 13
- Pending Submission = 0

Direct Task Completeness:

Score = 91.20%

- Submitted Complete = 44
- Submitted Incomplete = 4
- Completed After Submission = 2

Other Task Completeness:

Score = 98.18%

- Submitted Complete = 54
- Submitted Incomplete = 1
- Completed After Submission = 0

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 = 9
- Duplicate Filled Role = 6
- Vacant Role = 1

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	75% - Consolidating/Inputting Information for Submission		User Stories are 100% complete. Test cases are in progress		
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet.	07/14/25	12/19/25	100% - Submitted	12/19/25		Task Closed - Submission Incomplete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	11/07/25	100% - Submitted	12/02/25	GLC001 is being researched by A&A research closing entries from 2018. DBPR work on this task is complete.	Submission Complete	
Direct	Data	661	Update Conversion Field Mapping	08/11/25	11/05/25	100% - Submitted	10/30/25	All code issues have been resolved.	Submission Complete	
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	11/05/25	100% - Submitted	10/30/25	All code issues have been resolved	Submission Complete	
N/A	N/A	627	Submit Bimonthly Agency Readiness Status Report	11/03/25	11/10/25	100% - Submitted	11/10/25		Submission Complete	
Indirect	N/A	667	Submit Monthly Progress Report - Testing	11/03/25	11/25/25	100% - Submitted	11/21/25		Submission Complete	
Indirect	N/A	668	Submit Monthly Progress Report - Testing	12/01/25	12/30/25	100% - Submitted	12/30/25	File will be placed in secure folder Monday, 12/29	Submission Complete	
Direct	Technology	592	Agency IdP SMEs Add End Users to Agency's Identity Provider	12/08/25	01/09/26	100% - Submitted	01/09/26		Submission Complete	
Indirect	People	688	Update UAT Plan	12/08/25	01/09/26	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	606	Update Agency Readiness Certification #2	12/15/25	01/09/26	100% - Submitted	01/09/26	01/11/2026 FL PALM: Submitted on behalf of agency based on AS signoff and completion of worksheets		
N/A	N/A	671	Submit Bimonthly Agency Readiness Status Report	12/29/25	01/14/26	100% - Submitted	01/14/26		Submission Complete	
Indirect	N/A	669	Submit Monthly Progress Report - Testing	01/05/26	01/30/26					
Direct	Data	597	Complete Data Cleansing Based on Mock Conversion 4	01/12/26	03/13/26					
N/A	People	670	Share Florida PALM Updates	01/12/26	01/23/26					

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.

DBPR 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 Mitigating	01/13/25		Agency Business System	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Decreasing	9 (High/High)	DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed.	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	There may not be enough time for DBPR IT to make modifications in time to be retested	Interface Testing is in progress, and more testing will be done the week of 12/29
Open and Mitigating	02/19/25		User Acceptance Testing	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Stable	4 (Medium/Medium)	Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities.	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	DBPR SMEs will have minimal time to catch up review of business processes	20251125(LL): DBPR business processes are being mapped using test cases that are based on multiple user stories since it takes multiple PALM processes to make up one DBPR complete business process that adds value.
Open and Mitigating	05/31/24		Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Stable	3 (High/Low)	Documentation on Future-State business processes is being provided by The Project on the PALM website.	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	20251125 (LL): Those attending Pre-UAT are familiar.
Open and Mitigating	11/15/24		Deployment/Cutover	If DBPR does not have a cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.	Stable	3 (High/Low)	Down time and other conditions need to be planned for to ensure a smooth transition.	Create a Cutover Plan that identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	Key business processes may not be able to be completely timely and could have negative consequences	Informal discussions regarding the cutover plan have begun.
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Stable	2 (Medium/Low)	It would be better to have real transfers occur involving the actual real-life players to get more real testing and to reduce the likelihood of unanticipated errors.	Identify an Agency that we can partner up with and coordinate send/receive testing with them	UAT testing could be inadequate and could negatively impact DBPR PALM readiness	20251125 (LL): IU Transactions will be tested in UAT both Inter/Intra and Sending and Receiving s DBPR business processes require.
Open and Mitigating	08/19/24		Conversion/Configuration	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Stable	2 (Medium/Low)	We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world.	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	DBPR may not have the desired email notification flexibility once we go to production with PALM	While email notifications have been working during Pre-UAT Testing, adding proxies or other methods of communication must be researched.

DBPR 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
Open	06/04/25		Critical - Impacts the abil	Interface	ABS Versa Regulation remediation is behind schedule	DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule.	Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT.	10/31/25	DBPR has produced output and will be ready for another test on Monday, 12/29. A file will be placed in the secure folder for loading into PALM.

DBPR 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 Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	20251125 (LL): We have been able to get the spreadsheet upload templates working (security issue) so testing can begin.	
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	All DBPR stakeholders	Florida PALM's updates to process steps in UAT continue to provide the detail needed to understand process changes.	
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	Process changes are being reviewed as part of test case completion. They will be tested during full UAT.	
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	20251125 (LL): With Full UAT scheduled for 11 months, DBPR will have ample time to perform the rigorous testing and retesting, so cutting over to the new system is expected to be minimally eventful.	
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	20251125 (LL): Pre-UAT SMEs have already assisted in testing efforts and reporting issues directly to PALM staff. (Other agencies had already entered SNOW tickets for the issues reported.)	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	PALM Smartsheets are tracking some traceability, and DBPR is tracking agency specific user stories to test cases to cover any DBPR specific requirements.	
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251222: There have not been any unique requirements discovered so far.	
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251222: DBPR staff continue to emphasize changes in language and glossary terms between FLAIR and Florida PALM.	
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251222: PALM has provided data elements in reports but DBPR is responsible for those created by DBPR such as OA1 and OA2.	
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251222: To this date, DBPR has been responsible for testing DBPR agency systems and has not been approached to test other agency systems.	
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	20251222: There have not been any requirements unique to DBPR.	
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	20251222: PALM is working on a schedule update. The Project Management Plan will be updated once this is published.	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	20251222: PALM interfaces are included in Full UAT testing.	
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	20251222: This will be addressed once Versa interface testing is complete.	
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	20251222: This will be addressed once Versa interface testing is complete.	
People Processes	In addition to obtaining various scenarios and anomalies at Future State Generally Accepted Accounting Principles	Logged	12/05/24	All DBPR division/office staff Project Manager	20251222: Use stories have been completed. Test cases will contain scenarios and anomalies as part of Full UAT testing.	

Processes Data	Future-State Crosswalk screens, screens necessary to create/enhance all user stories will also be an objective out of the sessions			Project Manager Organizational Change Manager	only enhance and enhance as part of UAT testing.
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	20251222: The file will be moved to the secure file share for additional testing on Monday, 12/29
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	20251222: There are no challenges to training at this time.
People Processes Data	DBPR as well as the Project will follow PMI best practices and Rule 60GG statute.	Logged	05/28/25	IV&V endorses this.	20251222: The project is being tracked as required.
People	Resources will be available to support the agreed-upon schedule.	Removed	11/25/25	All DBPR division/office staff	20251125 (LL): Resources have always been available. This assumption is removed.
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Removed	11/25/25	All DBPR division/office staff	20251125 (LL): Engagement continues to be active and responsiveness has not been an issue. Removing this assumption.
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Removed	11/25/25	All DBPR division/office staff	20251125 (LL): Business groups are not only acting on the CCN/PALM Readiness Information, they are also taking the initiative to investigate changes on their own. Removing this assumption.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Removed	11/25/25	All DBPR stakeholders	20251125 (LL): This is a "given" not an assumption. We are creating DBPR/PALM operational workflows by combining multiple PALM processes and subprocesses to fulfill the requirements for the operational flow, and to meet reporting, audit and statutory demands.
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Removed	11/25/25	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	20251125 (LL): PALM has provided Pre-UAT Steps, LMS Training courses, and Training Materials specific to PALM. This is no longer an assumption.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Removed	11/25/25	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251125 (LL): Removing this as a duplicate of #12
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Removed	12/22/25	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251222: PALM has provided UAT environments for all UAT Testing and will continue to do so for FULL UAT.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Removed	12/22/25	Project Manager Business Analyst	20251222: PALM is providing process steps but test cases with test scripts have been written by DBPR for UAT Testing.
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Removed	12/22/25	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251222: PALM is providing videos for future state processes, but DBPR must put those together to match the DBPR user stories for agency process completion.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Removed	12/22/25	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251222: The reports contain OA2 fields. DBPR entered Object Codes as OA2 fields.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Removed	12/22/25	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251222: Data from PALM will be in reports in PALM and from reports and DW/BI information in the Data Warehouse.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Removed	12/22/25	All DBPR division/office staff Project Manager Organizational Change Manager	20251222: Crosswalks have been completed and will continue to be reviewed as test cases are completed.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Removed	12/22/25	Project Manager Business Analyst	20251222: Agency Collaboration meetings have proven that agencies are indeed writing test scripts for their own systems. This is something to be tracked by PALM, not DBPR.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Removed	12/22/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251222: The schedule and task completions continue to be reviewed at least once weekly.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Removed	12/22/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251222: Change Analysis sheets were updated and completed 12/19/2025

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:

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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2025	Sally Huggins	sally.huggins@myfloridalicense.com	01/14/26
September - October 2025	Sally Huggins	sally.huggins@myfloridalicense.com	11/10/25
July - August 2025	Sally Huggins	sally.huggins@myfloridalicense.com	09/10/25
May - June 2025	Sally Huggins	sally.huggins@myfloridalicense.com	07/08/25
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25