Task Instructions

Task ID: *611*
Task Name: *Submit Bimonthly Agency Readiness Status Report*
Task Start Date: July *1, 2025*
Task Due Date: July *10, 2025*
Project Impact: N/A

Task Description

Primary Agency Sponsor to confirm and submit bimonthly status report, in the format provided by the Project, on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of Florida PALM.

Task Overview

This task consists of two elements.

1. Manage Agency-specific Implementation Schedule, Risks and Issues
2. Submit Bimonthly Agency Readiness Status Report

Manage Agency-specific Implementation Schedule, Risks and Issues

Project planning and management is critical to the success of any project. Agencies previously created an agency-specific implementation schedule (Task 501) and agency-specific risk and issue management plan (Task 502). This ongoing activity requires agencies to actively manage the project activities as identified and described in those project plans.

NOTE: Active management includes regular review and ongoing maintenance of agency-specific project schedule, risks, issues and assumptions logs. You should not wait for a bimonthly reporting task to complete these activites.

Ongoing management of the implementation schedule includes:

- Regularly monitoring the implementation schedule progress against the timeline and revising the implementation schedule to accommodate new information or changes in Florida PALM Project or internal agency requirements
- Tracking actual progress against the planned schedule and adjusting, as needed
- Regularly addressing and communicating any deviations on progress and any changes to the schedule to stakeholders

When following the risk and issues management plan, agencies should be:

- Actively identifying, managing, and reporting Florida PALM-related readiness risks (or opportunities) and issues as they arise throughout the life of the Project
- Scoring of probability and impact to risks and priority to issues
- Determining management strategies for each identified risk and resolution plans for issues
- Reporting new or updated risks and issues in the Bimonthly Agency Readiness Status Report

A confirmation column will appear each bimonthly period on the *Agency Risks*, *Agency Issues* and *Agency Assumptions* worksheets located in your agency's *Status Reporting* folder in Smartsheet (Figure 1). Agencies must utilize this column to confirm the information is valid for each risk, issue, and assumption that is created, remained opened, or closed during the current reporting period. Risks, issues, and assumptions that were closed **in previous reporting periods** do not require confirmation.

NOTE: Only the risks, issues and assumptions that are checked in the Confirmed for <Reporting Period> column will populate in the <Agency> Status Report Dashboard.

Additional guidance for completing your *Agency Risks*, *Agency Issues* and *Agency Assumptions* worksheets are provided in the supplemental document found under RW Task Resources: Guidance for Bimonthly Agency Readiness Status Report Completion.

Figure 1: DEMO Risks Sheet in Smartsheet

Submit Bimonthly Agency Readiness Status Report

In accordance with the 2024-2025 Implementing Bill, agency Project Sponsors must provide a bimonthly status report to the Florida PALM Executive Steering Committee (ESC) providing information *"on the activities and ongoing work within the agency to prepare their systems and impacted employees for the deployment of the Florida PALM System."*

The status report is to be submitted on a bimonthly cadence using the report template as approved by the ESC to include *"meaningful information on each agency's progress in planning for the Florida PALM Major Implementation, covering the agency's people, processes, technology, and data transformation activities."*

An agency's critical operational elements are defined as:

- 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 processed from an agency's financial business operations

Agencies must complete and submit the status report in Smartsheet. Instructions for how to complete this task in Smartsheet are provided in the supplemental document found under RW Task Resources: Guidance for Bimonthly Agency Readiness Status Report Completion.

To support status monitoring and reporting, each agency has a comprehensive Agency Status Report Dashboard (Dashboard) within their agency workbook in Smartsheet. The Dashboard combines agency-specific readiness risks, issues and assumptions with a snapshot of the

agency's status across the four critical operational elements: people, process, technology and data.

The data represented on the Dashboard changes based on priority activities, Project timeline, and the reporting period. The data and metrics displayed on the Dashboard are detailed in the supplemental document found under RW Task Resources: Understanding your Dashboard.

How will agencies use this information?

Agencies will benefit from managing their agency-specific implementation schedule, risks and issues by:

- Planning for resources and activities needed to prepare for Florida PALM implementation
- Identifying, actively monitoring and mitigating potential risks
- Promptly identifying issues for timely management
- Reporting in the required Bimonthly Agency Readiness Status Report

Agencies can use the information in their Dashboard and process of gathering and reporting the information to:

- Support resource requests (e.g., legislative budget requests)
- Monitor their readiness progress in preparation for Florida PALM implementation
- Communicate their readiness progress and/or needs to stakeholders, such as the ESC, the agency's CCN and agency leadership

What will Florida PALM do with this information?

The Florida PALM team will review the results of your risk or issue management activities through the review of your Bimonthly Agency Readiness Status Report. The Project will publish your Dashboard to the Florida PALM website under Agency Reporting and share with the ESC and other key stakeholders for review to satisfy the requirements of the Implementing Bill for 2024-2025. Information provided by agencies will also be summarized and discussed in ESC meetings. Information shared may result in outreach from the ESC and/or the Project team to gather more information or provide additional support.

Table 1: Task Completion Rubric

Task Completion Rubric
All fields in the *Agency Risks*, *Agency Issues* and *Agency Assumptions* Status Reporting worksheets are completed for the reporting period. (All fields are required for open items except for the "Date Closed" field which is only required to be added once an item is closed.)
The 'Confirmed for May - June 2025' column contains a checkmark and 'Reporting Period Comments for May - June 2025' column is updated in the *Agency Risks*, *Agency Issues* and *Agency Assumptions* Status Reporting worksheets for all risks, issues, and assumptions created, remaining open, or closed for the current reporting period.
Primary Agency Sponsor has reviewed, signed, and submitted the Bimonthly Agency Readiness Status Report.
The Task Tracker has been marked as 100% complete for this task.

Task Instructions

Coordinate with your agency CCN, Risk and Issue Management Team, and Implementation Schedule Coordinator for ongoing project management and to identify, log, and maintain the Status Reporting sheets in Smartsheet. These sheets are available to update at any time. Only information that has been confirmed and is relevant to the reporting period will be displayed on the Dashboard. Agency Sponsors should work with their CCN to review the Dashboard for accuracy and submit confirmation.

The Bimonthly Agency Readiness Status Report is completed in your agency workspace in Smartsheet. Your Agency Liaison and Project Management Liaison manage access to that workspace for users within your agency. Work with your CCN to ensure that Agency Sponsors have access to the workspace to complete this task.

Indicate Task 611 is complete by completing the Confirmation column in the *Agency Risks*, *Agency Issues* and *Agency Assumptions* status reporting worksheets, having your Primary Agency Sponsor submit the Bimonthly Agency Status Report, and updating the Readiness Workplan Task Tracker to 100%.

NOTE: *Agency Risks, Agency Issues and Agency Assumptions that have not been confirmed within the timeframe will not show on the Bimonthly Agency Readiness Status Report for the Agency Sponsor to submit. Due to this task being timebound, late submissions and resubmissions after the due date will not be permitted.*

Table 2: Summary of Task Completion Steps

Summary of Task Completion Steps
1) *Review and update the Status Reporting Sheets (Agency Risks, Agency Issues, and Agency Assumptions) located in the Agency's Florida PALM Workbook, Agency Status Reporting folder in Smartsheet. Ensure all required fields are complete.*
2) *Complete the Confirmation and Reporting Period Comments columns in the Agency Risks, Agency Issues, and Agency Assumptions worksheets in Smartsheet for all risks, issues, and assumptions created, remaining open, or closed for the current reporting period.*
3) ***Primary Agency Sponsor*** *must review and confirm the Dashboard located in the Agency's Florida PALM Workbook, Agency Status Reporting folder in Smartsheet by* ***July 10, 2025***.
4) *When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.*
5) *Continue ongoing project management per your agency-specific project plans throughout the next Bimonthly Agency Readiness Status Report period.*
6) *Prepare to discuss your agency's progress on these tasks during monthly touchpoint meetings with your Readiness Coordinator and Technical Readiness Team.*
7) *If you have questions regarding these tasks, contact your Readiness Coordinator.*

Supporting Materials & Resources:

- Agency-specific Implementation Schedule and Risks and Issues Management Plan
- Guidance for Bimonthly Agency Readiness Status Report Completion
- Understanding Your Dashboard
- Risk and Issue Scoring Supplemental

- [Smartsheet User Guide](#)
- [Readiness Workplan and Task Tracker Job Aid](#)