# Understanding your Dashboard

A Readiness Certification Dashboard (Dashboard) has been created within your agency's Florida PALM Workbook in Smartsheet (example shown below in Figure 1). The Dashboard provides a view of the Readiness Certification #2 Criteria and the agency's current status for the related RW tasks. The Dashboard also serves as the tool for the Agency Sponsor to submit the agency's status for each Readiness Certification #2 criteria, any mitigation plans for any criteria not met, and an indication of the Sponsor's confidence level regarding the agency's readiness across each of the critical operational elements and at an overall level.

**Smartsheet Navigation:**

> *Florida PALM Workbook for (Agency) > Agency Readiness > Agency Readiness Certification*
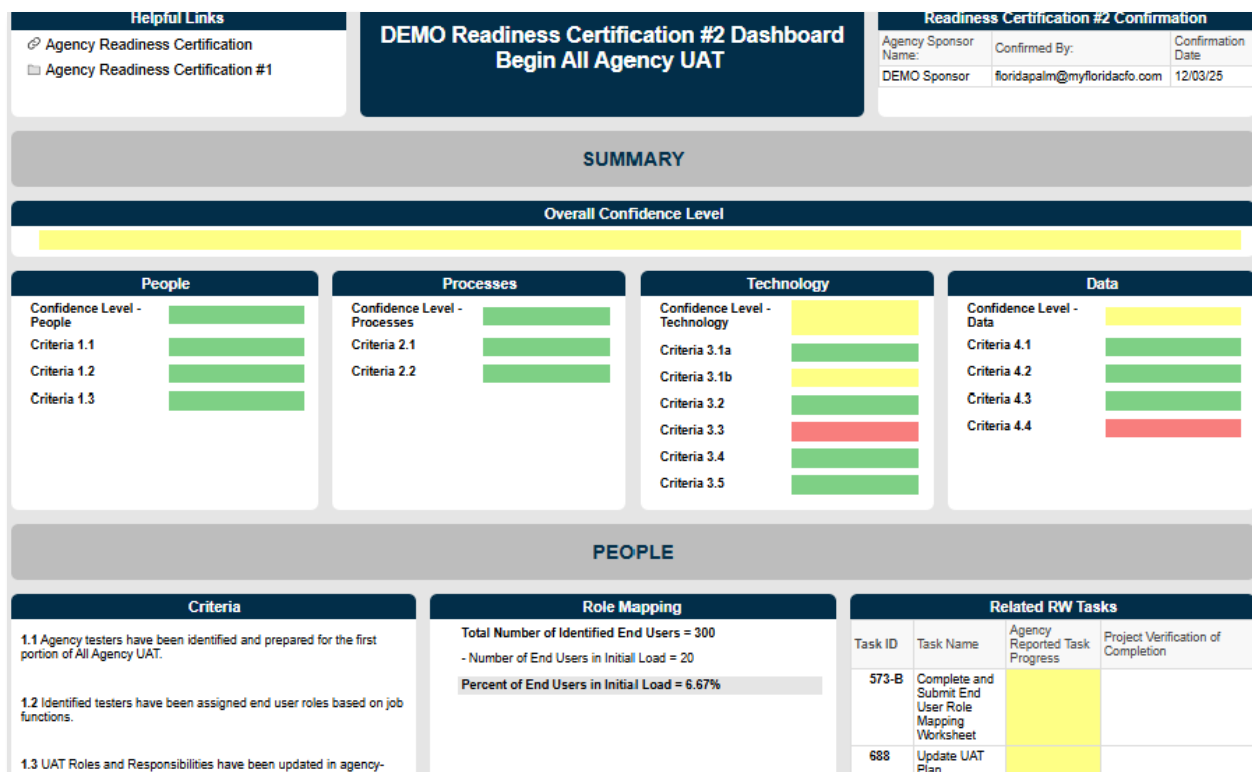


*Figure 1: Demo Readiness Certification Dashboard*

The Dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- *<Agency> Cycle 2 Technical Interface Testing*
- *<Agency> Project Recommended Standard Activities*
- *<Agency> Readiness Certification #2*
- *<Agency> Readiness Mitigation #2*
- *<Agency> Mitigation Plan for Incomplete Cycle 2 Testing*
- *<Agency> Readiness Workplan Task Tracker*
- *<Agency> Role Mapping Worksheet*

## Critical Operational Elements

The Dashboard is organized to provide a view of agency readiness across the four critical operational elements:

- 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

## Helpful Links Section

The "Agency Readiness Certification" link in the Helpful Links section of your Dashboard (Figure 2) navigates to the Agency Readiness Reporting page of the Florida PALM website, where you can find additional information about Agency Readiness Certification and criteria. The "Agency Readiness Certification #1" link navigates to the folder in your agency Smartsheet workspace that includes your worksheets and Dashboard from Readiness Certification #1 that was previously submitted in July 2025.
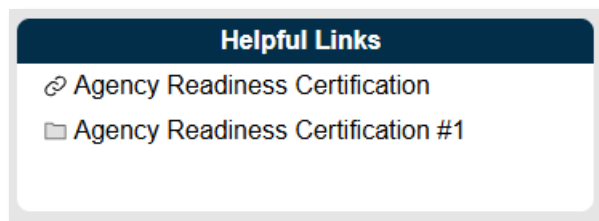


**Helpful Links**
- Agency Readiness Certification
- Agency Readiness Certification #1

*Figure 2: Helpful Links section*

## Readiness Certification Confirmation Section

The Readiness Certification Confirmation section (Figure 3) provides a view of the Sponsor Confirmation, including the date confirmed. The section will populate once the Agency Sponsor submits the certification confirmation.



| Readiness Certification #2 Confirmation | | |
|---|---|---|
| Agency Sponsor Name: | Confirmed By: | Confirmation Date |
| DEMO Sponsor | floridapalm@myfloridacfo.com | 12/03/25 |

*Figure 3: Readiness Certification Confirmation Section*

## Summary Section

The Summary section (Figure 4) contains five boxes. The first displays the Agency Sponsor's overall confidence level regarding the agency's readiness. The other four boxes display the Agency Sponsor's confidence level and status of agency readiness criteria for each critical operational element. All data displayed in this section is derived from the *<Agency> Readiness Certification* worksheet.
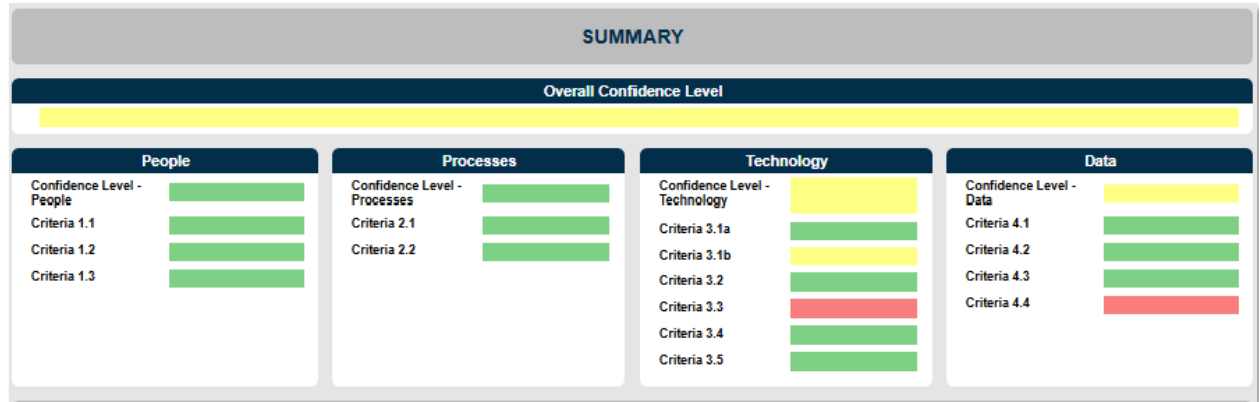
*Figure 4: Summary Section*

Summaries are conveyed using intuitive Green-Yellow-Red spectrum, where green indicates the agency has reported readiness in a positive range, yellow represents that the agency has identified gaps in expected results and presents a restrained confidence in agency readiness, and red indicates that there are significant gaps in expected results and the agency is apprehensive about their readiness. Each colored indicator is directly correlated to an agency's reported status made on their *<Agency> Readiness Certification* Worksheet.

Confidence levels are translated to the following colors on the Dashboard:
- 'Extremely Confident' and 'Very Confident' selections display as green
- 'Moderately Confident' and 'Becoming Confident' selections display as yellow
- 'Somewhat Concerned' or 'Highly Concerned' selections display as red

Responses of Met or Not Met, for each Readiness Certification Criteria, are displayed as the following colors:
- Criteria Met selection displays as green
- Criteria Not Met displays as red

Technology Criteria 3.1 – *Technical interface testing has been successfully completed* has been separated into two sub-criteria.
- Sub-criteria 3.1a – Status of Inbound Interface Cycle 2 Technical Testing
- Sub-criteria 3.1b – Status of Outbound Interface Cycle 2 Technical Testing

The colors for these sub-criteria are displayed as the following colors:
- If the status is 100%, the cell will be green indicating testing is complete.
- If the status is greater than or equal to 75% and less than 100%, the cell will be yellow indicating significant progress has been made.
- If the status is less than 75%, the cell will be red indicating significant gaps in testing progress.

# Critical Operational Element Sections (People, Processes, Technology, Data)

Each of the critical operational elements has a designated section on the dashboard. Each of these sections contain the following boxes.
- Criteria

- Related RW Tasks
- Readiness Certification Worksheet
- Mitigation Plan

***NOTE:*** *Some critical operational sections display additional related data as described below.*



| DATA | | | | | |
|---|---|---|---|---|---|

**Criteria**

4.1 Agency specific test data has been identified and documented, including source documents required for UAT scenarios.

4.2 Changes to agency specific configurations have been documented and provided to the Project, if applicable.

4.3 Agency data is cleansed based on Mock Conversion 3.

4.4 Agency has provided updated data mapping to support Mock Conversion 4.

**Related RW Tasks**

| Task ID | Task Name | Agency Reported Task Progress | Project Verification of Completion |
|---|---|---|---|
| 574 | Prepare Documentation for User Acceptance Testing | 75% - Consolidating/Inputting Information for Submission | |
| 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 100% - Submitted | Submission Complete |
| 587-B | Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers | 100% - Submitted | Submission Complete |
| 587-C | Complete Data Cleansing Based on Mock Conversion 3 – PCC001 Projects | 100% - Submitted | Submission Complete |
| 661 | Update Conversion Field Mapping | 100% - Submitted | Submission Complete |
| 662 | Submit Updated Configuration Workbooks | 100% - Submitted | Task Closed - Submission Incomplete |
| 662-A | Submit Updated Configuration Workbooks - State Program Selection for Budget Allotments | 100% - Submitted | Submission Complete |

**Readiness Certification Worksheet**

| Critical Operational Element | Criteria ID | Criteria | Criteria Met | Confidence Level | Comments |
|---|---|---|---|---|---|
| Data | 4.0 | Overall Data Readiness | | Somewhat Concerned | |
| Data | 4.1 | Agency specific test data has been identified and documented, including source documents required for UAT scenarios. | Yes | | |
| Data | 4.2 | Changes to agency specific configurations have been documented and provided to the Project, if applicable. | Yes | | |
| Data | 4.3 | Agency data is cleansed based on Mock Conversion 3. | Yes | | |
| Data | 4.4 | Agency has provided updated data mapping to support Mock Conversion 4. | Yes | | |

**Mitigation Plan**

| Criteria ID | Why has the criteria not been met? | What mitigating actions are being taken? | Who is responsible for supporting the mitigation? | Impact/workaround if mitigation is not completed? | Planned completion date of the mitigation steps? |
|---|---|---|---|---|---|

*Figure 5: Data Section*

## Criteria

***No agency action is needed in this section, as it's provided for reference only.***

The Criteria box provides the Readiness Certification Criteria required for that critical operational element.

## Related RW Tasks

***No agency action is needed in this section, as it's provided for reference only.***

The Related RW Tasks box provides a view of your agency's status of the RW tasks that are related to the Readiness Certification Criteria. Each task includes the agency reported task progress and the Project's provided verification status pulled from the *<Agency> RW Task Tracker.*

## Readiness Certification Worksheet

**Agency action is required for this section via completion of the Readiness Certification worksheet.**

The Readiness Certification Worksheet box provides the agency's responses to each readiness certification criteria for that critical operational element. Agency Sponsors must verify if each criteria were met or not and provide level of confidence of your agency's readiness for each critical operational element and overall. The data is pulled directly from the *<Agency> Readiness Certification* worksheet.

## Mitigation Plan

**Conditionally, agency action is needed for this section depending on the responses in the Readiness Certification worksheet.**

The Mitigation Plan box displays agency provided mitigation plans for each Readiness Certification Criteria not met. The data is pulled directly from the *<Agency> Readiness Mitigation* worksheet.

## Additional Data

**No agency action is needed for additional data boxes, as they are provided for reference only.**

Additional boxes have been added to display information related to the criteria in the applicable critical operational section.

### Role Mapping

The Role Mapping box located in the People Section (Figure 6) shows the total number of agency identified end users, the total number of agency identified initial load end users, and the percent of end users in the initial load. The data is pulled from your *<Agency> Role Mapping Worksheet* in Smartsheet.



| | | | |
|---|---|---|---|
| **PEOPLE** | | | |

| Criteria | Role Mapping | Related RW Tasks | | | |
|---|---|---|---|---|---|
| 1.1 Agency testers have been identified and prepared for the first portion of All Agency UAT. | Total Number of Identified End Users = 300 | Task ID | Task Name | Agency Reported Task Progress | Project Verification of Completion |
| | - Number of End Users in Initial Load = 20 | | | | |
| 1.2 Identified testers have been assigned end user roles based on job functions. | Percent of End Users in Initial Load = 6.67% | 573-B | Complete and Submit End User Role Mapping Worksheet | | |
| 1.3 UAT Roles and Responsibilities have been updated in agency-specific UAT Plan. | | 688 | Update UAT Plan | | |

*Figure 6: Role Mapping*

### User Story Creation

The User Story box located in the Processes section (Figure 7) shows the total number of Project Recommended Standard Activities applicable to your agency, how many applicable Project Recommended Standard Activities you have created user stories for, and the percent complete for creating applicable Project Recommended Standard Activities. The data is pulled from your *<Agency> Project Recommended Standard Activities* worksheet in Smartsheet.
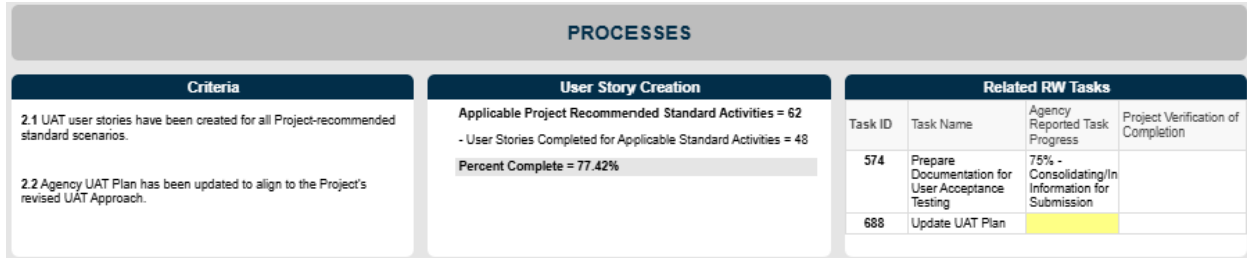
*Figure 7: User Story Creation*

## Interface Testing Progress

The Interface Testing Progress boxes located in the Technology section (Figure 8) shows the testing status and percent complete for both inbound and outbound interfaces. The data is pulled from your *<Agency> Cycle 2 Technical Interface Testing* worksheet in Smartsheet.
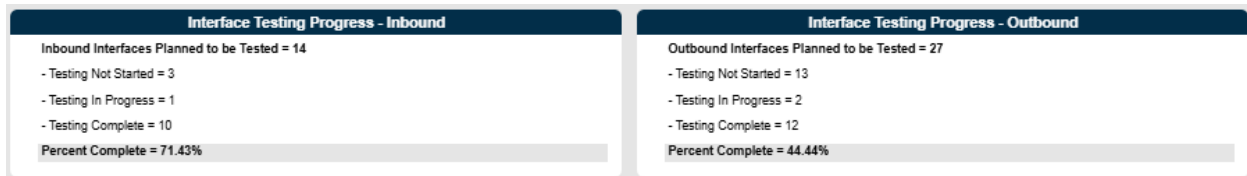


*Figure 8: Interface Testing Progress*

## Mitigation Plan for Incomplete Cycle 2 Testing

The Mitigation Plan for Incomplete Cycle 2 Testing box located in the Technology section (Figure 9) indicates that mitigation plans for each interface that has not completed Interface Cycle 2 - Technical Testing will be provided in a separate sheet, provided by the Project on January 5, 2026.
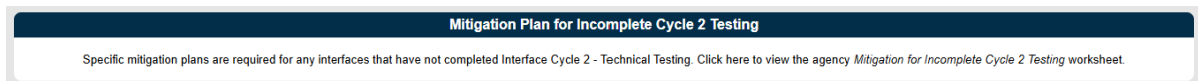


*Figure 9: Mitigation Plan for Incomplete Cycle 2 Testing*

**NOTE:** *This section is only provided on Dashboards for agencies that have not completed Interface Cycle 2 – Technical Testing.*

## Agency Sponsor Confirmation Section

***Agency action is needed for this section via completion of the Agency Sponsor Confirmation.***

The Agency Sponsor Confirmation (Figure 10) allows for easy submission of the Readiness Certification Dashboard. The confirmation should only be submitted by the Agency Sponsor after the *<Agency> Readiness Certification* and *<Agency> Readiness Mitigation* worksheets (if applicable) have been completed. Upon submission, a confirmation status will appear in the Status Report Confirmation section at the top of the page.

*Figure 10: Agency Sponsor Confirmation and Future Certifications Section*

## Future Readiness Certification Submissions Section

***No agency action is needed in this section, as it's provided for reference only.***

The Future Readiness Certification Submissions section (Figure 10) gives an overview of the timing and purpose of the additional certifications required before go-live.