EXECUTIVE STEERING COMMITTEE

DEPARTMENT OF FINANCIAL SERVICES

MARCH 26, 2025

ADMINISTRATIVE

TOMMY WERNER

Administrative
Budget

FY 2024-2025 Spend Plan Summary as of February 28, 2025				
Category	**Projected FYTD**	**Incurred FYTD**	**Released FYTD**	**Release Remaining**
FLAIR System Replacement	**$23,613,762**	**$17,556,993**	**$30,916,123**	**$13,359,130**
SSI Implementation Services	$13,900,000	$8,150,000		
Facilities and Maintenance	$277,128	$277,128		
Production Support	$6,403,608	$6,403,608		
Additional Facilities	$95,038	$86,049		
Production Support Administration	$44,066	$40,025		
Oracle Software and Maintenance	$812,467	$773,802		
Project Administration	$157,401	$59,597		
ERP and OC Support Services	$1,240,508	$1,137,980		
QA Support Services	$683,546	$628,804		
IT Service Management	$875,153	$885,925	$1,304,572	$418,647
Contingency	$0	$0	$0	$0
Salaries & Benefits	$6,260,798	$6,178,806	$10,220,897	$4,042,091
HR Transfer and Risk Management Insurance	$31,957	$19,957	$37,957	$18,000
Total:	**$30,781,670**	**$24,641,681**	**$42,479,549**	**$17,837,868**

Administrative
Risks and Issues

▸ Open Issue – Inability to Achieve Stage Gate 3 on the Current Timeline

   ◦ Action Plan Steps:

      • Negotiate and execute Amendment – Due March 3, 2025 - **Complete**

      • Update the Project Schedule – Due April 22, 2025 – **In progress**

      • Communicate RW changes to Stakeholders – Due April 28, 2025 – **In progress**

Administrative
Risks and Issues

▸ No new risks

▸ Three risks have been closed
  ◦ Risk 10 – Closed 3/19/2025
  ◦ Risk 8 and 9 – Closed on 3/26/2025

▸ One Risk with a score of 6
  ◦ Risk 2 – External stakeholders and agencies expectations

▸ Three Risks with a score of 9
  ◦ Risk 4 – Agency engagement
  ◦ Risk 5 – Timing and efficiency of information sharing
  ◦ Risk 6 – Execution of contracts and procurement activity outside of the Project

INDEPENDENT VERIFICATION AND VALIDATION (IV&V)

CONTENT PROVIDED BY PUBLIC CONSULTING GROUP

IV&V Update
Development

▸ Finding 14 – Risk that Delays to Build Could Impact the Completion of System Testing and the Start of UAT.

◦ All 122 Segment III Application Design Documents (AD) have been approved as of 3/7/25 (5 months behind targeted completion in the baselined schedule).

◦ Build Segment IV will be extended based on executed Amendment 12 (A12).

  • New target completion date of 5/31/25 in A12.

  • Current pace is ahead of schedule based on revised IV&V projections as of 3/20/25.

  • 102 of 103 ADs drafted (112 total ADs for Segment IV).

  • 54 ADs approved (12 more than the targeted 42).

  • Florida PALM IV&V Team projects Segment IV could be completed by 4/30/25.

IV&V Update
Development

▸ SSI Vendor development staffing levels have significantly increased over original projections.

  ◦ Based on pace of drafting ADs, there is an approximate 2-month learning curve from when additional staffing is added until the pace increases.

▸ The review process for AD documents is very thorough and comprehensive.

  ◦ Multiple review and update cycles based on feedback provided by the Florida PALM Project Team.

  ◦ The average time to complete the review of AD documents is approximately 32 business days.

IV&V Update
Data, Conversion, and Interfaces

‣ Finding 16 – Compounding delays in Mock Conversion 0 and 1 have led to a compressed timeline for Mock Conversion 2 and have the potential to impact multiple downstream activities, such as Interface Testing, future Mock Conversions, and UAT.

  ◦ Mock Conversion 2 was targeted for completion in December 2024 in the baselined schedule but has been impacted by delays to Build and Mock Conversions 1 and 0.

  ◦ Delay to start of Mock Conversion 2 has delayed the start of Interface Testing Cycle 2 (targeted for 2/1/25 in baselined schedule).

  ◦ Start of Mock Conversion 2 and Interface Testing Cycle 2 will be pushed back based on executed A12.

    • Mock Conversion 2A scheduled to begin 3/24/25 and 2B scheduled to begin 4/7/25.

    • All Mock Conversion 2 activities scheduled to be completed by 5/2/25.

‣ Florida PALM IV&V Team recommends that anticipated resolution dates for remaining Mock Conversion 1 SIRs and any new SIRs from future Mock Conversions should be provided by SSI Vendor.
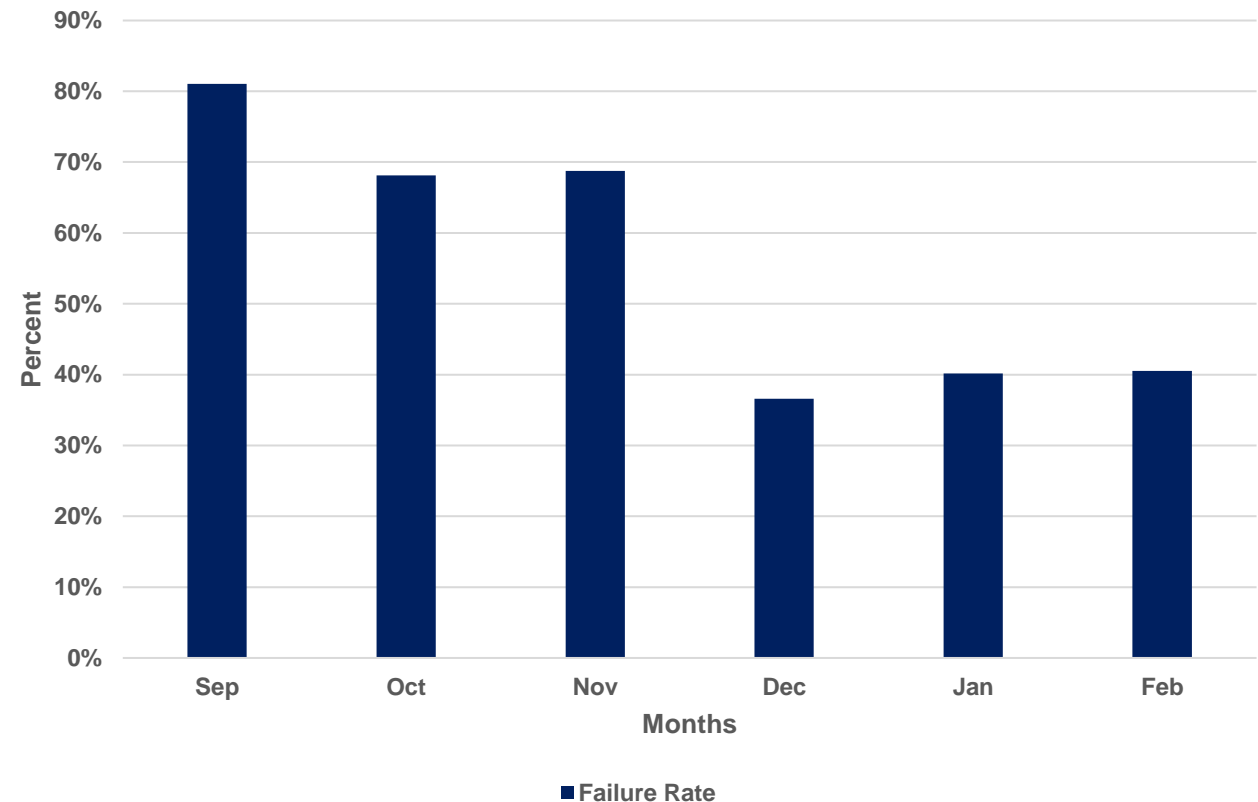
IV&V Update
System Testing

▸ Finding 15 – Risk that High Failure Rate For RICEFW-related Test Scripts May Impact Stage Gate 3 – Ready to Begin UAT.

- Initiatives implemented by the Software and System Integrator (SSI) Vendor improved the initial failure rate for RICEFW-related Test Scripts from December through February.

- Risk level reduced based on sustained reduction in failure rate.

RICEFW Test Cases Initial Failure Rate

Bar chart showing Failure Rate by month:
- Sep: ~81%
- Oct: ~68%
- Nov: ~69%
- Dec: ~36%
- Jan: ~40%
- Feb: ~41%

X-axis: Months; Y-axis: Percent (0%–90%)

■ Failure Rate

IV&V Update
System Testing

‣ Finding 18 – The current pace of System Test execution by the SSI Vendor and the addition of Test Scripts as Build Segments are completed could delay the completion of System Testing and increase the overlap with UAT.

◦ Trend in pace of execution increased to average of 65 Test Scripts per week in February before System Testing Segment II was completed on 2/25/25.

◦ Florida PALM IV&V Team estimates that an average of 88 Test Scripts executed per week would be needed to complete System Testing by 4/30/25 in the baselined schedule.

◦ System Testing will be extended and the overlap between System Testing and UAT will be removed based on executed A12.

IV&V Update
Project Management

- Finding 19 – The Florida PALM Project could benefit from increased adherence and updates to the Risk and Issue Management process.

  - Changes to the Risk and Issue Management process are pending since the Florida PALM Project focus has been on the A12 changes.

- As the schedule is updated per A12, Florida PALM Project Team should consider:

  - Establishing schedule control thresholds, schedule variance tolerances, and action triggers for task delays. This will assist in:

    - Early detection of issues for escalation.
    - Mitigation planning and decision-making support.
    - Risk Management.
    - Assist in keeping the Florida PALM Project on track and within budget, schedule, quality, and scope constraints.

IV&V Update
Organizational Change Management

▸ Finding 17 – Risk that the overlapping timing of UAT, Training activities, and Year End Close tasks may create resource constraints, increase SME and end user change fatigue and burnout, and reduce the effectiveness of Training delivery.

  ◦ Start of UAT will be pushed back, UAT will be extended, and go-live will be pushed back based on executed A12.

  ◦ Agencies continue to hire resources to support their Florida PALM readiness efforts.

IV&V Update
Organizational Change Management

▸ Florida PALM IV&V Team recommends leveraging information gathered from the Training Survey to:

- Provide agencies with guidance and support in developing and determining a Training timeline.

- Tailor the training approach based on feedback received.

- Encourage agencies' CCNs to collaborate/share their training and UAT approaches with each other.

- Deploying regular surveys and incorporate the results in future communications, plans, and activities.

IV&V Update
Agency Readiness

▸ Florida PALM IV&V Team identified key observations for Agency Risks and Issues:

- Agency Risks don't have sufficient detail in Risk documentation, including clear descriptions, potential impacts, and mitigation strategies.

- Inconsistent reviews of Risk scores & Issue priority to reassess the impact of mitigation plans or workarounds resulting in inaccurate Risk or Issue assessment.

- Risks are not categorized correctly as Monitoring or Mitigating, per RW Task 502 Supplemental Risk & Issue Guide, affecting the accuracy of risk reporting.

IV&V Update

Agency Readiness

▸ Florida PALM IV&V Team offers the following recommendations for agencies:

  ◦ Align agency practices with the Project Team's Risk and Issue management training and RW Task 502 Supplemental Risk and Issue Guide for identifying, documenting, and prioritizing Risks.

  ◦ Conduct periodic reviews to reassess Risk scores and update mitigation strategies, integrate Risk and Issue discussions into inter-agency meetings (e.g., PML-CML Standup Meeting) to identify cross-agency impacts, and regularly review Master Agency Risks and Issues Reports to detect shared or emerging risks.
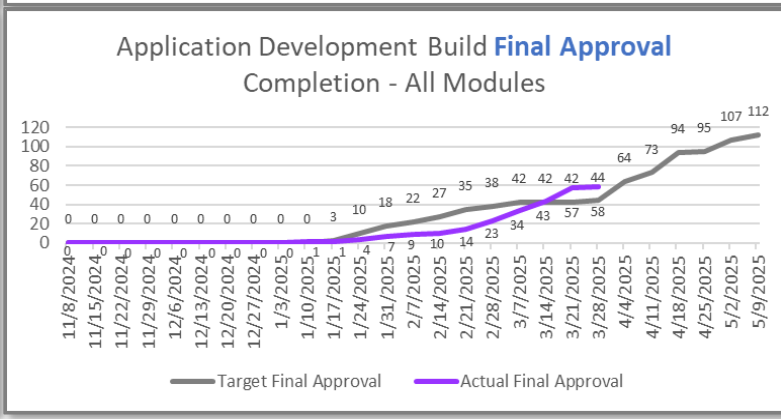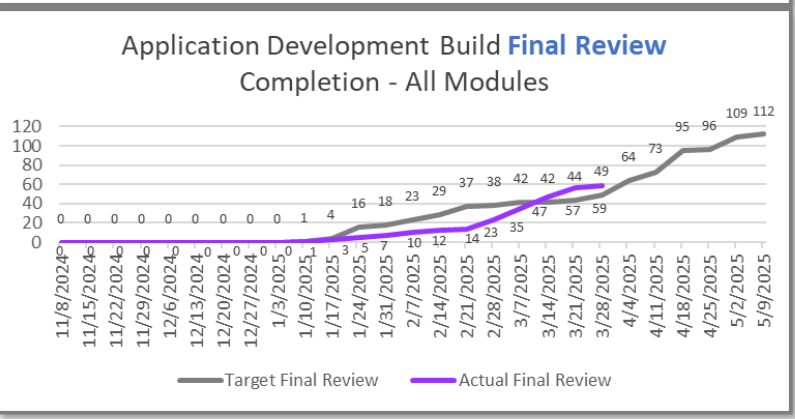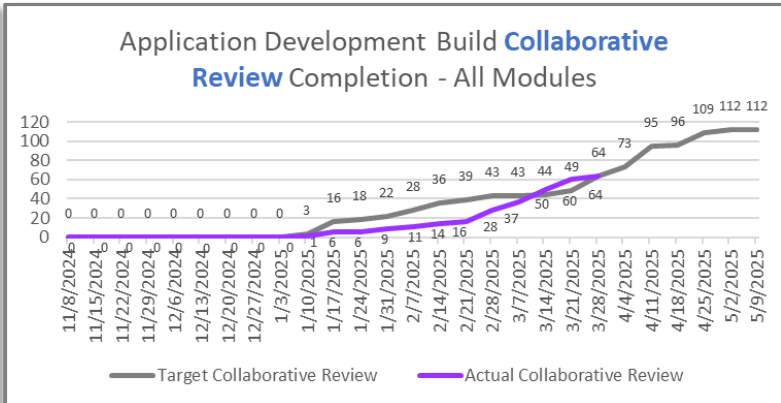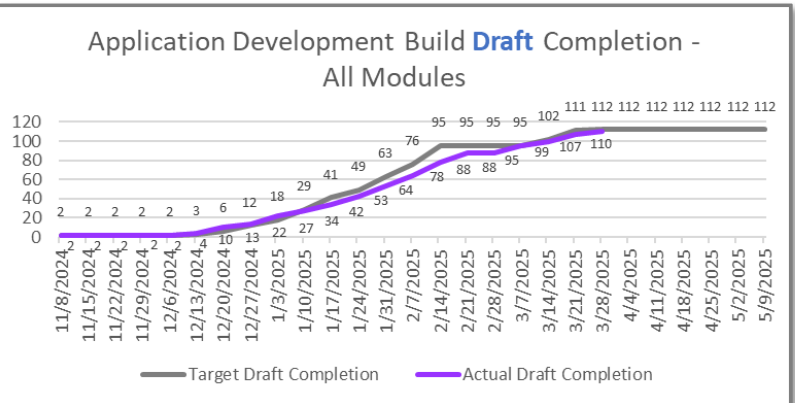
IMPLEMENTATION ACTIVITIES

STACEY TERRY

Implementation Activities
App Dev Build

Application Development Build **Draft** Completion - All Modules

Application Development Build **Collaborative Review** Completion - All Modules

Application Development Build **Final Review** Completion - All Modules

Application Development Build **Final Approval** Completion - All Modules

Segment III App Dev Build

- Build III completed on 3/7

Segment IV App Dev Build

- 112 of 112 (100%) draft AD work units have completed coding:
  - o Targeting submission of remaining 2 drafts by 3/28

- 110 of 112 (98%) draft ADs have been submitted for review / approval
  - o New process for tracking Collaborative Review status has been implemented and proving effective
  - o Targeting AD reviews/approvals to complete ahead of schedule by 5/9 to maintain System Test III execution completion in June
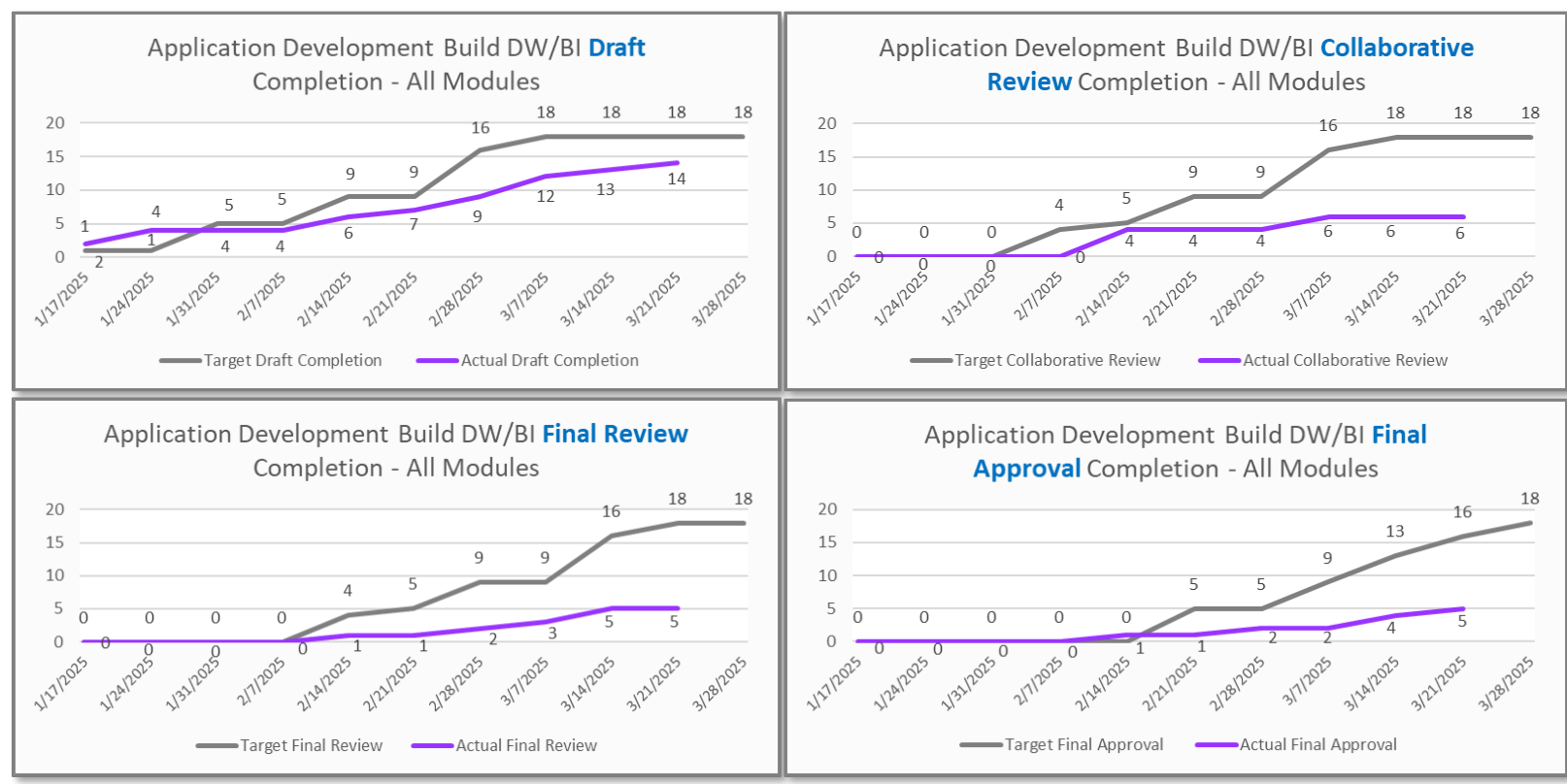
Segment IV App Dev Build Status
(as of 3/26/2025)

Legend: ● Complete ● On Track ● Monitoring ● Not on Track

Scope Schedule

Implementation Activities
DW/BI – Build

Application Development Build DW/BI **Draft** Completion - All Modules

Application Development Build DW/BI **Collaborative Review** Completion - All Modules

Application Development Build DW/BI **Final Review** Completion - All Modules

Application Development Build DW/BI **Final Approval** Completion - All Modules

DW/BI Build Segment III Status
(as of 3/21/2025)

DW/BI Build Segment III

- DW/BI Build Segment III completes 4/21
  - o Draft deliverable targeted to submit on schedule
- 14 of 18 (78%) drafts submitted to date
  - o Delays encountered in working through data validation issues and report build complexities on 1 work unit
  - o Targeting submission by 3/28
  - o Review feedback is being addressed
- 123 ETL jobs have been customized to-date for modules where reports have been built
  - o Complete – 64 (AP, AM, GM and GL)
  - o In Progress - 59 (IU, KK, PC, PR)
  - o Not Started – 20 (AR, PO); jobs will be evaluated after completion of DW/BI Build III

Implementation Activities
System Testing

System Test Execution Segment III	Count	% Against Total	% Against Executed to Date
Original Total Number of Scripts	706	-	-
New Total Number of Scripts	824	-	-
Planned to Date	7	0.8%	-
Executed to Date	10	1.2%	-
1st Run Pass Rate	9	1.1%	90%
1st Run Fail Rate	1	0.1%	10%
Pass Rate	9	1.1%	90%
Fail Rate	1	0.1%	10%

System Test Execution – Segment II

- System Test Segment II execution completed on schedule on 2/28
- As of 3/11, 795 scripts executed, 93% pass rate; 7% fail rate
- Medium and low SIRs will continue to be prioritized for resolution

System Test Execution – Segment III

- System Test Segment III began on 3/17; completes June 30
- Build IV work units that are eligible for migration through 3/20 will be migrated to the system test environments on 3/24
  - Migrations occur weekly

System Test Execution Segment III: Plan vs. Actual

— Planned Execution — Actual Execution
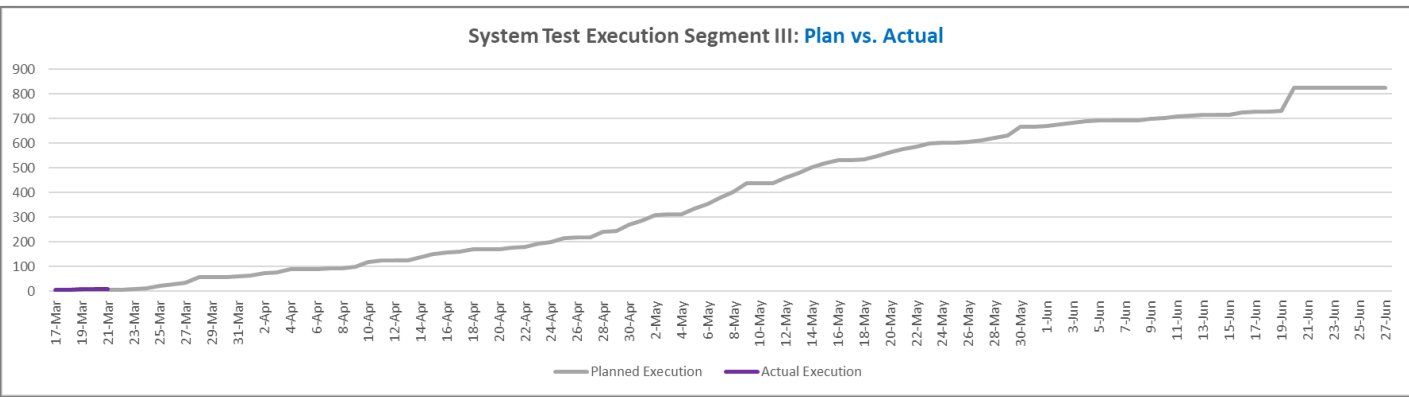
System Testing Segment III Status
(as of 3/21/2025)

Scope | Schedule

Implementation Activities
Mock Conversion

Mock Conversion II

Mock 2A - Financials	Mock 2B - Payroll
• APC001 – Suppliers • ARC001 – Customers • GMC001 – Grants (for Accounting Purposes) • CTC001 – Contracts (for Accounting Purposes) • PCC001 – Projects (for Accounting Purposes) • AMC001 – Assets and Property • KKC001 – Budgets • POC001 – Open Encumbrances • ARC002 – Open Accounts Receivable • GLC001 – General Ledger • PCC002 – Project Life-to-Date Balances	• PRC018 – Jobcode Conversion • PRC008 – Position Data • PRC005 – Personal Data and Privacy Indicators • PRC006 – Job and Payroll Data • PRC001 – W-4 Data and Lock-In-Letter Data • PRC002 – Employee ACH Information • PRC004 – Garnishments • PRC010 – Retirement Benefit Data • PRC003 – Employee Payroll Balances • PRC019 – Payroll Accounting Department Offset Groups Load (Manual) • PRC017 – Department Budget Position Funding Load • PRC021 – W-2 Employee Totals • API127 – Inbound Retiree Supplier Load • API022 – Inbound Employee Load

Conversion Mock I

- Mock 1A conversion completed in January
- Mock 1B conversion completed in March
- All critical and high SIRs have been resolved

Conversion Mock II

- Mock 2 kick-off meeting held on 3/19
  - Mock 2A (11) execution will begin on 3/24
  - Mock 2B (14) execution will begin on 4/7
  - Mock 2 targeted to fully complete by 5/2

Note: The revised A12 Go-Live date of July 2026 introduced the need to create the APC002 – 1099 Balances and PRC022 – Historical Paycheck Details conversions. These are being designed and built to be executed in future mock conversions.

Mock Conversion Status
(as of 3/21/2025)

Implementation Activities
Interface Testing

Enterprise Partners	Agencies and Special Handling	Third Parties
• DOR • FACTS • MFMP • LAS/PBS • People First • STMS • Works (BOA)	• Agencies (31) • AG • DFS Enterprise • DMS • EDR • FRS • HSMV • LEG • Risk Management • UCP	• Fidelity Information Services (FIS) • JP Morgan Chase (JPMC) • Wells Fargo (WF)

Interface Testing Segment I

- Interface Test Segment I includes the following cycles:
  - o Cycle 1 – Connectivity Testing (Began October 2024)
    - Connectivity testing is complete for agencies; pending for 2 enterprise partners
  - o Cycle 2 – Technical Testing (June – October 2025)
    - Testing is executed in the Interface Test environments (INT)
    - Connections confirmed for 39 integration partners; confirmation pending for 3 integration partners
    - Environment preparation activities are underway (e.g., interface configuration, MFT folders, etc.)
    - Execution schedule is being drafted
    - Kick-off meeting planned for week of May 20th; information materials being draft for submission in April

Interface Testing Segment II

- Interface Test Segment II includes the following cycles:
  - o Cycle 3 – Full Integration Testing (December 2025 – March 2026)
    - Testing is executed in the User Acceptance Test environments (UAT)

Interface Testing Status
(as of 3/21/2025)

READINESS & TRAINING ACTIVITIES

KIMBERLY KEMP, NIKKI KLEIN

Readiness & Training Activities

Bimonthly Agency Readiness Status Reports

General Observations

▸ Submission of Bimonthly (Task 589):

- All agencies submitted
- 5 agencies submitted after the due date (2 more from last bimonthly)
- Zero Agency Sponsor roles vacant (no change from last bimonthly)

▸ Open Items:

- 26 outstanding / late tasks (6 less from last bimonthly)
- 23 agencies with outstanding / late tasks (1 less from last bimonthly)
  - <u>4 Direct Impact</u> Tasks outstanding across 4 different agencies related to interface confirmations and conversions
  - "Other" Tasks concentration on Change Impacts and ABS Documentation and Remediation tasks by Segment

Readiness & Training Activities

Bimonthly Agency Readiness Status Reports

As of 03/19/2025

Direct Impact Task Timeliness
Green - 35
Yellow - 0
Red - 0

Other Task Timeliness
Green - 30
Yellow - 5
Red - 0

Direct Impact Task Completeness
Green - 33
Yellow - 2
Red - 0

Other Task Completeness
Green – 31
Yellow - 4
Red - 0

Observations:

- No agencies with a red indicator

- More green indicators for timeliness and completeness of Direct Impact Tasks

Agency	Direct Impact Task Timeliness	Other Task Timeliness	Direct Impact Task Completeness	Other Task Completeness
AHCA	Green	Yellow	Green	Green
APD	Green	Green	Green	Green
CITRUS	Green	Green	Green	Yellow
COM	Green	Green	Green	Green
DACS	Green	Green	Green	Green
DBPR	Green	Green	Green	Green
DCF	Green	Yellow	Green	Green
DEM	Green	Green	Green	Green
DEP	Green	Green	Green	Green
DFS	Green	Green	Green	Green
DJJ	Green	Green	Green	Green
DLA	Green	Green	Green	Green
DMA	Green	Green	Green	Green
DMS	Green	Green	Green	Green
DOAH	Green	Green	Green	Green
DOE	Green	Green	Green	Green
DOEA	Green	Yellow	Green	Green
DOH	Green	Green	Green	Green
DOL	Green	Green	Green	Green
DOR	Green	Green	Green	Green
DOS	Green	Green	Yellow	Green
DVA	Green	Yellow	Green	Green
EOG	Green	Green	Green	Green
FCOR	Green	Green	Green	Green
FDC	Green	Green	Green	Green
FDLE	Green	Green	Green	Green
FDOT	Green	Yellow	Green	Green
FGCC	Green	Green	Green	Green
FLHSMV	Green	Green	Green	Yellow
FSDB	Green	Yellow	Green	Green
FWC	Green	Green	Green	Green
JAC	Green	Green	Green	Yellow
LEG	Green	Green	Green	Green
PSC	Green	Green	Green	Green
SCS	Green	Green	Green	Green

Readiness & Training Activities
Bimonthly Agency Readiness Status Reports

Summary of Agency Risks Reported		Risk Probability		
		Low = 1	Medium = 2	High = 3
Risk Impact Rating	Low = 1	*Score = 1* 15 (+3)	*Score = 2* 5 (+0)	*Score = 3* 2 (+0)
	Medium = 2	*Score = 2* 25 (+5)	*Score = 4* 63 (-1)	*Score = 6* 20 (-4)
	High = 3	*Score = 3* 30 (-1)	*Score = 6* 68 (-4)	*Score = 9* 46 (-10)

Risk Metric	Prior Report	Current Report
Agencies Reporting	32	32
Open Risks	286	274
Closed Risks	49	38
Risks Scored 6+	152	134

Issue Metric	Prior Report	Current Report
Agencies Reporting	23	26
Open Issues	64	70
Closed Issues	21	9
Issues Scored Critical or High	55	55

Assumptions Metric	Prior Report	Current Report
Agencies Reporting	27	25
Assumptions Logged	192	179

Readiness & Training Activities
Bimonthly Agency Readiness Status Reports

Themes Across Risks, Issues, and Assumptions

‣ Some updates, including reduction is score, due to A12

‣ Lots of risks that should be logged questions

‣ ***Adoption/Implementation of Florida PALM as Designed*** – System remediation impacts, process change impacts, user education (UAT/Training)

‣ ***Staffing and Resource Availability*** – Internal and external, competing agency projects or priorities – *We are seeing onboarding of new resources*

‣ ***Data*** – effectiveness of Mock Conversion results and guidance, data availability for interface testing

‣ ***Timeline*** – Testing and remediation, downtime / cutover

‣ ***Enterprise Partners*** – Communication, testing plans and availability

Readiness & Training Activities
Upcoming

- **Readiness Workplan Updates**
  - RW and agency roadmap planned release in April to align to Project schedule
  - RW enhancement to include additional information
    - Detailed task type (conversion, configuration, role mapping, UAT, etc.)
    - Correlation to applicable Agency Readiness Certification
- **Upcoming Tasks**
  - Data Cleansing based on Mock Conversion 2
  - Identification and role mapping of UAT SMEs
    - End user role articles to be published to the Knowledge Center, will include end user role description, role functions, and any related SOD conflicts
- **New Report View on Website in May: Readiness for Cycle 2 Testing**

Readiness & Training Activities
End User Learning

	UAT August 2025 – May 2026	Training March 2026 – July 2027
Project	Online: • Secure locations for face-to-face sessions and schedule / support participants • Prepare step-by-step guidance on completing Activities within Florida PALM – Will be published to Knowledge Center as available • Develop and share prerequisite learning and conduct kick off for participants Full: • Resolve Tickets and support agency questions • Provide targeted support sessions to agencies • Refine materials based on UAT participant feedback	• Develop training materials for core Florida PALM functionality – Online and trainer delivered • Publish training materials to Knowledge Center • Deliver trainer-facilitated training, where appropriate • Create and maintain an End User Manual • Publish Knowledge Checks on LMS • Provide targeted support sessions to agencies / end users
Agency	Online: Identify SMEs and allow for their participation Full: • Secure locations for face-to-face sessions and schedule / support participants • Prepare and provide user stories and other materials to support end user testing and completion of business processes during UAT • Test processes end-to-end inclusive of agency business systems • Monitor and report progress with user acceptance testing • Update / modify processes based on information learned during testing	• Monitor and report end user training progress • Develop training materials for agency-specific processes • Deliver trainer-facilitated training, where appropriate

Readiness & Training Activities
Materials Development

Manually Managing Customer Information

Navigation

NavBar > Menu > Florida PALM > Customers > Customer Information > General Information

End User Roles

- Agency Customer Maintainer

Process Steps

1. Navigate to the **General Information** tab of the **Customer Information** page.
2. Click **Find an Existing Value**.
3. Populate the following:
   - SetID
   - Customer ID
4. Click **Search**.
5. Click the **Customer** to edit in the search results.
6. Edit customer information on any of the following tabs:
   - General Info
   - Bill To Options
   - Ship To Options
   - Sold To Options
   - Miscellaneous General Info
7. Additionally, the following criteria may be added and/or edited:
   - Name 2 field
   - User Defined
   - Status
   - Inactive
   - Active
8. Click **Save**.

Special Considerations or Process Variations

Version History

0x/xx/2025	Original Version

KNOWLEDGE CENTER

End User Manual

∨ **Florida PALM Fundamentals**

  ∨ State Financial Overview

  > **Florida PALM Overview**

  User Access and Roles

  Logging In

  Navigation Elements

  Search Function

  General Settings

  > **Personalization**

  Notifications

  WorkCenter Overview

> **Workflow Overview**

Account Management and Financial Reporting Overview - Demo

FloridaPALM

START TRAINING

Welcome

Purpose

This training will introduce you to accounting activities supported by Florida PALM's Account Management and Financial Reporting (AMFR) for Financials and Payroll Wave. This "Read It" approach features five microlessons where you can learn at your own pace. Each segment presents an Introduction, the Learning Content, and a Let's See What You Remember component.

Interactive Features

This training offers interactive features to engage you in the learning process. These sections will appear in green during the lessons. When you encounter them, follow the instructions to ensure you do not miss any content.

Recommended Audience

Florida PALM is a role-based system, and this training provides a high-level overview of AMFR. Due to Florida PALM's module interactions, the Project recommends that all end users complete this training.

To begin, click Overview in the menu below.

MENU

≡ Overview   ○

≡ Commonly Used Terms   ○

≡ Concepts   ○

≡ Subject Areas   ○

≡ Summary   ○

ADVISORY COUNCIL UPDATE

ROBERT HERRON

Advisory Council Update

▸ Open discussion on Agency Readiness during the March meeting
  ◦ How will your agency know if it's ready?
  ◦ What mitigation strategies are you considering if success factors are not met?
  ◦ What do agencies need that the Project is not providing?
  ◦ What questions should the Project be asking to determine agency readiness?

▸ Workgroup formed to create a Readiness Checklist that can be used by all agencies to help determine and document readiness from their perspective

▸ A recap from the workgroup's first meeting (April 1) will be shared in the April Advisory Council meeting

FUNDING REQUESTS

STEVEN FIELDER

Legislative Funding Requests

▶ Review your fiscal year 25-26 legislative budget request

▶ Discuss internally: Will your funding needs change due to the Florida PALM go-live shift to July 2026?

◦ Interface Testing and User Acceptance Testing now in FY 25-26

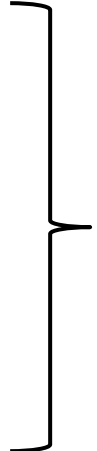# BIMONTHLY AGENCY STATUS REPORTS CHANGES

ANGIE ROBERTSON

Bimonthly Agency Status Reports Changes
Readiness Dial Calculations

	Current	Future	
Scale for Task Timeliness and Completeness Dials	• 100% - 80% = Green • 79% and 50% = Yellow • 49% and 0% = Red	• 100% - 90% = Green • 89% and 70% = Yellow • 69% and 0% = Red	For Direct Impact Tasks
Scoring Timeline for Task Timeliness	• 100% when submitted by due date • 10% reduction every 5 business days past due date	• 100% when submitted by due date • 10% reduction every *3 business days* past due date	
Scoring Timeline for Task Completeness	• 100% when submitted complete • If incomplete, 10% reduction every 5 business days to resubmit	• 100% when submitted complete • If incomplete, 10% reduction every *3 business days* to resubmit	
CCN Composition Scoring	Calculation maximum score = 14 (100%) – Uniquely filled role = 1 point each – Duplicate role = 0.25 points each – Vacant role = 0 points • 100% - 66% = Green • 67% - 34% = Yellow • 33% - 0% = Red	Calculation maximum remains 14 – Uniquely filled role = 1 point each – Duplicate role = 0 points – Vacant role = 0 points • 100% - 80% = Green • 79% - 50% = Yellow • 49% - 0% = Red	

Bimonthly Agency Status Reports Changes
Risk and Issues Enhancements

▸ Current design presumed that agencies had other mechanisms for fully tracking risks and issues – The Bimonthly would be a summary

▸ There is a separate task for review of risks and issues

▸ There remain stale risks and issues

▸ Planned enhancements:

◦ Eliminating the separate "manage risks and issues" task

◦ Expand the available fields of information (e.g., trend, dates)

◦ Clarify the purpose for each field

◦ Conditional formatting to help identify stale information

NEXT MEETING

APRIL 23, 2025

DEPARTMENT OF REVENUE

CONTACT US

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PROJECT WEBSITE

[HTTPS://MYFLORIDACFO.COM/FLORIDAPALM/](https://myfloridacfo.com/floridapalm/)

KNOWLEDGE CENTER

[HTTPS://MYFLORIDACFOFLORIDAPALM.US.DOCUMENT360.IO](https://myfloridacfofloridapalm.us.document360.io)