Bimonthly Agency Readiness Status Report

This report is a collection of Bimonthly Agency Readiness Status Reports as provided by agencies on a bimonthly basis, containing the status of the agency and enterprise remediation progress for each business system required for the Florida PALM Financials and Payroll deployment, in accordance with Proviso contained in the 2023/24 General Appropriations Act.

Reporting Period:

July – August 2023

AHCA Status Report Dashboard

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

Readiness Workplan Tasks

- 80%
- 20%
- 0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

People

Change Champion Network:

• Unique Filled Role = 7

• Duplicate Filled Role = 6

• Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Processes

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 1 Not Started = 0

Implementation:

• Role Mapping = TBD

Technology

Current-State:

Cataloged Business Systems = 26

• **Criticality:**

- High = 15 Med = 0 Low = 3 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 1 Not Started = 16

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Data

Current-State:

Unique FLAIR Data Elements = 63

• **Associated Unique Uses = 63**

- Continued Use - Yes = 1

- Continued Use - No = 0

• **Associated Business Systems = 22**

Cataloged Reports = 47

• **Criticality:**

- High = 45 Med = 0 Low = 0 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

AHCA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Data	If the resources are not identified and onboarded in a timely manner 1) the Agency will not complete the tasks in a timely manner 2) the Agency will not transition to Florida PALM in January 2026.	Open	6 (High/Medium)	Current Augmented Staff will take upon the added responsibility of documenting the functional and technical specifications and mapping the chart of accounts and will spend less time making needed application changes to incorporate current manual processes.			Management

AHCA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

AHCA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

AHCA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

Submit

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AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	09/11/23

APD Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Rose Salinas

Readiness Workplan Tasks

100%

0%

- Completed
- Submitted Late
- Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 6

• Duplicate Filled Role = 9

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

• **Criticality:**

- High = 9 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 3 Partial = 6 Not Started = 0

Cataloged Interfaces = 78

- Inbound Interfaces = 6

- Outbound Interfaces = 1

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 480

• **Associated Unique Uses = 1181**

- Continued Use - Yes = 1094

- Continued Use - No = 57

• **Associated Business Systems = 2**

Cataloged Reports = 112

• **Criticality:**

- High = 150 Med = 18 Low = 1 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully		APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime		PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents		PALM Team/APD Project Team
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect	Measurement: Reconciliation issue		APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system	Measurement: Employee feedback and adoption rate		PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems	Measurement: Number of integration issues		PALM Team/APD Project Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results		PALM Team/APD Project Team
People Processes Technology	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets		PALM Team/APD Project Team

Data

APD Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	IT Team question for confirmation - Data Warehouse - PALM to own this and open questions remain - regarding the scripting to be changed and how APD will receive that information along with the understanding of a comprehensive conversion plan at time of migration to the new PALM Platform.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	IT Team is engaged now with the PALM IT team and gaining input and understanding of status - ongoing	This is will be an on-going	07/31/25	APD IT/Project Team/PALM

APD Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	

APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	SME Team updates	8/31	APD CCN and SME Teams	Identify the primary and secondary contacts with each remote location - regions/facilities/DDDP	Updated with new input to the SME team. APD initiative to always provide a primary and secondary to each role within the finance team structure
People	Bi-Weekly Hi-5's - Information message to the APD teams	7/6, 7/24, 8/7, 8/21, 9/5	APD Teams/CCN/SME's	Provide updates and information regarding the progress and motivation for the PALM Project as it moves forward	Bi-weekly information email sent to the teams for review and information sharing
People	APD - OWP for Additional Project Team Support	8/31	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	Target onboarding in October 2023
People Processes Data	PALM Workshop Particiaption	8/14, 8/15	APD Finance teams for Module: Disbursements and Financials/Budget/Cash Control	APD Team members attending to get an understanding of the overview and discussion around design and build elements for the PALM platform and where changes or additions are being added	APD Team members participated - primary and secondary (2 from each Finance area) so that exposure and understanding was provided for the PALM efforts currently in process
People Processes Technology Data	PALM Advisory Council Meeting	8/16	APD participation in PALM Hosted Advisory Counsel meeting	Be a part of the communication dissemination - understand where APD fits in and what is happening by keeping up to date	Attended by either or both Ramon or Becky to represent any significant information understanding and sharing with the PALM roll out objectives and actions
People Processes Technology Data	APD - Readiness - Status update Task 331	9/6 - 9/11	APD Finance Teams/PALM Teams	APD reporting on efforts to manage the project activities and objectives	APD will meet the bi-monthly requirement - but will update as activities/issues/update/completions are done.Sept report submitted 9/11
People Technology	APD Smartsheet Use	8/31	APD Finance and IT Teams	APD has determined that the use of Smartsheet will enhance the productivity within the Finance and IT teams and will add value to the efforts to align with PALM and the project requirements as well as establish good internal communication and collaboration going forward	Currently APD is onboarding and learning the basic use of the application as it is rolled out to the Finance teams. it will be better used as the Business Analyst and Tech Developer come on board to manage multi projects internally
Processes	Business Process exercise Step 1	9/1	APD Finance Teams	APD Step 1 - Finance Team Responsibility defined with job listing and team organization defined - in process	Starting at top down - APD to define Team/Module Purpose/Responsibility/Objective/Requirements
Processes	Legacy Historical Process Manual Review	8/2 - present	APD Finance Team/APD PALM Team	Use and understanding of the existing APD Finance Manual with separation for PALM Alignment into teams and defining for use in Business Process Updates	Using the APD Manual to review and assist Teams with new effort to update/create new/analyze existing practices
Technology	Business System Review - Task 326	9/6 - 9/15	APD IT Team	Final Review on the inventory in Smartsheet	This Task is considered completed and will be submitted after review with IT Primary by 9/15 - 2 open questions remaining for IConnect and Inventory System

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** *

Submit

APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:

CITRUS Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Christine Marion

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5
- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:
- Unique Filled Role = 2
- Duplicate Filled Role = 12
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:
- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:
- Training = TBD

Current-State:
Cataloged Business Processes = 0
- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:
- Role Mapping = TBD

Current-State:
Cataloged Business Systems = 0
- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 1
- Inbound Interfaces = 1
- Outbound Interfaces = 0

Implementation:
- Interfaces = TBD

Current-State:
Unique FLAIR Data Elements = 70
- **Associated Unique Uses = 70**
- Continued Use - Yes = 21
- Continued Use - No = 0
- **Associated Business Systems = 2**

Cataloged Reports = 40
- **Criticality:**
- High = 18 Med = 11 Low = 5 None = 0

Implementation:
- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

CITRUS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Due to size of agency and small accounting staff, same person must have multiple roles or back up roles	Open	6 (Medium/High)	We had hoped to request additional appropriation to hire OPS/contract help during the project. However, the process for making these requests has not been identified to us.			
People	All new accounting staff. Staff members previously on PALM team have left the agency.	Open	6 (Medium/High)	We have assigned previous roles to new staff, but there will be a learning curve.			
People	The majority of PALM meetings have moved to "in-person" meetings in Tallahasee. Due to staffing and budget issues, travel to Tallahassee (a ten hour round trip) precludes us from sending staff to these meetings.	Open	6 (Medium/High)	It is difficult to get new staff up to speed. We are reviewing previously recorded meetings as time allows. I think this will be a significant issue as we get closer to go-live.			
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.			

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

CITRUS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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: *

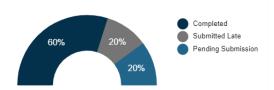☐ **Confirm** *

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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23

COM Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Tisha Womack

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

60% 20% 20%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 1
- Pending Submission = 1

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 5
- Vacant Role = 4

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 71

- **Associated Unique Uses = 84**
- Continued Use - Yes = 2
- Continued Use - No = 12
- **Associated Business Systems = 2**

Cataloged Reports = 373

- **Criticality:**
- High = 2 Med = 0 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

COM Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	The current schedule for review of Payroll Wave Business Models allows insufficient time for comprehensive agency review.	Open	6 (Medium/High)	At present all we can do is await the publication of the meeting materials.		09/13/23	Lisa Simpson

COM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

COM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

COM Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

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COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23

DACS Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Alan Edwards

Readiness Workplan Tasks

100%

- ● Completed
- ● Submitted Late
- ● Pending Submission

0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 5
- Submitted Late = 0
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 11
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 5
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 82

- Related Business Systems = 4
- Related Reports = 4
- **Documentation Status:**
- Complete = 0 Partial = 82 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 16

- **Criticality:**
- High = 13 Med = 3 Low = 0 None = 0
- **Documentation Status:**
- Complete = 12 Partial = 3 Not Started = 0

Cataloged Interfaces = 42

- Inbound Interfaces = 28
- Outbound Interfaces = 14

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- Continued Use - Yes = 50
- Continued Use - No = 19
- **Associated Business Systems = 6**

Cataloged Reports = 198

- **Criticality:**
- High = 84 Med = 56 Low = 17 None = 51

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities table below display only items that were opened/logged, closed/resolved or active during the reporting period.

DACS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	Divisions' use of existing budget codes for various purposes could increase the complexity of cross-walking/converting to the PALM data structure.	Open	9 (High/High)	Identify opportunities for standardization to discuss with divisions during engagements related to remediation and data cleansing. Began the PALM Task 116 early. Expecting an 18-month duration for the analysis.	Ongoing		Jim Lewandowski
Data	The FLAIR and Florida PALM data will represent substantially different information and may cause a gap in trend analysis.	Open	9 (High/High)	Detailed data crosswalks will be imperative to closing potential data translation gaps.	Ongoing		Jim Lewandowski
Technology	Division applications may require more remediation than the project team can accomplish prior to the transition to PALM.	Open	6 (Medium/High)	Begin the analysis of the Divisions earlier than planned and prioritize the Divisions that are the most likely to be impacted by PALM. Establish a communications plan with Divisions that were identified as a priority and adjust the plan as the analysis progresses using an iterative approach.	Ongoing		PPMO
Technology	Unknown changes to the PeopleFirst Payroll component.	Open	6 (High/Medium)	Monitor People First updates and the Florida PALM team to be involved in the analysis and dependencies.	Ongoing		Jim Lewandowski
People	Potential future vacancies with the finance and accounting staff as PALM approaches due to employee concerns about adapting to new processes/technology, job security, and performance.	Open	6 (High/Medium)	Increase focus on people readiness and change management. Increase communication and training to build confidence in employees' abilities to successfully launch as an agency.	Ongoing		Nicole Jacobik
Technology	Florida PALM Schedule for Functional Design -	Open	6	Stay current on Florida PLAM RW tasks, stay	Ongoing		Florida PALM

	leaves 1 year for major remediation (ESC 7/26/23, ~15:00 min.)		(High/Medium)	informed with Florida PALM updates, and remediate as much as possible in advance.			
Processes Technology	Short turnaround time of Florida PALM tasks (the time between the notification and description of the task and the expected task completion date) could result in the inability to meet stated due dates.	Open	4 (Medium/Mediu	Continue to monitor Florida PALM notifications and participate with Florida PALM at every opportunity.	Ongoing		Jim Lewandowski

DACS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DACS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	Funding for staff aug and services will continue through implementation and Hypercare (ESC 7/26/23, ~15:00 min.)	Logged	08/31/23	Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM.	

DACS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	FLAIR to PALM COA mapping	Ongoing	Enterprise-wide	Continued review and development of a concept PALM COA for the department for translation.	Ongoing
People	PALM Update: Monthly Supervisor's Meeting	7/27/23	Finance and Accounting	Facilitate open communication on Florida PALM updates and status of agency readiness activities	Finance and Accounting Supervisors and Bureau Chief's Office
People	Internal PALM Communication Update	7/28/23	Finance and Accounting	Increase awareness, preparedness, and engagement with training materials.	Communicated steps to prepare for PALM, reiterated the importance of understanding current processes, and emphasized training/resources available on PALM website
People	Participated in Advisory Council Monthly meetings	8/14/23	Direct: Finance and Accounting Indirect: Agency-wide	Provide feedback on Major Project Deliverables to the ESC. Anticipate PALM-readiness agency needs via AC discussions.	Discussed newly published Revenue Account Code titles, fall data management meetings, Task 328, Business Process Models Review Sessions, and Bimonthly Agency Readiness Status Report Feedback.
Processes	Process review	Ongoing	Enterprise-wide	Ensure processes are as effective and efficient as possible for translation to PALM as appropriate.	Ongoing
Processes	Revenue Process Meetings	7/6/23, 7/21/23	Direct: Revenue Section, Indirect: Enterprise-wide	Subject Matter Experts analyzed current revenue position processes and brainstormed REV system updates needed to transition to future PALM processes.	Outcome: REV system remediation items driven by accounting process design.
Processes	Attended Segment I Financials Wave Business Process Models Review: Disbursements Management	8/14/23	Direct: Finance and Accounting Indirect: Agency-wide	Share meeting updates to increase agency knowledge, improve remediation strategies, and assist in forward-thinking data cleanup.	Several agency subject matter experts and change champion network members attended.
Processes	Attended Segment I Financials Wave Business Process Models Review: Accounts Management and Financial Reporting, Budget Management, and Cash Control.	8/15/23	Direct: Finance & Accounting, Office of Policy and Budget Indirect: Agency-wide	Receive PALM updates to facilitate forward-thinking data cleanup and perform gap analysis of critical processes.	Several agency subject matter experts and change champion network members attended.
Technology	Participated in PALM Change Management and Training Liaison Forum	7/25/23	Direct: Change Management/Training Liaison Indirect: Agency-wide	Facilitate agency collaboration. Provide tools for agency change management and training plan implementation.	Addressed people-related issues, risks, and assumptions. Discussed strategies for overcoming resistance to change and embracing the PALM journey. Brainstormed communication and training format, frequency, and content (statewide and agency-specific)
Technology	Designed and developed a new application: FLAIR to PALM COA Lookup Tool	7/1/23 - ongoing updates and revisions	A new application. Indirect: All agency business systems with FLAIR/PALM COA codes.	Provide a lookup application for users to gain familiarity with the new COA for PALM Chart fields. Looking up FLAIR codes and showing the PALM translations to assist in agency business system remediation.	Published an internal URL for the lookup application. Reviewed the COA look-up application with Subject matter experts and management. The underlying COA translation tables will be updated as additional PALM COA values are released and FDACS FLAIR data cleanup progresses. The COA Lookup application will be used in future data cleanup discussions with divisions and SME training this fiscal year.
Technology	Chart of Accounts Crosswalk Design	7/1/23 - 9/30/23	New remediation software.	Design a common software for IT systems to use as part of their remediation to translate FLAIR to PALM.	In progress
Technology	Agency PALM Management Meetings: OATS, PRT, and F&A	7/20/23, 7/28/23, 8/11/23	REV, AIMS, FANS	Review the status of ABS readiness implementation schedule and increase collaboration between technology experts and agency process subject matter experts.	Discussed AIMS, FANS, and REV remediation, GASB remediation, ABS readiness timelines, report cleanup to reduce the number of reports needed for PALM and ABS, Data Cleanup, staffing changes. *Office of Agricultural Technology Services (OATS), PALM Remediation Team (PRT), and Finance and Accounting (F&A)
Technology	FANS and PALM Strategy Meeting	8/28/23	FANS	Discuss FANS upload, future PALM interface remediation, and implementation plan.	High-level strategy meeting to review resources needed, process/system gaps, and FANS-readiness impact to the overall PALM timeline.

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 ***

Submit

DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Alan Edwards	alan.edwards@fdacs.gov	09/11/23

DBPR Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Tyler Russell

Readiness Workplan Tasks

- Completed 60%
- Submitted Late 40%
- Pending Submission 0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 2
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

People

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 3
- Vacant Role = 3

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 3
- Meetings Missed = 2

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Processes

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Technology

Current-State:

Cataloged Business Systems = 15

- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Data

Current-State:

Unique FLAIR Data Elements = 84

- **Associated Unique Uses = 85**
- Continued Use - Yes = 48
- Continued Use - No = 32
- **Associated Business Systems = 37**

Cataloged Reports = 55

- **Criticality:**
- High = 20 Med = 19 Low = 15 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

DBPR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Agency's Operational Work Plan will be approved and funds to implement work plan will be available	Logged	09/11/23	All users of Florida PALM	

DBPR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Florida PALM Advisory Council	7/19/2023	Sally Huggins	Attended monthly meeting as member of the Advisory Council	
People	Monthly Touchpoint	7/21/23	Sally Huggins	Monthly touchpoint with Florida PALM readiness coordinator	
People	Executive Steering Committee	7/26/23	Lynn Smith	Attended monthly meeting as member of the ESC	
People	Florida PALM Advisory Council	8/16/23	Sally Huggins	Attended monthly meeting as member of the Advisory Council	
People	Monthly Touchpoint	8/18/23	Tyler Russell, Chief of Staff; Sally Huggins; Mindy Heindl	Monthly touchpoint with Florida PALM readiness coordinator	
People	Executive Steering Committee	8/23/23	Lynn Smith	Attended monthly meeting as member of the ESC	
People Processes Technology Data	Operational Work Plan	7/31/23	All stakeholders and systems	Submission of Operational Work Plan to the Office of Policy & Budget	
People Processes Technology Data	Segment I Business Process Model Review Financials Wave 30.3 Enter & Process Vouchers	8/14/23	All Disbursements Management users	Participated in business process model reviews for Disbursements Management	John Mounts & Sally Huggins attended
People Processes Technology Data	Segment I BPMR AMFR/Budget Mgmt/Cash Control Financials Wave 10.1 Set Up & Maintain Chart of Accounts & 20.1 Enter & Process Budget Journals	8/15/23	All Financial Reporting, Budget Management &Cash Control users	Participated in business process model reviews for Budget Managmen	John Mounts & Sally Huggins attended
People Processes Technology Data	Tuesday Task Talk	8/29/23	Tyler Russell, Lynn Smith, Sally Huggins	Listened to Tuesday Task Talk related to Task 331	Sally Huggins listened to the webinar on 9/8/23
People Processes Technology Data	Task 328 - Reports Inventory	7/28/23	All Users	Completed Task 328 Reports Inventory	
People Processes Technology Data	Task 198 - Provide Agency Update for Project Status Reporting	7/10/23	Sally Huggins	Completed June 2023 Agency Status Report	

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** *

[Submit]

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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Tyler Russell	tyler.russell@myfloridalicense.com	09/13/23

DCF Status Report Dashboard

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

20% / 20% / 60%

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

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 1

• Submitted Late = 1

• Pending Submission = 3

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 5

• Duplicate Filled Role = 6

• Vacant Role = 3

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 4

• Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 0

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 70**

- Continued Use - Yes = 0

- Continued Use - No = 0

• **Associated Business Systems = 0**

Cataloged Reports = 0

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DCF Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Financial Leadership Distraction	Open	6 (Medium/High)	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.			
People	Operational Management Turnover - Key Personnel	Open	6 (High/Medium)	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.			
People	Department Leadership Turnover	Open	4 (Medium/Medium)	Accept. Monitor political developments as they unfold and adapt, as needed.			
People	Operational Staff Turnover - Key Personnel	Open	4 (Medium/Medium)	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.			
People	Project Sponsor Turnover	Open	3 (High/Low)	Mitigate. Ensure sponsor commitments and operational plans are well documented and rationale is well established.			
People	Project Manager/Agency Liaison Turnover	Open	3 (High/Low)	Mitigate. Ensure project approach and status are well-documented.			
People	Project Staff Turnover	Open	2 (Low/Medium)	Avoid. Ensure project staff responsibilities are well defined and documentation is up-to-date			
People	Operational Management Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.			
People	Operational Staff Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.			

DCF Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Cost Allocation Not Available in PALM	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	DCF will construct a cost-allocation model building system called BASECAMP and build a processor to take PALM transactions and re-allocate them as our business needs.	DCF has submitted our OWP for FY23-34. DCF has begun designing BASECAMP.	01/01/26	Matthew Christovich
People Processes Technology Data	FY23-24 Funding Not Secured	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	DCF has submitted an OWP by the required deadline. Currently, there is no ETA for a decision regarding Florida PALM funding.	The Legislature has not released the requested funds for PALM Integration and Remediation submitted on 7/31/23.		Matthew Christovich

DCF Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	DCF will able to timely access the available Administered funds to support PALM readiness activities.	Logged	07/17/23	DCF-Departmentwide	This assumption is currently an open issue.
People Processes Technology	DCF's Project Sponsor will support the project by establishing and maintaining a project team that will manage the ongoing readiness activities and their associated dependencies.	Logged	07/17/23	DCF-Departmentwide	
People Processes Technology Data	DCF executive leadership 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	07/17/23	DCF-Departmentwide	
People Processes Technology Data	DCF executive and management leadership have a clear understanding of the benefits and limitations of low-code development and are supportive of its implementation.	Logged	07/17/23	DCF-Departmentwide	
People Processes Technology Data	DCF's project team possesses the necessary skills and expertise in the required disciplines to ensure project success.	Logged	07/17/23	DCF-Departmentwide	
People	DCF's hybrid product/project management framework approach combining predictive and agile methodologies is suitable for the project's objectives.	Logged	07/17/23	DCF-Departmentwide	
People Processes Technology Data	DCF business system owners will provide requirements for necessary system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	07/17/23	DCF-Departmentwide	
People	DCF project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet readiness requirements and project milestones.	Logged	07/17/23	DCF-Departmentwide	
People Processes Technology Data	DCF's Florida PALM project team can gain access to relevant documentation, specifications, and knowledge about the legacy enterprise systems and their data structures.	Logged	07/17/23	DCF-Departmentwide	
People Processes Technology Data	State of Florida legacy enterprise systems have accessible data sources that can be utilized for extracting and integrating data into the Enterprise Data Warehouse.	Logged	07/17/23	DCF-Departmentwide	
Technology Data	DCF's Enterprise Data Warehouse architecture and infrastructure can accommodate the additional data and effectively handle the integration process.	Logged	07/17/23	DCF-Departmentwide	
People Processes	The external schedule for implementation is determined by the DFS Florida PALM project. All key milestones and transition dates are provided by the larger PALM Project.	Logged	07/17/23	DCF-Departmentwide	
People Processes	The 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	07/17/23	DCF-Departmentwide	

DCF Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes	Conduct Department Re-Kickoff	8/11/23	DCF Financial Leadership and Supervisors	To inform the DCF Financial Leadership and Supervisors of all key information related to the Florida PALM restart. The following items were discussed: Timelines, Responsibilities, and Strategic Approaches.	
Technology Data	Submit Operational Work Plan (OWP) to OPB	7/31/23	DCF Department-wide.	To request funding to create the necessary data connections between State of Florida enterprise data that will support the Department's overall PALM implementation strategy.	As of 9/11, OPB has not approved the requested $750,000.00.
Technology Data	Draft RFQ for Data Integration	7/31/23 - 7/15/23	DCF Office of Administrative Services and Office of Information Technology Services	To solicit work from a qualified contractor to provide Data Integration Services for DCF to incorporate enterprise data into the DCF Enterprise Data Warehouse (EDW).	As of 9/11, OPB has not approved the requested $750,000.00.

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** *

Submit

DCF Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July – August 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	09/12/23

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DEM Status Report Dashboard

Reporting Period

July - August 2023

Agency Sponsor

Luke Strickland

Readiness Workplan Tasks

100%

0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

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

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 5

• Duplicate Filled Role = 9

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 27

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 71

• **Associated Unique Uses = 71**

- Continued Use - Yes = 48

- Continued Use - No = 0

• **Associated Business Systems = 22**

Cataloged Reports = 41

• **Criticality:**

- High = 24 Med = 9 Low = 7 None = 1

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DEM Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	N/A	Closed	1 (Low/Low)	N/A		09/06/23	

DEM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	N/A	Closed	Low - All impacts not listed as Critical or High	N/A	N/A	09/06/23	

DEM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The Division will be able to process all financial activity in order to adequately report to our grantors and all requestors to continue to assist in financial management of the Division's missions and objectives	Logged	09/06/23	FDEM	

DEM Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Analyzation of current financial data for preparation of future migration	ongoing	FDEM/Finance	To make all necessary adjustments to financial data to prepare for future migration	
People	Sharing and reviewing reference material related to the project	ongoing	FDEM	To educate all DEM staff who will interact with the system	
Technology	Reviewing current and possible application integration	ongoing	FDEM/IT	To plan and prepare for future PALM integration	

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** *

[Submit]

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DEM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Luke Strickland	luke.strickland@em.myflorida.com	09/07/23

DEP Status Report Dashboard

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

Readiness Workplan Tasks

- 80%
- 20%
- 0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period
July - August 2023

Agency Sponsor
Darinda McLaughlin

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 7

• Duplicate Filled Role = 9

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 48

• **Criticality:**

- High = 1 Med = 1 Low = 1 None = 1

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 261

• **Associated Unique Uses = 264**

- Continued Use - Yes = 221

- Continued Use - No = 41

• **Associated Business Systems = 35**

Cataloged Reports = 371

• **Criticality:**

- High = 46 Med = 3 Low = 15 None = 31

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DEP Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Agency Engagement	Open	6 (High/Medium)	FDEP PALM Project Team and expanding the FDEP CCN to the program staff.	FDEP's ability to engage is impacted by several factors, including funding, staff/resource retention, insufficient planning, or other unanticipated events.		Lydia Griffin & Steve Waters

DEP Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	SME Process & Business System Knowledge	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Catalog Desktop Procedures, Document Business System functionality and interfaces.	FDEP Project Team will facilitate information gathering and identifying financial data impacts.	12/29/23	Lydia Griffin, Steve Waters
People	PALM Project Implementation	Open	Low - All impacts not listed as Critical or High	Development of FDEP Communication plan	The success of the communication plan is critical to keeping PALM current and relevant until go-live to all stakeholders and impacted future users of PALM and FMIS	10/31/23	Lydia Griffin, Steve Waters

					systems.		

DEP Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FY 23/24 Budget and Funding	Logged	07/01/23	Division/District/Office Business Systems remediation and project management.	FDEP has submitted our Spending Plan and Operational Work Plan for FY23/24. We are currently funded for Q1 with revert and reappropriated funds from FY 22/23. Will need to seek additional funding from the Administered Funds to continue our remediation assessment efforts for the remainder of fiscal year.

DEP Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Property/Asset Analysis	Ongoing	Division/District/Office Staff	Identify depreciated assets, in an effort to clean-up property records.	7/1-8/31/2023 - During the reporting period an analysis was performed to list depreciated assets for consideration of write-off.
Data	Other Document Number Field (ODN)	Ongoing	Division/District/Office Staff	Review the current use of the FLAIR field, in consideration for the proposed use of the PALM field OA2.	7/1-8/31/2023 - The FDEP PALM Project Team reviewed the data and field use for the past 3 fiscal years. The results of their analysis and a recommendation will be presented to the Agency Sponsor and Agency Liaison for PALM implementation consideration.
Data	Data Management Cleanup	Ongoing	Division/District/Office Staff	List and prioritize data cleanup needs, and development of a schedule.	7/1-8/31/2023 - During the reporting period we created an itemized list of FLAIR fields requiring data cleansing. Progress was made to delete, inactivate or update fields as needed.
Data	Revenue Object Code Transition Plan	Ongoing	Division/District/Office Staff	Create a transition plan in anticipation of the revenue object code standardization and impacted Tier 2 and Tier 3 business systems.	7/1-8/31/2023 - identified impacted business systems, staff, and a need to develop a transition plan; to include possible implementation prior to PALM go-live.
People	PALM Stakeholder Engagement meeting	5/25/2023	Division/District/Office Leadership	Project Timeline, Implementation Approach, COA changes and Change Management structure for the Division/District/Office Program Unit.	Requested each Division/District/Office identify individuals that will actively support the CCN responsibilities, while working in collaboration with the Division of Administrative Services (DAS) and Office of Technology and Information Services (OTIS) staff on future readiness tasks.
People	FDEP PALM Resource Webpage	8/22/2023	Division/District/Office Staff and Business Systems	Dedicated agency resource webpage to share PALM Project information and FDEP CCN Contacts.	Resource webpage is critical to the communication plan of the department. During the reporting period, the resource page was updated to include current PALM information and the FDEP presentation materials.
People	FDEP Checkpoint Meetings	7/18/2023, 7/26/2023, 8/2/2023, 8/9/2023, 8/16/2023, 8/23/2023	FDEP Core CCN Members (Agency Sponsor, Agency Liaison, Business Liaison, and Project Management Liaision)	Weekly meeting to discuss readiness activities, tasks progress and deadlines, and roundtable discussion on PALM Project team conducted meetings/trainings/communications.	This is a standing meeting and expanded (as needed) to include Division of Administrative Services Leadership and OTIS staff.
People Processes Data	FDEP CCN Kickoff Meeting	8/22/2023	Division/District/Office Staff and Business Systems	The Division of Administrative Services hosted this kick-off meeting to discuss expectations for Program Area CCN roles, readiness workplan tasks, project timeline and the department implementation strategy.	The meeting was a success with 113 staff members participating in-person or virtually. FDEP PALM Readiness Coordinator was also in attendance to assist with questions from the audience.
People Processes Data	FDEP CCN Sharepoint site	8/11/2023	Division/District/Office Staff and Business Systems	Dedicated sharepoint site to share information and collect information related to readiness tasks from Prgram Area CCN staff.	The sharepoint site content will assist to track progress, allow users to see how other programs are gathering data, and a central resource for on-boarding/briefing new staff to the FDEP PALM Project activities.
People Processes Data	Division/District/Office Interviews	8/1/2023-12/31/2023	Division/District/Office Staff and Business Systems	The FDEP Project Team to interview all Division/District/Office Business and Technical Liaison, gathering information on business systems and processes with financial data impacts.	The Project Team drafted the schedule, survey questions for information gathering, and action item checklist. Planned updates and completion of RW 324, RW 326 and RW328.
People Processes Data	Division/District/Office Survey	8/1/2023-12/31/2023	Division/District/Office Staff and Business Systems	Survey will gather information on business systems and processes with financial data impacts within the Division/District/Office.	Planned updates and completion of RW 324, RW 326 and RW328.
People Processes Data	PALM Advisory Council Meetings	7/19/2023, 8/16/2023	Advisory Council Member	Discuss agenda topics, review presented material, and offer feedback as needed.	Attendees include FDEP Advisory Council Member, FDEP Project Team Lead, and Project Management Liaison.
People Processes Technology Data	FDEP PALM Project Team	8/1/2023	Division/District/Office Staff and Business Systems	FDEP PALM Project Team	Organized a dedicated PALM Project Team to assist in coordinating with administrative services, technical, and program area staff in the analysis, design, and development of updated procedures, policies, and business systems to support the agency's implementation of the State's enterprise-wide financial management solution.
People Processes Technology Data	PALM Readiness Task #328	Ongoing	Division/District/Office Staff and Business Systems	Continue gathering information to document the Agency Business System Processes.	7/1-8/31/2023 - continued updates to the task.
Processes	Procedure Catalog	6/1/2023-8/31/2023	Division/District/Office Staff	Inventory the Finance and Accounting (F&A) Desktop Procedures.	During the reporting period, procedures were archived that were no longer needed, and owners assigned to coordinate document revisions and updates.
Processes	Business Process Mapping	Ongoing	Division/District/Office Staff	The FDEP Office of Technology and Information Services is presenting Business Process Mapping training to the Division/District/Office Staff. This resource is planned to assist the staff with understanding "what they do today", identifying the business systems and reporting needs.	7/1-8/31/2023 - During the reporting period the OTIS staff mapped several DAS business system processes and created the presentation material. Training sessions are scheduled to occur October 2023.
Processes Technology	ADM Sprint Meeting	6/13/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #166, period of June 14, 2023 - June 30, 2023
Processes Technology	ADM Sprint Meeting	7/5/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #167, period of July 6, 2023 - July 21, 2023
Processes Technology	ADM Sprint Meeting	7/25/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #168, period of July 26 2023 - August 11, 2023
Processes Technology	ADM Sprint Meeting	8/15/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #169, period of June 14, 2023 - June 30, 2023
Technology	PALM Readiness Task #326	Ongoing	Division/District/Office Staff and Business Systems	Review and update inventory list of current agency business systems.	7/1-8/31/2023 - continued updates to the task.
Technology	PALM Readiness Task #327	Ongoing	Division/District/Office Staff and Business Systems	Review and Update Source and Frequency in ADM Reports inventory list.	7/1-8/31/2023 - continued updates to the task.
Technology	PALM Grant Chart field Assessment	Ongoing	Division/District/Office Staff and Business Systems	Review and update Grant COA design documents.	7/1-8/31/2023 - continued updates to the Grant COA design documents.
Technology	PALM Readiness Task #324	Ongoing	Division/District/Office Staff and Business Systems	Continuing effort to identify and document FLAIR data elements in database.	7/1-8/31/2023 - continued updates to the task.
Technology	Application Linkage	Ongoiing	Division/District/Office Staff and Business Systems	Update Application linkage diagram.	7/1-8/31/2023 - Completed for CRA based on new findings.
Technology	Application Flow Diagrams	Ongoing	Division/District/Office Staff and Business Systems	Process flow diagrams for designated business systems.	7/1-8/31/2023 - During the reporting period diagrams were completed for FIN-Tax, FIN-PRA, FIN-ARCollections. FIN-GMS, FIN-ABTS, FIN-Recon, FIN-Yes, FIN-RateRpt, FIN-Convert, FIN-Budget Projections, and FIN-Project Review.

Technology	PALM Impact Analysis - Tier 3 Systems	Ongoing	Division/District/Office Staff and Business Systems	PALM impact analysis meetings.	7/1-8/31/2023 - Completed for LMS and SUPRS.
Technology	PALM System Interface Support	Ongoing	Division/District/Office Staff and Business Systems	Code Analysis	7/1-8/31/2023 - Begin FIN - Convert JAVA/PLSQL code analysis for FLAIR files import. Also, continue PALM POC PHP and PL/SQL code for GMI005, importing data into FIN DB using FIN-Convert

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 *

Submit

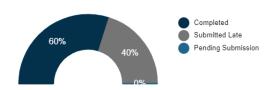Privacy Notice | Report Abuse

DEP Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	09/11/23

DFS Status Report Dashboard

Reporting Period

July - August 2023

Agency Sponsor

Scott Fennell

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

60%   40%   0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 3

• Submitted Late = 2

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 10

• Duplicate Filled Role = 7

• Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 76

• **Criticality:**

- High = 18 Med = 3 Low = 0 None = 0

• **Documentation Status:**

- Complete = 22 Partial = 7 Not Started = 0

Cataloged Interfaces = 121

- Inbound Interfaces = 100

- Outbound Interfaces = 21

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 419

• **Associated Unique Uses = 1301**

- Continued Use - Yes = 1064

- Continued Use - No = 47

• **Associated Business Systems = 19**

Cataloged Reports = 383

• **Criticality:**

- High = 252 Med = 76 Low = 38 None = 45

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DFS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

DFS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DFS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DFS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Develop Agency-wide Readiness Survey	Ongoing	DFS, OFR, OIR	To gauge awareness, readiness that will allow CCN to monitor and target communications and trainings	CCN started 8/11/23
People	Established Monthly Point of Contact meeting with Division/Offices	8/29/2023	DFS, OFR, OIR	Share project activities status, project communication wrap-ups and allow POCs an opportunity to ask questions, make suggestions and provide feedback.	last Tuesday of the month.

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** *

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DFS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Steven Fielder for Scott Fennell	steven.fielder@myfloridacfo.com	09/07/23

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

DJJ Status Report Dashboard

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:
- Unique Filled Role = 6
- Duplicate Filled Role = 3
- Vacant Role = 5

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:
- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:
- Training = TBD

Current-State:
Cataloged Business Processes = 0
- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:
- Role Mapping = TBD

Current-State:
Cataloged Business Systems = 13
- **Criticality:**
- High = 11 Med = 0 Low = 1 None = 1
- **Documentation Status:**
- Complete = 0 Partial = 9 Not Started = 4

Cataloged Interfaces = 15
- Inbound Interfaces = 12
- Outbound Interfaces = 3

Implementation:
- Interfaces = TBD

Current-State:
Unique FLAIR Data Elements = 76
- **Associated Unique Uses = 76**
- Continued Use - Yes = 75
- Continued Use - No = 1
- **Associated Business Systems = 4**

Cataloged Reports = 515
- **Criticality:**
- High = 131 Med = 613 Low = 2 None = 1

Implementation:
- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DJJ Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	CCN role vacancies. Out of the CCN 14 assigned roles, three of the primary roles and two backup roles are vacant. Duplications are due to backup role assignments and limited personnel.	Open	9 (High/High)	Positions and funds have been approved effective 10/1, to recruit and hire skilled personnel dedicated to the FL PALM project.	July - August 2023		Alexander Añé

DJJ Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Subject Matter Expert (SME) time constraints.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Recruit and hire skilled personnel to achieve objectives and tasks for the FL PALM project.	July - August 2023		Alexander Añé
Processes	Processes are not well documented or not documented at all.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Interview process owners to gain a better understanding and detail each element.	July - August 2023		Alexander Añé

DJJ Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DJJ Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes	Task 328 Review and Brainstorming Session	8/10/23	All SMEs and members of the CCN	Gain a better understanding of the task and ways to execute it within our Agency. Obtain questions that can be forwarded to RC/FL PALM.	July-August '23
People Processes	Segment I Roundtable	8/31/23	F&A and Budget SMEs	Discuss and share knowledge/insights on the process overviews given at the Financial Wave segments. (Meeting had to be rescheduled due to storm)	September '23

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** *

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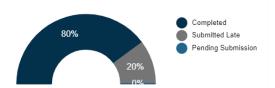Privacy Notice | Report Abuse

DJJ Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Heather DiGiacomo	heather.digiacomo@fldjj.gov	09/11/23

DLA Status Report Dashboard

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period

July - August 2023

Agency Sponsor

John Guard

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 10
- Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 5
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 14

- **Criticality:**
- - High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- - Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- - Continued Use - Yes = 39
- - Continued Use - No = 3
- **Associated Business Systems = 15**

Cataloged Reports = 176

- **Criticality:**
- - High = 21 Med = 1 Low = 86 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DLA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	loss of key CNN participant	Open	6 (Medium/High)	fill vacancy as quickly as possible with an individual with similar skills and experience		09/07/23	Darlene Faris

DLA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DLA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting	
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	

DLA Agency-Specific Readiness Activities

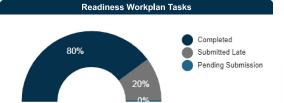| Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	workgroup to assign tasks and discuss processes	08/09/2023 - completion	primarily Finance & Accounting	to ensure tasks are completed appropriately and timely	

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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DLA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	John Guard	sabrina.donovan@myfloridalegal.com	09/11/23

DMA Status Report Dashboard

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

Readiness Workplan Tasks

80%

20%

0%

- Completed
- Submitted Late
- Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 5
- Vacant Role = 2

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 2
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
  - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 15

- **Criticality:**
  - High = 6 Med = 2 Low = 0 None = 2
- **Documentation Status:**
  - Complete = 1 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 94

- **Associated Unique Uses = 97**
  - Continued Use - Yes = 71
  - Continued Use - No = 22
- **Associated Business Systems = 2**

Cataloged Reports = 48

- **Criticality:**
  - High = 28 Med = 12 Low = 6 None = 1

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DMA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Replacing current F&A tracking system. May not be in place or compatible to perform testing with Florida PALM.	Open	9 (High/High)	Awaiting approval to move forward with project.	September		Jack McAlpine

DMA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	The agency F&A has 3 key staff resigned or accepted other positions.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	September	10/06/23	Trixy Pacetti
People	The agency Purchasing Office has two (2) vacancies.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	September	10/06/23	John Connor

DMA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	The agency has submitted an LBR for Project Manager to help manage implementation of Florida PALM and travel to Tallahassee for meetings.	Logged	09/01/23	All agency business systems	September

DMA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Tuesday Task Talk	9/6/23	Stay-Up-To-Date and familiarization in Smartsheet.	To provide training and understanding of upcoming task.	
People	Updated CCN	9/6/23	Stay up to date.	To receive important information and updates from Florida PALM.	
People Processes	Sent emails to agency sponsor.	9/8/23	Give access to dashboard.	To ensure agency sponsor is aware of DMA status within The Florida PALM and Smartsheet.	

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 *

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DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Timothy Smith	timothy.j.smith53.nfg@army.mil	09/11/23

DMS Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Katie Parrish

Readiness Workplan Tasks

- Completed 60%
- Submitted Late 40%
- Pending Submission 0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 2
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 9
- Duplicate Filled Role = 4
- Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 13

- **Criticality:**
- High = 4 Med = 2 Low = 0 None = 7
- **Documentation Status:**
- Complete = 9 Partial = 2 Not Started = 2

Cataloged Interfaces = 4

- Inbound Interfaces = 3
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 143

- **Associated Unique Uses = 1303**
- Continued Use - Yes = 205
- Continued Use - No = 43
- **Associated Business Systems = 5**

Cataloged Reports = 106

- **Criticality:**
- High = 91 Med = 16 Low = 3 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DMS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Resources. Year-end close out, certified forward and financial statements are forthcoming. There will be limited resources to perform Florida Palm tasks during year end, from June to September 30th.	Open	9 (High/High)	Postpone tasks completion deadline dates to after September 30, 2023.	Logged April 26, 2023. Reviewed again September 6, 2023.		Financial Management Services / Kedra Lewis
People Processes Technology Data	Variable risk/issues at this time with People First. People First is currently working on its next-generation platform efforts with our HR BPO with an est release date of June 30th and will start working on its ITN with an early 2024 release. The end of the contract is August 2026 with the end of current life support Dec 2027. The main risk/issue is several folds with launching two major state ERP systems at the same time, converging timelines, and not enough information on the level of remediation needed for PF/PALM. Once a scope and business requirements are developed - a resource plan will need to be developed to determine the lift which in turn determines the ask from a funding standpoint. It will take time to stand up the teams to tackle this effort. *another risk is for all vendors to be able to work together freely on solutionizing and remediating work. This is a risk because several of the vendors are known competitors	Open	6 (High/Medium)	Uncertain at this time until business requirements and remediation level efforts are scoped out and resource and project plans are developed. Very high-level solution with information known right now: 1) PF would require to stand up a separate remediation team. This team would be focused and solely dedicated to working directly with NGA and PALM. This would be a specialty project team just dedicated to working on this with a high velocity - quick sprint reviews. *In addition to the special project team listed above, PF would need additional FTEs on the core unit because historical knowledge and expertise on system/state functionality would be needed to help bridge the gap - we would need to backfill current FTEs to backfill current position to maintain current system use.	Logged April 22, 2023. Reviewed again September 6, 2023.		People First / Tomy Mollas

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
	with each other regarding ERP solutions and PF will have a competitive ITN next year. PF/PALM working on multi-party NDA to hopefully resolve this issue.						
People Processes Technology Data	Functionality, Will PALM deliver the functionality needed for DMS operations?	Open	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment.	Logged April 26, 2023. Reviewed again September 6, 2023.		Finance and Administration / Jennifer Gaines
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023.		Finance and Administration / Sandy Watson
People Processes	Timeline and Resources. There are multiple overlapping Palm tasks with due dates that utilize the same personnel resources as statutorily required tasks during year end.	Open	6 (High/Medium)	Complete the tasks early or ask for a later due date.	Logged April 27, 2023. Reviewed again September 6, 2023.		Finance and Administration / Eric Thiele
People Processes	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to departmental and enterprise systems affected by PALM implementation, at the same time.The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users.	Open	6 (High/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.	Logged Sept 8, 2023.		STMS / Kurt Bonhamer
People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for the it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Mediu	Roll out sandbox test capabilities as sections are completed for Agencies to test.	Logged April 21, 2023. Reviewed again September 6, 2023.		Division of State Group Insurance / Jason Ottinger
Technology Data	Funtionality. Failure to utilize latest and most efficient data transfer methods.	Open	4 (Medium/Mediu	Evaluate effort required to create Encumbrance API vs Voucher API and determine if creating one provides enough of a foundation to justify creating the second API.	Logged Sept 8, 2023.		STMS / Matt Gigglio
Data	Interface. Inability to make informed design decisions about API versus Flat File.	Open	4 (Medium/Mediu	Provide more information about flat files required to create vouchers, update voucher status, and update voucher payment status. Provide information about time required to process inbound vouchers in PALM and then return status updates. Then provide information about these processes if using an API to determine value provided.	Logged Sept 8, 2023.		STMS / Matt Gigglio
People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	4 (Medium/Mediu	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API.	Logged Sept 8, 2023.		STMS / Matt Gigglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	4 (Medium/Mediu	Provide information about when and where flat file data will be provided and how it will be accessed.	Logged Sept 8, 2023.		STMS / Matt Gigglio
Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Open	4 (Medium/Mediu	Provide information about the Speed Key interface, as well as training about how agencies will be using it in PALM. Provide training about how Speed Keys will be used by travelers to communicate billing information to Fiscal Accountants.	Logged Sept 8, 2023.		STMS / Matt Gigglio
Processes Technology Data	Interface. Insufficient information about what the Combo Edit Check API will verify and what STMS must be prepared to verify.	Open	4 (Medium/Mediu	Provide details about what the Combo Edit Check will verify and what needs to be verified outside of that check.	Logged Sept 8, 2023.		STMS / Matt Giglio

DMS Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Certain webservices that allow for live data between MFMP, STMS, and PALM will not be active in PALM like they are in FLAIR.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	No known solution at this time except for PALM to change their design.	Functionality: This is a step backwards in functionality from the 50-year-old system to the new solution.		State Purchasing / Gerard Steele
Processes Technology	The Florida PALM Team has decided to not provide a webservice/real time interface for budget pre-check or vouchers. This does not match up to current FLAIR functionality and presents a significant risk in increasing payment cycle time, which has direct impact on agencies' ability to meet prompt payment requirements.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The recommended proposed solution is for the Florida PALM team to provide a budget pre-check and voucher webservice/real time interface, in addition to the Combo Edit Check and Encumbrance webservice they have already offered.	Interface: There are also impacts to emergency operations invoice payment in the event a vendor needs to be paid quickly to secure emergency supplies or services during Emergency Operations Center (EOC) activation.		State Purchasing / Tyler Brown

DMS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	State Group Insurance / Jason Ottinger	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division.

DMS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes	PALM Agency Readiness Touchpoint	July 25, 2023	CCN, PALM Readiness Coordinator	To review and discuss Florida PALM implementation activities.	Recurring monthly Florida PALM touchpoint meeting between DMS's Change Champion Network Agency Liaison and PALM Readiness Coordinator, Vincent Cicco.
People Processes	PALM Training Meeting	August 3, 2023	Agency Liaison, Training Liaison	To review upcoming PALM workshop and activities.	Discussed Training Liaison backup role and responsibilities.
People Processes	Internal DMS Monthly PALM Connect	August 3, 2023	Agency Sponsor, Agency Liaisons	To review upcoming events and deadlines and receive updates from agency liaisons.	Recurring monthly Agency Sponsor briefing.
People Processes	PALM Agency Readiness Touchpoint	August 22, 2023	CCN, PALM Readiness Coordinator	To review and discuss Florida PALM implementation activities.	Recurring monthly Florida PALM touchpoint meeting between DMS's Change Champion Network Agency Liaison and PALM Readiness Coordinator, Vincent Cicco.
People Processes	Internal DMS Monthly PALM Connect	August 24, 2023	Agency Sponsor, Agency Liaisons	To review upcoming events and deadlines and receive updates from agency liaisons.	Recurring monthly Agency Sponsor briefing.
People Processes Technology Data	PALM Task Work Session	July 13, 2023	Agency Liaisons, SMEs	Review Readiness Workplan Tasks. Organize efforts. Determine collaborators. Develop timelines. Complete tasks.	Recurring weekly work group meeting. Focus: Task 327
People Processes Technology Data	PALM Task 327 Work Session	July 19, 2023	F&A, SAM	Complete empty fields on Reports Inventory Smartsheet.	SME meeting. Focus: Task 328
People Processes Technology Data	PALM Task Work Session	July 20, 2023	Agency Liaisons, SMEs	Review Readiness Workplan Tasks. Organize efforts. Determine collaborators. Develop timelines. Complete tasks.	Recurring weekly work group meeting. Focus: Task 327
People Processes Technology Data	PALM Work Plan	July 21, 2023	CCN	Develop PALM Operational Work Plan (OWP) for DMS Funding and Support Estimate	Worked with OIT Director on a detailed OWP as requested by Financial Management Director
People Processes Technology Data	PALM Work Plan	July 24, 2024	CCN	Develop PALM Operational Work Plan (OWP) for DMS Funding and Support Estimate	Worked with OIT Director on a detailed OWP as requested by Financial Management Director
People Processes Technology Data	PALM Task 326 Work Session: Interfaces	August 3, 2023	Production Support, Security, SMEs	Activities to prepare for interfacing with Florida PALM. Review and complete PALM Smartsheet fields.	Focus: Task 326. Reviewed the last Interface Report and supporting documentation. Reviewed expectations and requested updates.
People Processes Technology Data	PALM Task Work Session	August 17, 2023	Agency Liaisons, SMEs	Review Readiness Workplan Tasks. Organize efforts. Determine collaborators. Develop timelines. Complete tasks.	Recurring weekly work group meeting. Focus: Task 326
People Processes Technology Data	PALM Task 326 Work Session: Interfaces	August 24, 2023	Production Support, Security, SMEs	Activities to prepare for interfacing with Florida PALM. Review and complete PALM Smartsheet fields.	Focus: Task 326. Reviewed requested updates. in Excel prior to documenting in Smartsheet.

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** *

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DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Katie Parrish	evelyn.harrison@dms.fl.gov	09/11/23

DOAH Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Megan Silver

Readiness Workplan Tasks

80%
20%
0%

Completed
Submitted Late
Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 4

• Duplicate Filled Role = 10

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 3

• Meetings Missed = 2

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 0

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 73

• **Associated Unique Uses = 143**

- Continued Use - Yes = 49

- Continued Use - No = 39

• **Associated Business Systems = 0**

Cataloged Reports = 52

• **Criticality:**

- High = 11 Med = 25 Low = 17 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOAH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Staff's level of engagement regarding transitioning to new financial system	Open	6 (High/Medium)	Agency Liaison will integrate PALM awareness through emails, meeting discussions and providing updates regarding PALM during management staff meetings. Agency Liaison will provide staff with PALM resources to become familiar with the system.	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings.	07/05/23	Patricia Kenyon
People	Staff not trained / confident to perform their accounting functions in PALM on Go LIve Date	Open	3 (High/Low)	DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided.	Agency Liaison has integrated PALM awareness discussion during staff meetings.	07/05/23	Patricia Kenyon

DOAH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Staff member (Acct. III) retiring who performs PALM functions currently transferring knowledge to new staff member	Open	Low - All impacts not listed as Critical or High	Have retiring staff member train new staff member prior to leaving DOAH.	New staff member has been hired for the position and one-on-one training has begun.	10/31/23	Patricia Kenyon

DOAH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Staff will be able to function in PALM on Go Live Date	Logged	09/08/23	Budget, HR and Accounting staff	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders.

DOAH Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Provide updates related to PALM during weekly staff meetings	Weekly	Accounting Staff	To provide an opportunity for staff's awareness of the progress of PALM implementation	During this reporting period accounting staff have been shown the new designed Florida PALM website and reviewed Chart of Account information.
People	Provide PALM communications/meeting notifications through email	Upon receipt from PALM Team	Budget, HR and Accounting Staff	To provide staff with PALM activities information to keep their engagement level up	During this reporting period PALM communications such as business process modules meetings were sent to impacted stakeholders.

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** *

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DOAH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Megan S. Silver	megan.silver@doah.state.fl.us	09/11/23

DOE Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Suzanne Pridgeon

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

People

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 5
- Vacant Role = 2

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Processes

Current-State:

Cataloged Business Processes = 1

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
  - Complete = 0 Partial = 1 Not Started = 0

Implementation:

- Role Mapping = TBD

Technology

Current-State:

Cataloged Business Systems = 32

- **Criticality:**
  - High = 5 Med = 0 Low = 0 None = 0
- **Documentation Status:**
  - Complete = 0 Partial = 0 Not Started = 1

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Data

Current-State:

Unique FLAIR Data Elements = 443

- **Associated Unique Uses = 574**
  - Continued Use - Yes = 124
  - Continued Use - No = 3
- **Associated Business Systems = 6**

Cataloged Reports = 83

- **Criticality:**
  - High = 82 Med = 13 Low = 1 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	Missing element from task 324 - Only 4 of the 22 ABS recognized in the represented in the current Task 324- Missing information can possibly lead to missing features in FL PALM rollout	Closed	4 (Medium/Medium)	As PALM Team discover missing elements, the will be added to previous Task		07/31/23	Project Manager
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM		07/04/23	DOE IT
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM		07/13/23	DOE PALM Team

DOE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives

DOE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023

DOE Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data					

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** *

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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Matt Kirkland	matt.kirkland@fldoe.org	09/08/23

DOEA Status Report Dashboard

Reporting Period

July - August 2023

Agency Sponsor

Curtis Barker

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

60%
40%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 2
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 1
- Duplicate Filled Role = 12
- Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 3
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
  - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

- **Criticality:**
  - High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
  - Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 75**
  - Continued Use - Yes = 49
  - Continued Use - No = 0
- **Associated Business Systems = 6**

Cataloged Reports = 37

- **Criticality:**
  - High = 9 Med = 3 Low = 7 None = 17

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOEA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Review processes, look to a business system that could automate current manual processes. Could be easier to integrate the business system to Palm.	ongoing		
Technology	lack of internal business system could result in an additional workload on an already limited staff.	Open	4 (Medium/Medium)	currently evaluating potential business systems to implement	ongoing		
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Medium)	As vacancies occur, targeting candidates with increased technological skills.	ongoing		

DOEA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Current business system is manual input. is and will continue to be a workflow issue.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	currently evaluation existing systems in other agencies. hope to be able to secure one with minimal configuration needs.			
People	staffing level limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.			

DOEA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOEA Agency-Specific Readiness Activities

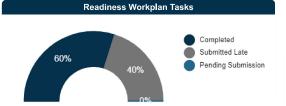| Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Technology	currently evaluating existing business systems in other agencies to determine the availability of a state owned system that would fit DOEA's needs.	ongoing	DOEA F&A, Program Areas, ACMS,	A business system to replace some of the manual processes that currently exist within DOEA. goal is to alleviate existing workload caused by inefficient manual processes and allow for a smoother transition into a new state accounting system.	

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** *

Submit

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DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23

DOH Status Report Dashboard

Reporting Period

July – August 2023

Agency Sponsor

Robert Herron

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

Readiness Workplan Tasks

80%

- Completed
- Submitted Late
- Pending Submission

20%

0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	**Processes**	**Technology**	**Data**
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 4

• Duplicate Filled Role = 10

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 4

• Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 63

• **Criticality:**

- High = 63 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 52 Not Started = 11

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 629

• **Associated Unique Uses = 646**

- Continued Use - Yes = 0

- Continued Use - No = 0

• **Associated Business Systems = 1**

Cataloged Reports = 653

• **Criticality:**

- High = 947 Med = 0 Low = 0 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.			
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.			
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in June-July 2024 (Segment IV)	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.			
Processes	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes are completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information.			

Processes	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.			
Technology	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.			

DOH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	06/28/23	All DOH systems	PALM Project has identified all impacted enterprise applications.
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	06/28/23	All DOH systems	DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule.

DOH Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Project Management Liaison Meeting		Project Manager	To collaborate and learn from other Agency PMs strategies and tools	
People	Training Liaison Meeting		Training Liaison	To collaborate and understand how other agencies will handle training	
People	DOH PALM Core Team Meeting	Every Wednesday	Project Stakeholders	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	
People	PALM Executive Steering Committee	Once a month	Executive Stakeholders	• Advise on project strategy and guidance • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts	
People	Advisory Council Meeting	Monthly or as scheduled	Stakeholder	To participate and advice the PALM Project team	
People	Readiness Meeting	Monthly or as scheduled	Executive Stakeholders	To meet the PALM Readiness team for PALM Project updates	
Processes	County Health Departments	Bi-weekly	CONMAN Application	To get business users and CHD's ready for PALM changes	
Technology Data	Finance and Accounting	Bi-Weekly	6 Impacted applications plus Payroll application	To document As-Is sections of the Functional Design Document	Each application has a Functional Design Document that will be completed for every application.
Technology Data	DDD Meeting	Bi-Weekly	5 Applications	All 5 impacted applications have completed Section 4 and 5 of As-Is applications	All 5 impacted applications have completed Section 4 and 5 of As-Is applications
Technology Data	FIRS Cadence Meeting	Weekly	6 Modules	To document As-Is sections of the Functional Design Document	As-Is for 4 modules of FIRS is complete
Technology Data	AFAM Activities	Bi-Weekly	AFAM Activities – AFAM has 64 documented processes that need remediation	To document all technical activities that are not within applications for e.g., batch jobs, reports published on SharePoint etc.	64 processes team has discussed and documented 40 processes
Technology Data	Reports Data	Bi-Weekly	AFAM Activities – AFAM has 64 documented processes that need remediation	To understand all impacted report data for	Approximately 200 plus reports from RDS FLAIR
Technology Data	Tracker Utility	Bi-Weekly	All impacted systems	One stop to access the remediation status of all applications for PALM transition	11 Groups or bureaus and 64 applications will be tracked in this utility
Technology Data	Disbursement As-Is meetings	Twice a week	Stakeholders	Completed collecting the As-Is documentation for Disbursements	This is currently in review for sign-off for users.

Agency Sponsor Confirmation

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Agency Sponsor Name: *

☐ **Confirm** *

Submit

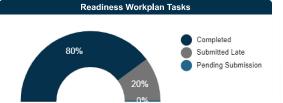## DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July – August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23

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DOL Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Becky Ajhar

Readiness Workplan Tasks

80%
20%
0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 5

• Duplicate Filled Role = 7

• Vacant Role = 2

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 18

• Related Business Systems = 0

• Related Reports = 1

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 7

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 70**

- Continued Use - Yes = 29

- Continued Use - No = 0

• **Associated Business Systems = 0**

Cataloged Reports = 76

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOL Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	Palm prescribed GLs not sufficient tp meet Lottery's Reporting needs	Open	9 (High/High)			09/07/23	Chris Rorison

DOL Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOL Assumptions

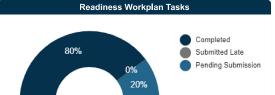| Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	PALM will allow for additional GL account entries to accommodate needs for Lottery Financial reporting	Logged	09/07/23	Finance Department	

DOL Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Palm task review meetings - Lottery team	7/10, 7/21, 8/7	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Cindie Mckenzie	Review new task objectives, sync on progress of ongoing tasks, discuss risks, issues, or concerns that have surfaced.	

Agency Sponsor Confirmation

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Agency Sponsor Name: *

☐ **Confirm** *

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DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Rebecca Ajhar	ajharb@flalottery.com	09/08/23

DOR Status Report Dashboard

Reporting Period

July - August 2023

Agency Sponsor

Clark Rogers

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80% 0% 20%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 0

• Pending Submission = 1

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 10

• Duplicate Filled Role = 6

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 7

• Related Business Systems = 2

• Related Reports = 3

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 7

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 30

• **Criticality:**

- High = 29 Med = 1 Low = 0 None = 0

• **Documentation Status:**

- Complete = 29 Partial = 0 Not Started = 0

Cataloged Interfaces = 28

- Inbound Interfaces = 15

- Outbound Interfaces = 13

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 431

• **Associated Unique Uses = 830**

- Continued Use - Yes = 392

- Continued Use - No = 0

• **Associated Business Systems = 9**

Cataloged Reports = 181

• **Criticality:**

- High = 208 Med = 3 Low = 12 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Legislation enacted in the 2024 legislative session that creates new taxes or modifies existing taxes may impact GTA's ability to complete remediation to SUNTAX on 2024/2025 due to staff augmentation resources being involved in system modifications to implement new legislation.	Open	6 (High/Medium)	Request funding to contract for additional GTA staff augmentation resources in FY23/24, FY24/25 and FY25/26.	A budget amendment was submitted for staff augmentation resources for Florida PALM agency business system remediation. Additional staff augmentation resources may be needed for system modifications to implement new legislation.	07/13/23	Laura Dukes, Budget Officer; Lisa Morgan, GTA Budget Liaison
People	Natural Gas project #006277 for GTA has an implementation date of January 2026, same time as PALM financials wave implementation date, and could create a resource issue.	Open	4 (Medium/Medium)	Plan efficiently with the resources provided.		07/13/23	Trang George, GTA PMO

DOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	The current PALM Chart of Accounts (COA) structure will not be changed.	Logged	07/01/23	All agency business systems	DOR will begin agency business system remediation in FY23/24.
People	Administered funds will be available for use in procuring staff augmentation resources for agency business system remediation.	Logged	07/13/23	All agency business systems	During July, DOR submitted a budget amendment requesting funds for staff augmentation to perform project management and IT consulting activities for agency business system remediation and pre-remediation evaluation activities.

DOR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Continued data clean-up activities to purge discontinued/obsolete funds and budget entities.	Ongoing	FLAIR and PALM, all agency users.	To remove obsolete/discontinued funds and budget entities from FLAIR prior to migration to PALM.	Current action item on track to be complete by 12/31/24. Will coordinate activities through DFS OIT.
Processes	Updated the DOR PALM Project Tracking Book.	Started 7/14/23	Business process owners in each program and the Information Services Program (ISP)	Maintain Action Items, Key Decisions, Risk Register, Issue Log, etc. in the Project Tracking Book	Ongoing process, will continue to maintain until all PALM implementation activities are completed.
Technology	Conducted a review of SAP Hana implementation guidelines.	7/17/23	CAMS, SUNTAX	Ensure that Hana implementation occurs after Financial and Payroll Go-Live.	Confirmed Hana migration will occur in FY26/27.

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** *

Submit

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DOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Clark Rogers	shannon.segers@floridarevenue.com	09/11/23

DOS Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Jennifer Kennedy

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

40%   60%   0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 2

• Submitted Late = 3

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 9

• Duplicate Filled Role = 4

• Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 4

• Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 6

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 67

• **Associated Unique Uses = 138**

- Continued Use - Yes = 0

- Continued Use - No = 0

• **Associated Business Systems = 2**

Cataloged Reports = 241

• **Criticality:**

- High = 0 Med = 0 Low = 1 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Current staff have little knowledge of the details of current Access Database being used to extract transaction data.	Open	6 (Medium/High)	Department currently exploring options for hiring staff with extensive Access experience to fill knowledge gaps.		09/08/23	Antonio Murphy

DOS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Held meeting with current grants staff to discuss what data elements are essential for state and federal reporting.	7/25/2023	Department grants staff	To ensure in the event of a change to current data elements, all expectations are continuously being met.	

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 *

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DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	09/08/23

DVA Status Report Dashboard

Readiness Workplan Tasks

- ● Completed
- ● Submitted Late
- ● Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

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

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 13
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- Continued Use - Yes = 48
- Continued Use - No = 0
- **Associated Business Systems = 0**

Cataloged Reports = 48

- **Criticality:**
- High = 41 Med = 2 Low = 5 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DVA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

DVA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DVA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DVA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

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DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Linda Rizzo	linda.rizzo@fdva.fl.gov	09/11/23

EOG Status Report Dashboard

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

Readiness Workplan Tasks

- ● Completed
- ● Submitted Late
- ● Pending Submission

80%
20%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 1

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 3

• Duplicate Filled Role = 12

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 3

• Meetings Missed = 2

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 5

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 77**

- Continued Use - Yes = 30

- Continued Use - No = 26

• **Associated Business Systems = 1**

Cataloged Reports = 146

• **Criticality:**

- High = 39 Med = 39 Low = 62 None = 6

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

EOG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Risks relate to training and to small staff.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.			
Processes	Risks relate only to a possible missed process due to limited staff and turnover.	Open	2 (Medium/Low)	Will outline as many processes as possible to mitigate risk of missing a step. Will ensure that all staff attend training and have access to PALM resources when appropriate.			
Technology	No known risks. Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open	1 (Low/Low)	No risks determined at this time.			
Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	Will outline as many processes as possible to mitigate risk of incorrectly attached documents. Will ensure that all staff attend training and have access to PALM resources when appropriate.			

EOG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Risks relate to training and to small staff.	Open		High (3) - Likely to occur often or soon	9 (High/High)		

Processes	Risks relate only to a possible missed process due to limited staff and turnover.	Open		Low (1) - Unlikely but possible to occur	2 (Medium/Low)
Technology	No known risks. Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open		Low (1) - Unlikely but possible to occur	1 (Low/Low)
Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open		Low (1) - Unlikely but possible to occur	1 (Low/Low)

EOG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged			
Processes	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged			
Technology	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged			
Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged			

EOG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	EOG understands the data it needs to complete workflows and processes and is actively participating in FL PALM design tasks.		All Administrative Services and IT		
People	EOG is actively participating in all FL PALM meetings.		All Administrative Services and IT		
Processes	EOG is actively participating in all FL PALM design workshops and is completing the tasks associated with office processes.		All Administrative Services and IT		
Technology	EOG IT is actively engaged in the requested IT needs for FL PALM.		All Administrative Services and IT		

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** *

[Submit]

EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23

FCOR Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Gina Giacomo

Readiness Workplan Tasks

- ● Completed
- ● Submitted Late
- ● Pending Submission

60% 40% 0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 2
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 3

- **Criticality:**
- - High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- - Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- - Inbound Interfaces = 0
- - Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 72

- **Associated Unique Uses = 221**
- - Continued Use - Yes = 183
- - Continued Use - No = 10
- **Associated Business Systems = 4**

Cataloged Reports = 7

- **Criticality:**
- - High = 4 Med = 3 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FCOR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	1074 – OIT Resource Capacity Technical FTEs	Open	9 (High/High)	FDC Staff Augmentation required due to current capacity		08/14/23	Greg Prescott, FDC OIT
People Processes Technology	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	FDC Funding request		08/14/23	Greg Prescott, FDC OIT
People Processes Technology	1078 - FLAIR interfaces	Open	6 (High/Medium)	FDC Assign Business Analyst		08/14/23	Greg Prescott, FDC OIT

FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	FDC to access the available Administered Funds to support the PALM Project and readiness activities			FDC OIT
People Processes	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	FDC Crosstrain staff to ensure adequate backup		09/30/23	David Eskin, FDC Finance and Accounting/Systems Reporting

FCOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FDC will be able to access the available Administered Funds to support readiness activities	Logged	07/01/23	FDC/FCOR All agency business systems and PM roles	July 31st, FDC submitted a budget amendment requesting funds for staff augmentation to perform project management functions for the agency's readiness activities. Due to the overallocation of FDC key subject-matter resources, hiring consultants and other resources to augment the FPST Project is essential for the department's continuity of operations and successful transition to the Florida PALM solution.
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities	Logged	07/31/23	FDC/FCOR All agency business systems and CCN roles	
People Processes Technology	FDC/FCOR's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	FDC/FCOR All agency business systems and CCN roles	
People Processes Technology	FDC/FCOR will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	FDC/FCOR All agency business systems and CCN roles	
People Processes Technology	FDC/FCOR will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	FDC/FCOR All agency business systems and CCN roles	

FCOR Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Property File Clean up	04/01/2023-Current	FLAIR: Property File	Error correction of two property items.	We are in communication OFFE (at DFS) to obtain guidance on how to resolve the issue
People	PALM	07/05/2023	F&A/OIT, Liaison	FDC OIT wanted to introduce F&A to the interim OIT liaison as the current liaison was leaving the Department, to bring him up to speed	
People	Pre-Florida PALM Funding Meeting with Budget/F&A	07/05/2023	CFO, Budget Director, F&A Director, Agency Liaison	To prepare for our July 7th meeting with FDC OIT and the CIO on PALM funding	
People	Fleet Management System Conversation PALM	07/06/2023	Fleet, Director of Administration, F&A	To determine if our Fleet section had any agency business systems and how the org codes will be converted in PALM	We reached out to PALM regarding how the org codes in the current Fleetwave system (maintained by DMS) will be converted in PALM. We have not yet received a response.
People	PALM and BARS discussion	07/07/2023	F&A, Budget, FMBC, Internal Audit, Regional Business Managers	To discuss and determine if our FDC's Budgeting and Reporting System (BARS) currently in use needs to be recreated with a new BARS or if the PALM reporting warehouse will be sufficient	Need to continue discussions internally and get additional clarification from PALM.
People	Florida PALM funding discussion	07/07/2023	CIO, CFO, Budget, OIT, PM, Agency Liaison	To review resources needed from FDC OIT and F&A, and the OWP plan.	Bring the FDC's interim PM up to speed on the project.
People	PALM discussion with interim Project Manager	07/17/2023	Agency Liaisons, Project Manager	To discuss the project	
People	PALM Resources meeting	07/27/2023	OIT, F&A, CIO, PM	To discuss the FDC's interim Project Manager and the lack of resources and the OWP	
People	PALM Weekly Standing Meeting	08/07/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
People	PALM Weekly Standing Meeting	08/21/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
People	PALM Weekly Standing Meeting	08/28/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
Processes	Sent out a request to update our current-state desktop procedures library	08/09/2023	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	RFQ posted to obtain consulting services	07/10/2023	FDC/FCOR Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC and FCOR's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions FDC/FCOR currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Vendor quotes to FDC's RFQ to be received by August 15th. Only received one quote, this has not moved forward due to funding issue.
Processes	Documenting current state reports, agency business systems, and interfaces.	07/01/2023	All business process owners in FDC/FCOR's Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	RFQ posted to obtain consulting services	07/10/2023	FDC's Office of Information Technology and FDC/FCOR F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC/FCOR Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Vendor quotes to FDC's RFQ to be received by August 15th. Only received one quote, this has not moved forward due to funding issue.

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: *

FCOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Gina Giacomo	mary.quinsey@fdc.myflorida.com	09/08/23

Confirm *

Submit

FDC Status Report Dashboard

Reporting Period

July - August 2023

Agency Sponsor

Mark Tallent

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
20%
0%

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 4
- Submitted Late = 1
- Pending Submission = 0

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 122

- **Criticality:**
- High = 39 Med = 2 Low = 16 None = 41
- **Documentation Status:**
- Complete = 58 Partial = 32 Not Started = 6

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 73

- **Associated Unique Uses = 222**
- Continued Use - Yes = 183
- Continued Use - No = 10
- **Associated Business Systems = 2**

Cataloged Reports = 224

- **Criticality:**
- High = 207 Med = 8 Low = 0 None = 10

Implementation:

- Conversions = TBD
- Configurations = TBD

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 5
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FDC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	1074 – OIT Resource Capacity Technical FTEs	Open	9 (High/High)	Staff Augmentation required due to current capacity		08/14/23	Greg Prescott, OIT
People Processes Technology	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	Funding request		08/14/23	Greg Prescott, OIT
People Processes Technology	1078 - FLAIR interfaces	Open	6 (High/Medium)	Assign Business Analyst		08/14/23	Greg Prescott, OIT

FDC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	To access the available Administered Funds to support the PALM Project and readiness activities			OIT
People Processes Technology	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup		09/30/23	David Eskin, Finance and Accounting/Systems Reporting

FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/01/23	All agency business systems and PM roles	July 31st, the agency submitted a budget amendment requesting funds for staff augmentation to perform project management functions for the agency's readiness activities. Due to the overallocation of FDC key subject-matter resources, hiring consultants and other resources to augment the FPST Project is essential for the department's continuity of operations and successful transition to the Florida PALM solution.
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	
People Processes Technology	FDC will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	

FDC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	AR Subsidiary Cleanup	06/01/2023-07/28/2023	FLAIR – AR Subsidiary and General Ledger Masters	True up the AR balance between the AR subsidiary and the General Ledger balances	This was completed. The balances within the subsidiary and the General ledgers match as of 06/30/2023. However, there is a couple of accounts receivables set up in prior years which need further research to determine actions. Decision will affect both AR subsidiary and the General Ledger balances.
Data	Property File Clean up	04/01/2023-Current	FLAIR: Property File	Error correction of two property items.	We are in communication OFFE (at DFS) to obtain guidance on how to resolve the issue.
People	PALM	07/05/2023	F&A/OIT, Liaisons	OIT wanted to introduce F&A to the interim OIT liaison as the current liaison was leaving the Department, to bring him up to speed	
People	Pre-Florida PALM Funding Meeting with Budget/F&A	07/05/2023	CFO, Budget Director, F&A Director, Agency Liaison	To prepare for our July 7th meeting with OIT and the CIO on PALM funding	
People	Fleet Management System Conversation PALM	07/06/2023	Fleet, Director of Administration, F&A	To determine if our Fleet section had any agency business systems and how the org codes will be converted in PALM	We reached out to PALM regarding how the org codes in the current Fleetwave system (maintained by DMS) will be converted in PALM. We have not yet received a response.
People	PALM and BARS discussion	07/07/2023	F&A, Budget, FMBC, Internal Audit, Regional Business Managers	To discuss and determine if our Budgeting and Reporting System (BARS) currently in use needs to be recreated with a new BARS or if the PALM reporting warehouse will be sufficient	Need to continue discussions internally and get additional clarification from PALM.
People	Florida PALM funding discussion	07/07/2023	CIO, CFO, Budget, OIT, PM, Agency Liaison	To review resources needed from OIT and F&A, and the OWP plan.	
People	PALM discussion with interim Project Manager	07/17/2023	Agency Liaisons, Project Manager	To discuss the project	Bring the interim PM up to speed on the project.
People	PALM Resources meeting	07/27/2023	OIT, F&A, CIO, PM	To discuss the interim Project Manager and the lack of resources and the OWP	
People	PALM Weekly Standing Meeting	08/07/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
People	PALM Weekly Standing Meeting	08/21/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
People	PALM Weekly Standing Meeting	08/28/2023	Agency Sponsors, Agency Liaisons, Project Management Liaison	Weekly standing meeting to discuss where we stand on the project	
Processes	Sent out a request to update our current-state desktop procedures library	08/09/2023	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	RFQ posted to obtain consulting services	07/10/2023	Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Vendor quotes to RFQ to be received by August 15th. Only received one quote, this has not moved forward due to funding issue.
Processes	Documenting current state reports, agency business systems, and interfaces.	07/01/2023	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	RFQ posted to obtain consulting services	07/10/2023	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Vendor quotes to RFQ to be received by August 15th. Only received one quote, this has not moved forward due to funding issue.

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 *

Submit

FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for FDLE
- Readiness Workplan

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

FDLE Status Report Dashboard

Readiness Workplan Tasks

100%

0%

- ● Completed
- ● Submitted Late
- ● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period
July - August 2023

Agency Sponsor
Charlotte Fraser

Readiness Workplan Tasks:
Total Tasks = 5
- Completed = 5
- Submitted Late = 0
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:
- Unique Filled Role = 2
- Duplicate Filled Role = 11
- Vacant Role = 1

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:
- Meetings Attended = 5
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:
- Training = TBD

Current-State:
Cataloged Business Processes = 0
- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:
- Role Mapping = TBD

Current-State:
Cataloged Business Systems = 21
- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 1
- **Documentation Status:**
- Complete = 0 Partial = 1 Not Started = 0
Cataloged Interfaces = 0
- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:
- Interfaces = TBD

Current-State:
Unique FLAIR Data Elements = 73
- **Associated Unique Uses = 193**
- Continued Use - Yes = 21
- Continued Use - No = 154
- **Associated Business Systems = 6**
Cataloged Reports = 116
- **Criticality:**
- High = 89 Med = 14 Low = 42 None = 21

Implementation:
- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FDLE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Open	4 (Medium/Medium)	Develop crosswalk methodology if the new Data Warehouse will not provide this capability			Mike Moore
People	If funding is not approved we will be unable to hire technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire staff required to complete the project.			Becky Bezemek / Charlotte Fraser
Technology	Development and Test instances of effected agency business systems are not available	Open	3 (High/Low)	Agency will provide development and test instances for all effected agency business systems.			Andrew Gutsch

FDLE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FDLE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will be approved for funding to support readiness activities.	Logged	07/01/23	Office of Information and Technology Systems Office of Financial Management Agency business systems	Request for administered funds submitted in addition to LBR request
Technology Data	PALM will not change the Chart of Accounts structure between now and go-live	Logged	07/01/23	Agency business systems	

FDLE Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes	Updated all Financial Mangement supervisors on PALM implementation timeline, upcoming Design Workshops, current and upcoming PALM tasks.	08/23/23	Office of Financial Management Agency business systems	Ensure updated and information is shared with the core support team.	Relayed that PALM activities will be increasing in the near future.

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 *

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FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23

FDOT Status Report Dashboard

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

Reporting Period

July - August 2023

Agency Sponsor

Lisa Saliba

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

100%

0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 25

• Duplicate Filled Role = 0

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 314

• **Criticality:**

- High = 21 Med = 9 Low = 9 None = 0

• **Documentation Status:**

- Complete = 18 Partial = 20 Not Started = 1

Cataloged Interfaces = 119

- Inbound Interfaces = 47

- Outbound Interfaces = 15

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 92

• **Associated Unique Uses = 92**

- Continued Use - Yes = 18

- Continued Use - No = 1

• **Associated Business Systems = 3**

Cataloged Reports = 215

• **Criticality:**

- High = 87 Med = 72 Low = 33 None = 23

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FDOT Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Impacted asset inventory inconsistencies cause problems in planning remediation efforts.	Open	9 (High/High)	Mitigation			Brian Boyd
Data	The new "Account" CoA field will be replacing the GL and Object codes. FDOT needs the specifications for how to cross walk GL and object codes to account in PALM. Delay in this information delays our ability to remediate our systems.	Open	9 (High/High)	Mitigation			Brian Boyd
Processes	Major schedule changes in PALM solution would impact our remediation efforts.	Open	9 (High/High)	Mitigation			Brian Boyd
Processes	Delay or loss of planned funding for the program	Open	9 (High/High)	Acceptance			Brian Boyd
Technology	Timeliness of PALM Nightly Batch Files and Data Warehouse Updates	Open	9 (High/High)	Avoidance			Brian Boyd
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FDOT is unable to accurately define impacts to our systems without complete specifications on the interfaces for supplier functionality, commitment control module, and project grants module.	Open	9 (High/High)	Mitigation			Brian Boyd

Technology	Vendor specifications are incomplete. FDOT TVI uses TIN and Seq # for vendors; Supplier is the new name for vendor and Traveler is new name for sub vendors. FDOT needs additional specifications on vendor functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation			Brian Boyd
Technology	MFMP revisions and impact on TVI is unknown. FDOT needs additional specifications on MFMP changed functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation			Brian Boyd
Processes	Delay of budget release on LBR funds preventing change orders for staff augmentation purchase orders.	Open	9 (High/High)	Acceptance			Brian Boyd
Processes	Scope changes in PALM solution	Open	9 (High/High)	Mitigation			Brian Boyd
Processes	Issues not resolved in a timely manner	Open	6 (High/Medium)	Mitigation			Brian Boyd
People	Limited qualified staff availability for requirements gathering, application remediation, remediation testing, and other critical activities	Open	6 (High/Medium)	Mitigation			Brian Boyd
Processes	Scope and schedule alignment of individual department remediation efforts with FPST.	Open	4 (Medium/Mediu	Mitigation			Brian Boyd
Processes	Inconsistent processes and standards across FDOT business units could impact efforts to perform remediation for PALM impacts	Open	4 (Medium/Mediu	Mitigation			Brian Boyd

FDOT Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	The New 8.6 GEN COM Bridge and HIS windows server have been built. Efforts are underway to migrate to the Dev and Test environments for additional testing. Errors have been encountered and the Department is working through a resolution.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue efforts to finalize migration.		09/30/23	Brian Wilson

FDOT Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	The Florida PALM Project implementation will replace current FLAIR functionality only and will not encompass the agency specific financial planning and analysis requirements of FDOT.	Logged	06/30/23	FDOT Florida PALM End Users FDOT Application Owners	Readiness Workplans will be provided by Florida PALM over the three years of the implementation process to provide guidance on the tasks and activities that are needed for the Financials and Payroll implementation waves.
Processes	The Readiness Workplan activities direct/guide the FPST Program work and tracks the progress of department specific tasks.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	Changes in the scope and/or schedule of RW activities impact the FPST Program activities.
Technology	The Florida PALM detail schedule specific to sequencing of design activities for PeopleSoft module functionality and interface designs will be available in July 2023.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	As of 9/1/23, we are still waiting for a detailed schedule.
Processes	FPST work efforts meeting the FDOT guidelines for project classification will be managed as projects and follow the established project management standards mandated by 60GG-1, F.A.C.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	
Processes	FPST work efforts classified as operations and maintenance (O&M) will follow the established standards for O&M activities.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	
People	Adequate staffing, equipment, software, and hardware are primary drivers of the department's FPST Program activities.	Logged	06/30/23	Executive FPST Program Sponsors Chief Information Officer	
Processes	Sufficient recurring Legislative Budget Request (LBR) funding will be appropriated to complete FPST efforts.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	
People	Due to the overallocation of FDOT key subject-matter resources, hiring consultants and other resources to augment the FPST Program is essential for the department's continuity of operations and successful transition to the Florida PALM solution.	Logged	06/30/23	Executive FPST Program Sponsors	
Processes	Additional appropriation is required to successfully complete required remediation efforts to align with the Florida PALM January 2026 implementation date for the Financial and Payroll Waves.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	
Processes	FDOT has extensive dependencies on Solution Design deliverables from the Florida PALM Project.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	The current Florida PALM schedule has several to-be-determined schedule placeholders. FDOT needs schedule detail specific to the Florida PALM solution modules to accurately map dependencies and activities for remediation efforts.
Processes	Staff resources are assigned to multiple workstreams and may have limited availability for FPST activities. Scheduling and resourcing for the FPST Program must take into consideration the department's annual operational schedule to minimize interference with development and delivery of the Work Program and required activities for the state and federal fiscal year-end closings.	Logged	06/30/23	Executive FPST Program Sponsors	

FDOT Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Completed Organization Code analysis results and updated data references on the FLAIR Data Element Inventory Smartsheet.		Florida PALM End Users	Develop detail requirements for Agency Business Systems use of the Organization ChartField.	
Data	Continued analysis of the current use of Expansion Option and Expansion Set by the Department's computing assets to transition to the Florida PALM Speed Charts and Speed Types (a.k.a. Accounting Tags) functionality.	6/30/2023	Florida PALM End Users	Reduce the number of Speed Chart and Speed Types that will be required in the Florida PALM solution.	
Data	Continued analysis of the Department's use of "hard-coded" values for General Ledger, Object Code, and Other Cost Accumulator for all computing assets.	6/30/2023	Florida PALM End Users	Develop detail requirements for Agency Business Systems use of the Account ChartField.	Findings are being documented for review with SMEs to determine if specific outbound interfaces should be targeted for processing changes, data validation routines updated, and/or data references replaced with specific Account ChartField values.
Data	PALM Expansion Option Discussion	8/17/2023	FDOT Florida PALM System Transition Team	discuss options for the remediation or replacement of Expansion Option	
Data	Unit test batch program to address legacy system FLAIR Transactions with missing Trust Funds.	6/30/2023	Florida PALM End Users	Create the landing zone for the Fund tree structure and complete data cleansing.	
People	Weekly BSSO Staff Meeting	5/3/2023 - 11/1/2023	FDOT FPST Team FDOT PALM End Users	Provide status update on readiness task and remediation status	Met 9/6
People	FDOT/Florida PALM Readiness Touchpoint Meeting	5/19/2023	FDOT Florida PALM System Transition Team	Review and discuss Florida PALM implementation activities	
People	FPST Internal Workgroup	6/1/2023	FDOT Florida PALM System Transition Team		
People	FPST Technology Components	6/8/2023	FDOT Florida PALM System Transition Team		
People	OIT Staff Meetings	7/7/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	7/14/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	7/21/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	7/28/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	8/4/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	8/11/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	8/18/2023	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OIT Staff Meetings	/	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	OOC Remediation Counts Updates	5/4/2023	FDOT Florida PALM System Transition Team	Review and update OOC Status for Assets and Objects in the scope of PALM remediation	
People	OOC Remediation Counts Updates	5/25/2023	FDOT Florida PALM System Transition Team	Review and update OOC Status for Assets and Objects in the scope of PALM remediation	
People	OOC Remediation Counts Updates	6/1/2023	FDOT Florida PALM System Transition Team	Review and update OOC Status for Assets and Objects in the scope of PALM remediation	
People	PALM Planning and Stand-Up Meeting	5/1/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	
People	PALM Planning and Stand-Up Meeting	5/8/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	
People	PALM Planning and Stand-Up Meeting	5/15/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	
People	PALM Planning and Stand-Up Meeting	5/16/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	
People	PALM Planning and Stand-Up Meeting	5/22/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	
People	Weekly PALM Planning and Stand-Up Meeting	9/1/2023 - 11/1/2023	FDOT Florida PALM System Transition Team	To discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	Met 9/11
People	PALM Technical Meeting	8/14/2023	FDOT Florida PALM System Transition Team	Discuss technical PALM issues.	
People	PALM Technical Meeting	8/28/2023	FDOT Florida PALM System Transition Team	Discuss technical PALM issues.	
Processes	Azure DevOps Technical user story review	8/17/2023	Subject Matter expert	Discuss user stories	
Processes	Cost Table 22 Meeting	7/27/2023	Subject Matter expert	Discuss cost table 22-anticpated use of landing zones, database structure	
Processes	EED Requirements document reviewed, revised, and accepted by business unit stakeholders.	6/13/2023-8/4/2023	Multiple	Document the requirements for replacing the EED system.	
Processes	FDOT-NH Onsite Session 1: Scope, Agile Approach, Repository Overview & Florida PALM Readiness	8/9/2023	FDOT Florida PALM System Transition Team	Discuss Scope, Agile Approach, Repository Overview & Florida PALM Readiness	
Processes	FDOT-NH Onsite Session 2: PCM Modernization Process & Business Functions	8/9/2023	FDOT Florida PALM System Transition Team	Discuss PCM Modernization Process & Business Functions	
Processes	FDOT-NH- Onsite Session 3: PCM Functional Requirements	8/10/2023	FDOT Florida PALM System Transition Team	Discuss PCM Functional Requirements	
Processes	FDOT-NH- Onsite Session 4: EED Review	8/10/2023	FDOT Florida PALM System Transition Team	Review EED system.	
Processes	FDOT-NH- Onsite Session 5: Closeout & Next Steps	8/10/2023	FDOT Florida PALM System Transition Team	Discuss closeout of onsite sessions and next steps.	

	Closeout & Next Steps		Transition Team		
Processes	Florida PALM Readiness Azure Dev Ops Working Session	8/25/2023	FDOT Florida PALM System Transition Team	Setting up this session to continue our collaboration and progress towards a useful central repository in Azure DevOps for Florida PALM readiness.	
Processes	FPST Internal Workgroup Meeting	7/20/2023	FDOT Florida PALM System Transition Team	These workgroups are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness.	
Processes	FPST Internal Workgroup Meeting	8/17/2023	FDOT Florida PALM System Transition Team	These workgroups are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness.	
Processes	NH-FDOT PCM Batch Job Disussion Meeting	7/31/2023	FDOT Florida PALM System Transition Team	Functional requirement review.	
Processes	PALM Discussion	8/15/2023	Business Analysts	PPS payroll processing	
Processes	Payroll Distribution	8/21/2023	Subject Matter expert	Payroll distribution	
Processes	PCM Decomposition Working Session w North Highland	8/2/2023	FDOT Florida PALM System Transition Team	The North Highland team is setting this time to review the PCM Decomposition Process, including: Process to identify PCM Batch Jobs, break down technical and business functionality, and create an Azure DevOps backlog for Florida PALM Readiness & PCM Modernization Actions, roles, and responsibilities needed	
Processes	PCM Red Box Diagram Review with North Highland	8/16/2023	FDOT Florida PALM System Transition Team	Discuss impacted PCM subject areas that need to be remediated by FL PALM, including chart of account fields, data model changes, etc.	
Processes	PPS Touchpoint	8/11/2023	Business Analysts	PPS payroll processing	
Processes	Task ID 326: (Update Current-State Agency Business System Inventory and Documentation): Continued with the analysis of current inventory to update and validate systems owners and users, review the information being captured, identify interface data being used, and determine the role of each system within the Department.	5/1/23-6/30/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide Current State Agency Business Systems Inventory to PALM project.	Task ID 326 is on target to be completed by October 27, 2023.
Processes	Task ID 327 (Complete Report Inventory): Continued with the current-state analysis of reviewing reports to identify the agency's essential reports used with the business processes. Areas of concentration include Federal Programs Management (FPM), Contract Funds Management (CFM), Disbursement Operations Office (DOO), and Project Cost Management (PCM).	5/1/23-6/30/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide Report Inventory to PALM project.	Task ID 327 is on target to be completed by July 28, 2023.
Processes	Task ID 329 (Update CCN and Project Contacts): Reviewed the CCN and SME selections to align to the roles as defined by the Florida PALM Team. Identified back-ups for key subject areas as well as defined organizational units. Contacts folder was completed.	5/1/23-6/1/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide agency project contacts to the PALM project.	
Technology	Completed physical data structure changes for the State Program, Organization, and Operating Level Org ChartFields, and the elimination of the Internal Budget Indicator ChartField. Targeting Fund (a.k.a. Trust Fund) as the next COA field to physically change in the test environment and create the landing zone for the Fund tree structure.	5/1/23-6/30/23	Multiple	Provide PALM data to agency systems.	
Technology	Continued analysis of the current use of Expansion Option and Expansion Set by the Department's computing assets to transition to the Florida PALM Speed Charts and Speed Types (a.k.a. Accounting Tags) functionality	5/1/23-6/30/23	Multiple	Replace the functionality provided by the Expansion Option and Expansion Set in agency business systems.	
Technology	Continued analysis of the Department's use of "hard-coded" values for General Ledger, Object Code, and Other Cost Accumulator for all computing assets.	5/1/23-6/30/23	Multiple	Replace functionality with PALM Chart of Accounts	
Technology	Continued the analysis efforts for the Department's Electronic Estimate Disbursement (EED) system.	5/1/23-6/30/23	Multiple	Assess business continuity risks with the current architecture, identify major system dependencies, and inform the assessment of future state solutions to modernize EED.	
Technology	Continued the analysis of the Chart of Accounts and Standardized Business Process Model adoption impact on the Department's project cost accounting functionality and supporting computing assets	5/1/23-6/30/23	Multiple	Ensure systems continue to function after PALM implementation.	
Technology	Continued the analysis on the impact of the Chart of Accounts and Standardized Business Process Model adoption on the Department's Contract Funds Management (CFM) system.	5/1/23-6/30/23	Multiple	Replace functionality with PALM Chart of Accounts	
Technology	Continued the Florida PALM Impact Analysis Phase for Office of Comptroller (OOC) owned computing assets	5/1/23-6/30/23	Multiple	Ensure OOC systems continue to function after PALM implementation.	
Technology	Continued the impact analysis and remediation of the Office of Work Program and Budget (OWPB) owned computing assets.	5/1/23-6/30/23	Multiple	Ensure OWPB systems continue to function after PALM implementation.	
Technology	EED POC Rewrite	8/17/2023	App Services Architect Team	Demonstration of Informatica ETL capabilities.	
Technology	GEN Installation Activities	7/1/2023-8/31/2023	Subject Matter expert	GEN installation activities	
Technology	Landing Zone Implementations	7/1/2023-8/31/2024	Subject Matter expert	Landing zone implementations	

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 *

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FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	09/07/23

July - August 2023		lisa.saliba@dot.state.fl.us	

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

Reporting Period
July - August 2023

Agency Sponsor
Lisa Mustain

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

100%

0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 2

• Duplicate Filled Role = 5

• Vacant Role = 7

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 3

• Meetings Missed = 2

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 4

• **Criticality:**

- High = 3 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 1 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 70**

- Continued Use - Yes = 48

- Continued Use - No = 17

• **Associated Business Systems = 4**

Cataloged Reports = 63

• **Criticality:**

- High = 56 Med = 3 Low = 6 None = 2

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FGCC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	FGCC is exploring options to acquire a new licensing systems and this system will likely not be complete in time to perform testing with Florida PALM.	Open	6 (High/Medium)	FGCC will work the PALM team to ensure compatibility of new system and PALM.	Monthly.	08/31/23	Lisa Mustain, Director of Administration
	Update to Risk 001			FGCC currently is requesting in FY 24-25, 10 million dollars to provide a licensing solution that will take the place of Versa Regulation. The Palm project and this new application will need to coordinate heavily.	Status Update for Comments	09/11/23	Lisa Mustain

FGCC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FGCC lacks the appropriate staffing levels to fully support readiness activities.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	FGCC has requested Administered Funds.		12/01/23	Brice Kayiranga, Chief of Financial Support Services

FGCC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FGCC will be able to access the available Administered Funds to support readiness activities.	Logged	07/31/23	All agency business systems.	

FGCC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	PALM Biweekly Meeting	Biweekly	Division of Administration	To provide future Florida PALM end users with a view of what Florida PALM looks like and to discuss current-state and remediation needs.	Meetings for the balance of the year have been scheduled.
Processes	Started a current-state desktop procedures library	07/04/2023	Bureau of Financial Support Services	Create a single location of all procedure documents that will require updating for Florida PALM.	Ongoing process.

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 *

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FGCC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Lisa Mustain	lisa.mustain@flgaming.gov	09/11/23

FLHSMV Status Report Dashboard

Agency Sponsor
Steve Burch

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

Readiness Workplan Tasks

100%

0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 4

• Duplicate Filled Role = 10

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 7

• **Criticality:**

- High = 3 Med = 1 Low = 0 None = 0

• **Documentation Status:**

- Complete = 2 Partial = 2 Not Started = 0

Cataloged Interfaces = 4

- Inbound Interfaces = 3

- Outbound Interfaces = 1

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 92

• **Associated Unique Uses = 155**

- Continued Use - Yes = 85

- Continued Use - No = 4

• **Associated Business Systems = 3**

Cataloged Reports = 156

• **Criticality:**

- High = 89 Med = 17 Low = 46 None = 23

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FLHSMV Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	HSMV has a number of key vacancies within the Bureau of Accounting.	Open	4 (Medium/Medium)	HSMV is attempting to fill these positions.		09/01/23	Steve Burch
Technology	HSMV processes large volume of data through its FAME application (Revenue Distribution, WEX, Goodyear, PRIDE, etc.). It is imperative that the interfaces work properly when designed..	Open	3 (High/Low)	HSMV has been working with the Florida PALM team to identify which interface files should be used to send and obtain data between FAME and Florida PALM. HSMV has mapped its current FLAIR interface file to the Florida PALM interface file. HSMV will begin building a new interface file in early 2024 in preparation for interface testing in late 2024.		09/01/23	Steve Burch / Mike Alexander / Nate Seabrooks
Technology	HSMV uses a mainframe application to process Hireback payroll outside of People First. HSMV needs to have the ability to process payments to multiple FHP Troopers for Hireback jobs worked at different hourly rates.	Open	3 (High/Low)	HSMV has met with Florida PALM staff to understand how Hireback pay will be processed. Florida PALM is looking at creating an interface that will be used by HSMV. HSMV is waiting to see the Payroll Business Processes to better understand how Hireback will work.		09/01/23	Mike Alexander / Aquila Franklin

FLHSMV Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FLHSMV Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	Florida PALM will provide similiar functionality as FLAIR@HSMV	Logged		All Accounting and Budgeting areas of HSMV	HSMV relies heavily on FLAIR@HSMV to query FLAIR data on a daily basis. Without a process to easily query data, it will have a significant impact on HSMV staff.
People Technology	Departmental technical resources will be available to update internal databases and reports for distributions from FRVIS to FAME for the new PALM Account codes.	Logged		Selected State Agencies, Not for Profit and, local governmental entities.	

FLHSMV Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

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FLHSMV Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Steve Burch	steveburch@flhsmv.gov	09/08/23

FSDB Status Report Dashboard

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

Reporting Period
July - August 2023

Agency Sponsor
Tracie Snow

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

100%   0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:
Total Tasks = 5
- Completed = 5
- Submitted Late = 0
- Pending Submission = 0

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 produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:
- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:
- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:
- Training = TBD

Current-State:
Cataloged Business Processes = 0
- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:
- Role Mapping = TBD

Current-State:
Cataloged Business Systems = 0
- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0
Cataloged Interfaces = 0
- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:
- Interfaces = TBD

Current-State:
Unique FLAIR Data Elements = 70
- **Associated Unique Uses = 70**
- Continued Use - Yes = 47
- Continued Use - No = 1
- **Associated Business Systems = 1**
Cataloged Reports = 64
- **Criticality:**
- High = 42 Med = 24 Low = 0 None = 0

Implementation:
- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FSDB Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

FSDB Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FSDB Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

FSDB Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

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FSDB Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Tracie C. Snow	snowt@fsdbk12.org	09/07/23

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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

Reporting Period

July - August 2023

Agency Sponsor

Jessica Crawford

Readiness Workplan Tasks

100%

0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 1

• Duplicate Filled Role = 13

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 56

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 113

• **Associated Unique Uses = 750**

- Continued Use - Yes = 700

- Continued Use - No = 0

• **Associated Business Systems = 34**

Cataloged Reports = 34

• **Criticality:**

- High = 27 Med = 8 Low = 1 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FWC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Limited subject matter expert (SME) availability	Open	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities			Laurie Kershaw
People	Team Attrition	Open	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards			Laurie Kershaw
People	Resistance to change	Open	4 (Medium/Medium)	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact			Laurie Kershaw

FWC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FWC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FWC will be able to access the available Administered funds	Logged	07/03/23	All agency business systems	

FWC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Change Champion Meeting	7/27.2023	Change Champions	Information sharing	
People	Change Champion Meeting	8/7	Change Champions	Information sharing	
Processes	Business Process Model Review Debrief	8/18		The purpose of this meeting is to debrief the BPR sessions, discuss any opportunities for improvement, things that worked well and/or action items	
Technology	Agency Business System Inventory - Voucher Meeting	8/3	Voucher	The purpose of this meeting is to work documentation associated with Vouchers	
Technology	Agency Business System Inventory - Status Meeting	8/16		Status updates	
Technology	Florida PALM - Agency Business System Documentation Review	8/28	All Transaction Detail and FLINT	The purpose of this meeting is to review the documentation associated with All Transaction Detail and FLINT	

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** *

Submit
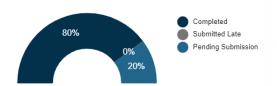
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FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Jessica Crawford	laurie.kershaw@myfwc.com	09/08/23

JAC Status Report Dashboard

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

80%
0%
20%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

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

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 4

• Submitted Late = 0

• Pending Submission = 1

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 5

• Duplicate Filled Role = 5

• Vacant Role = 4

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 4

• Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 7

• **Criticality:**

- High = 0 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 97

• **Associated Unique Uses = 97**

- Continued Use - Yes = 68

- Continued Use - No = 1

• **Associated Business Systems = 5**

Cataloged Reports = 1

• **Criticality:**

- High = 1 Med = 0 Low = 0 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

JAC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	The access to data must be segregated by each Judicial-Related Office (JRO) to ensure that JROs can only see their information. This is critical to protect indigent defendants' rights and the defense's trial strategies.	Open	9 (High/High)	The agency has been discussing mitigation options with the PALM team.			Rip Colvin, Executive Director
People	Poor acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	The agency is preparing a change management plan			Rip Colvin, Executive Director
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	The agency is initiating discussions with internal partners to create a new org code structure with a goal of implementing on July 1, 2024			Rip Colvin, Executive Director
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	3 (High/Low)	The agency needs to engage the business system vendor to discuss new chartfields once the agency has additional technical information			Rip Colvin, Executive Director
Data	Data my not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	The agency is preparing a plan for Data Cleansing			Rip Colvin, Executive Director

JAC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

JAC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will be able to access the available Administered Funds to support readiness activities	Logged	09/01/23	All processes and systems	The agency is preparing a work plan to be able to assess costs of needed resources

JAC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Continuously communicated PALM activities via newsletters, Commission Meeting Minutes, Executive Director Reports, etc	Multiple	All agency employees	To provide affected employees with up-to-date information regarding Agency activities regarding PALM	
People Processes Technology Data	Hired an agency a PALM Project coordinator to coordinate all activities of the Agency	08/29/2023	Agency administrative Staff	To better coordinate and document agency activities	

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** *

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JAC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	09/11/23

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

LEG Status Report Dashboard

Readiness Workplan Tasks

- ● Completed
- ● Submitted Late
- ● Pending Submission

40% 60% 0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period

July - August 2023

Agency Sponsor

Lisa Swindle

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 2
- Submitted Late = 3
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 9
- Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 5
- Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 11

- **Criticality:**
- High = 1 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 1 Not Started = 0

Cataloged Interfaces = 5

- Inbound Interfaces = 1
- Outbound Interfaces = 4

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 76

- **Associated Unique Uses = 76**
- Continued Use - Yes = 12
- Continued Use - No = 0
- **Associated Business Systems = 1**

Cataloged Reports = 69

- **Criticality:**
- High = 40 Med = 23 Low = 6 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

LEG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

LEG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
	Our Activities we need to accomplish during reporting period				
	Travel System	To be determined	ImageAPI/All Travelers & Finance and Accounting	To be able to use the travel system in Palm on January 1, 2026	
	HR System	To be determined	Highline/All employees/ HR staff	To be able to use the travel system in Palm on January 1, 2026	

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 *

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LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for PSC
- Readiness Workplan

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

Readiness Workplan Tasks

- Completed
- Submitted Late
- Pending Submission

60%
40%
0%

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period
July - August 2023

Agency Sponsor
Apryl Lynn

Readiness Workplan Tasks:

Total Tasks = 5

- Completed = 3
- Submitted Late = 2
- Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 2
- Duplicate Filled Role = 10
- Vacant Role = 2

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

- Meetings Attended = 4
- Meetings Missed = 1

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 4

- **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- Continued Use - Yes = 11
- Continued Use - No = 37
- **Associated Business Systems = 3**

Cataloged Reports = 10

- **Criticality:**
- High = 6 Med = 2 Low = 2 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

PSC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

PSC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

PSC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

PSC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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** *

[Submit]

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PSC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Katisha Mobley	kmobley@psc.state.fl.us	09/11/23

SCS Status Report Dashboard

Helpful Links

🔗 Dashboard Snapshots
🔗 Florida PALM Resources
🔗 Florida PALM Workbook for SCS
🔗 Readiness Workplan

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

Readiness Workplan Tasks

100%

0%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Reporting Period
July - August 2023

Agency Sponsor
Ali Sackett

Readiness Workplan Tasks:

Total Tasks = 5
• Completed = 5
• Submitted Late = 0
• Pending Submission = 0

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below 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.

Change Champion Network:
• Unique Filled Role = 6
• Duplicate Filled Role = 5
• Vacant Role = 4

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:
• Meetings Attended = 5
• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:
• Training = TBD

Current-State:
Cataloged Business Processes = 0
• Related Business Systems = 0
• Related Reports = 0
• **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0

Implementation:
• Role Mapping = TBD

Current-State:
Cataloged Business Systems = 6
• **Criticality:**
- High = 0 Med = 0 Low = 0 None = 0
• **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 0
Cataloged Interfaces = 0
- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:
• Interfaces = TBD

Current-State:
Unique FLAIR Data Elements = 70
• **Associated Unique Uses = 70**
- Continued Use - Yes = 48
- Continued Use - No = 0
• **Associated Business Systems = 6**
Cataloged Reports = 47
• **Criticality:**
- High = 3 Med = 26 Low = 6 None = 9

Implementation:
• Conversions = TBD
• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

SCS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	We have experienced a few key personnel changes which could affect us with the personnels in our CCN	Open	4 (Medium/Medium)	Whenever a new member is added to our CCN we will have to get them up to speed as quickly as possible. We also will have current CCN members able to fill in other roles if or when needed.			
Technology	Heather's departure from SCS is critical as we work on Task 328. Not sure who will be her replacement or when that transition will take plase.	Open	4 (Medium/Medium)	The current CCN member will try our best to complete our current tasks as best as possible.			

SCS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Our Agency is without an Agency Sponsor	Open	Low - All impacts not listed as Critical or High	Try to get the new State Court Administrator to assign a new agency Sponsor and get the Sponsor upto speed with the agency's current status.			

SCS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

SCS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People					
Processes					
Technology					

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** *

Submit

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SCS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Carlington Brown	brownd@flcourts.org	09/12/23