

# 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:

November – December 2023

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# AHCA Status Report Dashboard

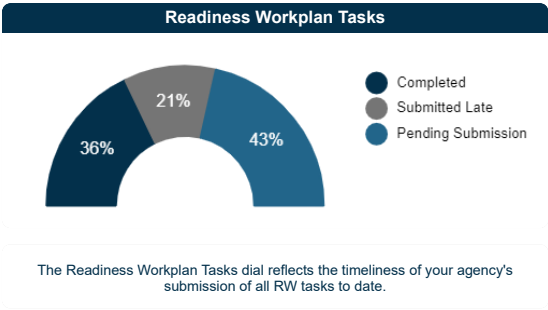
Reporting Period

November - December 2023

Agency Sponsor

Vacant

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 = 14

- Completed = 5
- Submitted Late = 3
- Pending Submission = 6

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
Technology	326	Update Current State Agency Business System Inventory and Documentation	03/13/23	10/27/23	75% - Consolidating/Inputting Information for Submission		Vendor is fully Agile and has not provided written documentation for the SunFocus Modules
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		12-22p.m. - Completed the identification of disbursement processes and documented the steps. May need to update the processes somewhat but will mark as 100% complete. Still waiting for the other 4 processes. 12-22 - a.m. -Waiting for 4 more process documents and compiling information for submission for the disbursement processes. 12/15 - I am targeting Friday to complete all documentation. I have 3 more interviews to validate information provide. (Assets, Contracts). I need to interview the Budget director for inputs, outputs, etc. There are two processes that the Trust Fund team is responsible for the I need to interview and Revisit the Disbursement processes. We should be complete by Thursday.
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	75% - Consolidating/Inputting Information for Submission		1-12: Continue finalizing PM deliverables 90% complete with all of the 500 tasks. Should upload them by COB Friday Dec 22.
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	75% - Consolidating/Inputting Information for Submission		
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	75% - Consolidating/Inputting Information for Submission		
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	75% - Consolidating/Inputting Information for Submission		
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			See Issue 001
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/22/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	01/11/24	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/11/24	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 7
- Duplicate Filled Role = 6
- Vacant Role = 1

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

Participation:

- Meetings Attended = 4
- Meetings Missed = 0

Current-State:

Cataloged Business Processes = 73

- Related Business Systems = 6
- Related Reports = 3

Documentation Status:

- Complete = 66 Partial = 6 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 23

Criticality:

- High = 20 Med = 0 Low = 2 None = 1

Documentation Status:

- Complete = 3 Partial = 15 Not Started = 0

Cataloged Interfaces = 18

- Inbound Interfaces = 13

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 23

Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 10

Current-State:

Unique FLAIR Data Elements = 82

Associated Unique Uses = 82

- Continued Use - Yes = 1

- Continued Use - No = 0

Associated Business Systems = 22

Cataloged Reports = 61

Criticality:

- High = 58 Med = 0 Low = 0 None = 0

The Participation dial reflects your agency's attendance at Project-led meetings.				- Inbound Interfaces = 1
				- Outbound Interfaces = 7
<b>Implementation:</b>				- Spreadsheet Uploads = 2
• 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.

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 Technology	When SunFocus and other urgent operational events occur, resources will be shifted to focus on the operational events thereby impacting the completion of Florida PALM tasks (schedule).	Open	9 (High/High)	Production incidents and time sensitive activities will continue to interfere with the resource-tight bureau. Assume the risk and work with the PALM Project staff to identify when a deliverable will be late. Document each occurrence and continue working on Florida PALM tasks and activities.	On-going	11/02/23	Phyllis Wander
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 and 2) the Agency will not transition to Florida PALM in January 2026.	Closed	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.	Changed to an issue	10/24/23	Management
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	New	11/02/23	Phyllis Wander
People Processes	Loss of Institutional Knowledge - Matriculation of knowledgeable business process and the SunFocus Application resources will hinder the progress of the project thereby impacting the timely completion of Florida PALM tasks (schedule).	Open	6 (High/Medium)	Continue to document desk procedures and manual processes and systems as well as encourage cross-training of operational functions.	On-going	11/09/23	Phyllis Wander

AHCA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Technology	After requesting system documentation, the Vendor team has not provided any functional/system documentation for SunFocus to attach to Florida PALM Task 326. The task did not meet the scheduled due date of 10/27/2023.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Escalate	On-going issue	01/15/24	Scott Ward
People Processes Technology	If the resources are not identified and on-boarded by the end of March 2024 1) the Agency will not complete the tasks in a timely manner and 2) the Agency will not transition to Florida PALM in January 2026.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Immediate plan is to add an additional BA or Business Process Consultant to document the HR/Payroll processes and complete the tasks that were done for the Financials Wave.	01/11/2024: Re-evaluated the advertisement and revised the eQuote documentation. Plan to post at the end of the week. 11/09/2023: Reviewed current resumes, but they did not have the specific skills we were seeking. Need to re-evaluate and resubmit a posting for the Staff Aug.	01/15/24	Abby Dunn

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	
People Processes Technology Data	Weekly Governance Meetings	10/23/23	Bureau of Financial Services (SunFocus)	To review highlighting of weekly activities and bring risks and issues for resolution		
People Processes Technology Data	Weekly Project Team Planning Meeting	10/18/23	Project Team	Planning for the transition of Florida PALM		
People Processes Technology Data	Weekly Project Team Planning Meeting	10/25/23	Project Team	Planning for the transition of Florida PALM		
People	Weekly Change Champions Workgroup Meeting	10/18/23	Change Champions and SMEs	To review status of tasks; Working session if need be		
People	Weekly Change Champions Workgroup Meeting	10/25/23	Change Champions and SMEs	To review status of tasks; Working session if need be		

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: \*

AHCA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	01/13/24
September - October 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	11/09/23
July - August 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	09/11/23

☐ Confirm \*

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Helpful Links

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Florida PALM Resources

Florida PALM Workbook for APD

Readiness Workplan

APD Status Report Dashboard

Readiness Workplan Tasks

100%

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

November - December 2023

Agency Sponsor

Rose Salinas

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 = 14

Completed = 14

Submitted Late = 0

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	12/15 - Completed and posted to Smartsheet
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded 12/27 - noting the review with RC and will add information but this is the formal internal APD document and stands as published - new timelines are being updated with teams in January 2024
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded 12/27 - noting the review with RC and will add information but this is the formal internal APD document and stands as published - new workforce readiness will be defined in the manner the RC asked for in the team reviews in January 2024
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/28/23	12/4 - APD has no contributing activity at this time - Business System Documentation is housed within IT and accessible/Help Desk in place. Test Cases will be submitted by Task Due date. Currently updating FRS/FAS in house Business System to clear out all queries that are outdated and align with the owner (strictly inhouse mini project) 12/6 - Updates to Business Smartsheet as reviewed with RC. 12/27 - IT Team has updated the documentation updates as reviewed with the PALM IT team - Chris and at this time there are no outstanding questions 12/28 - updates to smartsheet were completed based on the input and changes discussed with the PALM Team
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/28/23	12/4 - APD will have no change to the required interfaces from FL PALM - the interfaces will be the same for the current Business Systems and will require the PALM Technical information in order to make changes. No other updates needed at this time. 12/6 - Updates completed as reviewed with RC 12/27 - IT Team has updated the inventory as reviewed with the PALM IT team - Chris and at this time there are no outstanding questions 12/28 - updates to smartsheet were completed based on the input and changes discussed with the PALM Team
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	completed 11/10 Rose reviewed and submitted completion 11/13
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	12/4 - Core Team Review to finalize and Submit 12/27 - completed updates - status timeline readiness plan and risks
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	75% - Consolidating/Inputting Information for Submission		12/27 - updates within Smartsheet are current - will review for Sponsor's check in to approve and submit 1/8 - Due to Sponsor for Signoff

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 = 4

Current-State:

Cataloged Business Processes = 243

Related Business Systems = 4

Related Reports = 31

Documentation Status:

Complete = 244 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 = 8 Partial = 1 Not Started = 0

Cataloged Interfaces = 78

Inbound Interfaces = 6

Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 9

Segment I - Documentation Updates:

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

- Meetings Missed = 0



### Implementation:

- Training = TBD

- Spreadsheet Uploads = 3

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 noted: Migration Phase	12/08/23	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 noted: Migration Phase	12/08/23	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 - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	-Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed, within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Open	6 (High/Medium)	- Implement standardized documentation procedures	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024	12/27/23	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People Processes Technology Data	Business Process Workflow - Process Duplication	Closed	6 (High/Medium)	- Regularly review and update process documentation to identify duplication	- Report process duplication findings in the monthly process improvement meetings. -moving to diagram and update existing completed task328	12/27/23	APD Core Team

People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
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 noted: Migration Phase	12/08/23	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 - ongoing	10/24/23	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 noted: Business system's activities to be defined by IT team	12/27/23	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review	12/27/23	APD Core Team
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT 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 - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Data	APD Finance G/L Team - questioning when there will be a final approved full PALM Chart of Accounts listing	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions	This is will be an on-going December 2023 - new	12/27/23	APD Finance Team

Data	PALM Vendor Accounts listing provided		Deadlines or Milestones	Newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024	November 2023 - new chart fields finalized and the APD Team will be working to align old to new		
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with the resources we will be able to catch up and move forward.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found	01/31/24	APD Sponsor and Finance Team
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes.	12/31/24	APD Sponsor and Finance Team

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	On-Going with PALM Team Readiness Plan	
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	Working on Task 503 - In progress	
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	On-going	
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	On-going with Amendment 8 approved - move forward with PALM Directives as defined	
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	To be focused at conversion timeframe at 4th qtr. of project	
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project	
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	second half and then ongoing as the project readiness plan is outlined by PALM	
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	second half and then ongoing as the project readiness plan is outlined by PALM	
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	Post implementation - At Live	
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment	

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	APD - OWP for Additional Project Team Support	10/25/23	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	10/25 - Reg has been approved/funds pending budget amendment/then posting - target slides to November 2023	
People	APD - OWP for Additional Project Team Support	11/02/23	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	11/2 - funding approved - budget amendment in process - can move forward with getting candidates	
People	Task 506	11/08/23	APD Sponsor - CCN's SME's and PALM	11/8 Target for handoff to Rose Salinas for approval	On Track to Approve Prior to due date - 11/13	
People Processes	PALM Task 501- APD Implementation Schedule	12/06/23	APD PM and Core Team	APD Timeline under PALM Project	Becky is revising the initial timeline in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new timelines and scheduled events - living documentation - and formalize 12/6 - Completed Attached here - Project Timeline	
People Processes	PALM Task 502 - APD Risk Matrix	12/06/23	APD PM and Core Team	APD Risk Matrix under PALM Project	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize 12/6 - Completed Attached here - Project Risk Matrix	
People Processes	PALM Task 503 - APD Workforce Readiness	12/06/23	APD PM and Core Team	APD Workforce needs under PALM Project	Staffing needs and requirements review - ongoing with APD Core team - Reg is in play for new Business Analyst and Tech Developer Defining the team support for all Business Modules - aligning teams with scheduling/overview sessions/training preparation/current PALM Alignment exercises. On-Going 12/6 - Completed Attached here - Project Workforce Readiness	
People Processes	APD PM Collaboration lead with Commerce	10/19/23	APD PM and Commerce PM	Overview and mentoring for PALM Project initiation for new Commerce PM	Sharing of information/documents/overview of PALM engagement - mentoring	
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/02/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - sample form review	
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/09/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - overview of power point presentation on the positive effect of documenting tasks and keeping it simple	
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/16/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328	

Processes	Forum Weekly Call and Presentation		Regions/Facilities/State Office	Spreadsheet and Task List	regarding the progress or their efforts aligned with Task 328 - Review the importance of team work and teaming to align a task list per team on all relative and required tasks by team for completion to complete weekly/monthly/annual reporting of finances
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/30/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - review current status and answer questions
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	12/07/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - walk thru task requirements and provide a team by team review
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	12/14/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - final effort for task completion - Asset Accounting Team and the Contract Team specific to add
People Processes	APD Specific - APD and PALM Touchpoint meeting	11/08/23	APD CCN's/SME's and the PALM RC's	Review status on PALM Tasks/APD initiatives and review	Monthly in-person meeting with the PALM RC's and the APD team CCN's and SME's - APD provides status prior to the meetings so that the review is smooth and informative
People Processes	APD Specific - APD and PALM Touchpoint meeting	12/13/23	APD CCN's/SME's and the PALM RC's	Review status on PALM Tasks/APD initiatives and review	Monthly in-person meeting with the PALM RC's and the APD team CCN's and SME's - APD provides status prior to the meetings so that the review is smooth and informative
People Processes	APD Specific - PM with Asset Management Team	11/08/23	APD PM - APD Asset Management Team	Review the involvement of the Asset Management in the PALM Project project - with the Business Process Workflow overview to document their team financial activities that are all impacted.	Onboarding of the new employee that will be leading the effort with the Asset Team
People Processes	APD Revenue Accounting Team	11/13/23	APD PM - APD Revenue Accounting Team	Business Process clarification and review	In person - face to face meetings assisting teams in their effort with the Business Process documentation
People Processes	APD Asset Management Survey Review with DFS	11/14/23	APD PM - APD Asset Management Team	Asset Management Survey completion and submission for the DFS team	review and answer the survey for submission
People Processes	APD Payroll Survey Review with DFS	11/14/23	APD PM - APD Payroll Team	Payroll Survey completion and submission for the DFS team	review and answer the survey for submission
People Processes	APD Specific - Payroll Values round table	11/16/23	APD Payroll Team	APD Team meeting attendee for one off Payroll People First information	Asked to participate in a round table
People Processes	APD Specific - Smartsheet Training session	11/20/23	APD - PM - Admin	APD specific to create reports and task analysis	APD is adopting Smartsheet for future use
People Processes	APD Specific - APD Allotments/Budget Team	11/29/23	APD PM and APD Allotments/Budget Team	Business Process clarification and review	In person - face to face meetings assisting teams in their effort with the Business Process documentation
People Processes	APD - Finance Team - informal review	12/04/23	APD Finance Team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Budget Teams Business Processes	12/11/23	APD Budget team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Payroll Team Business Processes	12/11/23	APD Payroll team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Disbursements Team Business Processes	12/12/23	APD Disbursement team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Revenue Accounting Team Business Processes	12/12/23	APD Revenue Accounting team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Contracts Team Business Processes	12/12/23	APD Contracts team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Asset Management Team Business Processes	12/13/23	APD Asset Management team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD Smartsheet Updates review - All Teams	12/14/23	APD PM - All Teams	APD Informal calls with teams to review final efforts with Business Processes	In formal calls with questions or clarifications
People Processes	APD Teams Task Review	12/21/23	APD Teams and PM - internal Communication on upcoming Tasks	APD Readiness Task review	Align the teams with the next upcoming tasks readiness for 2024
People Processes Data	APD - Review - Process Task	12/15/23	APD PM and Finance Liaison	APD - quick review of the Smartsheet Business Processes	Review of the input provided by the teams for a quick once over - repurposed headers and completed in Smartsheet
People Processes Data	APD - Contracts Team Survey Review for DFS	12/19/23	APD PM and Contracts Team	APD Contracts Survey DFS	Answered and reviewed questions and submitted online to DFS
People Processes Data	APD - Grants Team Survey Review for DFS	12/19/23	APD PM and Grants Team	APD Grants Survey DFS	Answered and reviewed questions and submitted online to DFS
People Processes Data	APD - Projects Team Survey Review for DFS	12/19/23	APD PM and Projects Team	APD Projects Survey DFS	Answered and reviewed questions and submitted online to DFS with the Budget team for APD due to APD not really having Projects as in other agencies
People Processes Technology Data	Weekly APD Core Team Status Report	10/19/23	APD PALM Core Team	Keep Sponsor - Rose Salinas and Primary Core Team - Dee Warren and Ramon Evans fully up to date on APD Finance Team Activities	Providing APD Key Stake holders/Core Team members updated with status so that they are able to talk to any PALM topic and where APD is in the Project process
People Processes Technology Data	Weekly APD Core Team Status Report	11/02/23	APD PALM Core Team	Keep Sponsor - Rose Salinas and Primary Core Team - Dee Warren and Ramon Evans fully up to date on APD Finance Team Activities	Providing APD Key Stake holders/Core Team members updated with status so that they are able to talk to any PALM topic and where APD is in the Project process
People Processes Technology Data	High Fives	11/02/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	Tuesday Task Talks	10/24/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Tuesday Task Talks	10/31/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Tuesday Task Talks	11/07/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Business Process Open Forum	10/19/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Business Process Open Forum	10/26/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Business Process Open Forum	11/02/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People	Business Process Open Forum	11/08/23	APD Finance Teams as a	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status -

Processes Technology Data			whole		effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Advisory Council Meeting	10/18/23	APD PALM Core Team	PALM Council participation	Ramon and Becky back each other up to be in attendance for every meeting
People Processes Technology Data	PALM Task 500 - APD Agency Charter/Scope	12/06/23	APD PM and Core Team	APD Scope/Charter under PALM Project	Becky is revising the initial Scope/Charter - PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new readiness impact and formalize 12/6 - Completed Attached here - Charter/Scope
People Processes Technology Data	APD Core Team Weekly Status Meeting	10/26/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD Core Team Weekly Status Meeting	11/02/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD Core Team Weekly Status Meeting	11/09/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD/PALM Monthly Touchpoint - November	11/08/23	APD Core Team/CCN/SMEs	Monthly Touchpoint to review Agency Readiness and engagement	November - Meeting onsite and blended with the Business Process Forum audience (CCN's and SME's plus additional team members.
People Processes Technology Data	PALM Agency Collaboration	10/19/23	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky and Tulani met and talked to all things PALM
People Processes Technology Data	PALM Agency Collaboration - shared documents	10/23/23	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky shared the High Fives/Contact lists/power point presentations to help bring Tulani into the fold with way to help her department catch up to PALM initiatives
People Processes Technology Data	PALM RC call - catch up	10/18/23	PALM and APD	PALM Catch up and Smartsheet Status clarifications	Becky and Jordan - review some correct documentation methods using Smartsheet for status input
People Processes Technology Data	October Advisory Council Meeting	10/18/23	PALM and APD	Advisory council of agencies to the PALM Team	Ramon in attendance for latest updates and review of project efforts from PALM
People Processes Technology Data	APD Facility - Tacachale Accounting Review Call	10/18/23	APD SME and PM	Facilities accounting practices focus	discussion and overview of the efforts from the facility perspective and in conjunction with their payroll activities
People Processes Technology Data	Budget Team - Small Team internal review	10/24/23	Budget Team In Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Disbursement Team	10/24/23	Disbursement Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Financials Team	10/25/23	Financials Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Task 504	10/30/23	Business System Documentation Seg I - APD IT Team	Update Agency Business System Documentation for Segment I. This includes functional requirements, technical requirements, and test cases from reviewing Segment I resources.	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 505	10/30/23	Florida PALM Interface Inventory for Segment I	Update Florida PALM Interface Inventory for Segment I. Identify and document interface needs for Florida PALM implementation by reviewing Segment I resources	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 507	11/08/23	APD = All Finance Teams	Manage Agency-specific Implementation Schedule, Risks and Issues	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize
People Processes Technology Data	PALM Touchpoint and Business Process Forum Meeting	11/08/23	- All APD Finance Teams	In Person meeting with PALM RC's and also to bring the APD Teams into a focused PALM initiative/environment	PALM Monthly Touchpoint meetings will be critical to information dissemination
People Processes Technology Data	APD Specific - High Fives - Communication Letter	11/02/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - High Fives - Communication Letter	11/27/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - High Fives - Communication Letter	12/22/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call	11/02/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/09/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/16/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/30/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology	APD Specific - CORE Team Status Update Weekly Call/email report	12/07/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up

Data				Project Manager	
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/14/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/21/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/28/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - IT Team	11/13/23	APD PM - APD IT Team	Review of the Task effort due to amendments for task 326 and Role effort with the Finance teams in the business process flow efforts	IT team input on the updates and their alignment with the finance team business process workflows
People Processes Technology Data	APD Specific - APD IT Team	11/14/23	APD PM - APD IT Team	APD Team meeting for PALM Status and Review	Overview - update and review
People Processes Technology Data	APD Collaboration - PM Commerce	11/21/23	APD PM - PM from Commerce	Assist and help with the PALM Project overview and onboarding	APD - PM is mentoring other PM's
People Processes Technology Data	APD Specific - APD IT Team	12/04/23	APD Internal team review of Business Systems Inventory and understanding of the changes to come - ABC and Iconnect	Understanding and review	IT effort to complete updates to tasks and then answer PALM Team technical team questions on current inventory and direction
People Processes Technology Data	APD Specific - Core Team review of Charter/Risks/Change	12/04/23	APD Core Team - Sponsor/Business Liaison/Advisory Council Member/Project Manager	APD review of the formal documents - Charter/Risk and Change as well as timeline	In-depth review to approve and formalize the project documents due in Task requirements and also as an update to the current Project Implementation Document within APD
People Processes Technology Data	APD Team Building	12/22/23	APD CORE Team	APD Team Review for PALM Project addition	Business Analyst Opportunity review

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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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Rose Salinas	rose.salinas@apdcares.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for CITRUS](#)  
[Readiness Workplan](#)

# CITRUS Status Report Dashboard

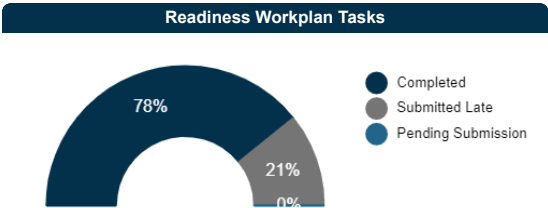
Reporting Period

November - December 2023

Agency Sponsor

Christine Marion

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 = 14

Completed = 11

Submitted Late = 3

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/21/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/08/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/08/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	Voucher print program has been replaced, no agency business system interfaces will be needed.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	No interface needs are identified at this time.
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/09/24	

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 = 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 = 0



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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 31

Related Business Systems = 3

Related Reports = 42

Documentation Status:

Complete = 31 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 4

Criticality:

High = 4 Med = 0 Low = 0 None = 0

Documentation Status:

Complete = 4 Partial = 0 Not Started = 0

Cataloged Interfaces = 1

Inbound Interfaces = 1

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates: TBD

Segment III - Documentation Updates: TBD

Segment IV - Documentation Updates: TBD

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Spreadsheet Uploads = 0

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 = 54

Criticality:

High = 31 Med = 12 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.	Appropriation for Additional funding was granted in CATF. This trust fund does not have sufficient fund balance to support using these funds. They will be reverted.	11/01/23	C Marion
People	The majority of PALM meetings have moved to "in-person" meetings in Tallahassee. Due to staffing and budget issues, travel to Tallahassee (a ten hour round trip) precludes us from sending staff to these meetings.	Closed	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.	We are attending online meetings whenever possible and following up with recordings when available.	11/08/23	C Marion
People	All new accounting staff. Staff members previously on PALM team have left the agency.	Closed	4 (Medium/Medium)	We have assigned previous roles to new staff, but there will be a learning curve.	Staff is being trained and are being brought in to the PALM meetings. Regular meetings have been established to review RW tasks and assign tasks.	11/08/23	C Marion
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.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings	09/19/23	C Marion

### CITRUS 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	Citrus does not have a dedicated project manager to ensure all PALM activities are completed, Tasks are updated, and staff is provided direction.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Without additional project funding, staff will complete tasks as time allows.	Instructions for requesting PALM resources are not clear. No progress on this issue	07/01/24	CCN
Technology Data	Citrus uses a voucher print program that was written in-house and is not documented	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Citrus will research possible voucher print programs other agencies are utilizing, and determine if there is one that meets our needs	Eform application installed on Dec 28th to replace in-house voucher print program	01/01/24	IT

### CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR funding has not been made available to Citrus. CATF does not have sufficient fund balance to absorb additional costs
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff continues to attend workshops, and will begin attending in person as we are able in January.
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.
People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins

### 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
People	Discussion with OPB	01/03/24	Christine, OPB	Discuss options for receiving GR funding for FY2024-25	Discussed amended LBR submittal. OPB suggests sending document stating needs rather than submitting as an amendment, anticipate FY2024-25 to be administered funds
People Processes	PALM Team meeting - review Task 501, 502, 328	11/16/23	ALL	Review Charter and receive feedback, Review implementation schedule, Develop plan to complete Task 328	As of December 14, Charter is ready to submit
People Processes	Consult with D. Screws on progress toward Task 328, identifying business processes, subprocesses, and documentation of same	12/13/23	Lucy, Kay, other as needed	With expertise in FLAIR processes, Dianne can review what has been done and make recommendations to the team	Task 328 Smartsheet was updated with Primary roles, based on Dianne's feedback. Since this is a living document, further tweaks may be needed. Staff continues work on documentation
People Processes	Citrus Touchpoint Meeting	12/14/23	Lucy, Christine, others as available	Discuss status of current tasks and receive feedback from PALM team	Discussed statuses of current Tasks, which will be completed by Dec 15th, with Task 328 being 95% complete. Also discussed funding for PALM project.
People Processes	PALM Team Meeting	12/28/23	Lucy, Christine, others as available	Check-in between holidays on status of current tasks, determine what items need to be completed	Meeting cancelled due to additional admin leave granted and staff annual leave. Tasks are on schedule for completion by due dates.
People Processes	PALM Team Meeting	01/04/24	Lucy, Christine, Kay, Angela, Melissa	Update on tasks due in January, plan for office coverage while Kay and Lucy are in Tally at PALM design workshops	Although we were sent a link to register for the design workshops remotely, we decided it would be good to attend in person this time. Executive Director Shepp dropped in on the meeting, to encourage staff and let them know she appreciated their efforts and teamwork.
Processes	Segment II Financials Wave Webinars	12/05/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes	Segment II Financials Wave Webinars	12/06/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes	Segment II Financials Wave Webinars	12/07/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes Technology	Install Eform voucher print program	12/28/23	George, Melissa, Kay, Angela	Replace in-house written voucher print routine that is not documented with a program that can be interfaced with PALM in the future.	George worked with Eform to install the program on Dec 28th. It is installed for Kay and Melissa. There are still some issues with the program that are being worked out.
Technology	Eform voucher demo - to replace in-house voucher print program	12/12/23	George, Kay, Lucy, Angela, Melissa	Determine if Eform is a solution that can replace in-house voucher print program and integrate with PALM	After demo, Citrus has requested a quote for implementation of eForm software.

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:
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23

Helpful Links

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[Florida PALM Resources](#)  
[Florida PALM Workbook for COM](#)  
[Readiness Workplan](#)

# COM Status Report Dashboard

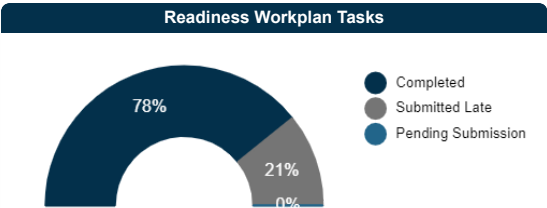
Reporting Period

November - December 2023

Agency Sponsor

Tisha Womack

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 = 14

- Completed = 11
- Submitted Late = 3
- Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	

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 = 9
- Duplicate Filled Role = 3
- 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

Current-State:

Cataloged Business Processes = 61

- Related Business Systems = 8
- Related Reports = 31

Documentation Status:

- Complete = 17 Partial = 41 Not Started = 3

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

Criticality:

- High = 7 Med = 18 Low = 0 None = 1

Documentation Status:

- Complete = 4 Partial = 22 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 23

Segment I - Documentation Updates:

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 14

- Inbound Interfaces = 3

- Outbound Interfaces = 7

- Spreadsheet Uploads = 4

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
People Processes	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	In process of restructuring day-to-day operations responsibilities to allow Business Liaison (Lisa Simpson) more dedicated time to the Florida PALM project, assist fellow SMEs in understanding and completion of implementation tasks in a timely manner. This will help remedy workload concerns at this time.	01/11/24	Caroline (Tisha) Womack / Lemuel Toro
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.	In process of restructuring day-to-day operations responsibilities to allow Business Liaison (Lisa Simpson) more dedicated time to the Florida PALM project, assist fellow SMEs in understanding and completion of implementation tasks in a timely manner. This will help remedy time constraints caused by current schedule.	01/11/24	Lisa Simpson
People	Staff turnover and retention rates negatively impact Commerce's ability to gain and retain talent beneficial to PALM project and agency	Open	4 (Medium/Medium)	Leadership efforts to recruit agency resources to support Commerce business goals and PALM initiatives as needed	No updates at this time.	01/11/24	Caroline (Tisha) Womack / Human Resources

COM 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	Insufficient work hours available to fully support Commerce specific PALM initiatives because existing staff are at capacity with regular hours	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Currently awaiting legislative budget amendment approval	Awaiting Legislative budget amendment approval	01/31/24	Caroline (Tisha) Womack (Sponsor)/ Lemuel Toro

COM Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations	
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations	
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings	
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities	
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings	
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team	

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
People Processes Data	Executive PALM Team Meeting	10/23/23	Commerce PALM Team	Update Executive leaders on PALM project progress and get understanding of expectations	
People Processes Data	PALM Planning Meeting with Business Liaison (Lisa Simpson)	10/19/23	Commerce PALM Team	Review and unpack Task 326 - Business Systems	
People Processes Technology Data	PALM COLLABORATION MEETING: COM Budget Process Discussion with PALM	11/08/23	Budget Team	Provide current and new COM Budget team members with awareness of Florida PALM Budget design.	
People Processes Technology Data	Task 504 & 505 Planning Review (PM & BL)	01/04/24	ABS/Interfaces; Commerce SMEs	Select/plan for ABS interfaces needed for Task 504 & 505	
People Processes Technology Data	Review Payroll Wave Business Process Models	01/08/24	Finance & Accounting SMEs; HR Payroll SMEs	Discussed PALM Payroll BPM	
People Processes	Executive PALM Team Meeting	11/10/23	Commerce PALM Team	Review and discuss Bi-Monthly Report	
People Processes	Executive PALM Team Meeting	12/11/23	Commerce PALM Team	Charter, Meetings, restructure day-to-day operations to allow Business Liaison (Lisa Simpson) to focus more on PALM.	
People Processes	PALM Planning Meeting with Business Liaison (Lisa Simpson)	11/03/23	Commerce PALM Team	Task 326 Progress Check; Begin planning of Task 328	
People Processes	PALM Planning Meeting with Business Liaison (Lisa Simpson)	11/06/23	Commerce PALM Team	Task 326 Progress Monitoring; Planning of Task 328	
People Processes	PALM Planning Meeting with Business Liaison (Lisa Simpson)	11/17/23	Commerce PALM Team	Discuss and unpack Tasks 503, 504, and 505	
People Processes	PALM Planning Meeting with Business Liaison (Lisa Simpson)	11/28/23	Commerce PALM Team	Plan for CCN & SME Kickoff Meeting	

People Processes	PALM Planning Meeting with Business Liaison (Lisa Simpson)	12/12/23	Commerce PALM Team	Identify engagement activities for Task 504	
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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:
November - December 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	01/11/24
September - October 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23

Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DACS

Readiness Workplan

DACS Status Report Dashboard

Readiness Workplan Tasks

100%

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

November - December 2023

Agency Sponsor

Alan Edwards

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 = 14

Completed = 14

Submitted Late = 0

Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	Issues, Risks, and Assumptions have been updated internally and will be added to the bimonthly status report and DACS spreadsheets once all internal approvals have been acquired. Agency-specific Implementation schedule has been reviewed, updated, and is on schedule.
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	

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 = 14

Duplicate Filled Role = 0

Vacant Role = 0

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

Current-State:

Cataloged Business Processes = 243

Related Business Systems = 6

Related Reports = 10

Documentation Status:

Complete = 243 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 49

Criticality:

High = 27 Med = 13 Low = 6 None = 3

Documentation Status:

Complete = 48 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

Inbound Interfaces = 28

Outbound Interfaces = 14

Implementation:

Business Systems Planned for Integration = 16

Segment I - Documentation Updates:

Complete = 3 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 12

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 13

Inbound Interfaces = 2

Outbound Interfaces = 7

Spreadsheet Uploads = 4

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 = 221

Criticality:

High = 85 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/convert 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, Mitigate	09/11/23	Jim Lewandowski
Data	The FLAIR data 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; Mitigate	09/11/23	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; Mitigate	09/11/23	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; Additional info	09/11/23	Jim Lewandowski
People	Increased 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; Mitigate	09/11/23	Nicole Jacobik
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/Medium)	Continue to monitor Florida PALM notifications and participate with Florida PALM at every opportunity.	Ongoing, Mitigate	09/11/23	Jim Lewandowski
Technology Data	Future transaction/data analysis: Division business systems and reports will need to speak both PALM and FLAIR COA languages.	Open	4 (Medium/Medium)	Mitigate. Reducing impact via concept model of COA crosswalk.	Ongoing; Crosswalks un	12/26/23	Rosemarie Zubler/ 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
People	The PALM Remediation Team has four contract vacancies.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	RFOs are drafted and provided to vendors, and interviews will be scheduled.	Closed	10/24/23	Khadija Harris
People	Vacancies: OPS PALM position and Contract Administrator Vacancies	Open	Low - All impacts not listed as Critical or High	Hire as soon as possible.	Working through hiring process for both positions. Contract Administrator candidate has a start date.	02/15/24	Nicole Jacobik / Michelle Faircloth

#### 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 augmentation and services will continue through implementation and Hypercare.	Logged	08/31/23	Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM.	Continuing to monitor
Data	Division reporting needs currently handled by Data Warehouse will be taken care of by user roles for Information Warehouse or PALM reports.	Logged	12/19/23	Division fiscals, Finance and Accounting, OPB, Purchasing, Payroll	Will monitor as FL PALM releases additional information.
Data	Contract numbers in FL PALM and agency business systems will use current values with 5 zeroes at the beginning (for 10 digit PALM COA Contract number).	Logged	12/19/23	Purchasing, Finance and Accounting, Division fiscals, OPB; AIMS	Will monitor as FL PALM releases additional information and agency develops internal Agency Business System remediation.

#### 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 Chart of Accounts – Division engagement	10/19/23	Division of Plant Industry Division of Food Safety Division of Agricultural Environmental Services Division of Florida Forest Service	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/20/23	Office of Agriculture Technology Services	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/23/23	Division of Licensing	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/24/23	Division of Marketing Division of Animal Industry	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/26/23	Division of Fruit and Vegetable	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/30/23	Division of Aquaculture Office of Energy Division of Food, Nutrition, and Wellness	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/31/23	Office of Agricultural Law Enforcement Division of Consumer Services	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	Chart of Accounts Brainstorming for AIMS Business Rules	11/27/23	Admin IT including Technical Liaison, Business Liaisons/Finance and Accounting Leadership, Change Management Liaison; AIMS	Brainstorm design of PALM Chart of Accounts business rules within AIMS	Reviewed initial proof of concept by Technical liaison with end user experience and data integrity in mind.
People	Participated in PALM Change Management and Training Liaison	10/26/23	Direct: Change Management/Training	Facilitate agency collaboration. Provide tools for agency change management and training plan	Addressed people-related issues, risks, and assumptions.

	Forum		Liaison Indirect: Agency-wide	implementation.	Discussed strategies for overcoming resistance to change and embracing the PALM journey. Brainstormed communication and training format, frequency, and content (statewide and agency-specific)
People	Participated in Project Management Liaison Forum	10/26/23	Direct: Project Management Liaison Indirect: Agency-wide	Facilitate agency collaboration; Provide tools for agency project management	Addressed the need for Stakeholder engagement and communication. Discussed strategies for gaining stakeholders support and collaboration.
People	Monthly Supervisors Meeting	11/02/23	Bureau of Finance and Accounting Supervisors and Chief's office	PALM Status updates, Task 328 status updates, Vacancy review for PALM Risks/Issues	Business Liaison, Change Management Liaison, Training Liaison,
People	PALM Business needs and budget	11/28/23	Admin Director's Office, OATS Director's Office, Finance and Accounting Bureau Chief's Office, OATS Fiscal, Admin IT,	Discussed PALM business needs and budget	Included Business Liaisons, Agency Liaison (Backup), Change Management Liaison, Project Management Liaison (Backup), Technical Liaison
People	Planning for FDACS PALM website	12/19/23	PRT, OATS, Admin IT, Finance and Accounting,	Discuss ownership of intranet site development and maintenance, show draft design preview, and discuss timeline for completion	Planning phase on intranet site for FDACS employees to gain awareness, knowledge, and buy-in via FDACS project documents and FL PALM links with anticipated updates as training materials are created.
People	Conducted interviews for PALM OPS position	12/27/23	Finance and Accounting	Interview to hire PALM business support for People/Process PALM tasks and agency readiness activities	Change Management Liaison, Business Liaison
Processes	Advisory Council Meeting	10/18/23	Enterprise-wide	Discussed Bimonthly status report, readiness workplan, Segment I Design workshops, project costing module, and brought back key takeaways to agency stakeholders	Takeaways shared.
Processes	PALM Task 328 – Personnel	10/23/23	Personnel, Change Management Liaison, F&A Assistant Bureau Chief	Met with Personnel to discuss Task 328 progress and approach	(Payroll processes)
Processes	Conducted PALM Readiness Support Procurement meeting	11/01/23	Administration, OATS, and PRT leadership, Vendor	Met with potential vendor to discuss procurement of PALM support services	PALM Management Workgroup leadership
Processes	Property Process Review	11/02/23	Finance and Accounting Chief's office and Property Section;	Met with Property section to discuss Task 328 progress.	Change Management Liaison
Processes	Financial Management Process Review	11/03/23	Finance and Accounting Chief's Office and Financial Management Section;	Met with Financial Management section to discuss Task 328 progress.	Change Management Liaison
Processes	Conducted AIMS to PALM Integration Meeting	11/03/23	Division of Administration (Director's office, IT, Finance and Accounting, Purchasing, Professional and Organizational Development), Project Management Liaison; AIMS	Brainstorm transition readiness for AIMS to PALM integration as it relates to people and processes with a high-level view of data and technology transformation, hosted by the Division of Administration	Risks, Issues, Assumptions, and vacancies reviewed; discussed payroll module, COA crosswalk, FANS, training planning, newsletters; Project Management Liaison, Change Management Liaison, Agency Liaison (Backup), Business Liaison, Technical Liaison, Training Liaison,
Processes	Discussed Additional Funding Needs for PALM	11/14/23	Finance and Accounting, OATS leadership, Admin Director's Office, PRT Project Manager	Discussed additional PALM funding needs,	Resources for LBR
Processes	Participated in PALM Advisory Council Meeting	11/15/23	Business Liaisons	Agency Council member participated in discussions regarding master data cleanup, budget/allocation, task completion and dashboard trackers. Information or meetings relayed to FDACS PALM key stakeholders	Information from Advisory Council meeting relayed to FDACS PALM key stakeholders
Processes	Conducted PALM Readiness Support Procurement meeting	11/16/23	Administration, OATS, and PRT leadership, Vendor	Met with potential vendor to discuss procurement of PALM support services	PALM Management Workgroup leadership
Processes	Monthly Supervisors Meeting	11/30/23	Bureau of Finance and Accounting Supervisors and Chief's office	PALM Status updates, Task 328 status updates, Vacancy review for PALM Risks/Issues	Reviewed Process documentation development
Processes	Monthly Supervisors Meeting	11/30/23	Bureau of Finance and Accounting Supervisors and Chief's office	PALM Status updates, Vacancy review for PALM Risks/Issues	Business Liaison, Change Management Liaison, Training Liaison,
Processes	Conducted PALM Tasks Status review	12/11/23	Finance and Accounting Chief's Office	Review Tasks 328, 500, 501, 502, 503 progress and completion status, identify blockers, and plan for accomplishing task completion with necessary internal approvals.	Business Liaison, Change Management Liaison
Processes	Conducted PALM Finance and Accounting Needs meeting	12/18/23	Finance and Accounting Chief's Office	Provide PALM status updates, address assistance needed, task approval route flows, payroll rollout, future agenda items, the Bimonthly status report, future quarterly liaison meetings, and PALM tasks completed	Business Liaisons, Change Management Liaison
Processes	Conducted Division of Administration AIMS to PALM Integration Meeting	12/19/23	Division of Administration (Director's office, IT, Finance and Accounting, Purchasing, Professional and Organizational Development), PRT Project Manager; AIMS	Brainstorm transition readiness for AIMS to PALM integration as it relates to people and processes with a high-level view of data and technology transformation, hosted by the Division of Administration	Included Business Liaisons, Agency Liaison (Backup), Change Management Liaison, Project Management Liaison, Technical Liaison, Training Liaison; Addressed AIMS COA Proof of Concept, OA1 and OA2 field usage, FANS approach, shared PALM updates, Discussed intranet site for FDACS employees, Training needs, Risk, Issue, Assumption, and vacancy review
Processes	Participated in Segment II Business Process Model Review Meetings: Disbursements Management and Asset Accounting & Management	12/05/23	Advisory Council member, Subject Matter Experts, PALM Management Workgroup	Review BPM design, ask the FL PALM team questions, and share takeaways with key stakeholders	Review of Segment II BPMs ongoing.
Processes	Participated in Segment II Business Process Model Review Meetings: Account Management and System Access & Controls	12/06/23	Advisory Council member, Subject Matter Experts, PALM Management Workgroup	Review BPM design, ask the FL PALM team questions, and share takeaways with key stakeholders	Review of Segment II BPMs ongoing.
Processes	Participated in Segment II Business Process Model Review Meetings: Accounts Receivable and Grants Management & Contract Management	12/07/23	Advisory Council member, Subject Matter Experts, PALM Management Workgroup	Review BPM design, ask the FL PALM team questions, and share takeaways with key stakeholders	Review of Segment II BPMs ongoing.
Technology	PALM Interface – Capture of Information	10/24/23	AIMS, REV	Discussing process for capturing PALM interface information and related fields for remediation, document templates, folders, and retention	F&A, PRT, Admin DIO
Technology	AIMS Chart of Account Fields	10/24/23	AIMS – Purchases, Contracts applications	Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA.	F&A, Purchasing, Admin DIO, PRT, OATS
Technology	PALM Management Touchpoint	10/27/23	AIMS, REV, FANS	Provide agency readiness status updates, discuss AIMS, REV, and FANS remediation, and review risks, issues, and assumptions. Discuss upcoming tasks and key takeaways from recent PALM meetings	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	AIMS Chart of Account Fields	10/31/23	AIMS – Receiving, Research, Bids, Travel Applications	Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA	F&A, Purchasing, Admin DIO, PRT, OATS
Technology	FANS for PALM Transition Meeting	11/01/23	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	Develop cross-functional team to develop FANS approach for PALM, share information/resources, and brainstorm how FANS will function once next PALM waves launch.	FNW= Division of Food, Nutrition, and Wellness, FANS = Food and Nutrition System (Agency Business System), PRT = PALM Remediation Team, OATS = Office of Agriculture Technology
Technology	AIMS Remediation Production Implementation	11/02/23	PALM Remediation Team, Disbursement Unit Supervisors, Admin IT, OATS; AIMS Disbursements	User Acceptance Testing for Production Implementation of AIMS Disbursements update in anticipation of PALM	Production configuration, verified maximized disbursement screens, created and voided batches, verified Certified Forward Code sheets, and other testing scenarios.

Technology	Participated in Effective Use of RAID Logs Workshop	11/07/23	PR I Project Manager	Learn about effective use of RAID (Risks, Actions, Issues, and Decisions) logs and project assumptions for FDACS PALM project management	Project Management Liaison
Technology	Conducted FANS PALM Workshop with PRT	11/08/23	PALM Remediation Team (PRT), FNW FANS IT, FNW Fiscals (FANS end users), OATS, Admin IT, Admin Director's office, Finance and Accounting; FANS	Continue to develop FANS approach for Florida PALM, build cross-sectional knowledge, and share analysis resources	Demonstration of FANS interactions with FLAIR Chart of Accounts, overview of processes and procedures PRT is using for analyzing AIMS and REV
Technology	PALM Management Touchpoint	11/10/23	Office of Agriculture Technology Services, Division of Administration ( Finance and Accounting, Admin IT, Director's Office, Purchasing, Professional and Organizational Development), PALM Remediation Team, Office of Policy and Budget; AIMS, REV, FANS	Provide agency readiness status updates; discuss AIMS, REV, and FANS remediation; review risks, issues, and assumptions; discuss upcoming tasks and key takeaways from recent PALM meetings; vacancy review	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	PALM Management Workgroup Touchpoint	11/10/23	Office of Agriculture Technology Services, Division of Administration ( Finance and Accounting, Admin IT, Director's Office, Purchasing, Professional and Organizational Development), PALM Remediation Team, Office of Policy and Budget; AIMS, REV, FANS	Provide agency readiness status updates; discuss AIMS, REV, and FANS remediation; review risks, issues, and assumptions; discuss upcoming tasks and key takeaways from recent PALM meetings; vacancy review	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	PALM Management Touchpoint	11/17/23	Office of Agriculture Technology Services, Division of Administration ( Finance and Accounting, Admin IT, Director's Office, Purchasing, Professional and Organizational Development), PALM Remediation Team, Office of Policy and Budget; AIMS, REV, FANS	Provide agency readiness status updates; discuss AIMS, REV, and FANS remediation; review risks, issues, and assumptions; discuss upcoming tasks and key takeaways from recent PALM meetings; vacancy review	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	Review and discuss PALM Task 504 and 505 and Addendum	11/17/23	Admin IT, OATS, PRT, Finance and Accounting	Review and discuss PALM Task 504 and 505 and Addendum.	Task 504/505 responsible and accountable parties
Technology	Walkthrough of Purchasing flow in AIMS	11/20/23	PRT	Provision of a demo for PRT on creating a new request, granting an approval, creating a change order, and the tasks of a reviewer.	The provision of the demo assists PRT with their analysis.
Technology	PALM Management Touchpoint	11/22/23	Office of Agriculture Technology Services, Division of Administration (Finance and Accounting, Admin IT, Director's Office, Purchasing, Professional and Organizational Development), PALM Remediation Team, Office of Policy and Budget; AIMS, REV, FANS	Provide agency readiness status updates; discuss AIMS, REV, and FANS remediation; review risks, issues, and assumptions; discuss upcoming tasks and key takeaways from recent PALM meetings; vacancy review	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	Conducted FANS PALM Weekly status meeting with PRT	11/29/23	PALM Remediation Team (PRT), FNW FANS IT, FNW Fiscals (FANS end users), OATS, Admin IT, Finance and Accounting; FANS	Provide FANS PALM remediation status update/accomplishments; review blockers and assistance needed, set goals for next week	Reviewed Risks and Issues
Technology	PRT Dashboard Preview Demonstration	11/29/23	PRT, OATS (Director's office, PPMO), Admin IT, Finance and Accounting	Demonstrate new PRT Dashboard. Review and provide feedback for PRT Dashboard (internal FDACS PALM project management tool developed for transparency and pull-communication for PALM Management Workgroup)	Reviewed Users who need access to PRT Dashboard, PRT Dashboard design with project management and deliverable documents, work breakdown structure, remediation schedule, and sprint details.
Technology	Conducted FANS PALM Weekly status meeting with PRT	12/06/23	PALM Remediation Team (PRT), FNW FANS IT, FNW Fiscals (FANS end users), OATS, Admin IT, Finance and Accounting; FANS	Provide FANS PALM remediation status update/accomplishments; review blockers and assistance needed, set goals for next week	Reviewed Risks and Issues
Technology	Conducted FANS PALM Weekly status meeting with PRT	12/13/23	PALM Remediation Team (PRT), FNW FANS IT, FNW Fiscals (FANS end users), OATS, Admin IT, Finance and Accounting; FANS	Provide FANS PALM remediation status update/accomplishments; review blockers and assistance needed, set goals for next week	Reviewed Risks and Issues
Technology	CATS Analysis Meeting	12/13/23	PRT	Provide PRT with a better understanding of where contracts are initiated from AIMS and where they are located on FDACS AIMS Tree structure,.	The provision of the demo assists PRT with their analysis.
Technology	Interface Selection	12/14/23	F&A Chief's Office, PRT Project Manager, Admin IT	Discuss interfaces that FDACS will/should be signing up for and general direction of the interfaces (in relation to PALM Task 505)	Included Technical Liaison, Project Management Liaison, Business Liaisons, and Change Management Liaison
Technology	Conducted FANS PALM Weekly status meeting with PRT	12/20/23	PALM Remediation Team (PRT), FNW FANS IT, FNW Fiscals (FANS end users), OATS, Admin IT, Finance and Accounting; FANS	Provide FANS PALM remediation status update/accomplishments; review blockers and assistance needed, set goals for next week	Reviewed Risks and Issues; discussion of task 504 items needed
Technology	Daily PRT Standups	11/01/23	PRT, Finance and Accounting, OATS, Admin IT	Conduct daily standups to provide update on technology tasks and deliverables, address risks, issues, assumptions, time exceptions, and blockers.	Ongoing; Work breakdown structure and deliverable progress monitoring; Project Management Liaison, Change Management Liaison,
Technology	Daily PRT Open Forum	11/01/23	PRT	Brainstorm items related to current and future tasks.	Ongoing; Project Management Liaison
Technology	Sprint Retrospectives and planning	11/01/23	PRT, OATS, Admin IT	Conduct retrospective of ending sprint and plan for next sprint	Ongoing; Project Management Liaison; Sprint 39/40: 11/1/2023; Sprint 40/41: 11/16/2023; Sprint 41/42: 12/1/2023; Sprint 42/43 12/16/2023
Technology	Weekly Summary Reporting	11/01/23	PRT, OATS, Finance & Accounting, Admin IT	Provide status of completed and ongoing PRT deliverables/agency tasks; analyze implementation schedule progress; plan for next week	Ongoing; Every Friday
Technology	Risks and Issue Management, monitoring Implementation Schedule, reviewing vacancies	11/01/23	PALM Management Workgroup	Consistently review and update Risks, Issues, Assumptions, Implementation Schedule, and vacancies	Ongoing; Primary: Project Management Liaison, Change Management Liaison

#### 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: \*

#### DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Alan Edwards	alan.edwards@fdacs.gov	01/11/24
September - October 2023	Alan Edwards	alan.edwards@fdacs.gov	11/09/23
July - August 2023	Alan Edwards	alan.edwards@fdacs.gov	09/11/23

Agency Sponsor name: \*

☐ Confirm \*

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# DBPR Status Report Dashboard

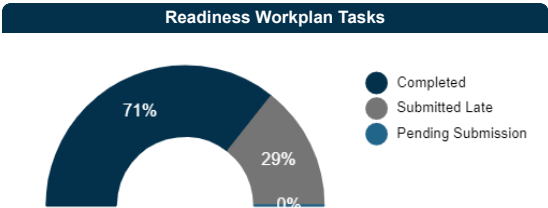
Reporting Period

November - December 2023

Agency Sponsor

Tyler Russell

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 = 14

- Completed = 10
- Submitted Late = 4
- Pending Submission = 0

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

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/14/23	Processes documented on file with DBPR.
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	Timeline based on Readiness Workplan; subject to change after project contractor in place for DBPR
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	Draft RAID log attached
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	Plan attached. Subject to change after project contractor in place for DBPR
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/03/24	No updates
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	Report submitted 1/12/24

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 = 8

Duplicate Filled Role = 3

Vacant Role = 3

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

Current-State:

Cataloged Business Processes = 7

Related Business Systems = 10

Related Reports = 36

Documentation Status:

Complete = 7 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 11

Criticality:

High = 5 Med = 2 Low = 1 None = 3

Documentation Status:

Complete = 10 Partial = 0 Not Started = 1

Cataloged Interfaces = 1

Inbound Interfaces = 0

Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 1

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 13

Inbound Interfaces = 3

Outbound Interfaces = 7

Spreadsheet Uploads = 3

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
People	Retirement of Accounting Systems Analyst	Open	6 (High/Medium)	Advertise position as soon as possible; hire new employee in time to overlap with retiring employee	Work in progress to advertise John Mounts' position; new Revenue/Financial Reporting manager Lyndell Francis has started - in addition to state/accounting background, he also has IT background	01/11/24	Sally Huggins
People Processes Technology Data	Completion of tasks	Open	4 (Medium/Medium)	Completion of upcoming project related tasks is at risk of not being completed timely due to delay in receiving administered funds requested in Operational Work Plan.	RFQ to be released, contractors submit proposal, contractor chosen, and PO issued all needs to be done before first project related deadline of 12/15/23; RFQ is in progress	01/11/24	Sally Huggins
People Processes Technology Data	Change in understanding of what project considers Agency Business System affects completion of tasks	Open					

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	Administered funds were just released during week of 10/30/23	
People Processes Technology Data	DBPR RFQ to hire Project Manager and Change Manager will be completed	Logged	11/08/23	All users of Florida PALM	RFQ will be released now that administered funds have been released	
People Processes Technology Data	DBPR Project Manager and Change Manager will have enough time to complete tasks released by Florida PALM	Logged	11/08/23	All users of Florida PALM	Chosen contractor will be able to start with enough time to complete upcoming tasks	
People	Replace retiring Accounting Systems Analyst	Logged	01/11/23	DBPR	New employee will be in place to overlap with John Mounts who will retire 4/29/24	

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 Processes Technology Data	Monthly Touchpoint	10/20/23	Sally Huggins, John Mounts	October 2023 Touchpoint with Readiness Coordinators		
People Processes Technology Data	Task 326	10/27/23	Sally Huggins	Completed Task 326		
People Processes Technology Data	Tuesday Task Talk	11/09/23	Sally Huggins	Task Talk 504, 505, 506, 507 & 508	Sally Huggins listened to webinar	
People Processes Technology Data	Monthly Touchpoint	11/17/23	Sally Huggins, John Mounts	November 2023 Touchpoint with Readiness Coordinators		
People Processes Technology Data	Business Process Model Reviews	12/05/23	John Mounts, Kristopher Burnside, Sally Huggins	Segment II Design Workshop Disbursements Management	JM & KB attended in person, SH listened online	
People Processes Technology Data	Business Process Model Reviews	12/06/23	John Mounts, Sally Huggins	Segment II Design Workshop Chart of Accounts	JM attended in person, SH listened online	
People Processes Technology Data	Business Process Model Reviews	12/07/23	John Mounts, Sally Huggins	Segment II Design Workshop Accounts Receivable, Contracts & Grants	JM attended in person, SH listened online	
People Processes Technology Data	Monthly Touchpoint	12/15/23	Sally Huggins, Mindy Heindl	December 2023 Touchpoint with Readiness Coordinators		
People Processes Technology Data	Task 500, 501, 502, 503, 328	12/15/23	Sally Huggins	Completed tasks due 12/15/23		
People	Advisory Council	10/18/23	Sally Huggins	Attended October Advisory Council meeting		
People	Executive Steering Committee	10/25/23	Lynn Smith	Attended October 2023 ESC meeting		
People	Advisory Council	11/15/23	Sally Huggins	Attended November AC meeting		
People	Executive Steering Committee	11/15/23	Lynn Smith	Attended November ESC meeting		
People	Advisory Council	12/13/23	Sally Huggins	Attended December AC meeting		
People	Executive Steering Committee	12/13/23	Lynn Smith	Attended December ESC meeting		
People	Sponsor meeting	12/19/23	Tyler Russell, Sally Huggins	Met with Steven Fielder & Angie Robertson		

Agency Sponsor Confirmation
As Agency Sponsor, I understand my role and responsibility for monitoring and reporting

DBPR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Tyler Russell	tyler.russell@mfloridapalms.com	01/12/24

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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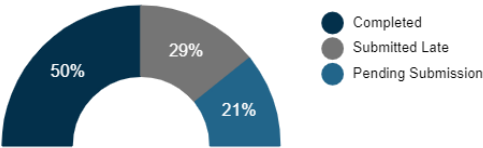
November - December 2023	Tyler Russell	tyler.russell@myfloridalicense.com	01/12/24
September - October 2023	Tyler Russell	tyler.russell@myfloridalicense.com	11/09/23
July - August 2023	Tyler Russell	tyler.russell@myfloridalicense.com	09/13/23

Helpful Links

- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for DCF](#)
- [Readiness Workplan](#)

DCF Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

November - December 2023

Agency Sponsor

Tony Lloyd

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 = 14

- Completed = 7
- Submitted Late = 4
- Pending Submission = 3

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
Data	324	Complete FLAIR Data Elements Inventory	12/09/22	03/31/23	50% - In Progress		
Processes	325	Complete Data Security and Access Survey	01/23/23	02/03/23	75% - Consolidating/Inputting Information for Submission		
Data	327	Complete Reports Inventory	04/03/23	07/28/23	50% - In Progress		
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	DCF has completed our review of the Segment I information and have determined that there are too many open questions about the design that will be addressed in subsequent Segments to update our own design documentation.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	Per the DCF touchpoint in December, DCF has created entries for our future state system modules which will be constructed this fiscal year and their interface needs.
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/15/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/12/24	DCF was unaware this task was not co-terminated with the status report due on 1/12/24. This effort is ongoing.
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 8
- Duplicate Filled Role = 6
- Vacant Role = 0



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 = 44

- Criticality:
  - High = 16 Med = 1 Low = 0 None = 20
- Documentation Status:
  - Complete = 4 Partial = 16 Not Started = 1

Cataloged Interfaces = 62

- Inbound Interfaces = 0
- Outbound Interfaces = 62

Implementation:

Business Systems Planned for Integration = 4

- Segment I - Documentation Updates:
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2
- Segment II - Documentation Updates: TBD
- Segment III - Documentation Updates: TBD
- Segment IV - Documentation Updates: TBD

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0
- Spreadsheet Uploads = 0

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.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
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.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Department Leadership Turnover	Open	4 (Medium/Medium)	Accept. Monitor political developments as they unfold and adapt, as needed.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
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.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Sponsor Turnover	Open	3 (High/Low)	Mitigate. Ensure sponsor commitments and operational plans are well documented and rationale is well established.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Manager/Agency Liaison Turnover	Open	3 (High/Low)	Mitigate. Ensure project approach and status are well-documented.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Staff Turnover	Open	2 (Low/Medium)	Avoid. Ensure project staff responsibilities are well defined and documentation is up-to-date	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
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.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
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.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam

### 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	Closed	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 released the requested funds for PALM Integration and Remediation submitted on 7/31/23 on December 12, 2023.	11/24/23	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 be 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 Data	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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.
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	None.

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

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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DCF Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Tony Lloyd	tony.lloyd@myffamilies.com	01/11/24
September - October 2023	Tony Lloyd	tony.lloyd@myffamilies.com	11/15/23
July - August 2023	Tony Lloyd	tony.lloyd@myffamilies.com	09/12/23

Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DEM

Readiness Workplan

DEM Status Report Dashboard

Readiness Workplan Tasks

93%

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

November - December 2023

Agency Sponsor

Luke Strickland

Readiness Workplan Tasks:

Total Tasks = 14

Completed = 13

Submitted Late = 1

Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/09/24	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 5

Duplicate Filled Role = 9

Vacant Role = 0

Current-State:

Cataloged Business Processes = 35

Related Business Systems = 3

Related Reports = 21

Documentation Status:

Complete = 30 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

Criticality:

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

Documentation Status:

Complete = 2 Partial = 1 Not Started = 1

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

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

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

Participation:

Meetings Attended = 4

Meetings Missed = 0

Implementation:

Training = TBD

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

Implementation:

Business Systems Planned for Integration = 2

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 2 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 10

Inbound Interfaces = 0

Outbound Interfaces = 6

Spreadsheet Uploads = 4

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	Challenge in filling vacant positions in Finance & Accounting	Open	9 (High/High)	Utilize other Finance employees to assist when needed	N/A	12/24/23	Karen Peyton
People	Ability to be fully devoted to the project because of unpredictable response activities related to natural disasters and other threats to the state and its citizens.	Open	4 (Medium/Medium)	Endeavor to utilize other staff members and/or employees from other agencies to assist	N/A	12/24/23	Karen Peyton
People Processes Technology Data	N/A	Closed	1 (Low/Low)	N/A	N/A	11/08/23	Karen Peyton

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	11/08/23	Karen Peyton

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	No change.	

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	

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:
November - December 2023	Luke Strickland	luke.strickland@em.myflorida.com	01/12/24
September - October 2023	Luke Strickland	luke.strickland@em.myflorida.com	11/09/23
July - August 2023	Luke Strickland	luke.strickland@em.myflorida.com	09/07/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DEP](#)  
[Readiness Workplan](#)

# DEP Status Report Dashboard

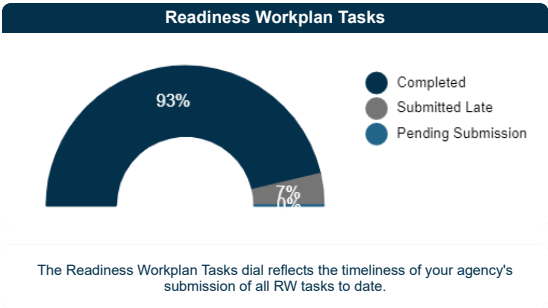
Reporting Period

November - December 2023

Agency Sponsor

Darinda McLaughlin

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 = 14

Completed = 13

Submitted Late = 1

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/22/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/10/24	

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 = 7

Duplicate Filled Role = 9

Vacant Role = 0



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

Current-State:

Cataloged Business Processes = 248

Related Business Systems = 20

Related Reports = 49

Documentation Status:

Complete = 248

Partial = 0

Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 44

Criticality:

High = 20

Med = 10

Low = 5

None = 9

Documentation Status:

Complete = 44

Partial = 0

Not Started = 0

Cataloged Interfaces = 67

Inbound Interfaces = 57

Outbound Interfaces = 10

Implementation:

Business Systems Planned for Integration = 26

Segment I - Documentation Updates:

Complete = 0

Updating = 4

Evaluating = 0

Not Started = 0

Not Needed = 0

Segment II - Documentation Updates: TBD

Segment III - Documentation Updates: TBD

Segment IV - Documentation Updates: TBD

Planned Interfaces = 4

Inbound Interfaces = 0

Outbound Interfaces = 4

Spreadsheet Uploads = 0

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 = 380

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
Technology Data	Unclear Requirements and Potentially Changing Requirements	Open	9 (High/High)	FDEP technical team would need to have sufficient knowledge of FDEP financial systems. Allow for adjustments to the implementation schedule for unplanned changes/updates to requirements.	Without finalized interface specifications, the application team may have limited visibility into the expected changes in the data formats and structures. This ambiguity can lead to misinterpretation or incorrect implementation of the new PALM interfaces. Additionally, there is the potential that previous design specifications could change as a result of subsequent discoveries in later design segments.	11/13/23	Brady Schmidt
People Processes Technology	Resources and Turnover	Open	6 (High/Medium)	Ensure job-specific processes are properly documented.	FDEP has engaged the Division/District/Office staff throughout the department to document business processes and transfer key knowledge.	11/13/23	Lydia Griffin & Steve Waters
Processes Technology Data	Increased Risk of Application Update Errors	Open	4 (Medium/Medium)	Sufficiently documented business system processes.	Rushing the update process or making assumptions without proper interface specifications and sample data can increase the risk of errors and inconsistencies. It may result in data integration issues, data loss, or inaccurate data processing, which can impact the reliability and functionality of the application.	11/13/23	Brady Schmidt

### 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 has begun to facilitate information gathering and identifying financial data impacts. The results will be used for future planning of PALM implementation.	07/01/25	Lydia Griffin, Steve Waters
People	PALM Project Implementation	Closed	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 systems. 12/15/2023- The communication plan was finalized in the development of the agency project charter RW500.	12/15/23	Lydia Griffin, Steve Waters

### 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 Data	SME Process & Business System Knowledge	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	FDEP Project Team has facilitated information gathering and identifying financial data impacts.
People Processes Technology Data	PALM Project Implementation Schedule	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	In planning, the success of FDEP's implementation schedule is contingent upon the timeliness receipt of information from the PALM Project team.
People Processes Technology	FY 23/24 Budget and Funding	Removed	11/28/23	Division/District/Office Business Systems remediation and project management.	9/11/2023-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. 11/13/2023-FDEP has been approved for additional funding from the Administered Funds and FY 22/23 revert and reappropriated 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
People Processes Data	Two DEP Division Town Hall meetings held to aid in completing PALM Task #328	10/31/23	All DEP divisions and listed agency business systems PALM-326 and business processes in PALM #328	Complete the information for: 1. Create an inventory of Current State Business Processes and User Roles, Desktop Procedures, and/or Job Aids 2. Document business processes via workflows and or narratives plus supporting user stories/process tasks. 3. Identify and record the changes needed to #1 and #2 based on Florida PALM business process adoption, which will constitute the testing and training needs for operational readiness.	None
People Processes Technology Data	PALM Readiness Task #328	12/15/23	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. 9/1-10/31/2023-data gathering continues. 11/1-12/31/2023 - Completed.
People Processes	Continue to Manage Agency Specific Implementation Schedule, Risks and	12/15/23	Same as Critical Operational Elements	Actively manage your agency's project activities including iterative updates to agency-specific project	Completed

Processes Technology Data	Implementation Schedule, Risks and Issues, PALM-507		Operational Elements columns	including iterative updates to agency-specific project schedule and manage agency-unique risks and issues.	
People Processes Technology Data	PALM Segments I & II - Internal Review	12/15/23	Subject Matter Experts	Conducted internal meeting to review and discuss information received from Segment 1 and 2.	Documented concerns, questions, issues and potential process impacts.
People Processes Technology Data	Stakeholder Engagement II	12/18/23	Division/District/Office Staff	Project Status and Agency Business System updates.	Continued Change Management for the Division/District/Office Program Unit.
Technology	PALM Readiness Task #326	12/29/23	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. 9/1-10/31/2023-data gathering continues. 11/1-12/31/2023 - Completed.
Technology	PALM Readiness Task #327	12/29/23	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. 9/1-10/31/2023-data gathering continues. 11/1-12/31/2023 - Completed.
Technology	PALM Grant Chart field Assessment	12/29/23	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. 9/1-10/31/2023-data gathering on grant field usage and grant manager responsibilities. 11/1-12/31/2023 - during the reporting cycle we met with Budget Coordinators regarding the impending changes to the process and protocol for establishing new records, updating existing records and changes to grant management.
Technology	Application Flow Diagrams	12/29/23	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-ABTS, FIN-Recon, FIN-Yes, FIN-RateRpt, FIN-Convert, and FIN-Budget Projections. 9/1-10/31/2023 - During the reporting period diagrams were completed for FIN-GMS and FIN-Project Review. Begin Analysis for FIN-Maintenance & FIN-CRARReconciler. 11/1-12/31/2023 - Completed.
Technology	COMPLETED tasks for PALM-326- Update Current State Agency Business System Inventory and Documentation	10/26/23	All DEP divisions and listed agency business systems PALM-326	This document identifies all of the agency business systems that needs to be remediated to support PALM Go-Live and will be retired.	Completed

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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DEP Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	01/10/24
September - October 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	11/13/23
July - August 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	09/11/23

Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DFS

Readiness Workplan

DFS Status Report Dashboard

Readiness Workplan Tasks

86%

14%

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

November - December 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:

Total Tasks = 14

Completed = 12

Submitted Late = 2

Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/11/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/11/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		Design details needed from PALM Design Segments II, III, and IV in order to complete ABS design impacts. DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/19/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 11

Duplicate Filled Role = 6

Vacant Role = 1

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

Current-State:

Cataloged Business Processes = 416

Related Business Systems = 11

Related Reports = 43

Documentation Status:

Complete = 416 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 68

Criticality:

High = 16 Med = 5 Low = 0 None = 47

Documentation Status:

Complete = 31 Partial = 0 Not Started = 0

Cataloged Interfaces = 121

Inbound Interfaces = 100

Outbound Interfaces = 21

Implementation:

Business Systems Planned for Integration = 20

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 9

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 7

Inbound Interfaces = 2

Outbound Interfaces = 4

Spreadsheet Uploads = 1

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 = 385

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
People Processes	Delayed access to Administered Funds that have been identified and requested to support Functional Readiness activities issued by PALM may impact scheduled onboarding of PM and OCM and task completions. CCN does not have a PM and OCM resource which could impact readiness tasks; Specifically, 1) the Agency could struggle to complete the tasks in a timely manner 2) Task may lack quality and CCN might miss something because lack the training/KSA to know what to look out for; 3) the Agency may likely struggle to transition to Florida PALM in January 2026 without the identified resources.	Closed	9 (High/High)	<ul style="list-style-type: none"> <li>Current CCN will attempt to manage the readiness activities as a project and do best on identifying change impact strategies to fulfill the obligations to be meet the project deadlines.</li> <li>CCN could use standardized PM templates and established procedures. Until we have dedicated resources to complete the readiness tasks.</li> </ul>	Still monitoring	10/31/23	Alexandra Weimorts
People	ENTERPRISE A&A: The Project timeline is very conservative regarding flexibility, and A&A's involvement is critical for project success. Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&A change management and internal preparation for A&A preparedness activities have already started, but having adequate resources will be key to successful implementation.	Open	9 (High/High)	<ul style="list-style-type: none"> <li>Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations.</li> <li>Retain our critical staff that are involved in Florida PALM activities and those who are picking up added job responsibilities so that subject matter experts can dedicate time to Florida PALM activities.</li> <li>Provide expectations that staff will cross-train and provide knowledge transfer to increase the depth need to continue operating with a high level of service and accuracy.</li> <li>A&amp;A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
People	ENTERPRISE A&A: Resource impacts due to A&A operational staff spending a significant amount of time performing Project related tasks. This pulls resources from operations, increases workloads, and causes stress and an increased chance of employee burnout.  <ul style="list-style-type: none"> <li>Project tasks may require additional time outside employees designated working hours to attend meetings, review time sensitive documents, or contribute to critical tasks. Some positions are not granted flexibility to flex time throughout the month, but they must flex it within the week. This policy limitation causes a strain on availability of resources. Allowing current staff more flexibility to flex their time beyond the work week would help with resource allocation.</li> <li>As we get closer to implementation, the number of items that will require attention will continue to increase. This will include, assisting agencies with data management, preparing enterprise data for conversion, developing cut-over and FLAIR close out plans, participating in all levels of integration and UAT testing, validating testing results, participation and validation of mock and production conversions, developing policy around new processes.</li> </ul>	Open	9 (High/High)	<ul style="list-style-type: none"> <li>Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities.</li> <li>Hire additional staff (FTE or OPS) to learn current operations so that our experienced staff can continue to participate with the Florida PALM Project in design, testing, and implementation activities.</li> <li>Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team.</li> <li>Work with Human Resources to properly document team members who should be classified as SES staff.</li> <li>Establish plans for reduction of current operational activities and prioritize responsibilities based on risk and probability. This could include posting all payments and suspending pre-audit activities, suspending Article V and Contract Management audits, suspending processing of EFT applications, as examples.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
Technology	Florida PALM design release dates for Segments III, IV, and Data Warehouse will decrease the build time for impacted agency business systems. This may impact the ability for applicable agency business systems to be ready for interface testing by January 2025.	Open	6 (Medium/High)	<ul style="list-style-type: none"> <li>Develop initial agency business system future-state designs as much as possible based on Segment I and II design information made available by the Florida PALM Project. Update ABS designs as soon as Segment III, IV, and Data Warehouse design information becomes available from the Florida PALM Project.</li> <li>Work with Division/Office management to allow dedicated technical and functional resources to be available for agency business systems remediation efforts when design information is released.</li> </ul>	Still monitoring	10/20/23	Stacey Pollock
Processes	ENTERPRISE TREASURY: The consolidation of Disbursements bank accounts will cause changes in file transmissions, transaction volumes, pricing, and reconciliation processes. Bank account configurations in Florida PALM will need to be updated to reflect this change. Transaction volumes will potentially increase, which will cause an increase in monthly costs. Reconciliation processes will shift to the Division of Treasury, which will increase workload and potentially require additional positions.	Open	6 (Medium/High)	<ul style="list-style-type: none"> <li>Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li> </ul>	Still monitoring	12/13/23	Sarah Dugan
Technology	Reduced duration for agency business system end-to-end testing with Florida PALM during UAT could impact Tier 1 agency business systems with significant changes, as well as those systems that will require downstream Tier 2 interface testing. As a result, DFS may not have enough time to successfully complete all of the testing needed for agency business systems, which in turn could impact agency readiness for go-live with Florida PALM.	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Develop remediation timelines and resources to prepare the agency business systems to be ready for the start of ABS end-to-end testing with Florida PALM.</li> <li>Work with Division/Office management to allow technical and functional resources to be available during the ABS end-to-end testing period with Florida PALM.</li> </ul>	Still monitoring	10/20/23	Stacey Pollock
Processes	ENTERPRISE A&A: The Statewide Cost Allocation Plan (SWCAP) process changes: <ul style="list-style-type: none"> <li>Business Process Changes will impact actual agency costs that are currently reported in SWCAP</li> <li>Process to identify and report the costs reported within the plan will change.</li> <li>Significant changes to the SWCAP or incorrect reporting of SWCAP costs could result in inaccurate management decisions.</li> <li>Inadequate reporting could result in loss of Federal funding if costs are deemed ineligible.</li> </ul>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Work with agencies to reasonably identify processes that will be impacted and estimate changes to costs that will be allocated.</li> <li>Identify reporting that will be needed and work with Florida PALM project to ensure needed reports are available and tested.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
Processes	ENTERPRISE A&A: Planning for some critical activities has not been done. Until these plans have been	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Continue to collaborate with the Florida PALM Project and seek resources through staff aug, additional FTE or contracts as needs are discovered.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling

	<p>developed, A&amp;A cannot adequately determine needed resources, time and effort.</p> <ul style="list-style-type: none"> <li>• Cutover planning</li> <li>• FLAIR retirement planning</li> <li>• Stabilization period planning</li> <li>• Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll</li> <li>• Financial Reporting mappings and data rollup</li> </ul>						
Processes	<p>ENTERPRISE TREASURY: The current Concentration Account contract ends in March of 2026. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM. The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, BAI codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. They will also need to receive and distribute new depository supplies to their locations.</p>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li> </ul>	Still monitoring	12/13/23	Sarah Dugan
Technology	Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities could cause delays in the ABS Remediation timeline.	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>• Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline.</li> <li>• Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration.</li> </ul>	Still monitoring	10/20/23	Stacey Pollock
People	<p>ENTERPRISE A&amp;A: • All bureaus within the division will have significant process changes. • Insufficient preparation or reluctance to adopt and adapt to changes could result in delays; operational deficiencies; and critical operations, tools, technologies, and resources not being available. • Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output. • Due to the unique activities that A&amp;A performs at an enterprise level, reduced performance could have a negative impact on agencies.</p>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>• Prepare staff through regular change management engagements.</li> <li>• Perform knowledge transfer on why things are done so we can ensure better understanding of future processes.</li> <li>• Complete thorough process analysis and mapping of each process, along with the technology, tools, and resources to future functionality can ensure that we have identified where operational changes will occur and to what extent it will be affected.</li> <li>• Monitor staffs' engagement.</li> <li>• Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps.</li> <li>• Review organizational charts and identify succession planning or knowledge transfers for known gaps.</li> <li>• A&amp;A has contracted with two People Soft experienced resources to help with implementation activities, including identifying staffing model changes and process changes.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
People Processes Technology Data	<p>ENTERPRISE A&amp;A: A&amp;A serves all other agencies, therefore our processes are at risk from external impacts:</p> <ul style="list-style-type: none"> <li>• Agencies – All A&amp;A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for implementation, this will cause significant issues for A&amp;A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&amp;A staff around go live.</li> <li>• Project – There may be changes in Project directions or decisions that negative affect A&amp;A that would cause an increase of time and resources or provide confusion and lack of clarity among A&amp;A's expectations.</li> <li>• Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&amp;A's operations.</li> </ul>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>• Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff.</li> <li>• A&amp;A OFFE team make outreach with agencies to determine training needs for skills that will be needed in Florida PALM users.</li> <li>• Participate with all FFMIS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon.</li> <li>• Assist agencies with readiness tasks such as data analysis and cleansing.</li> <li>• Develop contingency plans for agencies that are not prepared for Florida PALM implementation.</li> <li>• Monitor activities, changes in rules and regulations, and agencies competencies.</li> <li>• Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible.</li> <li>• A&amp;A is seeking funding through the LBR process to contract for financial expertise that State Agencies can use to identify knowledge gaps and areas needing improvement and address those issues.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
Processes	<p>ENTERPRISE TREASURY: Relating to CMIA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMIA reporting.</p>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li> </ul>	Still monitoring	12/13/23	Sarah Dugan

#### 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
Technology	Based on the Florida PALM implementation timeline established through the execution of Amendment #8, the Go-Live date for the Florida PALM solution is expected to occur	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.

	Live date for the Florida PALM solution is expected to occur on January 6, 2026.				
Technology	The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces and business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.
Technology	Agency business system owners will understand Florida PALM impacts to be able to provide requirements for system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.

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
Data	Conducted Data Clean-up Activities Meeting	12/18/23	OFB	Initiate approach for identifying and creating inventory of areas of data clean-up	Entered as new Readiness Activity
People Processes Technology Data	Printed and provided cardstock & foamboard Agency Implementation Road Maps to all Divisions to place in common areas	10/22/23	DFS, OFR, OIR	Bring awareness to the divisions of all the concurrent activities occurring to reach January 2026	Entered as a new Readiness Activity
People Processes Technology Data	Conducted DRM Invoice Received Date Requirement Meeting	11/20/23	Division of Risk Management, Bureau Chiefs, SME and Trainiers	Understanding of requirements for ABS design	Entered as a new Readiness Activity Meeting to discuss three-date stamp requirements in ABS.
People Processes Technology Data	Conducted DRM Project Tracking Meeting	12/13/23	DRM Bureau of Risk Financing & Loss Prevention	12/13 meeting to update FL PALM project tracking log	Entered as new Readiness Activity
People Processes Technology Data	Conducted DRM Chart of Accounts Meeting	12/14/23	DRM FL PALM SMEs, Bureau Chief, ABS	12/14 Meeting to discuss FL PALM chart of account requirements for ABS and interface files.	Entered as new Readiness Activity
People Processes Technology Data	Conducted DRM & DFS OIT/CCN ABS Pre-design meeting	12/15/23	DFS OIT, A&A, DFS BVR, CCN, DRM, ABS	Discuss unique processed that AA and DRM use with vendor file	Entered as new Readiness Activity
People Processes Technology Data	Conduct standing weekly CCN meetings	12/18/23	DFS, OFR, OIR	Share project activities status, project communication wrap-ups and allow CCN members an opportunity to ask questions, make suggestions and provide feedback. Prepare recurring agenda in SmartSheet and use to capture minutes and actions.	Every Monday held 11/6, 11/27, 12/4, 12/11, 12/18
People	Distributed Agency-wide Readiness Survey	10/30/23	DFS, OFR, OIR	To gauge awareness, readiness that will allow CCN to monitor and target communications and trainings	CCN started 8/11/23. Responses due 10/16 10/30: 893 completed. Sent to roughly 2,500+- employees
People	Conducted Unclaimed Property meeting with Division staff	11/01/23	DUP Employees	Provide information and awareness on PALM project implementation meetings, tasks, and deadlines.	Entered as new Readiness Activity
People	Conducted DRM Invoice Received Date Requirement Meeting	11/06/23	DRM Bureau Chiefs of Bureau of Workers' Compensation (WC)/State Liabilities & Property claims/Risk Financing & Loss Prevention, data management section, WC training coordinator, DRM Director and FL PALM POCs.	11/06 & 11/20 Meetings to discuss three-date stamp requirement in ABS.	Entered as new Readiness Activity
People	FL PALM DRM Management Meeting	11/13/23	DRM Management	Meeting items included CNN approach for the bi-monthly status reports, OIT approach to FL PALM Task 504, update on DRM Invoice Received Date Requirement meeting, and notes from October POC meeting.	Entered as new Readiness Activity
People	Conducted Office of the Insurance Consumer Advocate Staff meeting	11/14/23	OICA to bring awareness to the Florida PALM project and resources available to learn more about it.	Provided information on the Florida PALM project including implementation timeline, POC/CCN information and website and resources shared.	Entered as new Readiness Activity
People	Conduct Monthly Point of Contact meeting with Division/Offices	11/28/23	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. 11/28: Reviewed Survey results, check 328 status,
People	Conducted Administrative and Help Desk Florida PALM Awareness Meeting	11/30/23	OIT administrative and Desktop staff	In person one on one meetings with POC and SMEs discussing, PALM phases and segments, ensuring SMEs are aware and ready for PALM and communicating with their staff, demonstrating information resources (ie websites, recordings, chart of accounts release, etc), and encouraging staff to engage with FL PALM CCN.	Entered as new Readiness Activity.
People	Conducted DPAF manager meeting	12/05/23	Included was the Director, Chief's and Senior Management Analyst Supervisors.	The intended objective was to bring awareness to management about the Palm project and how it will impact everyone. Additional information will be provided in these weekly meetings as more pertinent information becomes available.	Entered as new Readiness Activity.
People	Conducted Quarterly all staff meeting	12/15/23	Accounting and Auditing Staff	Bring Awareness to division staff on what is Florida PALM	Entered as new Readiness Activity.
People	Create RFQ for Project Manager and OCM Manager for Florida PALM Readiness Activities using Administered Funds	12/18/23	CCN	Worked with Purchasing to draft RFQ, to acquire contractual services for additional team members	Entered as new Readiness Activity
People	Conduct Monthly Point of Contact meeting with Division/Offices	12/19/23	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. 12/19: POC Evolution, Expansion: Division "Gems" needed. Discuss Small bite-size communications led by POCs.
People	Communication with Division leadership on sharing additional resources. Diversity and Variety of Skills are keys to Success	12/19/23	Division Directors, Assistant DD, CCN	Growing the CCN with division gems	Entered as new Readiness Activity
People	DUP "Flyer" email to all division staff	12/21/23	DUP Employees	Bring Awareness to division staff on what is Florida PALM	Entered as new Readiness Activity
People	Maintained an open division outreach survey for A&A's Florida PALM feedback.	12/22/23	Accounting and Auditing Staff	Allow for AA staff to anonymously provide feedback suggestions observations fears.	Entered as new Readiness Activity.
People	Conducted weekly Leadership meetings on Florida PALM	12/22/23	Accounting and Auditing, Directors and Chiefs	Provide focused updates to Director and Chiefs on activities, resources and process changes	Entered as new Readiness Activity. 11/6, 11/13, 11/20 12/4, 12/11, 12/18
People	Friday email Updates and future FD meeting schedules	12/22/23	Accounting and Auditing, SME's & Chiefs	Provide weekly Friday email to SME's & Chiefs on information and awareness on PALM project implementation meetings, tasks, and deadlines.	Entered as new Readiness Activity. 11/3, 11/10, 11/17, 12/1, 12/15, 12/22
People	Segment preparation meetings	12/22/23	Accounting and Auditing SMEs	To hold meetings at end/beginning of the segments FD meetings with the Project, to conduct lessons learned, big take-aways, and to learn what our SMEs have shared with their staff.	Entered as new Readiness Activity
People	Email Communications released	12/22/23	Subject Matter Experts	Email stakeholders on PALM newsletter. Knowledge	Entered as new Readiness Activity.

People	Email Communications on released Florida PALM available resources	12/22/23	Subject matter experts, POCs, Department Leadership, AA staff, OFB Staff	Email stakeholders on PALM newsletter, Knowledge Center Roll-out, Implementation schedule, PalmCast 13, Payroll Page, Revenue and Expenses Account Values, Florida PLAM Quarterly Report Newsletter. 11/6,11/30, 12/19, 12/21	Entered as new Readiness Activity
People	Created and Distributed Top 5 infographic	12/28/23	Subject Matter Experts, POCs, Department Leadership, AA staff, OFB Staff	Provide quick easy content in a format that is visually appealing and keeps stakeholders engaged and aware of happenings	Entered as new Readiness Activity
People Processes	Created recurring and conducted Unclaimed Property meeting with Division staff	10/21/23	Division of Unclaimed Property Division leadership and staff	Bring awareness on PALM Financials, Payroll and Warehouse implementation	Entered as a new Readiness Activity 10/21/23 Provide information and awareness on PALM project implementation meetings, tasks, and deadlines.
People Processes	Printed and provided cardstock Design Workshop by Segment and Preparing for workshop tri-fold to all Division SMEs to have available and can easily reference	10/22/23	DFS, OFR, OIR	Bring awareness to the divisions of all the BPM Segment releases occurring to reach July 2024	Entered as a new Readiness Activity
People Processes	Maintained Teams Channel for Accounting and Auditing in Microsoft Teams	11/01/23	Accounting and Auditing Managers, and SMEs	Central repository that AA staff can use to communicate and have materials available	Entered as new Readiness Activity.
People Processes	Maintained "All things A&A FLAIR to Florida PALM" SharePoint Site	11/01/23	Accounting and Auditing Staff	Bring Awareness to division staff on Central FLAIR processes and Florida PALM Enterprise processes.	Entered as new Readiness Activity.
People Processes	Conducted Open Prep Segment II BPM Narrative reviews with SME and POC	11/29/23	Subject matter experts, Points of Contacts	Review materials in advance of meetings. Also to bring awareness of the narratives and flows. Also hoping to begin more active engagement to the users.	Entered as new Readiness Activity. Plan on repeating for workshops. Also plan to ask other SMEs to lead the review.
People Processes	Conducted Open Prep Segment II BPM Narrative reviews with SME and POC	11/30/23	Subject matter experts, Points of Contacts	Review materials in advance of meetings. Also to bring awareness of the narratives and flows. Also hoping to begin more active engagement to the users.	Entered as new Readiness Activity. Plan on repeating for workshops. Also plan to ask other SMEs to lead the review.
People Processes	Conducted Open Prep Segment II BPM Narrative reviews with SME and POC	12/01/23	Subject matter experts, Points of Contacts	Review materials in advance of meetings. Also to bring awareness of the narratives and flows. Also hoping to begin more active engagement to the users.	Entered as new Readiness Activity. Plan on repeating for workshops. Also plan to ask other SMEs to lead the review.
People Processes	Prepared and presented Power Point on Readiness Survey results with POC/Directors/Asst Directors/Bureau Chiefs/SME's	12/01/23	POC/Directors/Asst Directors/Bureau Chiefs/SME's	Acknowledging the awareness level and creating steps to improve responses in future survey's	Entered as new Readiness Activity.
People Processes	Conducted Open Prep Segment II BPM Narrative reviews for 10.2, 30.2, 30.4,30.5, 40.1, 40.3, 60.2, 90.2 90.3 &120.1, with SME and POC	12/04/23	Subject matter experts, Points of Contacts	Review materials in advance of meetings. Also to bring awareness of the narratives and flows. Also hoping to begin more active engagement to the users.	Entered as new Readiness Activity. Plan on repeating for workshops. Also plan to ask other SMEs to lead the review. Meetings held: 11/29, 11/30, 12/4
People Processes Technology	Conducted Pre-design ABS Meetings for Lease Tracking, WAPR, PIRQ, PT01, Fire Presentation, Origami & CODA with SME and business owners	12/06/23	DFS ABS owners	Meet with stakeholders to discuss Segment I interfaces and process model change impacts.	Entered as new Readiness Activity
Processes	Effective Use of RAID (Risks, Actions, Issues, Decisions) Logs	11/07/23	DRM & CCN Subject Matter Experts and CCN	CoLab/KPMG training on the use of RAID logs for project management.	Entered as new Readiness Activity

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:
November - December 2023	Scott Fennell	scott.fennell@myfloridacfo.com	01/12/24
September - October 2023	Scott Fennell	scott.fennell@myfloridacfo.com	11/13/23
July - August 2023	Steven Fielder for Scott Fennell	steven.fielder@myfloridacfo.com	09/07/23

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[Readiness Workplan](#)

# DJJ Status Report Dashboard

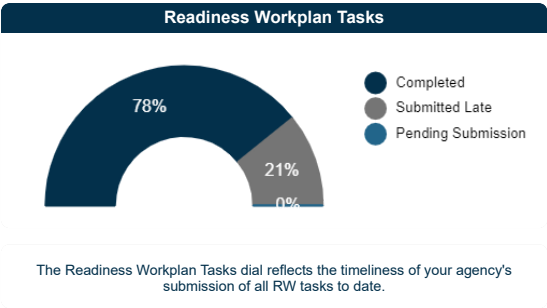
Reporting Period

November - December 2023

Agency Sponsor

Heather DiGiacomo

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 = 14

Completed = 11

Submitted Late = 3

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/22/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	Draft copies are ready for Sponsor review, and are stored in SharePoint.
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	Draft copies are ready for Sponsor review, and are stored in SharePoint.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	Draft copies are ready for Sponsor review, and are stored in SharePoint.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	Draft copies are ready for Sponsor review, and are stored in SharePoint.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/09/24	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 97

Related Business Systems = 3

Related Reports = 15

Documentation Status:

Complete = 97 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 11

Criticality:

High = 9 Med = 0 Low = 1 None = 1

Documentation Status:

Complete = 10 Partial = 0 Not Started = 0

Cataloged Interfaces = 16

Inbound Interfaces = 12

Outbound Interfaces = 4

Implementation:

Business Systems Planned for Integration = 8

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 7

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 9

Inbound Interfaces = 2

Outbound Interfaces = 4

Spreadsheet Uploads = 3

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, this risk will be present until vacancies are filled or another staffing solution is presented. November - December 2023, onboarding three (3) candidates to fill CCN vacancies.		Alexander Afé
People	External Audits present a risk for consuming time and personnel that would have been tasked toward FL PALM activities	Open	4 (Medium/Medium)	Ensure that if an external audit is assigned to a specific bureau that analysis is conducted to gauge the impact against current and upcoming tasks. Internal audits may offer some flexibility toward deadlines and resources that should be explored.	November - December 2023, this risk was not present during the reporting period.		Alexander Afé
People	Changes in CCN or SMEs present a risk for incomplete knowledge transfer and potential lack of authority or leadership depending on the scale of the change.	Open	2 (Medium/Low)	Ensure project information is shared throughout CCN and SME stakeholder pools in the event of a vacancy. Utilize backups whenever possible to avoid taxing individual resources.	September - October 2023, this risk is ongoing. November - December 2023, changes in CCN occurred during the period.		Alexander Afé

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. DJJ has implemented a discretionary spending plan to augment salaries for positions within the Department, including FL PALM related positions.	July - August 2023, this issue will be on-going until the staffing issue can be resolved. September - October 2023, ongoing. November - December 2023, ongoing.	06/30/24	Alexander Afé
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: Status defined. September - October 2023: Working on Task 328, to document and submit confirmation of current agency fiscal and payroll processes, including the people and any agency business systems (ABS) engaged in the processes. Task due December 15.	12/15/23	Alexander Afé

DJJ Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
Processes Technology	FL PALM Voucher processes/systems will be able to replace current voucher system (Axiom Pro).	Logged	08/01/23	Marcia Haye, Evelyn Jacobs	Gap analysis has been scheduled, awaiting further resources to conduct analysis.	
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Haye	Changes to COA have been identified and are being considered with the rest of our remediation processes.	

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	Pre-Session Discussion for BPM Segment II	11/30/23	All SMEs	Discuss materials for BPM segment II, brainstorm questions, review materials from DFS, and expectations for post-session review.	November - December 2023	
People Processes	Segment I Solution Design Roundtable + Misc Topics	10/19/23	All SMEs	Discussion over Segment I design session paired along with discussion about Segment II and the October Tasks	September - October 2023	
People Processes	FL PALM November Tasks Review and Discussion	11/08/23	All SMEs	Discuss the latest tasks released by the project, and check-in on already established tasks.	November - December 2023	
People Processes	Task 500, 501, 502, 503 Submission	12/14/23	All SMEs	Task 500: Create Project Charter identifying objectives, scope, stakeholders, and responsibilities. Task 501: Create Specific Implementation Schedule identifying the activities, tasks, and responsibilities required for implementation and align with project timeline. Task 502: Create Specific Risks and Issues Management Plan to document a systematic approach to mitigate and monitor risks and issues. Task 503: Create Workforce Readiness Plan to determine steps needed to meet current and future staff needs.	November - December 2023	
People Processes	Task 328 Submission	12/22/23	All SMEs	Document current agency business processes.	November - December 2023	
People Processes	Monthly Touchpoint Meeting	12/22/23	All SMEs and PALM Team	Review and discuss implementation activities; current and upcoming tasks to include open items, status, questions and or concerns.	November - December 2023	
People Processes Technology	Segment II Design WorkShop	01/08/24	F&A and IT SMEs	Discussed the questionnaires related to the workshop	January 2024	
Processes Technology	Task 504, 505 Submission	01/12/24	IT	The task is to identify the interfaces pertaining to Segment I Design	December 2023 - January 2024	

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: \*

DJJ Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Heather DiGiacomo	heather.digiacom@fldjj.gov	01/12/24
September - October 2023	Heather DiGiacomo	heather.digiacom@fldjj.gov	11/09/23
July - August 2023	Heather DiGiacomo	heather.digiacom@fldjj.gov	09/11/23

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# DLA Status Report Dashboard

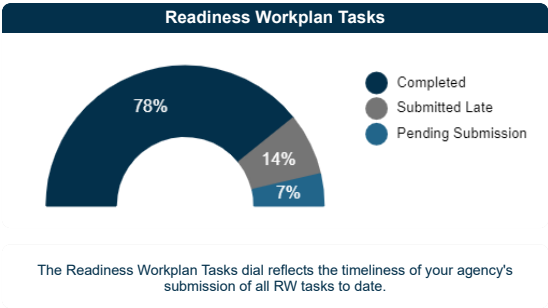
Reporting Period

November - December 2023

Agency Sponsor

Sabrina Donovan

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 = 14

- Completed = 11
- Submitted Late = 2
- Pending Submission = 1

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Continuing to gather desk procedures and consolidate responses
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/04/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/07/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/07/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	Risks and issues updated for current status
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 7
- Duplicate Filled Role = 6
- Vacant Role = 4

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

Current-State:

Cataloged Business Processes = 35

- Related Business Systems = 0
- Related Reports = 0

Documentation Status:

- Complete = 0 Partial = 35 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 13

Criticality:

- High = 9 Med = 0 Low = 1 None = 3

Documentation Status:

- Complete = 10 Partial = 3 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 6

Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 5 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 5

- Inbound Interfaces = 1
- Outbound Interfaces = 1
- Spreadsheet Uploads = 3

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	Ability to complete tasks completely and timely	Open	9 (High/High)	Initiating solicitation for staff augmentation to assist with business analysis and project management	RFP for business analyst posted 11/03/2023, RFP for project manager posted 11/06/2023. Candidate applications reviewed and will be scheduling interviews for business analyst. We will be postponing a decision on the project manager for now.	12/19/23	Sabrina Donovan
People Technology	loss of technical CNN participant	Open	6 (Medium/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	new	12/19/23	Sabrina Donovan
People Technology	Technical Documentation: Lack of technical knowledge and/or documentation related to business systems and interfaces being impacted by the project.	Open	4 (Medium/Medium)	Staff Aug business analyst to assist with gathering requirements.	new	12/19/23	Sabrina Donovan

DLA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Reengineer FLAIR accounting interfaces to Florida PALM.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation to review data formats and interface options to determine optimal solution.	new	12/30/25	Sabrina Donovan
People Processes Technology	Software Integration Issues: Planned software integration may not work as expected, leading to re-design and re-work.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation in design workshops and UAT.	new	12/30/25	Sabrina Donovan
Processes	Need ability to make corrections to closed reporting period	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option	new issue moved from risk	12/30/25	Darlene Faris
People	Availability of Finance & Accounting SMEs: Due to workload and competing priorities SMEs may not be available. This may result in extending the overall schedule, and adding cost to the budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	When the staff aug business analyst is engaged, interviews will need to be scheduled to minimize work disruption.	new	12/30/25	Sabrina Donovan

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	no change	
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	no change	

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

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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DLA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	01/10/24
September - October 2023	John Guard	john.guard@myfloridalegal.com	11/08/23
July - August 2023	John Guard	sabrina.donovan@myfloridalegal.com	09/11/23

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# DMA Status Report Dashboard

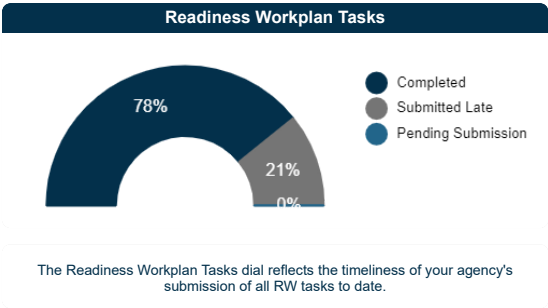
Reporting Period

November - December 2023

Agency Sponsor

Col. Adam Curry

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 = 14

Completed = 11

Submitted Late = 3

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/19/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/30/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/01/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 11

Duplicate Filled Role = 3

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 = 19

Related Business Systems = 4

Related Reports = 12

Documentation Status:

Complete = 18 Partial = 3 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

Criticality:

High = 2 Med = 3 Low = 0 None = 0

Documentation Status:

Complete = 2 Partial = 0 Not Started = 2

Cataloged Interfaces = 1

Inbound Interfaces = 0

Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 2

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 5

Inbound Interfaces = 1

Outbound Interfaces = 3

Spreadsheet Uploads = 1

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.	July/August	07/01/24	Jack McAlpine
People	Lack of Project Manager to lead tasks	Open	9 (High/High)	Funding has been received. Leadership will discuss next steps to onboarding a person.	Nov/Dec	01/31/24	Jack McAlpine
People	Awaiting hiring decision of Project Manager.	Open	9 (High/High)	Continued discussion for hiring process.	Jan/Feb	03/01/24	Tim Smith
Technology	Replacing current F&A tracking system. May not be in place or compatible to perform testing with Florida PALM.	Open	6 (High/Medium)	Awaiting approval and research information of possible products to purchase.	Sep/Oct	07/01/24	Brian Checchia
Technology	Awaiting information about new tracking system to replace Quickbooks	Open	6 (High/Medium)	Funding. LBR request has made it into the Governor's Recommended Budget.	Nov/Dec	05/31/24	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 2 Accountant positions to be fill. Recent termination and re-advertisement.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	Sep/Oct	12/01/23	Trixy Pacetti
People	The F&A current accountant supervisor is on medical leave.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Once supervisor returns interviews can be conducted.	Sep/Oct	12/01/23	Trixy Pacetti
People	The agency's Purchasing & Contracting office has 1 position to fill.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for position.	Sep/Oct	01/26/24	John Connor
People	The F&A has completed with hire of two (2) Accountant position however, 4 positions are less than 6 months and 1 more to come aboard	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	The F&A department is currently training personnel	Nov/Dec	12/29/23	Trixy Pacetti
Processes	Budget Administrator has sent email to other departments which interact with FLAIR to give their input via Excel spreadsheet.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Lack of incoming information as required	Nov/Dec	12/29/23	Trixy Pacetti
People	Email sent out to CCN to encourage members to sign up for the design workshops if applicable	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Passing along information to encourage important members to attend the workshops that apply to their positions.	Jan/Feb	01/19/24	Jack McAlpine
People Processes	Budget Administrator and Finance Supervisor are in the process of training several new personnel.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To bring staff up to date with current processes within the Finance and Accounting Office.	Jan/Feb		
People Processes	Leadership is beginning the process for looking for a project manager. CPT. Estes has been involved to fill some of the void for the time being	Open	Low - All impacts not listed as Critical or High	CFO and Deputy Quartermaster to discuss plan on hiring a project manager	Nov/Dec	01/31/24	Timothy Smith

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	July/August
People Processes Data	The agency is expecting Florida PALM funding in the 3rd quarter of Fiscal Year 2023-24.	Logged	09/25/23	Agency stakeholder and systems processess.	Sep/Oct
People Data	The agency is still information on funding for Project Manager	Logged	11/01/23	Agency stakeholder and systems processes	Nov/Dec
People Processes	The agency is current discussing the hiring process for Project Manager.	Logged	01/09/24	Agency stakeholder and systems processes	Jan/Feb

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 Processes Technology Data	Agency Liaison listen to recorded Tuesday Task Talk 503.	10/25/23	Information	To provide better understanding of task to be completed.	Sep/Oct
People Processes Technology Data	Continued discussion with payroll interfaces and DMAARRO	01/09/24	Informational	To ensure systems will transition properly.	Jan/Feb
Processes Technology Data	Continued conversations about AOD and documentation.	12/15/23	Updated required documentation	To stay updated with current and future processes needed to connect with FL PALM system	Nov/Dec
People	Tuesday Task Talk	11/07/23	Informational	To get an better understanding of upcoming task.	Nov/Dec
People	Continued conversation referencing roles with FL Palm	12/15/23	Consulting with appropriated departments.	To ensure who is responsible for various roles within FL Palm.	Nov/Dec
Processes	Budget Administrator attended technology meeting with FL PALM staff	11/23/23	Better understanding of what is needed.	FL PALM staff to get an understanding how to possible implement current systems with FL PALM.	Nov/Dec

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

DMA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Adam M. Curry	adam.m.curry.mil@army.mil	01/11/24
September - October 2023	Adam Curry	timothy.j.smith53.nfg@army.mil	11/08/23
July - August 2023	Timothy Smith	timothy.j.smith53.nfg@army.mil	09/11/23



Helpful Links

[Dashboard Snapshots](#)

[Florida PALM Resources](#)

[Florida PALM Workbook for DMS](#)

[Readiness Workplan](#)

# DMS Status Report Dashboard

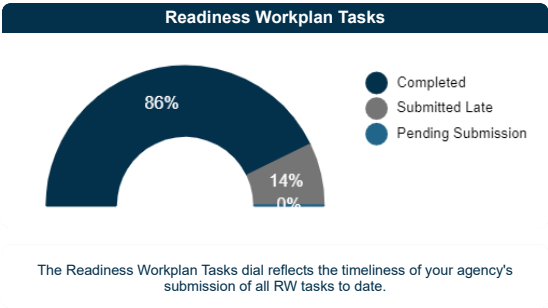
Reporting Period

November - December 2023

Agency Sponsor

Katie Parrish

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 = 14

Completed = 12

Submitted Late = 2

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/11/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	Charter signed electronically via DocuSign.
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/08/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	

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 = 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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 64

Related Business Systems = 7

Related Reports = 40

Documentation Status:

Complete = 64 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 12

Criticality:

High = 5 Med = 2 Low = 0 None = 5

Documentation Status:

Complete = 10 Partial = 1 Not Started = 1

Cataloged Interfaces = 55

Inbound Interfaces = 40

Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 4

Segment I - Documentation Updates:

Complete = 4 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 10

Inbound Interfaces = 2

Outbound Interfaces = 6

Spreadsheet Uploads = 2

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 = 108

Criticality:

High = 91 Med = 18 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.	Closed	9 (High/High)	Postpone tasks completion deadline dates to after September 30, 2023.  Year end close out complete. PALM tasks in progress.	Logged April 26, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 2 and closed.	11/02/23	Financial Management Services / Kedra Lewis
Technology Data	Functionality. Failure to utilize latest and most efficient data transfer methods.	Closed	6 (Medium/High)	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.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec 19, 2023 and closed.	12/19/23	STMS / Matt Giglio
People Processes Technology Data	Variable risks at this time with People First. People First is currently working on its next-generation solution and plans to issue an ITN in early 2024. The current contract expires August 2026 and the platform reaches end of life in Dec 2027. The primary risks are converging timelines, and limited information on the level of remediation necessary for PF/PALM integration.	Open	6 (High/Medium)	PALM integration will be addressed in current People First Solution and required in the next generation solution.  DMS will work in good faith to request and dedicate appropriate resources to ensure effective coordination of efforts between People First and PALM and will plan for contingencies within the requirements of the next generation solution.	Logged April 22, 2023.  Reviewed again September 6, 2023.  Reviewed again Nov 2 - no change.  Updated Dec 15, 2023.	12/15/23	People First / Stephen Eaton
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. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees.	Logged April 26, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 2 - no change.  Reviewed again Dec 20 - no change. Continuing to monitor.	11/02/23	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.  Reviewed again Nov 2 - no change. Continuing to monitor.  Reviewed again Dec 20 - no change. Continuing to monitor.	11/02/23	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.	Closed	6 (High/Medium)	Complete the tasks early or ask for a later due date. Most PALM tasks completed early - some still in progress. Year end required tasks complete.	Logged April 27, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 2, 2023 and closed.	11/02/23	Finance and Administration / Eric Thiele
People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Reports are available. Plan for report identification and testing.	Logged Nov 6, 2023  Reviewed again on Dec 20, 2023. No change.	11/07/23	Division of Retirement / Megan Biederman
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 it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Medium)	Roll out sandbox test capabilities as sections are completed for Agencies to test.  Sandbox environment is not secure for testing - PALM needs to work on true test environment.	Logged April 21, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 3, 2023. Mitigation notes updated.  Reviewed again Dec 15, 2023. No change. Continuing to monitor.	11/03/23	Division of State Group Insurance / Jason Ottinger
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	4 (Medium/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec 20. No change. Continuing to monitor.	11/06/23	STMS / Kurt Bonhamer
People Processes Technology	Make sure all business and IT and HRM liaisons are included in the appropriate technical sessions for capturing accurate business needs within these areas that will be using and/or interfacing with PALM.	Open	4 (Medium/Medium)	Weekly follow up with PALM staff to ensure recommended Business and Technical liaisons are up to date prior to these critical PALM sessions.	Logged Nov 2, 2023.  Reviewed again Dec 15, 2023. No change. Continuing to monitor.	11/06/23	Division of State Group Insurance / Jason Ottinger
People Processes Technology Data	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Open	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.	Logged Nov 6, 2023  Reviewed again Dec 20, 2023 and updated mitigation.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.	Open	3 (High/Low)	Programming needs to be completed to allow for flexibility so funds can be released timely.	Logged Nov 6, 2023  Reviewed again on Dec 20, 2023. No change.	11/07/23	Division of Retirement / Megan Biederman
People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	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.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec 20 - no change.	11/06/23	STMS / Matt Giglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.	11/06/23	STMS / Matt Giglio
Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Closed	2 (Medium/Low)	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.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec	12/19/23	STMS / Matt Giglio

				Meetings with PALM have been initiated. Still early in the process.	19, 2023 and closed.		
Processes Technology Data	Interface. Insufficient information about what the Combo Edit Check API will verify and what STMS must be prepared to verify.	Closed	2 (Medium/Low)	Provide details about what the Combo Edit Check will verify and what needs to be verified outside of that check.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec 19, 2023 and closed.	12/19/23	STMS / Matt Giglio
Data	Interface. Inability to make informed design decisions about API versus Flat File.	Closed	1 (Low/Low)	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.  Meetings with PALM have been initiated. Still early in the process. PALM removed most API options.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 and closed.	11/06/23	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
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.	01/01/24	State Purchasing / Tyler Brown
People Processes Technology Data	Promised piece of \$20M administered funds not being provided. System remediation and FLAIR clean up can not move forward without funding.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Release of funds to agencies is the proposed solution. New LBRs are currently in development.	Resources: Funding is a major factor to the success or failure of this effort.  Reviewed again on Dec 20, 2023. No change.	07/01/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Exchange of unique identifier that can be passed back and forth during the EFT process to ensure a specific member is identified. (RP240, RP501, RP503, RP504, and RP505)	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Functionality: Could use a SSN or Member ID, build a web service.	Internal meetings in progress to address this issue.  After meetings with PALM Team, we understand we must change some programing but this information has been addressed.	12/20/23	Florida Retirement System / Megan.Biederman
People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct.	01/30/24	Florida Retirement System / Megan.Biederman
People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plans in development.	This impacts resources and a new system, with new screens and interfaces.	02/29/24	Florida Retirement System / Megan.Biederman

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.  Reviewed again on Dec 27. No change.	

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 Technology Data	Retirement / KPMG Meeting regarding PALM future	11/01/23	Agency Liaisons, Change Management Liaisons, Project Management Liaisons, SMEs, CCN, Production Support / OIT / Technical	Discuss the future of PALM assistance from KPMG.		
People Processes Technology Data	PALM Task 328 Work Session: Document Current Agency Business Processes	11/02/23	Agency Liaisons, Production Support, SMEs	Document current agency fiscal and payroll processes, including the people and any agency business systems (ABS) engaged in the processes. Review and complete PALM Smartsheet fields.	Recurring weekly work group meeting to address PALM tasks.	
People Processes Technology Data	PALM Risk Review Work Session	11/03/23	Agency Liaisons, Production Support, SMEs	Review and update risks logged for the PALM Bi-monthly report.	One-on-one meeting with DSGI.	
People Processes Technology Data	PALM Risk Review Work Session	11/06/23	Agency Liaisons, Production Support, SMEs	Review and update risks logged for the PALM Bi-monthly report.	One-on-one meeting with STMS.	
People Processes Technology Data	PALM Risk Review Work Session	11/07/23	Agency Liaisons, Production Support, SMEs	Review and update risks logged for the PALM Bi-monthly report.	One-on-one meeting with FRS.	
People Processes Technology Data	PALM Risk Review Work Session	11/08/23	Agency Sponsor(s)	Review the Bi-Monthly PALM Report and approve it via the dashboard.	One-on-one meeting with Agency Sponsor and Agency Sponsor Backup.	

People Processes Technology Data	Retirement PALM LBR Discussion	11/08/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, SMEs, Agency Sponsor, CCN, Finance and Accounting, Production Support / OIT / Technical	Discuss funding amounts regarding supporting PALM through implementation from technical and other external vendor support.	Review LBR funding request.
People Processes Technology Data	Retirement / KPMG Bi-weekly status meeting	11/14/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, CCN, Production Support / OIT / Technical	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	Retirement Meeting: Pre-FD Discussion: APE017 Retiree Payment Remittance Extension	11/14/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, SMEs, CCN, Production Support / OIT / Technical	Discuss upcoming meetings and process of meetings.	
People Processes Technology Data	PALM Task 328 Work Session: Document Current Agency Business Processes	11/14/23	Agency Liaisons, Production Support, SMEs	Complete Smartsheet fields and prep for submission.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	Retirement PALM Task 328 Discussion	11/20/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, SMEs, Agency Sponsor, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 328	
People Processes Technology Data	PALM Task 328 Work Session: Document Current Agency Business Processes	11/27/23	Retirement Liaison, Agency Liaison / Project Manager	Complete Smartsheet fields for FRS and prep for submission.	Assist Retirement with Task 328 and how to interact with their vendor to get the proper documentation.
People Processes Technology Data	PALM Task 328 Work Session: Document Current Agency Business Processes	11/28/23	FMS Liaison, Agency Liaison / Project Manager	Complete Smartsheet fields for FMS and prep for submission.	Assist Financial Management Services with Task 328 and verify the proper documentation.
People Processes Technology Data	PALM Task 500 Work Session: PALM Project Charter	11/29/23	Agency Liaisons, Production Support, SMEs	Confirm PALM Project Charter for Agency Sponsor review and approval.	Open discussion regarding charter and associated risk evaluation.
People Processes Technology Data	Retirement PALM Task 328 Discussion	11/30/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 328	
People Processes Technology Data	PALM Project Work Session	11/30/23	Agency Liaisons, Production Support, SMEs	Review PALM Readiness Work Plan tasks due Dec 15: Task 500: Create Agency Specific Project Charter Task 501: Create Agency Specific Implementation Schedule Task 502: Create Agency Specific Risks and Issues Management Plan Task 503: Create Workforce Readiness Plan	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM Work Task 502 Work Session: Risk Management	11/30/23	Agency Liaison / Project Manager, SMEs	Review Task 502 internal DMS survey results. Insert calculations into Smartsheet columns.	One-on-one with SMEs.
People Processes Technology Data	Retirement PALM Task 328: Review Smartsheet	12/04/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 328	
People Processes Technology Data	Retirement PALM Task 328: Review Smartsheet	12/05/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 329	
People Processes Technology Data	Retirement PALM Task 328: Review Smartsheet	12/06/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 330	
People Processes Technology Data	PALM Task 328: Business Processes Discussion	12/06/23	Agency Liaison / Project Manager, Retirement Liaisons	Review Spreadsheet results and confirm documentation for FRS.	One-on-one with FRS.
People Processes Technology Data	Retirement PALM Meeting Summary: API127	12/07/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Discuss PALM design meetings.	
People Processes Technology Data	Retirement PALM Task 328: Review Smartsheet	12/07/23	Project Management Liaisons, SMEs, CCN, Finance and Accounting, Production Support / OIT / Technical	Work on Task 328.	
People Processes Technology Data	PALM PM Huddle	12/11/23	Agency Liaison / Project Manager, Project Manager Backup	Review all current tasks and confirm status.	One-on-one with PM Backup.
People Processes Technology Data	PALM People First Huddle	12/11/23	Agency Liaison / Project Manager, People First / Enterprise Liaison	Enterprise status review and update.	One-on-one with PF Liaison.
People Processes Technology Data	Retirement / KPMG Bi-weekly Status meeting	12/12/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, CCN, Production Support / OIT / Technical	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Project Work Session	12/14/23	Agency Liaisons, Production Support, SMEs	Review PALM Readiness Work Plan tasks due Dec 15: Task 500: Create Agency Specific Project Charter Task 501: Create Agency Specific Implementation Schedule Task 502: Create Agency Specific Risks and Issues Management Plan Task 503: Create Workforce Readiness Plan	Recurring weekly work group meeting to address PALM tasks.

				Task 505: Create Workforce Readiness Plan	
People Processes Technology Data	Retirement Risk Management	12/18/23	Agency Liaisons, Business Liaisons, Change Management Liaisons, Project Management Liaisons, SMEs, Agency Sponsor, CCN, Finance and Accounting, Production Support / OIT / Technical	To identify risk associated with PALM in regards to the Division of Retirement.	Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	Retirement PALM Solution Review	12/20/23	Project Management Liaisons, SMEs, Production Support / OIT / Technical	Meet with this group to go over what we are understanding PALM to be offering this far.	
People Processes Technology Data	Retirement Risk Review: Older Risks	12/20/23	Change Management Liaisons, Project Management Liaisons, SMEs, Finance and Accounting, Production Support / OIT / Technical	To review previously reported risks to ensure they are still relevant.	Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	PALM Project Work Session: Risk Management	12/20/23	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 507: Manage Agency Specific Implementation Schedule, Risks and Issues	Recurring weekly work group meeting to address PALM tasks.
Processes Data	STMS Internal review API002	11/01/23	SMEs	Line by line review of interface and discussion	One Time Success
Processes Data	STMS Internal review API002	11/01/23	SMEs	Line by line review of interface and discussion	One Time Success
People Processes	PALM Work Task 505 Work Session: Interfaces	12/01/23	Agency Liaison / Project Manager, Change Management Liaison	Review Task 502 Smartsheet results. Edit and identify additional SMEs.	One-on-one with Change Management Liaison

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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DMS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Katie Parrish	katie.parrish@dms.fl.gov	01/11/24
September - October 2023	Katie Parrish	katie.parrish@dms.fl.gov	11/08/23
July - August 2023	Katie Parrish	evelyn.harrison@dms.fl.gov	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOAH](#)  
[Readiness Workplan](#)

# DOAH Status Report Dashboard

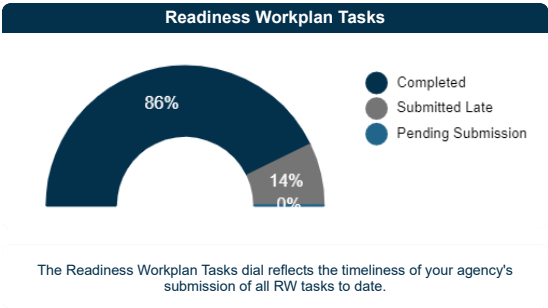
Reporting Period

November - December 2023

Agency Sponsor

Megan Silver

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 = 14

- Completed = 12
- Submitted Late = 2
- Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/29/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 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 = 0

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

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 25

- Related Business Systems = 0
- Related Reports = 18

Documentation Status:

- Complete = 25 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

Criticality:

- High = 2 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 0 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

- Spreadsheet Uploads = 0

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	Due to the staff's previous experience with system implementation, the staff's level of engagement regarding transitioning to new financial system may be low or non-existent.	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. Accounting, Budget and HR staff are actively participating in completing PALM tasks.	07/05/23	Patricia Kenyon
People	Due to the limited number of positions, staff may not be fully 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. Accounting staff members are actively participating in completing PALM tasks.	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	Closed	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. Update on 11/7/2023: New staff Member has been trained and functioning in PALM.	10/31/23	Patricia Kenyon
People	Accountant III position is vacant who performs PALM functions.	Open	Low - All impacts not listed as Critical or High	Fill the vacant position. Have the current back-up Accountant perform functions.	Interviewed candidates and have requested to fill the vacant Accountant III position on 1/5/2023.	01/26/24	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. CCN Members will be actively participating in Segment III and Segment IV meetings.

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

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:
November - December 2023	Megan S. Silver	megan.silver@doah.state.fl.us	01/10/24
September - October 2023	Megan S. Silver	megan.silver@doah.state.fl.us	11/09/23
July - August 2023	Megan S. Silver	megan.silver@doah.state.fl.us	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOE](#)  
[Readiness Workplan](#)

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

DOE Status Report Dashboard

Readiness Workplan Tasks

78%

21%

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

November - December 2023

Agency Sponsor

Suzanne Pridgeon

Readiness Workplan Tasks:

Total Tasks = 14

Completed = 11

Submitted Late = 3

Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/18/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/19/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	50% - In Progress		
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 6

Duplicate Filled Role = 5

Vacant Role = 3

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

Current-State:

Cataloged Business Processes = 30

Related Business Systems = 5

Related Reports = 0

Documentation Status:

Complete = 30 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

Criticality:

High = 23 Med = 0 Low = 0 None = 1

Documentation Status:

Complete = 7 Partial = 1 Not Started = 9

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 9

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 6 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 4

Inbound Interfaces = 0

Outbound Interfaces = 3

Spreadsheet Uploads = 1

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
People Technology	Task 505 not being completed by PALM schedule deadline.	Open	6 (Medium/High)	DOE has schedule meeting with technical teams to plan the completion of task.	No change	12/28/23	Project Manager
People Processes Data	Due to BA not being in place, process documentation for Task 328 maybe late due to the lack of personal.	Open	4 (Medium/Medium)	DOE Executive staff is working to add BA to PALM team. DOE will continue to work the process and submitted what is completed at the due date. If not completely completed at the due date, DOE will continue to work the processes and update PALM until task is complete.	Task has been submitted to PALM. Additional documentation will be added.	09/21/23	DOE PALM Team
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team (anyone working on PALM)). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	No Change	10/27/23	Project Manager
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	New risk	01/12/24	DIT and Aware technical teams

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	RFO for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People	Lead payroll staffer retired without notice	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	DOE is searching for the replacement. Someone with state payroll experience.	Payroll staff has been hired and in place	12/01/23	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.	Closed	
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.	No Change	
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
People Processes Technology Data	PALM Files Meeting	10/27/23	Project Manager, Comptroller, Deputy Comptroller, BA, BA Manager and Policy Coordinator	Discuss the release Files from PALM	
People Processes Technology Data	VR AWARE	01/12/24	AWARE End-users, AWARE technical Team, and PM	504 and 505	
Technology Data	Meeting with DTI for segment 1 files and interfaces	12/22/23	DTI Team, Deputy Comptroller and PM	PALM task 504 and 505	
Technology Data	Meeting with AWARE system team	01/04/24	AWARE technical Staff, Deputy Comptroller and PM	PALM task 504 and 505	
People	Status Meeting	10/20/23	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	DOE CCN Meeting	10/24/23	DOE CCN Team along with PALM coordinators	Communicate the Status of the project within DOE, discuss any upcoming task, address any risk or issues, and any other PALM related topics	
People	Status Meeting	10/27/23	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	Status Meeting	11/01/23	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	PALM Payroll Meeting	11/02/23	PALM team, Comptroller, Deputy Comptroller, DOE Payroll and DOE HR	Discuss of Budget entity	
People	Status Meeting	11/03/23	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People Processes	VR Process Mapping	10/25/23	Project Manager, Deputy Comptroller, Aware technical support and Supervisor of VR	Map out the workflow and process for VR and Aware	
People Processes	Federal Grants Process Mapping	10/31/23	Project Manager, Deputy Comptroller and Supervisor of Federal Grants	Map out the workflow and process for Federal Grants and FLAGS Systems	
People Processes	Change control meeting with DEL	11/01/23	Project Manager, Change control Liaison and DEL Supervisors	Review Current state process.	
People Processes	Indirect Cost Process Mapping	11/16/23	Project Manager, Deputy Comptroller, and Indirect Cost supervisor	Documenting the Indirect Cost process	
People Processes	Revenue Process Mapping	11/20/23	Financial Manager and Project Manager	Documenting revenue management processes	
People Processes	Budget Process Mapping	11/20/23	Project Manager and Budget Manager	Document the budget process to FLAIR.	
People Processes	Revenue Process Meeting	12/12/23	Project Manager, Deputy Comptroller, Financial	Documenting revenue management processes	

			Manager and GLC III		
People Processes	Procurement Process Mapping	12/13/23	Project manager, Deputy Comptroller, Contracts Administrator & Procurement Director and, Chief Bureau of Contracts, Grants and Procurement	Documenting Procurement Process	
People Processes	Revenue Process Meeting	12/14/23	Project Manager, Deputy Comptroller, Financial Manager and GLC III	Documenting revenue management processes	
People Processes	DOE payroll department	01/08/24	Payroll, Deputy Comptroller and PM	Task 508	
People Processes Technology	PALM file for Aware System	11/03/23	Project Manager, Comptroller and Deputy Comptroller, AWARE end users (supervisors) and AWARE Technical team	Discuss the release Files from PALM	
People Processes Technology	Budget Allotments	11/20/23	PALM staff, Deputy comptroller, Budget Department.	Discuss DOE allotment process for PALM.	
People Technology	PECO System Meeting	10/25/23	Project Manager, Deputy Comptroller, Systems owners, and Technical owners	Determine the relationship PECO has to FLAIR.	
People Technology	DOE CCN Meeting	12/19/23	CCN Members along with DTI Staff	Plan for PALM task 505	

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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DOE Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Matt Kirkland	matt.kirkland@fldoe.org	01/10/24
September - October 2023	Matt Kirkland	matt.kirkland@fldoe.org	11/08/23
July - August 2023	Matt Kirkland	matt.kirkland@fldoe.org	09/08/23

Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DOE

Readiness Workplan

DOEA Status Report Dashboard

Readiness Workplan Tasks

Completed

Submitted Late

Pending Submission

57%

29%

14%

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

Reporting Period

November - December 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:

Total Tasks = 14

Completed = 4

Submitted Late = 2

Pending Submission = 8

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
Technology	326	Update Current State Agency Business System Inventory and Documentation	03/13/23	10/27/23	50% - In Progress		
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		loaded some procedures to worksheet
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23			
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23			
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23			
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24			
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23			
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 1

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 = 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 = 10

Criticality:

High = 0 Med = 0 Low = 0 None = 7

Documentation Status:

Complete = 0 Partial = 7 Not Started = 0

Cataloged Interfaces = 7

Inbound Interfaces = 0

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Spreadsheet Uploads = 0

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
People	no change to previous items	Open	6 (High/Medium)	Limited resources continue to create issues	ongoing		
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.	Business system has been selected and undergoing customization.	12/01/23	Glenn Elmer
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	System selected. Customization currently underway.	12/01/23	Glenn Elmer
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	12/01/23	Glenn Elmer

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.	System has been selected and is currently undergoing customization	12/31/23	
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.	Only \$40,000 secured. Does not provide sufficient funding to begin to address needs. Delays will result in	12/01/23	Glenn Elmer
People	Staff limitations still exist	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue to identify options. Solution has not been identified.	Issue remains	07/01/24	

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

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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DOEA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Curtis Barker	elmere@elderaffairs.org	01/16/24
September - October 2023	Curtis Barker	elmere@elderaffairs.org	11/15/23
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOH](#)  
[Readiness Workplan](#)

# DOH Status Report Dashboard

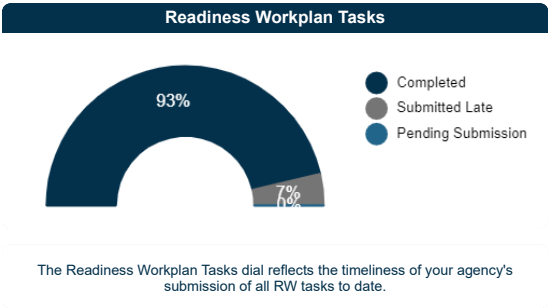
Reporting Period

November - December 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:

Total Tasks = 14

Completed = 13

Submitted Late = 1

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/01/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/13/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/08/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/13/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/13/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/10/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/10/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	11/06/23	
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	11/20/23	Reviewed the Payroll process and workflow with HR on October 9, 2023
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/10/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/10/24	Reviewed and Updated

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 = 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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 62

Related Business Systems = 10

Related Reports = 27

Documentation Status:

Complete = 62 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 58

Criticality:

High = 58 Med = 0 Low = 0 None = 0

Documentation Status:

Complete = 58 Partial = 0 Not Started = 0

Cataloged Interfaces = 39

Inbound Interfaces = 21

Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 50

Segment I - Documentation Updates:

Complete = 50 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 10

Inbound Interfaces = 3

Outbound Interfaces = 5

Spreadsheet Uploads = 2

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

## 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.	N/A	02/14/22	PALM & DOH
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.	N/A	02/14/22	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in June-July 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	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.	N/A	07/19/23	PALM & DOH
Processes	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be 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.	N/A	08/11/23	PALM & DOH
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.	N/A	08/16/23	PALM & DOH
Technology	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	N/A	08/21/23	PALM & DOH
Processes	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	N/A	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	N/A	02/14/22	PALM & DOH
People Processes Technology	The training timeframe given will not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	N/A	09/25/23	PALM & DOH
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.	N/A	02/14/22	PALM & DOH
Processes	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	N/A	10/18/23	PALM & DOH
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 2026? • If only the balances are rolling over to PALM, then what about the voucher details?  This is specific for Payroll Reallocation, but this will be true for all Vouchers.	Open	4 (Medium/Medium)	DOH needs to know how this will work in PALM	N/A	10/18/23	PALM & DOH

### 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	Impacted Stakeholder(s)
----------	-------------------------

Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Segment II - Business Process Models	12/05/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None
People Processes Technology Data	Segment II - Business Process Models	12/06/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None
People Processes Technology Data	Segment II - Business Process Models	12/07/23	DOH SME, PM & Technical Lead	To understand PALM Business Process Models.	None
People Processes Technology Data	Task 328 Meeting	11/08/23	SME and PM	Completed Task 328	Task Submitted
People Processes Technology Data	Task 328 Submission meeting	11/08/23	PM and SMEs	Completed Task 328 updates for Reports and systems	Submitted Task 328
People Processes Technology Data	Survey Meetings to complete and Submit surveys	12/14/23	PM and SMEs	Meeting with SMEs to complete Surveys	Survey submission
People	Project Management Liaison Meeting	10/26/23	Project Manager	To collaborate and learn from other Agency PMs strategies and tools	PALM Collaboration Meeting at DCF
People	DOH Readiness Touchpoint Meeting	12/20/23	Executive Stakeholders	To meet the PALM Readiness team for PALM Project updates	Touchpoint meeting with Readiness Co-ordinator
People	Executive Steering Meeting	12/13/23	Agency Sponsor	Attended Advisory Steering Meeting	Updated Core team
People	Advisory Council Meeting	12/13/23	Agency Sponsor	Attended Advisory Council Meeting	Updated Core team
People	Advisory Council Meeting	11/15/23	Agency Sponsor	Attended Advisory Council Meeting	Updated Core team
People	Executive Steering Meeting	11/15/23	Agency Sponsor	Attended Advisory Steering Meeting	Updated Core team
People Processes	DOH Core Meeting	11/08/23	Key Stakeholders and PM	<ul style="list-style-type: none"> <li>• Monitor progress against project plan</li> <li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li> <li>• Advise on project planning and implementation strategies</li> <li>• Make strategic decisions related to project deliverables prioritization and approvals</li> <li>• Review and suggest solutions for issues critical to project success</li> <li>• Assist in resolving project conflicts</li> </ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Core Meeting	11/15/23	Key Stakeholders and PM	<ul style="list-style-type: none"> <li>• Monitor progress against project plan</li> <li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li> <li>• Advise on project planning and implementation strategies</li> <li>• Make strategic decisions related to project deliverables prioritization and approvals</li> <li>• Review and suggest solutions for issues critical to project success</li> <li>• Assist in resolving project conflicts</li> </ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Core Meeting	11/29/23	Key Stakeholders and PM	<ul style="list-style-type: none"> <li>• Monitor progress against project plan</li> <li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li> <li>• Advise on project planning and implementation strategies</li> <li>• Make strategic decisions related to project deliverables prioritization and approvals</li> <li>• Review and suggest solutions for issues critical to project success</li> <li>• Assist in resolving project conflicts</li> </ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Core Meeting	12/13/23	Key Stakeholders and PM	<ul style="list-style-type: none"> <li>• Monitor progress against project plan</li> <li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li> <li>• Advise on project planning and implementation strategies</li> <li>• Make strategic decisions related to project deliverables prioritization and approvals</li> <li>• Review and suggest solutions for issues critical to project success</li> <li>• Assist in resolving project conflicts</li> </ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Budget Allotments Meeting	12/20/23	SME's and DOH PALM	To understand DOH budget allotment process and give possible options of completing this in PALM	Discussion with PALM
People Processes	Review PALM Data with CORTNE Applications	12/28/23	DOH PIT team and CORTNE technical team	Review PALM design Seg I and give PALM updates to CORTNE team	Reviewed design documents
People Processes	FIRS Resource Transition Meeting	12/20/23	FIRS Technical Resource and Key stakeholders	Review the need and spend plan for FIRS resources and	Updated Spend Plan to accommodate FIRS resources.
People Processes Technology	Financial As-Is meeting - Reconciliation and Corrections Processings As-Is	11/06/23	PM, BA and SME's	To document As-Is	Documented and Reviewed as is with the team
People Processes Technology	Financial As-Is meeting - PCard Disbursements As-Is	11/17/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team
People Processes Technology	Financial As-Is meeting - Cell Phone Verification System As-Is	11/27/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team
People Processes Technology	Financial As-Is meeting - Financial Reporting	11/29/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team
People Processes Technology	Financial As-Is meeting - CJT and CommLine As-Is	12/04/23	PM, BA, and SME's	To document As-Is	Documented and Reviewed As-Is with the team

#### 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 \*

#### DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Robert Herron	robert.herron@flhealth.gov	01/08/24
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23

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# DOL Status Report Dashboard

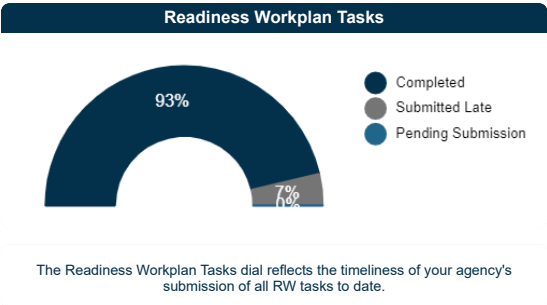
Reporting Period

November - December 2023

Agency Sponsor

Becky Ajhar

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 = 14

- Completed = 13
- Submitted Late = 1
- Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/11/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/14/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 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

Current-State:

Cataloged Business Processes = 49

- Related Business Systems = 3
- Related Reports = 5

Documentation Status:

- Complete = 73 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 7

Criticality:

- High = 7 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 28

- Outbound Interfaces = 2

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:

Business Systems Planned for Integration = 6

Segment I - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 5

- Inbound Interfaces = 0

- Outbound Interfaces = 4

- Spreadsheet Uploads = 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.

DOL 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	Dual reporting in two separate systems FLAIR and PALM GO-LIVE for the financial fiscal year	Open	6 (High/Medium)	Need to ensure clear understanding of cross-walking new and old chart of accounts structures. Maintaining the data integrity for financial reporting			Stella Bargas

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	
People Processes Technology Data	Florida PALM will design and be able to record DOL manual payments currently handled outside of FLAIR today. 30.5 Manage Payments 30.5.1 Record Manual Payments	Logged	12/11/23	Disbursements	FLAIR screenshots of recording retailer incentives for manual payments	
People Processes Data	Florida PALM will provide final approved Chart of Accounts and Descriptions	Logged	01/08/24	Agency and ABS systems		

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	10/30/23	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.	
People	Palm Advisory Council	10/18/23	Stella Bargas	Advisory Council meeting	
People Processes	Project Management Liasion Forum	10/26/23	Stella Bargas	CCN forum for Project Management	
People Processes	Change Management and Training Liasion Forum	10/26/23	Stella Bargas, Cindie McKenzie	CCN forum for Change Management and Training	
People Processes	Palm task review meetings - Lottery team	11/13/23	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.	
People Processes	Palm task review meetings - Lottery team	11/27/23	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.	
People Processes	Segment II Financial Wave Business Process Models Review	12/05/23	Stella Bargas	Review model and flows: Disbursement Management and Asset Accounting & Management	
People Processes	Segment II Financial Wave Business Process Models Review	12/06/23	Stella Bargas	Review model and flows: Acct Mgment & Financial Reporting/System Access & Controls	
People Processes	Segment II Financial Wave Business Process Models Review	12/07/23	Stella Bargas	Review model and flows: Accounts Receivables, Grants Management & Contracts Management	
People Processes	FL Palm Budget Allotment Discussion	12/08/23	Stella Bargas, Chris Rorison, Mary Ann Kelley	Palm Budget Team/DOL discussion on Budget Allotments	
People Processes	Palm task review meetings - Lottery team	12/11/23	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.	
People Processes	Palm task review meetings - Lottery team	01/08/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Discuss Tasks 504, 505, 508. Review progress to complete task 509. Assess risks and issues, review existing risks, discuss implementation progress for Task 510	

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

DOL Status Report Confirmation

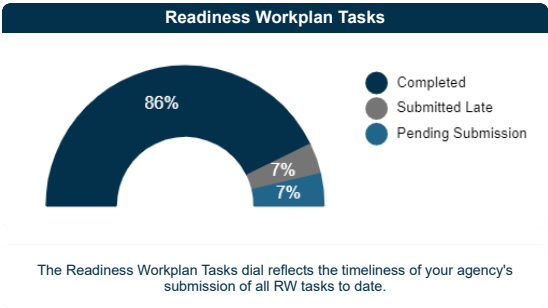
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Rebecca Ajhar	ajharb@flalottery.com	01/14/24
September - October 2023	Rebecca Ajhar	ajharb@flalottery.com	11/09/23
July - August 2023	Rebecca Ajhar	ajharb@flalottery.com	09/08/23

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

# DOR Status Report Dashboard



Reporting Period

November - December 2023

Agency Sponsor

Clark Rogers

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 12
- Submitted Late = 1
- Pending Submission = 1

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/07/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/08/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	50% - In Progress		
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 10
- Duplicate Filled Role = 6
- Vacant Role = 0

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

Current-State:

Cataloged Business Processes = 222

- Related Business Systems = 8
- Related Reports = 43

Documentation Status:

- Complete = 201 Partial = 4 Not Started = 17

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 32

Criticality:

- High = 31 Med = 1 Low = 0 None = 0

Documentation Status:

- Complete = 32 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 17
- Outbound Interfaces = 13

Implementation:

Business Systems Planned for Integration = 26

Segment I - Documentation Updates:

- Complete = 23 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 15

- Inbound Interfaces = 4
- Outbound Interfaces = 7
- Spreadsheet Uploads = 4

Current-State:

Unique FLAIR Data Elements = 439

- Associated Unique Uses = 838

- Continued Use - Yes = 392
- Continued Use - No = 0

Associated Business Systems = 9

Cataloged Reports = 205

Criticality:

- High = 218 Med = 16 Low = 16 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

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. Funding was received for FY23/24.	11/02/23	Laura Dukes, Budget Officer; Lisa Morgan, GTA Budget Liaison
Processes Data	DOR collects and distributes funds to 16 other state agencies. We are going to request that they provide the business unit specific ChartField values needed to effect those collections and distributions within PALM. Due to individual agency readiness activities, data from one or more of those agencies may not be available and could result in DOR not being able to collect and distribute their funds to them.	Open	6 (High/Medium)	Coordinate with other agencies to gather, confirm and validate ChartField data.	Discussed with DOR's Readiness Coordinator and other Florida PALM project staff during November 2023 Touchpoint meeting.	11/02/23	Steve Welch, GTA PMO
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.	Continue monitoring risk. We plan to kick-off this project Fall 2024 to ensure we have sufficient time for all projects. Updated risk owner and backup.	11/02/23	Catherine Barber, GTA; Andrea Hunter, GTA, Backup Owner
People	The GTA E-services project may be conducted at the same time agency business system remediation is conducted.	Open	4 (Medium/Medium)	Plan efficiently with the resources provided. This project will begin in July 2024. Staff augmentation resources to support Florida PALM activities have been requested for FY24/25.	Continue monitoring risk.	10/17/23	David Potter, GTA - BTO
Processes Data	The current Payroll BPMs do not address the processing and payment of out-of-state payroll taxes. DOR processes out-of-state payroll taxes for nine states and two additional municipalities. If the Florida PALM Payroll BPMs do not address out-of-state payroll processing, the likelihood of withholding incorrect state income taxes from employees, making incorrect payments on their behalf and reporting state and local income tax withholding on employee W2 forms is increased.	Open	4 (Medium/Medium)	1) Request that out-of-state payroll tax processing be addressed in Florida PALM. 2) Ensure that adequate review procedures and monitoring take place if out-of-state payroll tax processing is not addressed in Florida PALM.	New risk; continue monitoring.	12/18/23	Jill Reynolds, EXE-OFM; Lucinda Harris (backup), EXE-OFM

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. Funds were approved and released for FY23/24.	
Processes	If out-of-state payroll taxes are not addressed in Florida PALM Payroll BPMs, the existing process of using miscellaneous deduction codes and external state's payroll tax websites to process out-of-state payroll taxes will be available.	Logged	12/18/23	Office of Financial Management/Office of Workforce Management	DOR realized the risk and assumption in review of the Payroll BPMs.	
Processes Technology	People First will be successfully and timely remediated to support Florida PALM Payroll business processes, and FLAIR PYRL will be retired.	Logged	12/18/23	Office of Financial Management, Office of Workforce Management, People First, and FLAIR PYRL	DOR realized the risk and assumption in review of the Payroll BPMs.	

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	
People Technology	Determine if organizational changes will be needed to transfer positions from the Office of Financial Management (OFM) to the Office of Workforce Management (OWM) to facilitate payroll processing in PALM. The current PALM Payroll BPMs have most of the payroll information being entered in People First and assumes the elimination of the PYRL system currently in FLAIR. Positions that support payroll activities in OFM may be needed in OWM due to the potential shift in workload.	12/22/23	Office of Financial Management, Office of Workforce Management, People First, FLAIR PYRL	Ensure that sufficient human resources are placed in the proper organizational unit to support payroll processing in Florida PALM.	New Assumption; discussions ongoing and dependent on final payroll processes.	

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 \*

DOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Clark Rogers	shannon.segers@floridarevenue.com	01/11/24
September - October 2023	Clark Rogers	shannon.segers@floridarevenue.com	11/09/23
July - August 2023	Clark Rogers	shannon.segers@floridarevenue.com	09/11/23

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DOS Status Report Dashboard

Readiness Workplan Tasks

29%

36%

36%

Completed

Submitted Late

Pending Submission

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.

Reporting Period

November - December 2023

Agency Sponsor

Jennifer Kennedy

Readiness Workplan Tasks:

Total Tasks = 14

Completed = 4

Submitted Late = 5

Pending Submission = 5

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/21/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23			
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23			
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23			
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24			
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 8

Duplicate Filled Role = 4

Vacant Role = 2

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

Participation:

Meetings Attended = 2

Meetings Missed = 2

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 10

Related Business Systems = 1

Related Reports = 21

Documentation Status:

Complete = 7 Partial = 2 Not Started = 1

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

Criticality:

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

Documentation Status:

Complete = 0 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Spreadsheet Uploads = 0

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.	The Department has received Administered funds for the purposes of preparations for Florida PALM. These funds are intended to be used for hiring a project manager and consultant to assist with agency efforts. The Department is currently in the solicitation process to hire contracted Project Manager.	01/12/24	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

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:
November - December 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	01/12/24
September - October 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	11/09/23
July - August 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	09/08/23

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# DVA Status Report Dashboard

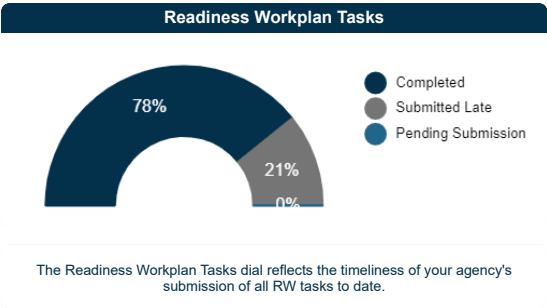
Reporting Period

November - December 2023

Agency Sponsor

Al Carter

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 = 14

Completed = 11

Submitted Late = 3

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/04/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/13/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/13/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/13/23	See attached FDVA PALM WORKFORCE Plan With Schedule
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/15/23	Al Carter was traveling so this was signed off on - on 15 November.
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/09/24	Included in the Agency PALM Charter
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	12/14/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/09/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/09/24	

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 = 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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 100

Related Business Systems = 2

Related Reports = 39

Documentation Status:

Complete = 20 Partial = 59 Not Started = 2

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

Criticality:

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

Documentation Status:

Complete = 0 Partial = 9 Not Started = 0

Cataloged Interfaces = 3

Inbound Interfaces = 3

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 9

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 1 Not Started = 3 Not Needed = 1

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 3

Inbound Interfaces = 0

Outbound Interfaces = 0

Spreadsheet Uploads = 3

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 = 49

Criticality:

High = 41 Med = 3 Low = 5 None = 0

Implementation:

Conversions = TBD

Configurations = TBD

Agency Reported

## 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
People Processes Technology	Setup and Integration Staffing	Open	9 (High/High)	Agency is seeking to hire contract personnel to support the setup and integration of FLORIDA PALM within the Agencies overall structure. This is an unfunded mandate and the Agency critically needs these assets to support a successful transition of this system. The Agency submitted a Legislative Budget Request to secure funding mitigate this shortfall.			
Processes Technology	PeopleFirst Payroll integration may be impacted as we are unclear how this interface will work.	Open	6 (Medium/High)	Monitor PeopleFirst updates to ensure we can adapt to any new dependencies that may evolve.			
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with FLAIR-end is a risky proposition given the unknown compatibility issues with other systems and business processes our Agency employs to conduct its day-to-day operations.	Open	6 (High/Medium)	Mimic FLAIR functionality exactly or as close to this standard as possible. If there are deviations from FLAIR functionality, there should be extensive retesting and training, hopefully a year ahead of implementation. Agencies are limited in staff, support and available resources for the implementation and the execution following implementation. Allowing some lead time prior to implementation to prepare may reduce inherent risks.			Agency Fiscal, Finance & Accounting, and Billing
People	Contracting and Procurement	Open	4 (Medium/Medium)	Our Agency is unique and may require system remediation as a product of implementation as our processes and procedures change as federal, state, and local statutes, laws, and administrative codes change. FDVA may have to redesign or retool existing business processes and designs. This could impact the Agency meeting its deliverables to its clients and impact the overall implementation of the project statewide.			
People Processes	Agency size and small administrative staff has a few people having multiple roles.	Open	4 (Medium/Medium)	Staff will have to be flexible and OPS personnel may be required to augment existing staff to get project implemented.			
People Technology	IT staff has limited knowledge of the FLORIDA PALM system and will take time to get trained up, especially given their existing Agency requirements.	Open	4 (Medium/Medium)	We will have to grow IT Staff experience as we move through the implementation process.			
Processes Data	FLAIR and FLORIDA PALM data will be different in its representation which may cause challenges when performing data analysis functions.	Open	4 (Medium/Medium)	Staff will incur extra time and possible productivity lag when trying to crosswalk and translate data.			
People Processes	Staff Turnover. Agency staff turnover while decreasing, still remains over 16% in the Administrative areas mostly impacted by FL PALM.	Open	4 (Medium/Medium)				

### DVA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Personnel to support the implementation of FLORIDA PALM within the Agencies processes	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request resources via the Legislative Budget Request process.	Legislative budget requests are granted at the end of the Legislative Session which occurs during the first week of May, but if approve, are effective 1 July of the next fiscal year.	08/30/24	Al Carter, Chief of Staff

### DVA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Funding will be approved/provided by the Florida Legislature to secure personnel needed to support the Agencies PALM transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	Requested in Agency LBR as of August 15, 2023
Technology	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	TBD after funding is secured.
People Processes Data	FDVA Executive leadership, including Project Sponsor, will support the project by providing resources, access to systems and stakeholders and by supported the organizational change management strategy created by the project team.	Logged	09/18/23	Agency wide	
People Processes Technology Data	FDVA project stakeholders, involved parties, project team, and other involved parties will be available to provide support, feedback, and review of material to meet readiness requirements and project milestones.	Logged	09/18/23	Agency wide	
People Processes Technology Data	The State level Florida PALM project team will provide key information identifying the functionality, business processes, and timeline of the larger project, in a timely manner, to facilitate timely planning and execution.	Logged	09/18/23	State and Agency implementation team.	

### 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
People Processes Technology Data	Florida PALM - Effective Use of Raid Logs Workshop	11/07/23	Agency wide	How to use the RAID logs to track progress and identify issues, risks, and related decisions.	Provided education to other staff members.
	PALM Schedule	10/23/23	Agency wide	Incorporate PALM Schedule into Implementation Charter	Reviewing State PALM schedule and pairing it down to Agency specific tasks and milestones.

### 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 \*

### DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Alfred D. Carter	al.carter@fdva.fl.gov	01/09/24
September - October 2023	Alfred D. Carter	al.carter@fdva.fl.gov	11/15/23
July - August 2023	Alfred D. Carter	al.carter@fdva.fl.gov	09/18/23

Agency Sponsor Name: \*

☐ Confirm \*

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July - August 2023	Linda Rizzo	linda.rizzo@fdva.fl.gov	09/11/23

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# EOG Status Report Dashboard

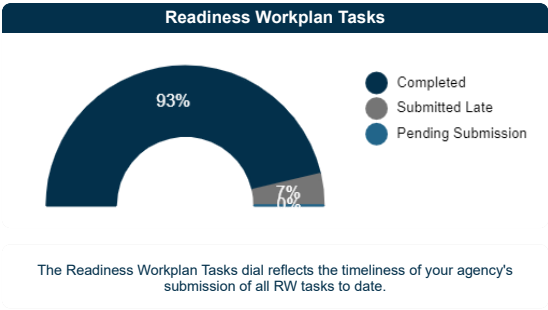
Reporting Period

November - December 2023

Agency Sponsor

Dawn Hanson

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 = 14

Completed = 13

Submitted Late = 1

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/13/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	11/27/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	11/27/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	11/27/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/29/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/07/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/13/23	
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	11/29/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/09/24	

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 = 12

Vacant Role = 0

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

Current-State:

Cataloged Business Processes = 151

Related Business Systems = 1

Related Reports = 41

Documentation Status:

Complete = 150

Partial = 0

Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 1

Criticality:

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

Documentation Status:

Complete = 0

Partial = 0

Not Started = 0

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

Segment I - Documentation Updates:

Complete = 0

Updating = 0

Evaluating = 0

Not Started = 0

Not Needed = 1

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Spreadsheet Uploads = 0

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

## 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 Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes Technology Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	Open	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries.	New.	10/31/23	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	New.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process.	New.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources.	Open	4 (Medium/Medium)	The EOG will monitor staff workload.	New.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software does not properly interface due to EOG specific item numbering.	Open	4 (Medium/Medium)	The EOG will discuss this issue with any providers as appropriate.	New.	10/31/23	Kelley Sasso
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	Updated/clarified wording and critical operational elements.	10/31/23	Kelley Sasso
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	New.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need.	New.	10/31/23	Kelley Sasso
Technology	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.	Updated/clarified wording.	10/31/23	Kelley Sasso
People 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)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	Updated/clarified wording.	10/31/23	Kelley Sasso

### EOG 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	The EOG currently has no pending issues.	Closed	Low - All impacts not listed as Critical or High	The EOG currently has no pending issues.	Removed duplicate issue.	10/31/23	Kelley Sasso

### EOG 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	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.

### 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
People Processes Technology Data	Participated in PALM business workflow design workshops	12/05/23	All Administrative Services		

### 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 \*

### EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/11/24
September - October 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/23
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23

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# FCOR Status Report Dashboard

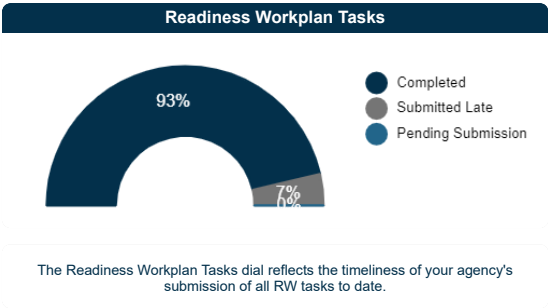
Reporting Period

November - December 2023

Agency Sponsor

Gina Giacomo

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 = 14

- Completed = 13
- Submitted Late = 1
- Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	10/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	Since we handle all of FCOR's functions, we used the same OWP.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	Since we handle all of FCOR's functions, we used the same OWP.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/10/23	Since we handle all of FCOR's functions, we used the same OWP.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	FCOR doesn't have any ABS systems to update documentation.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	Since we handle for FCOR, please see FDC response.
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/03/24	

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 = 10
- Duplicate Filled Role = 4
- Vacant Role = 0

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 = 11

- Related Business Systems = 0
- Related Reports = 12

Documentation Status:

- Complete = 11 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:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

- Spreadsheet Uploads = 0

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 = 17

Criticality:

- High = 8 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.

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	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	FDC's funding request approved by OPB – hiring currently in process	FDC's funding request approved by OPB – hiring currently in process	12/01/23	Greg Prescott, FDC OIT
People Processes Technology	1074 – OIT Resource Capacity Technical FTEs	Open	3 (High/Low)	FDC Staff Augmentation required due to current capacity	FDC has implemented an OIT Governance Process to manage all FCOR IT Projects and assign resources based upon capacity. The PALM-FDC Project has been approved by Governance. The risk rating improved from 6 to 3.	09/20/23	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	To access the available Administered Funds to support the PALM Project and readiness activities	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	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	Crosstrain staff to ensure adequate backup	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	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	The agency will be able to access the available Administered Funds to support readiness activities	Logged	07/01/23	All agency business systems and FDC PM roles	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 and the Commission's continuity of operations and successful transition to the Florida PALM solution. Hiring currently in process.	
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	FDC's Organizational Change Management (OCM) Lead was selected 12/19/2023 - pending on a start date.	
People Processes Technology	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	All agency business systems and CCN roles	Currently still relevant.	
People Processes Technology	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	All agency business systems and CCN roles	Continually updating as needed.	
People Processes Technology	FCOR 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	Continually updating as needed.	

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	FACTS Agreement File Cleanup	12/31/23	FACTS, Procurement, FMBC, Budget and Finance & Accounting	To reconcile and update inactive vendors and past end dates on Contracts and Leases per a request by DFS, Bureau of Auditing	
People	FL Palm Budget engagement and Task 328	11/14/23	Agency Liaisons, Backup Agency Sponsor, Budget Director, Sharon McNeal, Katie Bellflower, John Kelley	To get the Budget Office more engaged in FL PALM and to discuss Task 328	
People	Task 326 Internal Discussion Meeting	11/16/23	Agency Liaisons	To discuss upcoming CCN meeting and the 8 outstanding task	
People	CCN PALM Monthly Standing Meeting	11/17/23	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Segment II Debriefing Meeting	12/12/23	Agency Sponsors, Agency Liaisons, and all identified CCN staff who attend workshops	Meeting to debrief all December Segment II workshops to discuss what we heard and learned on the project	
Processes	Continuous updates to our current-state desktop procedures library	12/31/23	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	Review of posted RFQ and funding to obtain consulting services	11/29/23	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.	Funding was approved and approval to move forward on 11/7/2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the issue to be resolved.
Processes	Continuous documentation of our current state reports, agency business systems, and interfaces.	12/31/23	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	Review of posted RFQ and funding to obtain consulting services	11/29/23	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	Funding was approved and approval to move forward on 11/7/2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the

				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.	issue to be resolved.
--	--	--	--	--	-----------------------

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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FCOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Gina Giacomo	karencarter@fcor.state.fl.us	01/03/24
September - October 2023	Gina Giacomo	ginagiaco@fcor.state.fl.us	11/13/23
July - August 2023	Gina Giacomo	mary.quinsey@fdc.myflorida.com	09/08/23

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# FDC Status Report Dashboard

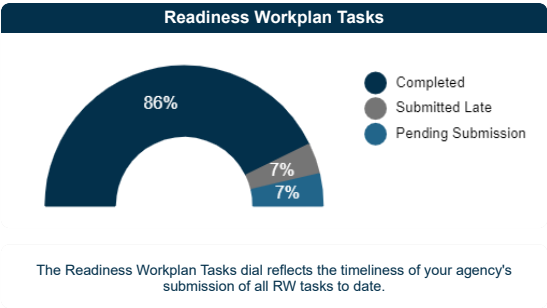
Reporting Period

November - December 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:

Total Tasks = 14

Completed = 12

Submitted Late = 1

Pending Submission = 1

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	10/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/12/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/03/24	

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 = 10

Duplicate Filled Role = 4

Vacant Role = 0

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

Current-State:

Cataloged Business Processes = 263

Related Business Systems = 12

Related Reports = 58

Documentation Status:

Complete = 139 Partial = 91 Not Started = 33

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

Criticality:

High = 10 Med = 5 Low = 5 None = 6

Documentation Status:

Complete = 13 Partial = 8 Not Started = 5

Cataloged Interfaces = 33

Inbound Interfaces = 30

Outbound Interfaces = 3

Implementation:

Business Systems Planned for Integration = 12

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 12

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 1

Inbound Interfaces = 0

Outbound Interfaces = 1

Spreadsheet Uploads = 0

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 = 233

Criticality:

High = 210 Med = 11 Low = 2 None = 11

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.

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	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	Funding request approved by OPB – hiring currently in process	Funding request approved by OPB – hiring currently in process	12/01/23	Greg Prescott, OIT
People Processes Technology	1074 – OIT Resource Capacity Technical FTEs	Open	3 (High/Low)	Staff Augmentation required due to current capacity	FDC has implemented an OIT Governance Process to manage all IT Projects and assign resources based upon capacity. The PALM-FDC Project has been approved by Governance. The risk rating improved from 6 to 3.	09/20/23	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	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	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	The Planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date – January 2026.	06/30/25	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	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. Hiring currently in process.
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	Organizational Change Management (OCM) Lead was selected 12/19/2023 - pending on a start date.
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	Currently still relevant.
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	Continually updating, as needed.
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	Currently still working on Task 328.

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	FACTS Agreement File Cleanup	12/19/23	FACTS, Procurement, FMBC, Budget and Finance & Accounting	To reconcile and update inactive vendors and past end dates on Contracts and Leases per a request by DFS, Bureau of Auditing	
People	FL Palm Budget engagement and Task 328	11/14/23	Agency Liaisons, Backup Agency Sponsor, Budget Director, Sharon McNeal, Katie Bellflower, John Kelley	To get the Budget Office more engaged in FL PALM and to discuss Task 328	
People	Task 326 Internal Discussion Meeting	11/16/23	Agency Liaisons	To discuss upcoming CCN meeting and the 8 outstanding task	
People	CCN PALM Monthly Standing Meeting	11/17/23	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Segment II Debriefing Meeting	12/12/23	Agency Sponsors, Agency Liaisons, and all identified CCN staff who attend workshops	Meeting to debrief all December Segment II workshops to discuss what we heard and learned on the project	
People	Enlightenment – FL PALM Quiz (Survey)	12/22/23	All F&A staff & Inmate Grievance	Communication to engage non-supervisory staff	
Processes	Continuous updates to our current-state desktop procedures library	12/31/23	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	Review of posted RFQ and funding to obtain consulting services	11/29/23	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.	Funding was approved and approval to move forward on 11/7/2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the issue to be resolved.
Processes	Continuous documentation of our current state reports, agency business systems, and interfaces.	12/31/23	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	Review of posted RFQ and funding	11/29/23	Office of Information	Inventory, catalog, and comprehensively document	Funding was approved and approval to move forward on

	to obtain consulting services	technology and I&A	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.	11///2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the issue to be resolved.
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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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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	01/03/24
September - October 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	11/08/23
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23

Helpful Links

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[Florida PALM Resources](#)  
[Florida PALM Workbook for FDLE](#)  
[Readiness Workplan](#)

# FDLE Status Report Dashboard

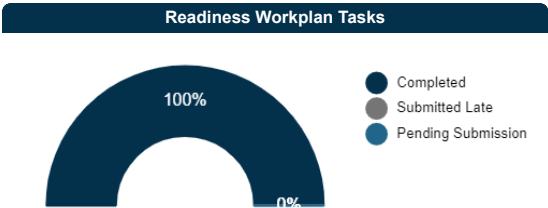
Reporting Period

November - December 2023

Agency Sponsor

Charlotte Fraser

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 = 14
- Completed = 14

Submitted Late = 0

Pending Submission = 0

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/05/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/12/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/05/23	This document may be revised when our Program Manager is in place.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/07/23	Will get from OWP for PALM Administered Funds Request. This document may be revised when our Program Manager is in place.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/19/23	Will do as best as we can. Program Manager can get more in depth when they are hired.
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/12/24	

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 = 0

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

Implementation:

Current-State:

Cataloged Business Processes = 279

Related Business Systems = 15

Related Reports = 57

Documentation Status:

Complete = 199 Partial = 44 Not Started = 38

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 21

Criticality:

High = 14 Med = 0 Low = 0 None = 7

Documentation Status:

Complete = 2 Partial = 10 Not Started = 7

Cataloged Interfaces = 46

Inbound Interfaces = 24

Outbound Interfaces = 22

Implementation:

Business Systems Planned for Integration = 16

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 3 Not Started = 0 Not Needed = 13

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 4

Inbound Interfaces = 2

Outbound Interfaces = 0

Spreadsheet Uploads = 2

Current-State:

Unique FLAIR Data Elements = 73

Associated Unique Uses = 193

Continued Use - Yes = 68

Continued Use - No = 108

Associated Business Systems = 11

Cataloged Reports = 123

Criticality:

High = 97 Med = 14 Low = 45 None = 22

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
Processes Technology	The new "Account" COA field will be replacing the GL and Object codes. Specifications for how to crosswalk GL and object codes to account in PALM needed for system remediation.	Open	6 (High/Medium)	Once information is relayed from PALM, we will have to analyze how this will affect remediation of RAMS.	Monitoring	10/31/23	Terri Speed / Ajay Katta
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.	None	07/01/23	Mike Moore
Technology	Development and Test instances of affected agency business systems are not available.	Open	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring	07/01/23	Andrew Gutsch
People	If funding is not approved, we will be unable to hire additional technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire staff required to complete the project.	Awaiting FY 24/25 legislative session. We have been approved for FY 23/24 Administered funds.	08/01/23	Becky Bezemek / Charlotte Fraser
Technology Data	FDLE uses Object code for various purposes. PALM is replacing this with Account. As a result it will be challenging to reconcile RAMS with PALM and get details at transaction type level.	Open	3 (High/Low)	New chart of accounts and transaction types have to be setup to fulfill PALM and FDLE accounting requirements.	Monitoring	10/31/23	Andrew Gutsch
People Processes Technology	Current systems have high visibility and are available to end customers 24/7. There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	2 (Medium/Low)	Project Manager will identify cutover schedule for all affected applications and provide detailed plans much before PALM go-live date.	Monitoring	10/31/23	Andrew Gutsch
People	New consultants and existing team do not have much knowledge of PALM and its impact.	Open	2 (Medium/Low)	Project Manager will need a plan to update everyone on PALM technical and functional features based on which teams can prepare.	Monitoring	10/31/23	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	Pending FY 24/25 Legislative Session	
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.	Logged	07/01/23	Agency business systems	Monitor information as provided by PALM.	
Data	PALM will provide similar functionality as ABS Open Reports which is used for querying FLAIR and PYRL data so that we can retire those applications.	Logged	09/01/23	Office of Financial Management Office of Policy and Planning All divisional/regional business liaisons Management	Monitor information as provided by PALM.	
People Processes Technology Data	PALM will provide significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT).	Logged	10/31/23	All agency business systems	Monitor information as provided by PALM.	
People Processes Technology Data	The agency will be approved for administered funding to support readiness activities.	Removed	11/07/23	All agency business systems	We have been notified that our request for administered funds has been approved.	

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 Technology Data	Updated and submitted Operational Work Plan (OWP)	11/09/23	All Stakeholders and Systems	Submitted OWP plan to the Office of Policy and Budget to secure funds for PALM related changes in FDLE business systems	We have been notified that administered funds were approved.
People	Advisory Council	10/18/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council	Two members attended for two hours.
People	October's FDLE/PALM Readiness Touchpoint Meeting	10/25/23	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	Three members attended for one hour.
People	Project Management Liaison Forum	10/26/23	Office of Financial Management Office of Information Technology Services	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Change Management and Training Liaison Forum	10/26/23	Office of Financial Management	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Tuesday Task Talk - RW Task 504, 505, 506, and 507.	10/31/23	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for two hours and thirty minutes.
People	Tuesday Task Talk - RW Task 508 - Review Payroll Wave Business Process Models	11/07/23	Office of Financial Management	Discussed the instructions and the task overview to ensure the task is done correctly.	Four members attended for thirty minutes. One member watched the recording.
People	Discuss recruitment of contractor for PALM project	11/09/23	FDLE Business Systems	Hire all necessary staff to implement changes specific to PALM in agency business systems as soon as possible.	PALM related changes will be initiated once resources are allocated to different applications
People	Tuesday Task Talk - Addendum RW Task 504 - Update Agency Business System Documentation for Segment I RW Task 505 - Update Florida PALM Interface Inventory for Segment I	11/14/23	Office of Financial Management Office of Information Technology Services	Discussed the updates/changes to the task instructions.	Four members attended for thirty minutes.

People	Advisory Council	11/15/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for two hours.
People	December's FDLE/PALM Readiness Touchpoint Meeting	12/08/23	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Six members attended for one hour.
People	Advisory Council	12/13/23	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Two members attended for two hours.
People	Interviews for Program Manager and Project Manager have been completed.	12/15/23	All stakeholders and Systems	Program manager will ensure all PALM mandated initiatives are being fulfilled by FDLE. Project Manager will ensure all the affected Agency Business Systems will be modified to align with PALM priorities.	Program and Project Manager have been selected and currently going through background checks. FDLE is currently waiting for these resources to formally join the project.
People Processes	SMEs Pre-meeting Account Management & Financial Reporting / System Access & Controls	11/28/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Three members attended for one hour and thirty minutes.
People Processes	SMEs Pre-meeting Contracts and Grants Management	11/29/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Three members attended for two hours.
People Processes	SMEs Pre-meeting Accounts Receivables	12/01/23	Office of Financial Management Office of Information Technology Services	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Five members attended for one hour and thirty minutes.
People Processes	SMEs Pre-meeting Disbursements Management	12/04/23	Office of Financial Management	Reviewed the PALM BPMs and narratives prior to the upcoming PALM Segment II meeting.	Six members attended for one hour and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Disbursements Management	12/05/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Five members attended for three hours and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Asset Accounting & Management	12/05/23	Office of General Services	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Account Management & Financial Reporting / System Access & Controls	12/06/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Two members attended for three hours and thirty minutes.
People Processes	Segment II Financials Wave Business Process Models Review Accounts Receivables	12/07/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thirty minutes. Two members watched virtually.
People Processes	Segment II Financials Wave Business Process Models Review Contracts and Grants Management	12/07/23	Office of Financial Management	To review the updates and discuss the changes to better prepare FDLE.	Three members attended for three hours and thirty minutes.

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:
November - December 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	01/12/24
September - October 2023	Mike Moore	mikemoore@fdle.state.fl.us	11/13/23
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FDOT](#)  
[Readiness Workplan](#)

# FDOT Status Report Dashboard

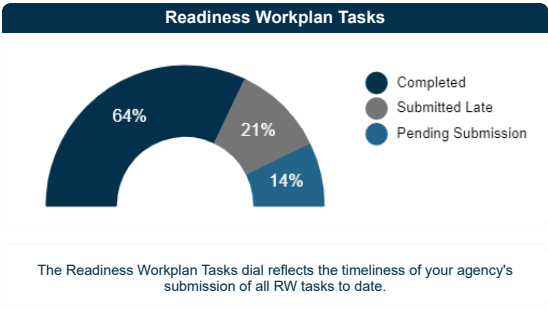
Reporting Period

November - December 2023

Agency Sponsor

Lisa Saliba

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 = 14

- Completed = 9
- Submitted Late = 3
- Pending Submission = 2

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
Technology	326	Update Current State Agency Business System Inventory and Documentation	03/13/23	10/27/23	75% - Consolidating/Inputting Information for Submission		Looking to complete by 2/1/24
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	01/05/24	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/13/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		Looking to complete by 2/15/24
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		Currently under review, looking to complete by 2/1/24.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	75% - Consolidating/Inputting Information for Submission		Selections made by 12/1 for 12/12 Touchpoint, second review for Segment I in progress. Looking to complete by 2/1/24.
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/28/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/05/24	Not yet started
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	75% - Consolidating/Inputting Information for Submission		Being completed 1/12/24

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 = 27
- Duplicate Filled Role = 0
- Vacant Role = 0

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

Current-State:

Cataloged Business Processes = 54

- Related Business Systems = 36
- Related Reports = 43

Documentation Status:

- Complete = 13 Partial = 31 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 310

Criticality:

- High = 88 Med = 35 Low = 15 None = 7

Documentation Status:

- Complete = 19 Partial = 120 Not Started = 1

Cataloged Interfaces = 119

- Inbound Interfaces = 47

Outbound Interfaces = 45

Implementation:

Business Systems Planned for Integration = 182

Segment I - Documentation Updates:

- Complete = 1 Updating = 1 Evaluating = 0 Not Started = 10 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 14

- Inbound Interfaces = 3

- Outbound Interfaces = 7

- Spreadsheet Uploads = 4

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	No comment this period	11/01/23	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	No comment this period	11/01/23	Brian Boyd
Processes	Major schedule changes in PALM solution would impact our remediation efforts.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Delay or loss of planned funding for the program	Open	9 (High/High)	Acceptance	No comment this period	11/01/23	Brian Boyd
Technology	Timeliness of PALM Nightly Batch Files and Data Warehouse Updates	Open	9 (High/High)	Avoidance	No comment this period	11/01/23	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	No comment this period	11/01/23	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	No comment this period	11/01/23	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	No comment this period	11/01/23	Brian Boyd
Processes	Delay of budget release on LBR funds preventing change orders for staff augmentation purchase orders.	Open	9 (High/High)	Acceptance	No comment this period	11/01/23	Brian Boyd
Processes	Scope changes in PALM solution	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Issues not resolved in a timely manner	Open	6 (High/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
People	Limited qualified staff availability for requirements gathering, application remediation, remediation testing, and other critical activities	Open	6 (High/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Scope and schedule alignment of individual department remediation efforts with FPST.	Open	4 (Medium/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Inconsistent processes and standards across FDOT business units could impact efforts to perform remediation for PALM impacts	Open	4 (Medium/Medium)	Mitigation	No comment this period	11/01/23	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 1/1/24, we are still waiting for a detailed schedule. The recently provided Agency Implementation Roadmap and updates to the Readiness Workplan lack the necessary detail.
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	No comment this period
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	No comment this period
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	No comment this period
Processes	Sufficient recurring Legislative Budget Request (LBR) funding will be released to complete FPST efforts.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	Funding received December, 2023
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	No comment this period
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	No comment this period

				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	No comment this period
Technology	Expansion Options being replaced by Speed Keys will require interface and design guidance with adequate availability for review and integration.	Logged	11/01/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	No comment this period

#### 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	RW Task 505: Update Florida PALM Interface Inventory for Segment I	01/12/24	FDOT Florida PALM System Transition Team	Review Segment I resources; identify and document interface needs for Florida PALM implementation.	In Progress - Looking to complete by 2/1/24
People Processes Data	Florida PALM Segment II Design Workshop: Disbursements Management Meeting	01/10/24	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for Disbursements Management.	
People Processes Data	Florida PALM Segment II Design Workshop: Asset Accounting and Management Meeting	01/11/24	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for 40.1 Acquire and Set Up Assets and 40.3 Set Up and Maintain Asset Controls	
People Processes Data	Florida PALM Segment II Design Workshop: Disbursements Management Meeting	01/12/24	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for Disbursements -30.2 Establish and Maintain Encumbrances	
People Processes Technology Data	Technology Transformation Weekly Status Review Meetings	11/02/23	FDOT Florida PALM System Transition Team	Weekly, half-hour sessions to review Transformation status report for the PALM remediation support effort.	
People Processes Technology Data	Internal Florida PALM Readiness Workplan Task Workgroup Meeting	11/16/23	FDOT Florida PALM System Transition Team	Discuss and assign readiness workplan tasks for PALM.	
People Processes Technology Data	Internal FDOT PALM Touchpoint Agenda Review Meeting	11/28/23	FDOT Florida PALM System Transition Team	Review the agenda and discuss what changes the team would like to make prior to meeting with PALM.	
People Processes Technology Data	FDOT Internal PALM Interface Inventory for Segment I	11/30/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting to review the information PALM requested for interface inventories and complete RW task 501.	
People Processes Technology Data	FDOT Internal Readiness Task 501 and 503 - Implementation Schedule and Workforce Readiness Plan Meeting	11/30/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting to discuss and review the RW task 501 and 503 deliverables and confirm the FPST transition team is in agreement.	
People Processes Technology Data	FL PALM Segment II - Financials Wave Business Process Models - Disbursements Management Meetings, Asset and Accounting	12/05/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for 30.2 Establish and Maintain Encumbrances 30.4 Process Payments 30.5 Manage Payments, 40.1 Acquire and Set Up Assets 40.3 Set Up and Maintain Asset Controls	
People Processes Technology Data	FL PALM Segment II - Financials Wave Business Process Models - Account Management and Financial Reporting, System Access and Controls Meeting	12/06/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for 10.2 Enter and Process Journals 120.1 Interface Error Handling Process	
People Processes Technology Data	FL PALM Segment II - Financials Wave Business Process Models - Accounts Receivables Meeting	12/07/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM designs for 60.2 Deposit and Apply Receipts	
People Processes Technology Data	FL PALM Segment II - Financials Wave Business Process Models - Grants Management, Contracts Management Meeting	12/07/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Review PALM Designs for 90.2 Create and Maintain Grants 90.3 Create and Maintain Contracts.	
People Processes Technology Data	OIT Efforts for RW tasks 500 and 502	12/07/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Efforts to complete the Florida PALM RW Tasks 500 and 502.	
People Processes Technology Data	FDOT Internal Florida PALM Workplan Readiness Task Update Meeting	12/07/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting with OOC and OIT to discuss and review together the work efforts completed for RW Tasks 500 and 502.	
People Processes Technology Data	FDOT Change Champion Network Meeting	01/03/24	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting with Change Champion networkers to discuss I. Welcome – Review CCN Roles and Purpose II. Review PALM Project Timeline a. Program Planning and Approach i. System Design b. Remediation Approach i. Status Tracking Dashboard c. Training d. End User Testing e. Go-Live Plan f. Post Go-Live Support III. Program Communication Plan IV. Change Management Plan a. Central Office b. Districts and Turnpike V. Future Quarterly Meetings	
People Processes Technology Data	Resource Planning and Statement of Work (SOW) drafting for hiring resources for FPST.	01/05/24	FDOT Florida PALM System Transition Team	Resource Planning and Statement of Work (SOW) drafting for hiring resources for FPST.	
People Technology Data	FDOT Internal Server Discussion Meeting	12/06/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting to discuss the server needs for OIT, OOC, & OWP for the Florida PALM project.	
People Technology Data	FDOT Internal PALM Resource Planning and Budget Meeting	12/21/23	FDOT Florida PALM System Transition Team	A meeting with OOC and OIT to discuss 1) OIT Operating Expenses to be reimbursed by Florida PALM Funding 2) Outstanding Funds Availability 3) Project Resource Needs for the remainder of FY23/24 4) Infrastructure needs and availability timeline	

				a. Unit Testing for CFM, RPS, and other .NET Apps b. Systems Testing for Mainframe and .Net Applications Revisions to spend plan for FPST	
Processes Technology Data	GEN FL PALM Remediation Check In Meeting with Vendor	11/07/23	FDOT Florida PALM System Transition Team, Florida PALM End Users	GEN Code remediation sizing and approach meeting.	
Processes Technology Data	FDOT Interfaces Mapping Session Meeting with vendor	11/17/23	FDOT Florida PALM System Transition Team, Florida PALM End Users	Discuss mapping of interfaces and how we will document them via user stories.	
Processes Technology Data	Deployment Test Environments for PALM Meeting with vendor	11/21/23	FDOT Florida PALM System Transition Team	review test environments for FL PALM, current state, and path forward.	
Processes Technology Data	FDOT OIT Application Services System Remediation Check in Meetings	11/28/23	FDOT Florida PALM System Transition Team, Florida PALM End Users	Bi-weekly project team meeting to track the Chart of Account remediation efforts against the schedule and discuss any blockers.	11/28, 12/12,
Processes Technology Data	FDOT FL PALM Testing Sync Meeting with vendor.	12/05/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Follow up meeting to discuss the PALM Testing environments approach.	
Processes Technology Data	FDOT FL PALM Testing sync with vendor.	12/07/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Continue to discussions for the server needs for the Florida PALM remediation and readiness efforts.	
Processes Technology Data	FDOT Interfaces Check In Meeting with vendor.	12/12/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Continue discussion on interface remediation efforts for OOC and OIT.	
Technology Data	RW Task 504: Update Agency Business System Documentation for Segment I	01/12/24	FDOT Florida PALM System Transition Team	Update Agency Business System Documentation for Segment I	In Progress - Looking to complete by 2/1/24
People	Monthly FDOT/Florida PALM Readiness Touchpoint Meetings	11/29/23	FDOT Florida PALM System Transition Team	Review and discuss Florida PALM implementation activities	Meetings:
People	Internal FPST FY 23/24 Resource Plan Meeting	11/15/23	FDOT Florida PALM System Transition Team	Discuss project needs and resources available to complete the efforts.	
People	FDOT Internal FY 24/25 Spend Plan Meeting	12/18/23	FDOT Florida PALM System Transition Team	A meeting with OOC, OWPB, and OIT to discuss resource needs and planning funds.	
People Processes	RW Task 502: Create Agency Specific Risks and Issues Management Plan	12/13/23	FDOT Florida PALM System Transition Team	Create or update a plan to identify and manage agency specific risks and issues for Florida PALM implementation.	Completed
People Processes	PALM Agency Communication Plan Meeting	11/16/23	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	Discuss how to keep districts and other agency departments involved in the PALM project.	
People Processes	FDOT Internal RW 502: Risk and Issue Management Guide Review Meeting	11/29/23	FDOT Florida PALM System Transition Team, Florida PALM End Users	A meeting to review the risk and issue management guide together and make updates, give feedback before uploading to Smartsheet for PALM.	
People Processes	RAID Log Consolidation	01/09/24	FDOT Florida PALM System Transition Team		
People Processes	RW Task 510 and Resource planning and SOW Planning Internal OIT Meeting	01/08/24	FDOT Florida PALM System Transition Team	Meeting in support of completing RW Task 510.	
People Processes	RW Task 501: Create Agency Specific Implementation Schedule	12/15/23	FDOT Florida PALM System Transition Team	Develop an implementation schedule that includes agency-specific tasks to successfully implement Florida PALM.	Completed
People Processes	RW Task 503: Create Workforce Readiness Plan	12/15/23	FDOT Florida PALM System Transition Team	Create a plan to identify and engage impacted stakeholders within your agency workforce including a communication strategy, knowledge transfer needs, and workforce attrition planning.	In Progress - Looking to complete by 2/15/24
People Processes	RW Task 507: Manage Agency Specific Implementation Schedule, Risks, & Issues	12/27/23	FDOT Florida PALM System Transition Team	Actively manage your agency's project activities including iterative updates to agency-specific project schedule and manage agency-unique risks and issues	Completed - Being managed regularly in standing meetings.
People Processes Technology	Set up bi-weekly meeting series for Florida PALM RW Tasks Update.	01/05/24	FDOT Florida PALM System Transition Team	Bi-weekly meeting with OOC and OIT program and project managers to assign and review efforts for RW task completion.	
People Technology	Adjustments to FDOT Resource Plans In Service Now and Resource Planning	12/15/23	FDOT Florida PALM System Transition Team	Revise resource plans and planning for resource needs.	
Processes	RW Task 500: Create Agency Specific Project Charter	12/15/23	FDOT Florida PALM System Transition Team	Collaborate with your Change Champion Network, Agency Sponsor, and key stakeholders to draft or update a project charter.	Completed
Processes	RW Task 506: Submit Bimonthly Agency Readiness Status Report	11/09/23	FDOT Florida PALM System Transition Team	Confirm with Sponsor and submit bimonthly status report to Florida PALM on the activities and ongoing work within FDOT.	Completed
Processes	Biweekly FPST Internal Workgroup Meetings	01/10/24	FDOT Florida PALM System Transition Team	These bi-weekly workgroups are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness.	Met biweekly
Processes	RW Task 509: Submit Bimonthly Agency Readiness Status Report	01/12/24	FDOT Florida PALM System Transition Team	Confirm with Sponsor and submit bimonthly status report to Florida PALM on the activities and ongoing work within FDOT.	In progress.

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

FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	01/12/24
September - October 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	11/12/23
July - August 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	09/07/23

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[Florida PALM Resources](#)  
[Florida PALM Workbook for FGCC](#)  
[Readiness Workplan](#)

# FGCC Status Report Dashboard

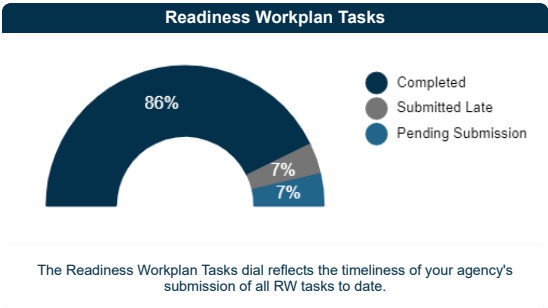
Reporting Period

November - December 2023

Agency Sponsor

Lisa Mustain

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 = 14

- Completed = 12
- Submitted Late = 1
- Pending Submission = 1

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	12/07/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 5
- Vacant Role = 6

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

Current-State:

Cataloged Business Processes = 25

- Related Business Systems = 6
- Related Reports = 14

Documentation Status:

- Complete = 24 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 6

Criticality:

- High = 6 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 5 Partial = 0 Not Started = 1

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

Segment I - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 0

- Spreadsheet Uploads = 1

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 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.	Monthly.	09/11/23	Lisa Mustain, Director of Administration

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.	Waiting on OPB approval.	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	11/13/23	All agency business systems.	Approval Received.	
Technology	FGCC will have a replacement for Versa Regulation by PALM go live	Logged	11/13/23	Revenue Management	Ongoing.	
Technology	DBPR will continue to update and keep FGCC abreast on any modifications or remediations if any of Versa Regulation.	Logged	01/10/24	Revenue Management	Ongoing.	

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	

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:
November - December 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	01/12/24
September - October 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	12/07/23
July - August 2023	Lisa Mustain	lisa.mustain@flgaming.gov	09/11/23

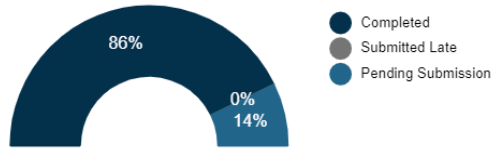
## Helpful Links

- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for FLHSMV](#)
- [Readiness Workplan](#)

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

# FLHSMV Status Report Dashboard

## Readiness Workplan Tasks



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

## Reporting Period

November - December 2023

## Agency Sponsor

Steve Burch

## Readiness Workplan Tasks:

**Total Tasks = 14**

- Completed = 12
- Submitted Late = 0
- Pending Submission = 2

## RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Agency is actively working on completing all desk procedures for each business process.
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/16/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/01/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/07/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/07/23	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/07/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/07/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	75% - Consolidating/Inputting Information for Submission		
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

## 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 = 12
- Duplicate Filled Role = 6
- Vacant Role = 0



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

## Current-State:

**Cataloged Business Processes = 130**

- Related Business Systems = 4
- Related Reports = 53
- Documentation Status:**
  - Complete = 49 Partial = 21 Not Started = 59

## Implementation:

- Role Mapping = TBD

## Current-State:

**Cataloged Business Systems = 6**

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

**Cataloged Interfaces = 5**

- Inbound Interfaces = 3
- Outbound Interfaces = 2

## Implementation:

**Business Systems Planned for Integration = 2**

- Segment I - Documentation Updates:**
  - Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- Segment II - Documentation Updates:** TBD
- Segment III - Documentation Updates:** TBD
- Segment IV - Documentation Updates:** TBD

**Planned Interfaces = 3**

- Inbound Interfaces = 1
- Outbound Interfaces = 2
- Spreadsheet Uploads = 0

## 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 = 165**
- Criticality:**
  - High = 94 Med = 18 Low = 49 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 Technology	Lack of backup developer for FAME	Open	6 (High/Medium)	Identify and train a backup developer in the event that the current developer leaves the agency.	New risk	01/12/24	Mike Alexander / Fred Patton
Processes Technology	Chartfield Mapping impacts current processes and business systems. COA values will need to be mapped correctly for a successful project implementation.	Open	4 (Medium/Medium)	Review current FLAIR chartfield values, and identify current agency needs. Map current chartfield values to the correct FL PALM COA value/structure. Record impacts to business processes and agency business systems.	New risk	01/12/24	Mike Alexander / Stephanie Cabrera
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.	No change	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.	No change	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
People	FLHSMV has a large number of key vacancies within the Bureau of Accounting. Due to difficulties in filling these positions, FLHSMV will need to move duties performed by vacant positions to other employees reducing the amount of time that can be committed to complete Florida PALM Tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	HSMV will attempt to fill these positions.	New Issue	07/01/24	Steve Burch / Mike Alexander

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	08/31/23	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	08/31/23	Selected State Agencies, Not for Profit and, local governmental entities.	No Change	
Processes	Vouchers will not be produced or required by DFS for auditing purposes.	Logged	10/31/23	Accounts Payable Section	State Agencies are required to produce vouchers for DFS audit and retain for documenting purposes.	

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
People	Determine which Org Codes, Grants, and OCAs have no transactions over the past three fiscal years	11/23/23	Conversion data	Delete inactive FLAIR values used by FLHSMV prior to data conversion.	
People Technology	WRAP 8068 Positive Pay Reconciliation Process	12/20/23	Bureau of Accounting continues to do manual reconciliations/ FRVIS	Automate Positive Pay reconciliation.	The WRAP 8068 is currently in the testing stage.

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:
November - December 2023	Steve Burch	steveburch@flhsmv.gov	01/12/24
September - October 2023	Steve Burch	steveburch@flhsmv.gov	11/07/23
July - August 2023	Steve Burch	steveburch@flhsmv.gov	09/08/23

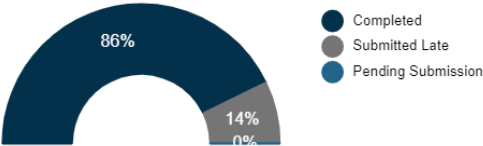
Helpful Links

- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for FSDB](#)
- [Readiness Workplan](#)

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

FSDB Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

November - December 2023

Agency Sponsor

Tracie Snow

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 12
- Submitted Late = 2
- Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	10/25/23	Procedures are for FLAIR and PYRL
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/06/23	Our project is dependent on PALM activities
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	We follow the PALM implementation schedule
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	We have no local risk issues identified
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/06/23	Stakeholder groups have been identified within FSDB
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/14/23	NA- We do not use interfaces to FLAIR and will not need them for PALM
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	11/14/23	NA - We do not use interfaces to FLAIR and will not need them in PALM
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/14/23	Tracie Snow is occupied with school business and is unavailable at the moment.
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/09/24	PALM dependent
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/09/24	No changes from before

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 = 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 = 1
- Related Reports = 65
- Documentation Status:
  - Complete = 7 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 1

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

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

- Segment I - Documentation Updates:
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- Segment II - Documentation Updates:
  - TBD
- Segment III - Documentation Updates:
  - TBD
- Segment IV - Documentation Updates:
  - TBD

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0
- Spreadsheet Uploads = 0

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/loaded, closed/resolved or active during the reporting period.

The entry, review, descriptions and comments provided were solely for reporting and do not constitute an official report, decision or recommendation of 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:
November - December 2023	Tracie C. Snow	snowt@fsdbk12.org	01/10/24
September - October 2023	John Wester for Tracie Snow	westerj@fsdbk12.org	11/14/23
September - October 2023	Tracie C. Snow	snowt@fsdbk12.org	11/14/23
July - August 2023	Tracie C. Snow	snowt@fsdbk12.org	09/07/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FWC](#)  
[Readiness Workplan](#)

# FWC Status Report Dashboard

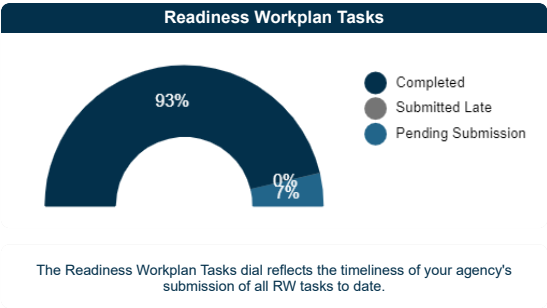
Reporting Period

November - December 2023

Agency Sponsor

Jessica Crawford

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 = 14

Completed = 13

Submitted Late = 0

Pending Submission = 1

RW Tasks - Completed or Open Items							
Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	10/12/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	11/13/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	10/24/23	Section 5.4 of our agency project plan represents our risk and issues management
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/13/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/12/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/26/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/08/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/09/24	

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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 248

Related Business Systems = 2

Related Reports = 4

Documentation Status:

Complete = 65 Partial = 182 Not Started = 1

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 18

Criticality:

High = 11 Med = 6 Low = 0 None = 1

Documentation Status:

Complete = 18 Partial = 0 Not Started = 0

Cataloged Interfaces = 8

Inbound Interfaces = 8

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

Segment I - Documentation Updates:

Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 1

Inbound Interfaces = 0

Outbound Interfaces = 1

Spreadsheet Uploads = 0

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 = 41

Criticality:

High = 32 Med = 8 Low = 1 None = 2

Implementation:

Conversions = TBD

Configurations = TBD

## Agency Reported

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

The Agency, County, Departments and Stakeholders involved were not using any name that was general enough, which resulted in not seeing 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
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FWC is unable to accurately define impacts to our systems without complete specifications on the interfaces.	Open	9 (High/High)	1. FWC Analysis and design is being based on calculated assumptions	No change	11/06/23	Laurie Kershaw
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	No change	11/06/23	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	No change	11/06/23	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	No change	11/06/23	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 received approval to access the requested amount of the administered funds

#### 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 Processes Technology	Meet with manager/supervisors to review the Functions by Position document	10/18/23	Florida PALM users	Meet with manager/supervisors to review the Functions by Position document	Complete
People Processes Technology	Publish Project Plan for Florida PALM team	10/24/23	Florida PALM users	Publish Project Plan for Florida PALM team	Complete
People Processes Technology	Prepare List of FLAIR business process documentation	11/03/23	Florida PALM users	Prepare List of FLAIR business process documentation	Complete
People Processes Technology	Meet with staff members to validate Functions by Position document	11/09/23	Florida PALM users	Meet with staff members to validate Functions by Position document	Complete
People Processes Technology	Send email to divisions to provide business process documentation	11/09/23	Florida PALM users	Send email to divisions to provide business process documentation	Complete
People Processes Technology	Create and/or modify FLAIR business process documents	11/16/23	Florida PALM users	Create and/or modify FLAIR business process documents	In Process
People Processes Technology	Mark Task Complete in Smartsheet	12/15/23	Florida PALM users	Mark Task Complete in Smartsheet	Not Started
People Processes Technology	Submit plan	12/15/23		Submit plan	Complete
People Processes Technology	Identify tasks, due dates and responsible parties	11/06/23	Florida PALM users	Identify tasks, due dates and responsible parties	Complete
People Processes Technology	Identify which systems/documents are impacted	11/06/23	Florida PALM users	Identify which systems/documents are impacted	Complete
People Processes Technology	Send Email to the group to verify documents	11/06/23	Florida PALM users	Send Email to the group to verify documents	Complete
People Processes Technology	Group to respond to email from Amber	11/07/23	Florida PALM users	Group to respond to email from Amber	Complete
People Processes Technology	Schedule meetings with impacted individuals	11/13/23	Florida PALM users	Schedule meetings with impacted individuals	Complete
People Processes Technology	Update documentation in the meeting	11/14/23	Florida PALM users	Update documentation in the meeting	Complete
People Processes Technology	Submit Documentation	12/21/23	Florida PALM users	Submit Documentation	Complete
People Processes Technology	Identify tasks, due dates and responsible parties	11/06/23	Florida PALM users	Identify tasks, due dates and responsible parties	Complete
People Processes Technology	Identify interface(s)	11/07/23	Florida PALM users	Identify interface(s)	Complete
People Processes Technology	Send Email group to verify documents	12/01/23	Florida PALM users	Send Email group to verify documents	Complete
People Processes Technology	Group to respond to email from Amber	12/04/23	Florida PALM users	Group to respond to email from Amber	Complete
People Processes Technology	Identify fields within interface to be used	12/11/23	Florida PALM users	Identify fields within interface to be used	Complete
People Processes Technology	Submit Documentation	01/11/24	Florida PALM users	Submit Documentation	Complete
People Processes Technology	Update Documentation	11/01/23	Florida PALM users	Update Documentation	Complete

People Processes Technology	Submit Documentation	11/07/23	Florida PALM users	Submit Documentation	Complete
People Processes Technology	Complete Task 507 Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	Florida PALM users	Complete Task 507 Manage Agency Specific Implementation Schedule, Risks and Issues	Complete
People Processes Technology	Update Documentation in Smartsheet	11/01/23	Florida PALM users	Update Documentation in Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	12/27/23	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Attend Tuesday Task Talk	11/07/23	Florida PALM users	Attend Tuesday Task Talk	Complete
People Processes Technology	Send email to identify payroll management SMEs	11/07/23	Florida PALM users	Send email to identify payroll management SMEs	Complete
People Processes Technology	Team responds to SME email	11/08/23	Florida PALM users	Team responds to SME email	Complete
People Processes Technology	Meeting to discuss task expectations and timelines	11/15/23	Florida PALM users	Meeting to discuss task expectations and timelines	Complete
People Processes Technology	Meeting to review the Payroll BPMs and related resources	11/29/23	Florida PALM users	Meeting to review the Payroll BPMs and related resources	Complete
People Processes Technology	Meeting to review the Payroll BPMs and related resources	12/06/23	Florida PALM users	Meeting to review the Payroll BPMs and related resources	Complete
People Processes Technology	Meeting to review the Payroll BPMs and related resources	12/13/23	Florida PALM users	Meeting to review the Payroll BPMs and related resources	Complete
People Processes Technology	Meeting to review the Payroll BPMs and related resources	12/15/23	Florida PALM users	Meeting to review the Payroll BPMs and related resources	Complete
People Processes Technology	Report any newly identified risk, issues or assumptions and any payroll management readiness activities in Smartsheet	12/18/23	Florida PALM users	Report any newly identified risk, issues or assumptions and any payroll management readiness activities in Smartsheet	Not Started
People Processes Technology	Mark Task Complete in Smartsheet	12/20/23	Florida PALM users	Mark Task Complete in Smartsheet	Not Started
People Processes Technology	Update Smartsheet	01/05/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Sign Smartsheet	01/10/24	Florida PALM users	Sign Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	01/11/24	Florida PALM users	Mark task complete in Smartsheet	Complete

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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FWC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Jessica Crawford	jessica.crawford@myfwc.com	01/08/24
September - October 2023	Jessica Crawford	jessica.crawford@myfwc.com	11/08/23
July - August 2023	Jessica Crawford	taurie.kershaw@myfwc.com	09/08/23

Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for JAC

Readiness Workplan

JAC Status Report Dashboard

Readiness Workplan Tasks

57%

29%

14%

Completed

Submitted Late

Pending Submission

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.

Reporting Period

November - December 2023

Agency Sponsor

Alton L. "Rip" Colvin, Jr.

Readiness Workplan Tasks:

Total Tasks = 14

Completed = 8

Submitted Late = 4

Pending Submission = 2

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		11/30/2023 - The goal is to have the inventory complete before 12/15/2023; RFQ released 11/27/2023; goal is to have contractors working by 02/01/2024
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	50% - In Progress		01/11/2024 - CNN members are working on their sections and adding items
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/14/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24			
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/15/23	Completed and submitted 11/13/2023
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/28/23	11/30/2023 - Meeting on 12/12/2023 to discuss and finalize
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/11/24	
People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Completed in Requested Format	01/08/24	

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 = 6

Duplicate Filled Role = 6

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

Current-State:

Cataloged Business Processes = 79

Related Business Systems = 2

Related Reports = 21

Documentation Status:

Complete = 0 Partial = 29 Not Started = 36

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 10

Criticality:

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

Documentation Status:

Complete = 0 Partial = 6 Not Started = 3

Cataloged Interfaces = 4

Inbound Interfaces = 3

Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 10

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 6

Inbound Interfaces = 2

Outbound Interfaces = 3

Spreadsheet Uploads = 1

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 = 139

Criticality:

High = 57 Med = 63 Low = 23 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.

#### 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)	Transfer: The agency has been discussing mitigation options with the PALM team.	No change since the last reporting period. We continue to remind the PALM team of the importance of this issue.	09/11/23	Rip Colvin, Executive Director
People	Low acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	Mitigate: The agency is preparing a change management plan. Additionally, the agency has started a series of meetings to involve the JROs and keep them informed of the project progress and current status.	No update	09/11/23	Rip Colvin, Executive Director
People Processes Technology Data	Funding insufficient for project costs	Open	6 (High/Medium)	Mitigate: The agency will continue to look at projected costs and request needed funding	Additional funding received for FY 2023-2024; Amended LBR submitted for FY 2024-2025	10/20/23	Rip Colvin, Executive Director
People	Availability of staff to work on the project/Limited qualified staff	Open	6 (High/Medium)	Mitigate: The agency is looking at ways to supplement current staff.	Updated owner	12/31/23	JAC Executive Steering Committee
Processes	Delays in PALM information will create delays in remediating our processes	Open	6 (High/Medium)	Accept: The agency will continue to monitor information received	Reworded risk statement; Updated owner	12/31/23	JAC Executive Steering Committee
Technology	Delays in PALM information will create delays in remediating our systems	Open	6 (High/Medium)	Accept: The agency will continue to monitor information received especially regarding interfaces	Separated from item #8; Updated owner	12/31/23	Mausumi Das
Data	Data may not be sufficiently cleansed at go-live due to the JACs inability to adjust FLAIR records which are no longer active in FLAIR. DFS manages these records, and there is not guidance on how DFS will eliminate these records prior to go-live.	Open	4 (Medium/Medium)	Transfer: The agency will continue to discuss this issue with DFS staff and react to their guidance	We continue to remind the PALM team of the importance of this issue; updated owner	10/20/23	Nona McCall
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	Mitigate: The agency is initiating discussions with internal partners to create a new org code structure with a goal of implementing on July 1, 2025	CCN members have started meeting with stakeholders regarding this topic; updated owner	09/11/23	Dina Kamen
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	3 (High/Low)	Avoid: The agency needs to engage the business system vendor to discuss new chartfields once the agency has additional technical information	The agency intends to engage the vendor in the first or second quarter of 2024; updated owner	12/31/23	JAC Executive Steering Committee
Processes	PALM fails to integrate properly with other state-owned systems such as PeopleFirst, STMS, and PCard Works	Open	3 (High/Low)	Accept: The agency will continue to monitor information being received from the PALM team and other agencies.	Updated owner	12/31/23	Nona McCall
People Processes	Replacement or major upgrade of PeopleFirst involving the same team members as the PALM Project	Open	3 (High/Low)	Mitigate: The agency will review all available information regarding this potential new contract and then plan accordingly.	Updated owner	12/31/23	Jamie Johnson
Data	Data may not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	Avoid: The agency is preparing a plan for Data Cleansing	No update	09/11/23	Nona McCall
Processes	Downtime during transition	Open	2 (Medium/Low)	Mitigate: The agency will create a plan to minimize this risk such as front loading work in December 2025.	Updated owner	12/31/23	Dina Kamen and Jamie Johnson

#### 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 have sufficient funding in FY 2023-2024 and receive funds via the LBR process for FY 2024-2025.	Logged	09/01/23	All processes and systems	The agency received funding for FY 2023-24 which we believe will fully cover all expenditures. The agency has submitted an Amended LBR for FY 2024-25.
People Processes Technology	Program governance will provide timely decisions and issue resolution	Logged	11/13/23	All stakeholders	The agency continues to monitor those decisions for which we need more information
People Processes Technology Data	Project teams will have access to the appropriate management, staff and related Program stakeholders (internal and external) and other resources as required and as needed without delay	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project. Additionally, the agency is looking into acquiring contracted or OPS staff to assist with the workload
People Processes Technology Data	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project.

#### 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 Processes Data	Meeting to discuss the agency PALM budget and status	11/28/23	Rip, Valerie		
People Processes Technology Data	Attended Advisory Council Meeting	10/18/23	CCN	Gather information to share/have input into decisions	
People Processes Technology Data	Attended Tuesday Task Talk	11/14/23	CCN and other JAC staff		
People Processes Technology Data	Submitted FY 2024-2025 Amended LBR to the Commission for approval	11/14/23	JAC ESC		
People Processes Technology Data	Advisory Council Meeting	11/15/23	Nona and others		

People Processes Technology Data	Met with the Executive Director to discuss status of the PALM project	11/17/23	Rip, Valerie	Discuss status and issues	
People Processes Technology Data	Meeting with RC to discuss various items	12/04/23	RC and CCN		
People Processes Technology Data	Meeting to discuss Chart of Accounts meeting and face-to-face meeting in Tampa	12/08/23	Nona, Dina, Valerie		
People Processes Technology Data	Attended Advisory Council Meeting	12/13/23	Nona and others		
People Processes Technology Data	Monthly Touchpoint	12/19/23	CCN and RC		
People Processes Technology Data	Monthly Touchpoint meeting	12/19/23	CCN and PALM Team		
People Processes Technology Data	Updated PALM information for the Executive Director's Report to the FPDA Board	12/20/23	FPDA Board	To provide information to the Florida Public Defenders Association Board regarding PALM activities	
People	Internal Meeting - Discuss the makeup of the JAC PALM team	10/24/23	All JAC employees	Attempt to assure that the correct people are included on calls and in meetings	
People	Sent out "Last Week - This Week" newsletter	12/04/23	All JAC employees	To provide affected employees with up-to-date information regarding Agency activities regarding PALM	
People	Queried JAC supervisors regarding staff that currently perform tasks using FLAIR or FLAIR data	12/06/23	All JAC employees who work with FLAIR	To get a concise list; this will be a precursor to Task 512	
People	Sent out "Last Week - This Week" newsletter	12/12/23	All JAC employees	To provide affected employees with up-to-date information regarding Agency activities regarding PALM	
People	Sent out "Last Week - This Week" newsletter	12/21/23	All JAC employees	To provide affected employees with up-to-date information regarding Agency activities regarding PALM	
People	Queried the JRO staff to ask for a more streamlined listing of JRO staff that should attend meetings and receive PALM information	12/28/23	All JRO employees who work with FLAIR	To get a concise list; this will be a precursor to Task 512	
People Processes	Internal Meeting - Discuss Businesss Process Inventory	10/19/23	JAC Executive Steering Committee and alternates	Discuss how to begin and complete Task 328	
People Processes	Internal Meeting - Discuss Task 501 - Implementation Plan	10/25/23	JAC Executive Steering Committee	Discuss the plan for preparing the Agency Specific Implementation Schedule as required in Task 501	
People Processes	Attended the Change Management and Training Liaison Forum	10/26/23	Business Liaison, Change Management Liaison, Training Liaison	To learn more about other agency's plans	
People Processes	Attended the Project Management Liaison Forum	10/26/23	Project Management Liaison	To learn more about other agency's plans	
People Processes	Internal Meeting - Discuss Task 501 - Implementation Plan	10/30/23	JAC Executive Steering Committee	Discuss the plan for preparing the Agency Specific Implementation Schedule as required in Task 501	
People Processes	Attended Tuesday Task Talks	10/31/23	CCN	To receive new information and instructions	
People Processes	Attended Tuesday Talk Talk	11/07/23	CNN and other JAC staff		
People Processes	Meet with Dora and Felicia	11/15/23	CCN and RC	Introduce new RC and discuss issues	
People Processes	Meeting to discuss JRO engagement	11/16/23	Dina, Nona, Valerie	Start planning the January JRO meeting	
People Processes	Created and released an RFQ for Staff Augmentation services	11/27/23	All SMEs	To hire contractors to write our documentation for Business Processes and Agency Business Systems	
People Processes	PALM JAC - Executive Steering Committee Meeting	11/29/23	JAC ESC	Internal Touchpoint on items due in December	
People Processes	Met with JROs regarding the Chart of Accounts	12/14/23	JRO staff, Financial Services, Accounting	Discuss the changes in the CoA and begin discussion regarding how the JAC CoA will look in the future	
People Processes Technology	Monthly Touchpoint	11/08/23	CNN		
Processes	Internal Meeting - Discuss/Create the JAC Agency Specific Project Charter, and Risks and Issues	10/23/23	JAC Executive Steering Committee	Discuss the project charter as required in Task 500 and Task 502	
Processes	Internal Meeting - JRO Reports Inventory	10/24/23	JRO staff	To request that the JROs start cataloguing the FLAIR reports that they use	
Processes	Attended Disbursement Management Workshop	12/05/23	Most JAC employees		
Processes	Attended Asset Accounting Workshop	12/05/23	Most JAC SMEs		
Processes	Met to review Task 500 - Create an Agency Charter	12/05/23	JAC ESC		
Processes	Attended Account Management and Financial Reporting Workshop	12/06/23	Most SMEs		
Processes	Attended Accounts Receivable Workshop	12/07/23	Most SMEs		
Processes	Attended Grants and Contracts Workshop	12/07/23	Most SMEs		
Processes	Meeting regarding Task 502 - Risks and Issues Plan	12/12/23	CCN		
Processes	Met with PALM Team regarding Allotments in PALM	12/15/23	JAC Budget and PALM Team		
Technology	Submitted the Agency Business System Inventory	10/27/23	Technical Team	Inventory all Agency Business Systems as required in Task 326	
Technology	Meeting with PALM team to discuss Florida PALM token	11/30/23	Brian, Rinesha		

#### Agency Sponsor Confirmation

#### JAC Status Report Confirmation

Reporting Period	Agency Sponsor	Confirmed By	Confirmation
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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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Reporting Period	Name:	Confirmed By:	Date:
November - December 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	01/11/24
September - October 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	11/13/23
July - August 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for LEG](#)  
[Readiness Workplan](#)

LEG Status Report Dashboard

Readiness Workplan Tasks

64%

29%

7%

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

November - December 2023

Agency Sponsor

Lisa Swindle

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 = 14

Completed = 9

Submitted Late = 4

Pending Submission = 1

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/13/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	11/08/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/14/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	11/21/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/12/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24			
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24			

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 = 13

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 = 0

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

Implementation:

Training = TBD

Current-State:

Cataloged Business Processes = 119

Related Business Systems = 13

Related Reports = 24

Documentation Status:

Complete = 119 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 16

Criticality:

High = 10 Med = 1 Low = 1 None = 1

Documentation Status:

Complete = 12 Partial = 1 Not Started = 0

Cataloged Interfaces = 9

Inbound Interfaces = 3

Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 6

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 3

Inbound Interfaces = 0

Outbound Interfaces = 1

Spreadsheet Uploads = 2

Current-State:

Unique FLAIR Data Elements = 105

Associated Unique Uses = 106

Continued Use - Yes = 14

Continued Use - No = 0

Associated Business Systems = 13

Cataloged Reports = 77

Criticality:

High = 42 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

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
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not possess, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hire F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

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

Agency Sponsor Confirmation			LEG Status Report 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.			Reporting Period	Agency Sponsor Name:	Confirmed By:
			November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us
			September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us
			July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us

Agency Sponsor Name: \*

☐ Confirm \*

Submit

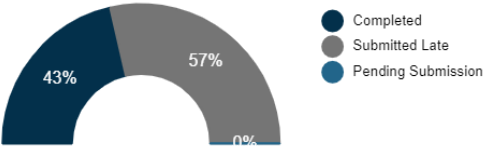
Helpful Links

- [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.

PSC Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

November - December 2023

Agency Sponsor

Apryl Lynn

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 6
- Submitted Late = 8
- Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/27/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/27/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/27/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/27/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/27/23	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/27/23	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/14/23	Apryl was unavailable.
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/10/24	

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



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

Participation:

- Meetings Attended = 2
- Meetings Missed = 2



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

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 13

- Related Business Systems = 0
- Related Reports = 1
- Documentation Status:
  - Complete = 11 Partial = 0 Not Started = 2

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

- Criticality:
  - High = 0 Med = 1 Low = 0 None = 4
- Documentation Status:
  - Complete = 0 Partial = 2 Not Started = 0

Cataloged Interfaces = 1

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

- Segment I - Documentation Updates:
  - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- Segment II - Documentation Updates:
  - TBD
- Segment III - Documentation Updates:
  - TBD
- Segment IV - Documentation Updates:
  - TBD

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0
- Spreadsheet Uploads = 0

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/loaded, closed/resolved or active during the reporting period.

The Agency, County, Department and System(s) selected above were used to display only items that have been reported, which means that you are seeing 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
People	Training and understanding how to work in FL PALM	Open	4 (Medium/Medium)				
Technology	Updating any agency business systems that we enter FLAIR data into	Open	4 (Medium/Medium)				

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 \*

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PSC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Apryl Lynn	alynn@psc.state.fl.us	12/27/23
September - October 2023	Apryl Lynn	alynn@psc.state.fl.us	11/20/23
September - October 2023	Katisha Mobley	kmobley@psc.state.fl.us	11/13/23
July - August 2023	Katisha Mobley	kmobley@psc.state.fl.us	09/11/23

Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for SCS](#)  
[Readiness Workplan](#)

SCS Status Report Dashboard

Readiness Workplan Tasks

64%

36%

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

November - December 2023

Agency Sponsor

Eric Maclure

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 = 14

Completed = 9

Submitted Late = 5

Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	01/10/24	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/15/23	This is a living document and subjected to changes
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	This is a living document and subjected to changes
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/21/23	This is a living document and subjected to changes
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	This is a living document and subjected to changes
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/11/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/14/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	01/08/24	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/08/24	
N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Completed in Requested Format	01/08/24	

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 = 7

Duplicate Filled Role = 5

Vacant Role = 3

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

Current-State:

Cataloged Business Processes = 33

Related Business Systems = 5

Related Reports = 31

Documentation Status:

Complete = 32 Partial = 0 Not Started = 0

Implementation:

Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

Criticality:

High = 3 Med = 2 Low = 0 None = 0

Documentation Status:

Complete = 5 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 4

Segment I - Documentation Updates:

Complete = 0 Updating = 0 Evaluating = 2 Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:

TBD

Segment III - Documentation Updates:

TBD

Segment IV - Documentation Updates:

TBD

Planned Interfaces = 8

Inbound Interfaces = 3

Outbound Interfaces = 3

Spreadsheet Uploads = 2

Current-State:

Unique FLAIR Data Elements = 72

Associated Unique Uses = 72

Continued Use - Yes = 48

Continued Use - No = 0

Associated Business Systems = 6

Cataloged Reports = 48

Criticality:

High = 3 Med = 27 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/loaded, closed/resolved or active during the reporting period.

This table displays the current status of the SCS risks. The risks are categorized by Critical Operational Elements, Risk Description, Status, Risk Rating, Mitigation/Response Strategy, Reporting Period Comments or Updates, Date of Status Change, and Owner / Coordinator.

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	Additional/adequate human resources for accounting roles	Open	6 (Medium/High)	Prepare LBR to request additional funding or FTE. Cross train employees to assume different work responsibilities.	This was discussed during our last touchpoint meeting 12/12/23	12/12/23	Finance & Accounting Chief and Budget Chief
Technology Data	Data conversion integrity and procedures.	Open	6 (High/Medium)	Working with PALM to see what resources will be provided to the agencies.	This was discussed during our 12/12/23 Touch Point meeting that we need assistance to convert our ORG Code listings.	12/13/23	F&A, OIT and HR
People	We have experienced a few key personnel changes which could affect us with the personnel in our CCN	Closed	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.	Agency Sponsor Eric Maclure has met with PALM	11/13/23	Dean Brown
People Technology	IT Technical Liasion departure from SCS is critical as we work on Task 328. Not sure who will be her replacement or when that transition will take place.	Closed	4 (Medium/Medium)	The current CCN member will try our best to complete our current tasks as best as possible.	Andrea and Roosevelt have been added as Technical liaison	11/01/23	Dean Brown
Technology	Purchasing of new services	Open	4 (Medium/Medium)	Looking for the appropriate products and services	Funding was received and resources are being identified to prioritize spending.	12/15/23	OIT/Technical Liasian
Processes	Proper documentation of current processes and procedures.	Open	2 (Medium/Low)	In the process of updating and documenting all our processes.	Processes were updated to complete FL PALM TASK 328	11/30/23	SCS
People	Ongoing Communication about project	Open	1 (Low/Low)	Working on a communication plan.	Planned bi-monthly SCS communication beginning 2024. Intranet updates. As PALM implementation comes closer, we will create a mass communication SCS campaign.		Finance & Accounting

SCS Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Data conversion with our ORG Code Listing to COA	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	As soon as possible, we will begin the conversion process from FLAIR Accounts to COA	This was discussed with Readiness coordinator to see what recourse	12/12/23	Finance & Accounting

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
Processes	IMS batch upload with FLAIR	12/12/23	OSCA Finance & Accounting	Key accounting invoices in IMS with FLAIR	
Processes	IMS corrections will still be processed in FLAIR	12/12/23	OSCA Finance & Accounting		

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

SCS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Eric W. Maclure, Interim	macluree@flcourts.org	12/28/23
September - October 2023	Eric W. Maclure, Interim	macluree@flcourts.org	11/13/23
July - August 2023	Carlington Brown	brownd@flcourts.org	09/12/23