

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 2024/25 General Appropriations Act.

Reporting Period:

March – April 2025

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 95.71%

Submitted On Time = 25

Submitted Late = 9

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 73.02%


Submitted On Time = 31

Submitted Late = 30

Pending Resubmission = 6

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 83.82%

Submitted Complete = 26

Submitted Incomplete = 0

Completed After Submission = 8

Other Task Completeness



Other Task Completeness:

Score = 87.43%

Submitted Complete = 28

Submitted Incomplete = 1

Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 4

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		5/9/2025 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 11/1 - Discussed completion of the tasks and in the process of documentation 8/30 - On-going process for updates. Identifying most important processes to document. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		5/9/2025 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission		5/9/2025 - SunFocus Modules for Receipts are 95% complete. End User Testing underway. For CATS (Contracts ABS) remediation has not begun.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		5/9/2025 - Documentation has not been completed for the lack of access to the BFS team that are understaffed.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/9/2025 - ABS Remediation is not on the same Segment Schedule as Florida PALM. 9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering		5/9/2025 - ABS Remediation is not on the same Segment Schedule as Florida PALM.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	Pending Resubmission	05/02/25	5/9/2025 - Resubmitted with updated Scope 4/25/2025-Awaiting SME review and additional input before submission	Submission Incomplete	05/02/25

N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/05/25	4/25/2025-SME s continuing the completion of the tool, with the limited resources	Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		5/9/2025 ABS Remediation is not on the same Segment Schedule as Florida PALM. All but 1 interface is ready to exchange with Florida PALM although the remediation efforts of the SunFocus modules is not completed. 4/25/2025 - All but 1 interface are ready for Cycle 2 Interface Testing 4/7/2025 - All but 3 interfaces are ready for Cycle 2 Testing. But system is not remediated to process the files for each of the system modules 01/27-All files have started 01/17- A third of the interfaces have been remediated.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/20/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	05/13/25
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/12/25			05/12/25
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 39

• Business Process Groupings = 12/13

Identified Subject Matter Experts = 20

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 67

• Related Business Process Groupings = 10/13

• Planned Spreadsheet Uploads = 4

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 23

Planned Interfaces = 17

- Inbound Interfaces = 2

- Outbound Interfaces = 15

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 2 - Track with Budget

- Account ChartField Tier Selection = Account Tier #3: Family

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

AHCA Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	11/25/24		Business Process Change	Unavailability of Accounting System	Increasing	9 (High/High)	Strategy: 1) Change statutory requirements 2) Meet with CMS to explain the absence of Accounting System to plan for holding federal funds for more than 72 hours. 3) Meet with A&A and Treasury to aid in decision making process on the solution. 4) Multiple Projections for the month of July. Note: Banks are still operational	5/8/2025 - Shared the information with AHCA leadership to begin a mitigation plan based upon the basic strategy.
Open and Mitigating	02/28/25		Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Implementation Timeline Changes	Increasing	6 (Medium/High)	Request administrative funding from the Legislature.	5/8/2025 - Continues to be a risk. Will need to address it once the Legislative Session ends.
Open and Mitigating	01/31/25		Agency Business System	Unidentified Impacted ABS	Decreasing	2 (Low/Medium)	1) Hire a second PM to manage the ABS applications that are indirectly impacted by Florida PALM where impacts are associated with the Enterprise applications (PeopleFirst, FACTS, etc.)-Completed 2) Identify change requirements for identified applications. ABS: Versa - Completed ABS: ePar-Completed ABS: FX-PeopleFirst Impact ABS: AHCA Network-PeopleFirst Impact ABS: CATS - Due to the nature of this COTS software remediation is not required for Go-Live. Remediation can be completed after FACTS has made its changes. 3) Create Plan of ABS remediation and testing ABS: Versa - Completed ABS: ePar-Completed ABS: FX-Completed ABS: AHCA Network - Completed ABS: CATS - N/A	5/8/2025 - Meetings with impacted teams is underway.

AHCA Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	09/24/24		High - Impacts the ability	Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Lack of Bureau of Financial Services Resources	Continue to actively recruit		5/9/2025 - Converted issue over. There have been 2 additional resources added to the team.
Open	09/30/24		High - Impacts the ability	Agency Business System	ABS Remediation Schedule different than Florida PALM	Interface remediation will be completed to be ready to perform Cycle 2 Interface Testing before the August start date. Update the comments of the remediation tasks as they become complete.		5/9/2025 - Converted issue over. ABS Remediation Schedule different than Florida PALM. Required modules will be completed before end-to-end user acceptance testing.
Open	09/06/24		High - Impacts the ability	Staffing/Resource Availability User Acceptance Testing	Florida PALM Tasks and SunFocus Operations Competing Resources	Leadership will prioritize the activities		5/9/2025 - Converted issue over. Continuing to monitor and prioritize operational incidents and Florida PLAM tasks as incidents arise.
Open	10/28/24		Low - All impacts not listed	Post Implementation	FY25-26 Lack of Funding for Third-Party Vendor supported Agency Business System	Workaround has been established with CATS. Contract managers will utilize FACTS directly until remediation of CATS can be planned and completed. ePAR remediation impacts and planning remains under investigation.		5/9/2025 - Converted issue over. Enterprise application (PeopleFirst) changes are being reviewed for impacts to the ePAR app.

AHCA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

Submit

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AHCA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/25
January - February 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	03/10/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for APD](#)
[Readiness Workplan](#)

APD Status Report Dashboard

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

Reporting Period


March - April 2025

Agency Sponsor

Rose Salinas

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.03%

Submitted On Time = 34

Submitted Late = 2

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 99.86%


Submitted On Time = 66

Submitted Late = 1

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 87.22%

Submitted Complete = 22

Submitted Incomplete = 0

Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 85.48%

Submitted Complete = 26

Submitted Incomplete = 1

Completed After Submission = 15

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 4

Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission		12/16 - reviewing the task in depth with APD PALM Team 12/30 - BA and PM in review of training docs that will be incorporated in the APD plans 1/7 - re-read task - use template 1/13 - reviewed with core team - reviewing the template 1/24 - training survey submitted 1/24 3/3 - actively working plan 3/31 - meetings to review and agency collaboration team input vaule add 5/12 - on-going process and the team will review the draft in person the week of 5/19 - to be ready for submission next week		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		1/24 - IT team working 3/3 - IT sources working in tandem and updates in progress 3/31 - team working this as a remediation for overarching ABS that will be completed by task due date - FRS database completed and NOT taking the segment approach - working as an overall update to each ABS - IT team in process 5/12 - actively updating and working - PALM question out for answer to FLAIR to PALM Mapping pending		
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	Submission Complete	03/31/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/27/25	3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/24/25	4/21 All Teams have named their SME - exception is one pending this week will meet the due date 4/24 - all updates = Primary noted in the Comments column = but all SME's for teams identified	Submission Complete	04/25/25
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25	4/21 - Becky is working on the spreadsheet to update Smartsheet with all things POALM at APD and this includes the samples/Attachments 4/25 - completed for Jan Feb Mar	Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25	5/12 - updated the new sheet(s) with updated risks, issue, and assumptions - this is going to be reviewed with the teams as we work with them over the next 2 weeks in MAY - to consolidate and close any that can be at this time	Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/13/25	5/12 - in review by the team at this time 5/13 - IT Team email working this to confirm SME's and review both sheets -		

								team reviewed - updated the sme list and checked off - completed		
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering		5/13 - BA working the new task for team review		

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.
<p><u>Implementation:</u></p> <p>Planned Florida PALM End Users = 73</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 43</p>	<p><u>Implementation:</u></p> <p>Impacted Agency Business Processes = 120</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10/13 Planned Spreadsheet Uploads = 0 	<p><u>Implementation:</u></p> <p>Business Systems Planned for Integration = 8</p> <p>Planned Interfaces = 25</p> <ul style="list-style-type: none"> Inbound Interfaces = 5 Outbound Interfaces = 20 	<p><u>Implementation:</u></p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agencywide Optional ChartFields OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

APD Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	05/02/25		Agency Business System Deployment/Cutover Staffing/Resource Availability User Acceptance Testing	Insufficient IT staff experience with cloud technologies	Stable	6 (Medium/High)	Upskill internal staff; augment with vendor/cloud consultants - adjust APD staff	Archived listing being consolidated for curren layout
Open and Monitoring	05/02/25		Agency Business System Interface Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Limited time for user testing due to technical delays - interface changes and updates not finalized	Stable	6 (Medium/High)	Create a risk buffer in schedule for testing; prioritize high-value scripts - IT Team working sprint and actively testing as you go	Archived listing being consolidated for curren layout
Open and Monitoring	05/02/25		Agency Business System Interface User Acceptance Testing	Legacy system interfaces mapping with ABS-PALM APIs	Stable	6 (High/Medium)	Develop interface translation layers; validate APIs early - continual review and update	Irreversible data loss c extended downtime during transition
Open and Monitoring	05/02/25		Conversion/Configuration Deployment/Cutover	Inadequate cloud platform performance under high user load due to multi agency impact	Stable	6 (High/Medium)	Conduct load testing in pre-production; scale infrastructure proactively	Archived listing being consolidated for curren layout
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Security configuration gaps during system transition	Stable	6 (High/Medium)	Security audits and review access controls before go-live	Archived listing being consolidated for curren layout
Open and Monitoring	05/02/25		Interface Conversion/Configuration Deployment/Cutover Post Implementation	Data corruption or loss during migration process	Stable	6 (High/Medium)	Perform dry-run migrations; ensure backups are tested and validated - need PALM Conversion Plan as soon as ready	Archived listing being consolidated for curren layout
Open and Monitoring	05/02/25		Deployment/Cutover Identity Provider (IdP) Role Mapping	Failure of third-party integrations post-migration - unknowns	Stable	6 (High/Medium)	Engage vendors early; build fallback interface plans - APD attending	Archived listing being consolidated for curren layout

				for peripheral systems - STMS/MFMP/etc.			all meetings at this time	
Open and Monitoring	05/02/25		Conversion/Configuration Post Implementation	Inadequate disaster recovery or backup strategy during cutover - new system - what if's	Stable	6 (High/Medium)	Implement robust backup and rollback strategies; conduct failover tests - once understanding of PALM conversion plan is in place - adjust and ready	Archived listing being consolidated for current layout
Open and Monitoring	05/02/25		Business Process Change Training User Acceptance Testing	1. Inadequate trainer knowledge	Stable	4 (Medium/Medium)	Conduct Train-the-Trainer programs; certify trainers before rollout	Critical data exchange fail; project delays and costly rework
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	3. Inconsistent training across departments	Stable	4 (Medium/Medium)	Standardize training materials and delivery; track attendance and completion	Data breaches or access violations; potential audit or legal issues
Open and Monitoring	05/02/25		Agency Business System Interface Training User Acceptance Testing	4. Technical issues during training (e.g., system crashes)	Stable	4 (Medium/Medium)	Test systems in advance; have IT support on standby during training	Delays and rework due to misconfiguration; higher support burden
Open and Monitoring	05/02/25		Business Process Change Staffing/Resource Availability Training	6. Training not aligned with actual job functions	Stable	4 (Medium/Medium)	Customize training per role; gather pre-training feedback	Permanent loss of financial or transactional data
Open and Monitoring	05/02/25		Staffing/Resource Availability Training	7. Knowledge retention loss post-training	Stable	4 (Medium/Medium)	Provide job aids, refreshers, and post-training support	Failure to process essential transactions like payroll or grants
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	8. Delayed training timeline	Stable	4 (Medium/Medium)	Build buffer into project schedule; monitor progress regularly	Unexpected bugs and incompatibilities in cloud version
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	9. Overwhelming training content	Stable	4 (Medium/Medium)	Break into modules; offer self-paced options	Missed defect discovery leading to production errors
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Delay in configuring role-based access and permissions - changes updates learned during training and UAT	Stable	4 (Medium/Medium)	Map all roles early; perform iterative testing with key users - advantage during UAT	Archived listing being consolidated for current layout
Open and Monitoring	05/02/25		Agency Business System Business Process Change Interface	Unanticipated technical debt from legacy customizations - for interfaces - need to reduce to cause cost savings - but not aligning with what we have - PALM issue	Stable	4 (Medium/Medium)	Catalog all custom logic and evaluate for platform-fit - updating in ABS	Archived listing being consolidated for current layout
Open and Monitoring	05/02/25		Business Process Change Role Mapping Staffing/Resource Availability Training	2. Low user engagement or attendance	Stable	3 (High/Low)	Mandatory training policy; offer flexible schedules and formats	Users face slow performance; loss of trust in system usability
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training	5. Resistance to change from employees	Stable	2 (Medium/Low)	Communicate benefits early; involve staff in design and feedback	Access issues for users; delay in operations post-migration
Open and Monitoring	05/02/25		Role Mapping Staffing/Resource Availability Training User Acceptance Testing	10. Lack of evaluation and feedback mechanisms	Stable	2 (Medium/Low)	Implement surveys, quizzes, and performance tracking	Irreversible data loss extended downtime during transition

APD Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/01/25		High - Impacts the ability	Agency Business System Interface Conversion/Configuration	PALM Project Mapping Key	Develop interface translation layers; validate APIs early - continual review and update	05/30/25	Waiting on PALM Response - Brought to the attention of IV&V - this is an agency wide issue =FLAIR Mapping to PALM Mapping - shared understanding and process so all align together and without human error potential as well as everyone re-creating the same thing

APD Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People Data	Legacy system data is complete and accurate	Logged	05/12/25	Finance, IT, Audit, All modules using historical data	May require significant data cleansing before migration - Team Review with YEAR END Activities
Processes Technology	Chart of Accounts structure will be successfully mapped to the new system	Logged	05/12/25	Budget, General Ledger, Accounting Leads	Mapping discrepancies could impact reporting and compliance-pending PALM insight on mapping from FLAIR
People Processes	All critical business processes are documented	Logged	05/12/25	All accounting teams, Change Management, Training Team	Lack of documentation may delay configuration and training-identifying new processes with PALM will add or remove risks and changes but the assumption is that PALM has provided all insight

					to system and processes are available that are currently used within the agency
Technology Data	Cloud system will support all required functionalities	Logged	05/12/25	Program and Financial Users, System Admins	Some legacy custom functions may not be supported natively - APD use of current processes within agency business systems will remain and can be enhanced or eliminated based on discovery with PALM
People Processes Technology Data	Interfaces with peripheral systems will remain compatible	Logged	05/12/25	IT, Third-Party Vendors, Grants/Payroll/Procurement Units	Integration scripts and APIs may require redevelopment - ABS for APD is aligned with new specifications for PALM and tested prior to migration with all considerations provided by PALM - business as usual.
Processes Technology Data	Data migration will occur with minimal downtime	Logged	05/12/25	All staff, especially Payroll, Accounts Payable, and Receivables	Need a robust cutover plan and contingency plan - concerned that no conversion plan has been provided and that there will be a full understanding of timeline and expectations for data movement
People Processes Technology Data	End users will receive adequate training prior to go-live	Logged	05/12/25	All functional end users	Training plan must be tailored to user roles and readiness levels - APD driven at this point with a need to fully understand PALM's delivery of training expectations that are currently not fully defined.
People Processes	Security roles and access permissions will be properly configured	Logged	05/12/25	Security Admins, HR, Supervisors, External Auditors	Misconfigured roles could lead to data access issues or compliance violations - UAT will help to vet this out - however - the matrix is built based on current understanding of PALM
Processes Technology Data	Reports used in the legacy system will be recreated accurately	Logged	05/12/25	Finance, Program Managers, Oversight Agencies	Report logic may differ between systems; validation is critical - teams will review and understand the reports capabilities during UAT and training and therefore know if there is a need within ABS or PALM
People Processes Technology Data	Project timeline will remain on schedule despite unknowns	Logged	05/12/25	Project Managers, Executive Sponsors, All involved teams	Scope creep, vendor delays, or data issues could require re-baselining - APD continues to work to deliver on time as set by the PALM team. This is multi-agency dependent and therefore - can be impacted without control from APD.

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:
March - April 2025	Rose Salinas	rose.salinas@apdcares.org	05/12/25
January - February 2025	Rose Salinas	rose.salinas@apdcares.org	03/06/25

Helpful Links

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

CITRUS Status Report Dashboard

Reporting Period

March - April 2025

Agency Sponsor

Christine Marion

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 89.35%

Submitted On Time = 19

Submitted Late = 12

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 82.00%

Submitted Complete = 19

Submitted Incomplete = 2

Completed After Submission = 9

Other Task Completeness:

Score = 73.06%

Submitted Complete = 22

Submitted Incomplete = 7

Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

- The Change Champion Network composition reflects the completeness of your CCN makeup.
- Unique Filled Role = 5

Duplicate Filled Role = 9

Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25			Due to budget constraints and the pending changes to Florida PALM's schedule, Citrus is delaying starting remediation efforts until May 2025.		
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	Pending Resubmission	04/16/25		Submission Incomplete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25					
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		Citrus anticipates this task to be delayed to match the new timeline.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/17/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/17/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/17/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	50% - In Progress				
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25	PALM Status update provided to Citrus Commission in public meeting 3/26/25. Weekly touchpoint meetings held for status updates.	Submission Incomplete	05/12/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25					

Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25				
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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.
Implementation: Planned Florida PALM End Users = 9 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 6	Implementation: Impacted Agency Business Processes = 32 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 12 - Inbound Interfaces = 0 - Outbound Interfaces = 12	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Not Needed - Grants = Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

CITRUS Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	02/28/25		Staffing/Resource Availability	Funding Alignment	Decreasing	9 (High/High)	Certain Readiness Tasks are delayed until remediation can be accomplished. It is anticipated that Citrus will be able to complete these tasks by Fall 2025.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	02/28/25		Deployment/Cutover	Design Misalignment	Stable	9 (High/High)	Citrus is working to resolve the reporting issues we anticipate through the use of interfaces from PALM.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	02/28/25		Business Process Change	Foreign Currency Transactions	Stable	6 (Medium/High)	Citrus is working with Treasury and CFO's office to identify possible solutions. Still to be identified is method for reporting foreign currency payments in FACTS.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.
Open and Monitoring	09/19/23		Staffing/Resource Availability	New IT Staff	Decreasing	2 (Low/Medium)	IT staff is quickly coming up to speed with Citrus business systems and the needs going forward with the implementation of PALM. More meetings/workshops targeted to the technical liaisons would be beneficial.	The changeover of risk reporting, which involved the complete archive of all risks, issues, and assumptions caused an unexpected increase in workload for our project team.

CITRUS Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

CITRUS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People	The leadership of the Department of Citrus 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	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes Technology	The Legislature will appropriate and timely release General Revenue funding for contracted services for Agency support of the PALM project and those resources are available to perform the work assigned to them as scheduled.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Assumption transferred from archived sheet.
People Processes Technology Data	The timeline of the project is subject to the independent DFS Florida PALM project and all key milestones and transition dates are provided by the larger PALM Project.	Logged	05/12/25	PALM Project Team, Citrus Accounting Dept, CCN's	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	Citrus business process owners will provide input for necessary process mapping efforts with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Technology	Citrus business system owners will provide requirements for necessary system modifications with enough detail and time to implement needed changes according to the Florida PALM schedule.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	Citrus project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet project milestones.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
Technology	Citrus stakeholders have a clear understanding of the benefits and limitations of low-code development and are supportive of its implementation.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Technology	The project team has access to relevant documentation, specifications, and knowledge about the legacy systems and their data structures.	Logged	05/12/25	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	New Assumption logged to create explicit category for risk identification and issue management.
People Processes	The DFS Florida PALM project team will provide a PALM UAT environment to all CCN members, SMEs, and End Users prior to go-live. The Department will be given sufficient time to test and practice critical transactions before go-live in this dedicated testing environment.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Assumption transferred from archived sheet.
People Processes	The DFS Florida PALM project will provide key information identifying the functionality, business processes, and timeline	Logged	08/30/24	PALM Project Team, Citrus Accounting Dept, CCN's	Assumption transferred from archived sheet.

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:
March - April 2025	Christine Marion	cmarion@citrus.myflorida.com	05/12/25
January - February 2025	Christine Marion	cmarion@citrus.myflorida.com	03/03/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.22%

Submitted On Time = 28

Submitted Late = 7

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 95.57%


Submitted On Time = 59

Submitted Late = 8

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 95.43%

Submitted Complete = 29

Submitted Incomplete = 0

Completed After Submission = 6

Other Task Completeness



Other Task Completeness:

Score = 96.83%

Submitted Complete = 38

Submitted Incomplete = 0

Completed After Submission = 3

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	05/07/25	UPDATE AS OF 3/26/2025: Task team is working on CPAS & TSPPS business systems to ensure compatibility with PALM outbound interfaces; UPDATE AS OF 4/3/25: team continues to work on coding to ensure compatibility and anticipates task completion prior to July 2025; UPDATE AS OF 5/7/2025: Commerce has opted to submit task 561, however, remediation efforts will remain on-going and tracked with task 567.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	02/18/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25	UPDATE AS OF 4/3/2025: business process unit teams are actively working to complete task activities by way of team meetings. We anticipate successful completion by task due date.	Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		UPDATE AS OF 4/3/2025: team is actively working on activities that impact the completion of the training plan. We anticipate successful completion by due date.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/08/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	04/01/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/29/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/15/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/13/25			
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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.
<u>Implementation:</u> Planned Florida PALM End Users = 64 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 22	<u>Implementation:</u> Impacted Agency Business Processes = 103 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 11	<u>Implementation:</u> Business Systems Planned for Integration = 22 Planned Interfaces = 82 - Inbound Interfaces = 7 - Outbound Interfaces = 75	<u>Implementation:</u> Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

COM Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	08/26/24		Agency Business System Business Process Change	Lack of support for Life-to-Date Accounting and Reporting	Stable	9 (High/High)	Create internal life-to-date reporting system.	UPDATE as of 5/9/2025: agency will continue to gather further feedback from project to find ways to meet Commerce's life-to-date reporting need
Open and Mitigating	12/12/24		Business Process Change	Documentation Tracking Process	Decreasing	9 (High/High)	Develop documentation tracking process tool, schedule meetings with supervisors and determine a centralized location for BPs. We will then develop a matrix to cross check and verify all BPs listing in the tracking tool are in the centralized location. Supervisors will provide any missing information or correct incorrect information.	UPDATE as of 5/7/2025: PML is working with each business unit to train and use centralized location for business processes and documentation.
Open and Mitigating	12/12/24		Training	Common Understanding of Florida PALM project goals	Decreasing	6 (Medium/High)	Provide project update communications to team or team members associated with the areas of impact via email, Teams channels, Teams chat, face-to-face and/or virtual meetings. Also provide opportunities to participate in workshops and CoLab sessions provided by PALM. We will also provide and share information to team members with office/agency social gatherings approved by management in approved locations/areas.	UPDATE as of 5/7/2025: Information i shared with each business unit as it is released by the Florida PALM project. Commerce has hosted a Town Hall and other information sharing events to ensure common understandin of Florida PALM goals and updates.
Open and Mitigating	01/30/25		Conversion/Configuration	Data Migration Process	Stable	4 (Medium/Medium)	- Perform a comprehensive data audit before migration to identify and resolve inconsistencies - Use automated data validation tools to	UPDATE as of 5/9/25: Evaluating options for how to use data fields in PALM to meet Commerce's financial reporting needs.

							ensure data accuracy during migration - Conduct multiple rounds of data testing in a staging environment to verify accuracy and completeness - Establish a plan to address any critical issues identified post migration	
Open and Mitigating	01/07/25		Training	End User Training	Decreasing	3 (High/Low)	- Develop a detailed training plan tailored to various user roles, including hands-on practice sessions - Provide user-friendly guides, FAQs, and on-demand video tutorials for continuous learning - Partner with Florida PALM to provide support helpdesk information to address end-user questions during and after implementation - Involve SMEs and end users in Commerce specific and Florida PALM User Acceptance Testing for familiarization purposes, as well as feedback"	UPDATE as of 5/9/25: Team will work to prepare for upcoming UAT end-user training based on results of Change Analysis activity.
Open and Mitigating	01/07/25		Interface	FLAIR Integrations	Decreasing	2 (Medium/Low)	- Conduct a system mapping and dependency analysis for all interfacing applications - Test integrations thoroughly during User Acceptance Testing - Partner with Florida PALM, third-party vendors, and in-house teams to ensure compatibility - Monitor system performance post-integration and address any issues promptly using Florida PALM help desk"	UPDATE as of 5/9/2025: Commerce i working to update existing systems to use the interface files, as designed by PALM, to create the required output for managemer reporting.
Open and Mitigating	01/07/25		Business Process Change	Business Processes Alignment with Florida PALM	Decreasing	2 (Medium/Low)	- Review all Florida Commerce Finance & Administration business processes impacted by the Florida PALM implementation in order to identify inefficiencies and areas for improvement before system implementation - Collaborate with key stakeholders to design optimized processes that align with the capabilities of Florida PALM - Document the redesigned processes and train staff to ensure smooth adoption - Conduct regular reviews post-implementation to identify and address any process gaps	UPDATE as of 5/9/2025: The work being done on documenting existing Commerce business processes will assist in mitigating any related risks.

COM Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

COM Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
Technology	It is assumed that Florida PALM will be fully operational and accessible to all users at go-live, with minimal downtime required for maintenance and updates.	Logged	01/08/25	Commerce F&A Stakeholders	Commerce will have the ability to prioritize things that need to be uploaded. Put together a workflow of transactions to be posted in case user access is limited.	
Data	It is assumed that all critical financial data from FLAIR will be accurately migrated and available in the cloud-based system before go-live, ensuring continuity in financial operations and reporting.	Logged	01/08/25	Commerce F&A Stakeholders	Seek verification from PALM prior to the migration, during UAT, in order to have a solid understanding of what is going well and note potential issues.	
Data	It is assumed, at go-live, Florida PALM will provide a data warehouse with detailed data tables, including data that may not currently be available through outbound interfaces. This data will be essential for supporting F&A's reporting and financial analysis requirements.	Logged	01/08/25	Commerce F&A Stakeholders	Commerce F&A will build in-house processes so we are not relying on the data warehouse.	

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:
March - April 2025	Tisha Womack	caroline.womack@commerce.fl.gov	05/12/25
January - February 2025	Tisha Womack	caroline.womack@commerce.fl.gov	03/06/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 100%

Submitted On Time = 37

Submitted Late = 0

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 94.64%


Submitted On Time = 63

Submitted Late = 4

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 99.19%

Submitted Complete = 34

Submitted Incomplete = 0

Completed After Submission = 3

Other Task Completeness



Other Task Completeness:

Score = 99.76%

Submitted Complete = 41

Submitted Incomplete = 0

Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 13

Duplicate Filled Role = 2

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/30/25	04/30/2025 - To be completed/tracking in Task 576 03/2025 – Remediation efforts impacted by enterprise partner design details and agency specific carry forward considerations. Remediation efforts based on Segment IV designs will continue to progress toward completion to align with the Florida PALM Project's timeline to participate in future testing activities, June/August 2025 based on the revised current project timeline. • People First data structure changes for interface testing and consumption – scope, level of effort, and ETA unknown	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress		4/10: 576 Addendum for Interface Test Planning completed. Progress for Cycle 2 test readiness on-going.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/13/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/19/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/30/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/02/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/07/25			

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.
<u>Implementation:</u> Planned Florida PALM End Users = 69 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 25	<u>Implementation:</u> Impacted Agency Business Processes = 155 • Related Business Process Groupings = 13/13 • Planned Spreadsheet Uploads = 11	<u>Implementation:</u> Business Systems Planned for Integration = 15 Planned Interfaces = 30 - Inbound Interfaces = 9 - Outbound Interfaces = 21	<u>Implementation:</u> Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DACS Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	10/31/24		Agency Business System Business Process Change Interface User Acceptance Testing	Florida PALM UAT Plan details needed for batch processing	Stable	3 (High/Low)	Internal management and mitigation of this risk is dependent on pending information about Florida PALM UAT testing details from the PALM Project. Our Agency CCN collectively continues to monitor any updates related to the release of the PALM Project UAT Plan (AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing time line.	04/2025 - Department continues to request Florida PALM Project UAT Plan details for internal planning and preparation needs. No additional change or update at this time.
Open and Monitoring	10/31/24		Agency Business System Business Process Change Interface User Acceptance Testing	Florida PALM UAT Plan details needed for Outbound Interfaces	Stable	3 (High/Low)	Internal management and mitigation of this risk is dependent on pending information about Florida PALM UAT testing details from the PALM Project. Our Agency CCN collectively continues to monitor any updates related to the release of the PALM Project UAT Plan (AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing time line.	04/2025 - Department continues to request Florida PALM Project UAT Plan details for internal planning and preparation needs. No additional change or update at this time.

DACS Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	10/31/24		High - Impacts the ability	Agency Business System Business Process Change Interface Conversion/Configuration Staffing/Resource Availability Training User Acceptance Testing	Florida PALM Segmented Design Approach	Our agency PRT is actively working on ABS remediation based on Segment designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that cannot be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. Regular monitoring of the interface catalog is occurring to stay up to date on any changes made to interface layouts or sample data files.	June/August 2025	04/2025 - No Change or update at this time.

DACS Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
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.	04/2025 - 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	04/2025 - Continuing to Monitor	
People	The Florida PALM team will be able to provide timely and complete requirements for the transition to Florida PALM with sufficient detail and time to implement the changes according to the Florida PALM schedule	Logged	11/13/23	FDACS PALM Readiness Team, CCN, all FDACS key stakeholders, PALM/impacted Agency Business System end users	04/2025 - Continuing to Monitor	
Processes	Work efforts of staff augmentation resources are undertaken to collectively achieve a broader understanding of the totality of work that must be accomplished to meet all Critical Success Factors. As such, the deliverables outlined in the Operational Work Plan are critical, and the FDACS PALM Transition Readiness Team assumes that the deliverables are accurately and thoroughly defined and reflect the necessary Level of Effort to achieve all transition tasks and activities. Work efforts under the deliverables may adjust to accommodate operational variances, but the deliverables are fixed.	Logged	11/13/23	Staff Augmentation; FDACS PALM Readiness Team, CCN	04/2025 - Continuing to Monitor	
Technology Data	FDACS is assuming that interface testing between PALM and enterprise partners/third parties will be completed on schedule and that suitable batch scheduling between PALM and enterprise partners/third parties will be established. Deviation from those outcomes might impact downstream project activities including agency interface testing and user acceptance testing.	Logged	10/22/24	FDACS PALM Readiness Team, PALM/impacted Agency Business System end users.	04/2025 - Continuing to Monitor	

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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DACS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Alan Edwards	alan.edwards@fdacs.gov	05/01/25
January - February 2025	Alan Edwards	alan.edwards@fdacs.gov	03/03/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 96.86%

Submitted On Time = 29

Submitted Late = 5

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 93.33%


Submitted On Time = 54

Submitted Late = 12

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 98.86%

Submitted Complete = 33

Submitted Incomplete = 0

Completed After Submission = 2

Other Task Completeness



Other Task Completeness:

Score = 100.00%

Submitted Complete = 42

Submitted Incomplete = 0

Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 10

Duplicate Filled Role = 6

Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/09/25	Versa will produce direct interface API002. Testing will be managed under PALM Task 576.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/29/25	The final UAT Testing Plan has been drafted and reviewed internally by DBPR Project Directors.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/30/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		DBPR will be testing 1 interface - API002 out of Versa Regulation		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Need to add DMS-owned location(s) under PALM Task 657	Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25	Reporting on January and February 2025	Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/25/25	Required SpeedKey changes added to comments and highlighted in blue for subsequent configurations.	Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25	Reviewed with Director	Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25	Reviewed with Director. SpeedKey PYDREI0001 was requested to be DEACTIVATED. Resubmitted on 3/28/25.	Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/18/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25	Reporting on March and April 2025 New Risk, Issue, and Assumption Smartsheet(s)	Submission Complete	
Direct	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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.
<u>Implementation:</u> Planned Florida PALM End Users = 32 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 16	<u>Implementation:</u> Impacted Agency Business Processes = 117 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 0	<u>Implementation:</u> Business Systems Planned for Integration = 2 Planned Interfaces = 1 - Inbound Interfaces = 1 - Outbound Interfaces = 0	<u>Implementation:</u> Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

DBPR Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	03/27/25		Deployment/Cutover	If the deployment PALM occurs on 7/1/2026 as is now planned, working on bugs and other remedies as well as transition activities could interfere with Year End activities.	Increasing	6 (High/Medium)	Discuss with readiness coordinators and arrive at logistics that least impact Year End efforts	The original proposed implementation date o January 2026 was much better in terms o impact to Year End.
Open and Mitigating	02/19/25		Business Process Change	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Increasing	4 (Medium/Medium)	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	20250402 Crosswalk sessions are slated to begin in May 2025. 20250402 Crosswalk sessions are slated to begin in May 2025. 20250326 Crosswalk session dates have been pushed out in the draft of the re-baseline Project Schedule.
Open and Mitigating	04/23/25		Business Process Change	If PALM (The Project) does not take into account Statutory requirements surrounding Financial Statement preparation and completion into their decision making (particularly Year end activities in 2026 around deployment time), then violations of statutes from a timing perspective may result	Stable	4 (Medium/Medium)	Share Risk with RC Team and ensure this is presented to the PALM Project decision-makers so Statutes can be incorporated into planning and subsequent Decisions that impact the Agencies.	Newly opened Risk.
Open and Mitigating	04/09/24		Training	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Decreasing	3 (High/Low)	Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners. Create visual aids, mapping documents, and other PALM educational tools.	20250402 See Assumption #52 that addresses that detaile training Risks/Assumptions will be addressed within th Training Plan. 20250402 See Assumption #52 that addresses that detaile training Risks/Assumptions will be addressed within th Training Plan. 20250319 Progress or the Change tool (PALM Task 560) and training plan (PALM Task 568)

								has been made.
Open and Mitigating	05/31/24		Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Stable	3 (High/Low)	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250319 Changed Status from Decreasing to Stable.
Open and Mitigating	11/15/24		Deployment/Cutover	If DBPR does not have a cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.	Stable	3 (High/Low)	Create a Cutover Plan that identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	20250326 This is logged as a question for related FLAIR availability details on the DBPR Question Log maintained by the RC. 20250326 This is logged as a question for related FLAIR availability details on the DBPR Question Log maintained by the RC. 20250312 Changed Status from Increasing to Stable.
Open and Mitigating	01/13/25		User Acceptance Testing	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely, efficient, and successful completion of UAT	Stable	3 (High/Low)	Ensure that crosswalks, user stories, and flow detail diagrams are covered at a detail level. Ensure sources of data required to complete business processes (e.g. FLAIR@BPR, Reports, queries, etc) are identified for current processes so equivalents (when applicable) can be identified before test scripts are created.	Looking at Current-State processes to identify prerequisite items that will likely carry over to Future-State processes so that we can begin to identify certain details. Changed Status from Stable to Decreasing.
Open and Mitigating	01/13/25		Staffing/Resource Availability	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Increasing	3 (High/Low)	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	20250409 Per Decision #38, Versa Regulation testing will be managed under PALM Task 576 and PALM Task 561 can be closed. Desk-Checking Versa output files should help. 20250409 Per Decision #38, Versa Regulation testing will be managed under PALM Task 576 and PALM Task 561 can be closed. Desk-Checking Versa output files should help. 20250312 Escalated to Bureau Chief. We are lacking updates and information regarding Versa Regulation remediation. Despite the project extension, no additional time was granted for PALM Task 561.
Open and Mitigating	03/04/25		Staffing/Resource Availability	If DBPR IT has too many competing initiatives that prevents them from remediating Versa Regulation for PALM in time for UAT, then the required testing may not be completed in time for Go-Live	Increasing	3 (High/Low)	Provide DBPR IT with detailed and accurate specifications. Periodically check in with them for a status update and to see if they have any questions.	20250409 Per the revised Testing Timeline, desk check of direct interface output from ABS Versa Regulation should be completed by July 202 and interface testing with PALM begins in August 2025. 20250326 A meeting with DBPR IT has been requested by the Director. 20250312 Changed Status from New to Increasing.
Open and Mitigating	04/09/24		Business Process Change	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Decreasing	2 (Medium/Low)	Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250319 Changed Priority from High (H) to Medium (M).
Open and Mitigating	04/18/24		Business Process Change	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows	Decreasing	2 (Medium/Low)	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, flow diagrams, screen mockups from Design Workshops, FLAIR Transactions to PALM	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed

				and that could lead to incomplete workflows			Equivalents Crosswalk, etc.)	training Risks/Assumptions will be addressed within the Training Plan. 20250305 Changed Priority from High (H) to Medium (M).
Open and Mitigating	04/23/24		Agency Business System	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live	Decreasing	2 (Medium/Low)	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	20250416 Changed Priority from Medium (M) to Low (L). 20250416 Changed Priority from Medium (M) to Low (L). 20250305 Changed Priority from High (H) to Medium (M).
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Decreasing	2 (Medium/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	Changed Tolerance from Low (L) to Medium (M).
Open and Mitigating	08/19/24		User Acceptance Testing	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Decreasing	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	20250409 All Current-State processes that equate to PALM Future-State processes that include email notifications have been identified and the test cases are being updated.
Open and Mitigating	08/19/24		Role Mapping	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Decreasing	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	20250402 The Business Process Tracking spreadsheet has a column for required roles that should be populated.

DBPR Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DBPR Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR stakeholders	None	
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	All DBPR stakeholders	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository. Currently in the process of re-baselining the Project Schedule per the 6-month extension.	
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan (Smartsheet).	Logged	04/01/24	Project Manager Organizational Change Manager DBPR Sponsor	Updates are current through April 2025.	
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR division/office staff	Year End and other situations could be exceptions that will need to be managed.	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR stakeholders	The Executive Steering Committee agreed to a 6-month extension.	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR division/office staff	The DBPR staff remain active and engaged	
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR division/office staff	Guidance and direction will be provided by the Project Manager.	
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	DBPR Executive Leadership Project Manager	None	
People Processes Technology Data	The Department will remediate all agency business systems (ABS) impacted by Florida PALM that cannot be retired.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Versa Regulation is the only ABS being remediated. FLAIR@BPR will be replaced by Agency Query Writer and reports in PALM.	
People Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producing 2 other files to be imported into PALM, but those remain upload spreadsheets (ARI010 and IUI001).	
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM. Note: A snapshot of FLAIR@BPR data query tool will be retained and available for subsequent use of historical data only.	Logged	04/01/24	All DBPR stakeholders	However, a snapshot of FLAIR@BPR that will not be kept current will be available for historical reference. Also, there will be a period of time where neither FLAIR nor PALM will be available. Details are not known at this time.	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Logged	04/01/24	All DBPR stakeholders	There are some business processes that DBPR will perform that have no component in PALM but will still need to be completed. These will be tested as part of UAT. All identified current-state business processes serve as the starting point for what will be tested during UAT.	
Processes	The Florida PALM Project will be able to provide timely and	Logged	04/01/24	All DBPR stakeholders	Changes to business processes should be minimal. Organizational	

Technology Data	complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.				Change Manager leading sessions with Agency staff to become familiar with PALM business processes.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	The Project Schedule is updated and managed on a daily basis. Snapshots are captured on a weekly basis. Organizational Change Manager leading sessions with Agency staff to become familiar with PALM business processes and to identify any required changes.
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Versa Regulation (DBPR licensing ABS) remediation continues. One PALM Spreadsheet Upload has been completed and one more is in the works. One (1) direct interface from Versa to PALM (API002) is being developed.
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	UAT test scripts are being assigned to agency SMEs that will perform the functions in production as part of UAT. Details can be found in the UAT Testing Plan per PALM Task 536.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	DBPR Sponsor Project Manager Organizational Change Manager	Consultant resources are currently under contract through June of 2025.
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	PALM training Tasks are under way. In addition, PALM Task 568 addresses a training plan. Training for PALM by the project for SMEs will be conducted at the beginning of UAT in August of 2025.
People Processes Technology Data	The Department will support data cleansing. PALM configuration and conversion tasks will facilitate this cleansing.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	DBPR was engaged in the required data cleansing. Additional cleansing is still required for SpeedKeys, Organizations, and a couple of other data elements.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Scheduled PALM Tasks associated with configuration and conversion were completed. Additional opportunities to modify configured data and data to be converted will be provided by the Project.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	These are available on the PALM website.
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	11/06/24	DBPR Revenue staff Project Manager Finance & Accounting Bureau Chief DBPR Sponsor	All PALM CMS processes that include a FLAIR component, were revisited to determine if the FLAIR component (because FLAIR is going away) needs to be replaced or accounted for. It was determined that nothing special needs to be done to account for FLAIR going away.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Logged	05/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Placeholder test scripts have been created and those that do not need to be tested because they are obsolete have been flagged as such.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	Received confirmation we will only have the UAT environment, which will be available starting in August 2025.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Logged	06/14/24	Project Manager Business Analyst	Has been included in the UAT Testing Plan (Task 536)
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Logged	06/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	Future-State Business Processes are currently being reviewed with DBPR staff. Only 10 videos are currently available and availability of the remainder of the Business Processes has been presented to the RC.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	This information is being captured as part of User Story development.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	These will be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios and assistance with related test scripts.

				Finance & Accounting Bureau Chief Project Sponsor	
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	The PMP quarterly review was completed as scheduled. The second quarterly review/update is currently under way.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Logged	08/16/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Reports are being reviewed and validated as they become available for analysis.
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	Only one direct interface is being developed for DBPR ABSs at this time (API002). PALM Tasks related to establishing interface network connectivity have been addressed.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Some data will be provided in the form of reports, but queries can be run whenever needed. Timing of batch cycles will need to be known and considered.
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	PALM spreadsheet upload ARI010 has been finalized and turned over to DBPR IT for remediation. FGCC is responsible for working with DBPR IT for any FGCC specific details that need to be applied to Versa Regulation remediation outputs.
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Current-State to Future-State Business Processes were rearranged, rescheduled, with revised tasks with the input from the OCM Lead. They are still behind schedule.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	The PALM Technical Team is limiting the Payment Method values that will be stored in PALM. The Remittance Type values included in the QLIK report should be sufficient to obtain the necessary detail when needed considering the values are limited in the ARI010 output from Versa.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Logged	12/04/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Future-State crosswalks have been rescheduled and are no longer behind in accordance with the Project Schedule. They are slated to begin May 2025.
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create/enhance all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Future-State crosswalks are currently on pause. User Stories are being used to capture a significant portion of the necessary details.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Logged	12/18/24	Project Manager Business Analyst	STMS continues to provide monthly updates that are very helpful. MFMP has held sessions as well. Requested information from RC at monthly Touchpoint regarding Works and People First.
People Processes Technology Data	All appropriate supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR division/office staff	Complete addresses must be available in PALM to support mailing of refunds.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Review sessions have been scheduled once a month and are being conducted with the Microsoft Project comprehensive version of the Schedule.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Task 560 is due by 5/2/25 so the business process details will need to available 1-2 days prior to that.
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	Periodic updates are being requested from DBPR IT as to where they stand with remediation progress.
People	The new Business Analyst will be onboarded and available to attend PALM Training during the initial leg of UAT in August 2025.	Logged	03/19/25	Project Manager Business Analyst	Being in on the PALM portion of UAT will put the BA in a better position to write accurate test scripts
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	This is related to PALM Task 568 and Risk Management pertaining to training. In the How to Create a Traing Plan training provided FL Digital Services and Tidal Basin on 4/2/25, including training Risks in Training Plan was one suggestion. The Risk Register already contains high-level PALM education and training Risks.

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

DBPR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25

RW Task Timeliness

Direct Impact Task Timeliness




Direct Impact Task Timeliness:

Score = 91.58%

- Submitted On Time = 22
- Submitted Late = 15
- Pending Resubmission = 0

Other Task Timeliness




Other Task Timeliness:

Score = 83.28%

- Submitted On Time = 33
- Submitted Late = 26
- Pending Resubmission = 8

RW Task Completeness

Direct Impact Task Completeness




Direct Task Completeness:

Score = 87.84%

- Submitted Complete = 28
- Submitted Incomplete = 2
- Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 89.12%

- Submitted Complete = 23
- Submitted Incomplete = 0
- Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

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

The dials above 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.

RW Tasks - Completed or Open Items											
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date	
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.			
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/16/25		Submission Complete		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	75% - Consolidating/Inputting Information for Submission		Courtney - Business Areas (FSS, HR, Budget, Revenue, FCO)			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission		Courtney Howell			
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/26/25		Not Submitted		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/13/25		Submission Complete	03/14/25	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/31/25	Matt Brock, Rick Owen	Submission Complete		
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/31/25	Matt Brock, Rick Owen	Submission Complete		
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/31/25	Matt Brock, Rick Owen	Submission Complete		
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/31/25	Matt Brock, Rick Owen	Submission Complete		
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/28/25		Submission Incomplete	05/05/25	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/23/25		Submission Complete		
N/A	N/A	599	Submit Bimonthly Agency Readiness	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission		

		Status Report						Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	50% - In Progress			
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering			

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.
<u>Implementation:</u> Planned Florida PALM End Users = 210 • Business Process Groupings = 12/13 Identified Subject Matter Experts = 33	<u>Implementation:</u> Impacted Agency Business Processes = 52 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 16	<u>Implementation:</u> Business Systems Planned for Integration = 23 Planned Interfaces = 33 - Inbound Interfaces = 9 - Outbound Interfaces = 24	<u>Implementation:</u> Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DCF Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	05/06/25		Agency Business System Business Process Change Training User Acceptance Testing	Risk of not completing system development/remediation by deadline for interface testing approval, potentially resulting in exclusion from PALM end-to-end testing at a future date.	Increasing	6 (Medium/High)	Avoid. Establish aggressive development milestones Increase development resources Weekly progress monitoring Early interface testing preparation Prioritize critical system components Regular communication with PALM project team Mock up files as if they were coming from our apps, for completion of April/May testing	None
Open and Mitigating	05/06/25		Staffing/Resource Availability Training User Acceptance Testing	Out-of-balance prioritization of PALM with other business processes	Increasing	6 (Medium/High)	Mitigate. Work with business units to develop work management plan to ensure adequate distribution of personnel resources across competing priorities. Involve SMEs frequently in discussion of interface systems to ensure mapping of existing FLAIR chartfields to PALM chartfields. Engage Agency Liaison and Sponsor as necessary to set priorities for business system managers	None
Open and Mitigating	05/06/25		Business Process Change Deployment/Cutover Post Implementation	If encumbrances are not accomplished in MFMP then sufficient budget may not be available for purchase	Increasing	6 (High/Medium)	Mitigate. Provide training and job guides to teach that budget check must be conducted before	None

				even though purchase order is approved.			seeking purchase order approval.	
Open and Mitigating	05/06/25		Staffing/Resource Availability Training	Operational Staff Turnover - General	Stable	4 (Medium/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None
Open and Mitigating	05/06/25		Agency Business System Business Process Change Training User Acceptance Testing	FL PALM's inclusion of Speed Keys, particularly with Enterprise Applications, can support current business processes that utilize Expansion Option with front end processing.	Stable	4 (Medium/Medium)	Mitigate. Adjust documentation where needed. If Speed Keys are not adopted such that they can support "front end processing" for "splits" then a new application must be made to act as a front end to conduct those operations.	None
Open and Mitigating	05/06/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Improper Data Cleansing Activities	Increasing	4 (Medium/Medium)	Avoid. Continue data cleansing activities, otherwise UAT testing with the data sets will produce unexpected and inaccurate results.	None
Open and Mitigating	05/06/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Improper Current State Analysis	Stable	4 (Medium/Medium)	Mitigate. Due to change in implementation strategy and change in stakeholders, avoiding inconsistencies in current state analysis is unlikely. Remediation must take place when and where appropriate.	None
Open and Mitigating	05/06/25		Deployment/Cutover Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Incomplete/Improper UAT planning and execution	Decreasing	4 (Medium/Medium)	Avoid. Build user stories that accurately represent current business processes so that users are aware which processes to test against PALM and enterprise systems. Ensure a time management plan for SMEs so that a testing/work balance can be achieved.	None
Open and Monitoring	05/06/25		Business Process Change Deployment/Cutover Post Implementation	Federal Grant System Integration Approval Requirements	Increasing	4 (Medium/Medium)	Mitigate. Early engagement with federal stakeholders Detailed documentation of PALM-GRANTS interface specifications Parallel testing of both systems during transition Regular status updates to federal authorities Contingency planning for extended approval timeline	None
Open and Monitoring	05/06/25		Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Delays and negative impacts may result if adequate training materials and information are not made available by the Florida PALM Project Team.	Stable	4 (Medium/Medium)	Monitor. Continue to request materials and information from PALM. Work with SMEs and other agencies to develop comprehensive training plan independent of PALM Project team.	None
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Manager/Agency Liaison Turnover	Stable	2 (Medium/Low)	Mitigate. Ensure project approach and status are well-documented.	None
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Staff Turnover	Stable	2 (Medium/Low)	Accept. Ensure project staff responsibilities are well defined and documentation is up-to-date	None
Open and Mitigating	05/06/25		Agency Business System Business Process Change Staffing/Resource Availability Training User Acceptance Testing	Operational Management Turnover - General	Stable	2 (Medium/Low)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None
Open and Mitigating	05/06/25		Staffing/Resource Availability	Department Leadership Turnover	Decreasing	2 (Medium/Low)	Accept. Monitor political developments as they unfold, and adapt as needed.	None
Open and Mitigating	05/06/25		Staffing/Resource Availability	Financial Leadership Distraction by competing priorities	Decreasing	2 (Medium/Low)	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.	None
Open and Monitoring	05/06/25		Staffing/Resource Availability Training User Acceptance Testing	Not enough time for training before go live.	Stable	2 (Medium/Low)	Monitor. Continue to promote the importance of prioritizing the PALM transition at a level equal to or greater than performance of legacy business processes.	None
Open and Mitigating	05/06/25		Agency Business System	Potential for inaccurate or inconsistent mapping	Stable	2 (Medium/Low)	Mitigate. Conduct a	None

			Business Process Change Conversion/Configuration Deployment/Cutover User Acceptance Testing	of organizational codes during transition from FLAIR to PALM, affecting financial tracking, reporting, and departmental accountability.			Comprehensive audit of existing FLAIR org codes. Documentation of mapping logic and decisions. Stakeholder validation of crosswalk methodology	
Open and Mitigating	05/06/25		Staffing/Resource Availability	Project Sponsor Turnover	Stable	1 (Low/Low)	Ensure sponsor commitments and operational plans are well documented and rationale is well established.	None
Open and Mitigating	05/06/25		Staffing/Resource Availability Training	Operational Staff Turnover - Key Personnel	Stable	1 (Low/Low)	Accept. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None
Open and Monitoring	05/06/25		Business Process Change Interface Deployment/Cutover Training User Acceptance Testing	Cutover date from FLAIR to PALM not formally established	Stable	1 (Low/Low)	Monitor. Continue to engage with PALM contract to obtain meaningful and timely schedule for cutover. Establish "roughed-in" and anticipated cutover date and build agency plan around this expectation.	None

DCF Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/08/25		Critical - Impacts the ability to process	Agency Business System Business Process Change Conversion/Configuration Deployment/Cutover	Cost Allocation Not Available in PALM. (See attachments)	On going pending SpeedKey and other conversation with Enterprise applications		Carried forward
Open	05/08/25		Critical - Impacts the ability to process	Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover	DCF's journal distribution process	As DCF is moving forward with reviewing and updating processes, we have several concerns related to the journal distributions which is a critical business process in DCF. We have sent the related concerns to the PALM team, conversations are on-going. Several of our updates are dependent on the concerns being addressed.		Carried forward
Open	05/08/25		Critical - Impacts the ability to process	Agency Business System Business Process Change Interface Conversion/Configuration	Budget Funding Process since PTAXX cannot be loaded in FACTS.	Develop alternate budgeting process for TANF processing that estimates and budgets revenue per year.		Carried forward
Open	05/08/25		High - Impacts the ability to process	Business Process Change Interface Role Mapping Staffing/Resource Availability Training User Acceptance Testing	MFMP to PALM interface will not support more than 100 splits per invoice line item, some of our Collocated expenditures are expected to split to at least 500 lines, directly impacting our ability to utilize that enterprise business system.	Restructure invoices and implement manual processing in the short term Develop intermediate processing systems and request interface enhancements in the medium term System integration improvements and potential accounting structure redesign for the long term		Carried forward
Open	05/08/25		High - Impacts the ability to process	Deployment/Cutover Staffing/Resource Availability Training User Acceptance Testing	Agency often experiences delays between requests for meetings and other communication with various PALM teams and acknowledgement of these requests.	Continue to submit requests and follow-up with RCs to ensure message is received and appropriate prioritization occurs.		Carried forward
Open	05/08/25		High - Impacts the ability to process	Conversion/Configuration Staffing/Resource Availability Training	Staffing challenges in General Services are presenting difficulties with readiness workplan tasks related to assets, leading to voids in data migration.	Meet with impacted stakeholders to create strategy for resolving personnel and training shortfalls.		Carried forward

DCF Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	

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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DCF Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Chad Barrett	chad.barrett@myffamilies.com	05/12/25
January - February 2025	Chad Barrett	chad.barrett@myffamilies.com	03/13/25

- [Dashboard Snapshots](#)
- [Knowledge Center](#)
- [Florida PALM Workbook for DEM](#)
- [Readiness Workplan](#)

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

Jeremy Smith

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Needed

Agency Reported

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

DEM Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	05/21/25		Business Process Change Conversion/Configurator	Grant LTD balances	Stable	6 (Medium/High)	The FDEM Finance team is building it's reporting effectiveness to increase the agility of building reporting structures to the necessary level to meet this challenge	Added to new Risk Register
Open and Mitigating	05/21/25		Interface Post Implementation	Interface need fulfillment	Stable	6 (High/Medium)	DEMES development assets have been onboarded to the PALM project to project any issues that may arise and attempt to port all elements of PALM on top of the FLAIR structure	Added to new Risk Register
Open and Monitoring	05/21/25		Interface Identity Provider (IdP)	EOG/DEM Interface relationship	Stable	2 (Medium/Low)	Working directly with Kelley Sasso in EOG to put process agreements in place.	Added to new Risk Register
Open and Monitoring	05/21/25		Agency Business System Business Process Change	Payroll Process	Increasing	2 (Medium/Low)	Highlighting Payroll within UAT as an important module with downstream impact so we can quickly close or escalate this risk	Added to new Risk Register
Open and Mitigating	05/21/25		Agency Business System Business Process Change	PA Payment Process	Increasing	1 (Low/Low)	Will socialize with Florida PA users and then the poc for those users to ensure the appropriate interface conversation is had	Added to new Risk Register
Open and Mitigating	05/21/25		Conversion/Configurator	Fund Data Freshness	Stable	1 (Low/Low)	The budget team in the finance bureau has been tasked with clearing stale funds/project ids out of our system	Added to new Risk Register
Open and Monitoring	05/21/25		Post Implementation Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Need PALM Promoters	Stable	1 (Low/Low)	Communication about PALM including changes and updates is ongoing, frequent and positively positioned	Added to new Risk Register
Open and Monitoring	05/21/25		Deployment/Cutover Post Implementation User Acceptance Testing	FLAIR to PALM shutdown around Year End	Stable	1 (Low/Low)	Request more information from Felecia	Added to new Risk Register
Open and Monitoring	05/21/25		Conversion/Configurator	FACTS Contract Values	Stable	1 (Low/Low)	Review Mock Conversion 2 to see if changes were effective	New, added to support issue

DEM Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/12/25		High - Impacts the ability	Conversion/Configurator	CSFA/ALN Value Recognition	Discuss the specific expectations with a technical contact Need to Review Mock Conversion 2 to see if changes were effective	06/05/25	Added to new Issue Column

DEM Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
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	05/12/25	FDEM	Moved to new Assumptions list
Technology Data	Connecting to interfaces within PALM will be supported by a request process that is not difficult to navigate AFTER launch	Logged	05/12/25	DEMES; FDEM IT; Sialom Development Team	Moved to new Assumptions list
Processes	There will be a process to change, add, remove speedkeys after launch. The knowledge center is up to date on exceptions and speedkey expectations.	Logged	05/12/25	Finance;	Moved to new Assumptions list
Data	The PALM Data Warehouse will be accessible by appropriate agency staff for self service reporting	Logged	05/12/25	DEMES; FDEM IT; Sialom Development Team; Finance	Moved to new Assumptions list
Processes Data	Project information and OA1 & 2 can be added to PALM if needed for data conversion post Configuration	Logged	05/12/25	Finance	Moved to new Assumptions list
Processes	Budget Year Close will be either done in FLAIR or easily managed in PALM post cutover 6/1/26	Logged	05/12/25	Finance	Moved to new Assumptions list
Processes Data	Grant LTD balances can be represented in the PALM General Ledger with representative entries balanced with a reporting element, and users will be able to access this information in the PALM Data Warehouse	Logged	05/12/25	Finance	New

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.

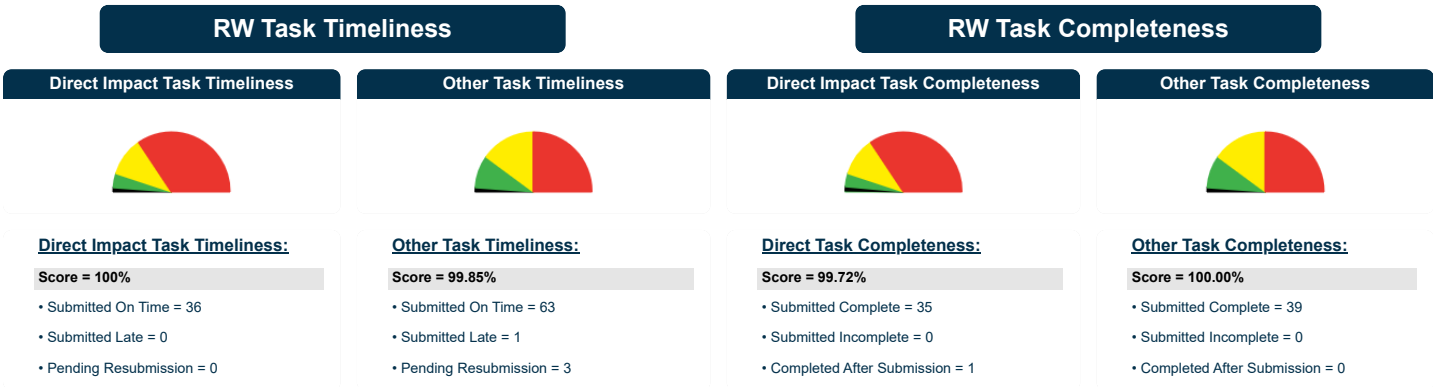
Agency Sponsor Name: *

☐ Confirm *

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DEM Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	05/12/25
January - February 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	03/06/25



The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 21

Duplicate Filled Role = 0

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission		DEP's current remediation schedule is prioritized based on the agency business system (ABS) tier. DEP's ABS remediation schedule continues to be adjusted to allow for interface updates posted to the knowledge center. Remediation is anticipated to be completed prior to PALM interface testing and UAT.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		DEP's current remediation schedule is prioritized based on the agency business system (ABS) tier. DEP's ABS remediation schedule continues to be adjusted to allow for interface updates posted to the knowledge center. Remediation is anticipated to be completed prior to PALM interface testing and UAT.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		DEP's current remediation schedule is prioritized based on the agency business system (ABS) tier. DEP's ABS remediation schedule continues to be adjusted to allow for interface updates posted to the knowledge center. Remediation is anticipated to be completed prior to PALM interface testing and UAT.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	04/25/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/13/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission	

N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25		Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/09/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
Implementation: Planned Florida PALM End Users = 102 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 26	Implementation: Impacted Agency Business Processes = 268 • Related Business Process Groupings = 13/13 • Planned Spreadsheet Uploads = 5	Implementation: Business Systems Planned for Integration = 31 Planned Interfaces = 21 - Inbound Interfaces = 4 - Outbound Interfaces = 17	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DEP Risks								
status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	08/31/23		Agency Business System Business Process Change Conversion/Configuration Post Implementation Role Mapping Staffing/Resource Availability Training User Acceptance Testing	Loss of knowledge due to staff turnover and time to get added staff trained to meet expectations	Increasing	9 (High/High)	Ensure job-specific processes are properly documented, staff are cross trained and backups are trained on processes.	Agency is continuing to fill positions as they become vacant, however vacancies are requiring multiple postings due to the lack of candidates and experience within the application pool.
Open and Monitoring	11/04/24		Agency Business System Interface Conversion/Configuration Staffing/Resource Availability Training User Acceptance Testing	Timeline for ABS system testing and PALM UAT	Stable	9 (High/High)	Continuing to monitor remediation progress. Remediation is anticipated to complete in advance of UAT start date.	Tier 1 and Tier 2 ABS testing efforts are ongoing. Tier 3 Remediation is in progress.
Open and Mitigating	11/20/24		Agency Business System Business Process Change Interface Conversion/Configuration User Acceptance Testing	PALM data availability for ABS testing of remediated applications	Increasing	6 (High/Medium)	DEP will establish a data strategy for testing based on the mock conversion and configuration data submitted to PALM. Additional mock files and data will have to be created where PALM does not have planned conversions. Sample test data will be created by using FLAIR data files mapped to PALM	Agency is continuing to improve its test data design efforts and building test scenarios for specific data required for testing with mock PALM data

							values. DEP will also establish testing scenarios and cases to ensure that transactions are posted correctly to the new Chart of Accounts and verifiable totals possible for new and old transactions based on reporting.	
Open and Monitoring	11/20/24		Agency Business System Business Process Change Interface Conversion/Configuration Post Implementation Staffing/Resource Availability User Acceptance Testing	Availability of reports through PALM	Stable	6 (High/Medium)	DEP is monitoring changes to PALM reports through the knowledge center. DEP is identifying critical reports that PALM will not provide or may be provided in the data warehouse. These reports will be updated in DEP's reporting tool due to uncertainty of the PALM DW/BI.	Agency continues to monitor changes to PALM reports through the knowledge center.

DEP Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DEP Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	

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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DEP Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	05/09/25
January - February 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	03/10/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for DFS](#)
[Readiness Workplan](#)

DFS Status Report Dashboard

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

Reporting Period

March - April 2025

Agency Sponsor

Scott Fennell

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 99.74%

Submitted On Time = 36

Submitted Late = 1

Pending Resubmission = 0

Other Task Timeliness:

Score = 89.57%

Submitted On Time = 55

Submitted Late = 12

Pending Resubmission = 0

Direct Task Completeness:

Score = 96.49%

Submitted Complete = 32

Submitted Incomplete = 0

Completed After Submission = 5

Other Task Completeness:

Score = 98.54%

Submitted Complete = 40

Submitted Incomplete = 0

Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

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

The dials above 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.

RW Tasks - Completed or Open Items											
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/21/25	Build will not start until design is complete based on all applicable segments. Changes to IUI002 and IUI001 on 3/13/25 impacted design and build activity for 3 systems. Differences in IUI002 sample data provided and a recent question response on IU Transaction Id values impacting design and build activity for 1 system. As of Closing of this task, 2 systems and 1 new 3rd party system are still in progress using Segment IV interfaces. These will be tracked as part of task 576.	Submission Complete		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/01/25		Submission Complete		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission					
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25		Submission Complete		
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Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25		Submission Complete		
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25		Submission Complete		
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25		Submission Complete		
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete	05/01/25	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete		
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/09/25		Submission Complete		
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/09/25				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25						

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.
Implementation: Planned Florida PALM End Users = 355 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 45	Implementation: Impacted Agency Business Processes = 489 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 1	Implementation: Business Systems Planned for Integration = 21 Planned Interfaces = 45 - Inbound Interfaces = 15 - Outbound Interfaces = 30	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

DFS Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	04/17/25		Conversion/Configuration Training User Acceptance Testing	ENTERPRISE A&A - Conversion and Data Validation:	Increasing	9 (High/High)	<ul style="list-style-type: none"> A&A will work closely with the Project to understand where agencies need support and additional guidance in understanding their agency's FLAIR data. A&A will provide guidance to agencies to help them understand the critical things to consider and evaluate for conversion. A&A will meet with agencies through workshops or one-on-one sessions to further support agencies in cleaning up their data in preparation for conversion. Closely evaluate mock conversions results. 	This risk item has just been approved and logged in the month of April.
Open and Monitoring	02/19/24		Staffing/Resource Availability	CCN - Potential loss of CCN resources.	Stable	9 (High/High)	<ul style="list-style-type: none"> Create a knowledge base of CCN operational processes and procedures; develop training methods to facilitate knowledge transfer; and provide cross-training among CCN members where feasible. Use of dedicated back-up CCN Liaisons will aid in the short-term continuity. 	Monitoring
Open and Monitoring	10/20/23		Deployment/Cutover Staffing/Resource Availability	ENTERPRISE A&A - Project Timeline.	Stable	9 (High/High)	<ul style="list-style-type: none"> Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations. Retain our critical staff 	Monitoring

							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.	
							<ul style="list-style-type: none">• 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.• A&A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY.	
Open and Monitoring	10/11/23		Staffing/Resource Availability	ENTERPRISE A&A - Resource Impacts.	Stable	9 (High/High)	<ul style="list-style-type: none">• Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities.• 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.• Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team.• Work with Human Resources to properly document team members who should be classified as SES staff.• 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.	Monitoring
Open and Monitoring	01/25/24		Deployment/Cutover	TREASURY - Outstanding warrants at cutover	Stable	6 (High/Medium)	<ul style="list-style-type: none">• Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants.• Potential solutions being discussed between PALM and Treasury including the possibility that warrants would be maintained in FLAIR and concurrently canceled and reissued in PALM while maintaining warrant number. Note that solution is pending approval from Treasury.	Monitoring - Changed dates to Jun 2026 and July 2026.
Open and Monitoring	12/13/23		Interface Conversion/Configuration	TREASURY - Concentration account	Increasing	6 (High/Medium)	<ul style="list-style-type: none">• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.• The current concentration account agreement, Contract #TR201, has a 6-month extension available as permitted in Section 287.057, F.S. if additional time is needed. Treasury and OPCS will work together to implement the extension when appropriate.• Stay in close communications with Edward Nabong within	Monitoring

							OPCS on the vendor negotiation status. Edward is the sole point of contact for the ongoing ITN, and all communications must be directed specifically to him. If negotiations not concluded before December 2025, DFS will extend our contract with existing financial institution in 6-month increments.	
Open and Monitoring	10/20/23		Agency Business System Interface User Acceptance Testing	OIT/ABS - Reduced Testing Window	Stable	6 (High/Medium)	<ul style="list-style-type: none"> • 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. • 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. 	Monitoring
Open and Monitoring	10/11/23		Deployment/Cutover Staffing/Resource Availability Training	ENTERPRISE A&A - Planning.	Stable	6 (High/Medium)	<ul style="list-style-type: none"> • Continue to collaborate with the Florida PALM Project and seek resources through staff aug. additional FTE or contracts as needs are discovered. • Cutover planning sessions have been scheduled for later in May 2025 	Monitoring
Open and Monitoring	12/13/23		Business Process Change Conversion/Configuration	TREASURY - CMIA	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered. 	Monitoring
Open and Mitigating	02/27/24		Agency Business System Deployment/Cutover User Acceptance Testing	OIT/ABS - Third Party Vendors	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Communicate the Florida PALM timelines with third-party vendors. • Provide information and advisory support to the functional area(s) related to remediation activities and timelines. • Provide advisory support if needed related to interfaces, interface field mapping, and possible functional changes. 	Actively mitigating
Open and Mitigating	10/20/23		Agency Business System Staffing/Resource Availability	OIT/ABS - Resource Impacts.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline. • Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration. 	Actively mitigating
Open and Monitoring	10/11/23		Business Process Change Deployment/Cutover Training	ENTERPRISE A&A - Process Changes.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Prepare staff through regular change management engagements. • Perform knowledge transfer on why things are done so we can ensure better understanding of future processes. • 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. • Monitor staffs' engagement. • Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps. • Review organizational charts and identify succession planning or 	Monitoring

							knowledge transfers for known gaps.	
							<ul style="list-style-type: none"> • A&A has contracted with a People Soft experienced resource to help with implementation activities, including identifying staffing model changes and process changes. 	
Open and Monitoring	10/11/23		Deployment/Cutover Staffing/Resource Availability	ENTERPRISE A&A - Risk of External Impacts on Business Processes.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff. • A&A OFFE team make outreach with agencies to determine training needs for skills that will be needed in Florida PALM users. • Participate with all FFMS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon. • Assist agencies with readiness tasks such as data analysis and cleansing. • Develop contingency plans for agencies that are not prepared for Florida PALM implementation. • Monitor activities, changes in rules and regulations, and agencies competencies. • Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible. • A&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. 	Monitoring
Open and Monitoring	10/08/24		Agency Business System Business Process Change Interface User Acceptance Testing	ENTERPRISE A&A - ABS Testing.	Stable	4 (Medium/Medium)	<ul style="list-style-type: none"> • Identify all enterprise business systems that will need to be tested. • Work with Division/Office management to allow dedicated technical and functional resources to be available for enterprise business systems testing efforts when the UAT timeline is released. • We plan to work through the CCN Network with other agencies on planning and collaboration that needs to happen for those cross agencies testing scenarios. 	Monitoring

DFS Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DFS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
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	Still Valid
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	Still Valid
Technology	Based on the Florida PALM implementation timeline established with the execution of Amendment #12, the Go-Live date for the Florida PALM solution is expected to occur in July 2026.	Logged	03/31/25	Agency Business Systems	Still Valid

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

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DFS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Scott Fennell	scott.fennell@myfloridacfo.com	05/09/25
January - February 2025	Scott Fennell	scott.fennell@myfloridacfo.com	03/06/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.88%

Submitted On Time = 27

Submitted Late = 5

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 86.71%


Submitted On Time = 47

Submitted Late = 20

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 90.63%

Submitted Complete = 25

Submitted Incomplete = 0

Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 98.86%

Submitted Complete = 41

Submitted Incomplete = 0

Completed After Submission = 3

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/22/25	Marking as complete. Remediation will continue to occur within Task 576.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/29/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/17/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25	Sponsor submitted confirmation 3/10/25.	Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	03/31/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/07/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/29/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/23/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	05/12/25
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	50% - In Progress				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 66

Business Process Groupings = 13/13

Identified Subject Matter Experts = 30

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 107

Related Business Process Groupings = 12/13

Planned Spreadsheet Uploads = 2

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 22

Planned Interfaces = 8

Inbound Interfaces = 1

Outbound Interfaces = 7

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

Commitment Control (KK)

Budget Allotments - Control Option = Option # 2 - Track with Budget

Account ChartField Tier Selection = Account Tier #1: Highest

Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-

Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Not Needed

Agency Reported

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

DJJ Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	10/28/24		Staffing/Resource Availability User Acceptance Testing	UAT/LBR Timing Conflict	Stable	6 (Medium/High)	When developing the testing schedule, the Budget Office will need to go first so that an appropriate amount of time is dedicated to both UAT and the LBR due 9/15/25; The agency's LBR schedule started earlier this year due to prepare for this.	Reviewed.
Open and Mitigating	12/03/24		Staffing/Resource Availability User Acceptance Testing	Separations of Qualified Employees - F&A	Increasing	6 (Medium/High)	Encourage SMEs to document and archive their job functions and business processes to allow for swift training and knowledge transfer; Continue to advertise to recruit for vacant positions; Continue to allow for management decisions that support personnel actions to retain qualified employees.	Reviewed.
Open and Mitigating	08/09/24		Conversion/Configuration	Data Cleansing Maintenance	Stable	6 (High/Medium)	Concerted and on-going effort required to ensure data cleansing completed accurately; biweekly meetings with bureaus to discuss ongoing data cleansing and/or process improvements efforts continue.	Reviewed.
Open and Monitoring	11/04/24		Staffing/Resource Availability User Acceptance Testing	Limited Staff for End-User UAT	Stable	6 (High/Medium)	Limited staff resources for business units during end user UAT due to competing priorities and vacant positions.	Reviewed.
Open and Monitoring	02/28/25		Staffing/Resource Availability User Acceptance Testing	Processing Backlog of Invoices	Stable	6 (High/Medium)	Monitoring plan is being discussed.	Reviewed.
Open and Mitigating	02/28/25		Business Process Change Post Implementation	Reliance on Florida PALM and Data Warehouse for Reporting Functionality	Stable	6 (High/Medium)	SMEs to work with Agency Liaison to ensure that all related financial reports and research information are documented and tested during UAT; Bureau staff will study the reports currently available in the Knowledge Center; PMO to stay abreast of changes and/or updates to reports and communicate major changes to pertinent bureaus.	Reviewed.
Open and Mitigating	12/13/24		Agency Business System Interface	Limited Availability of Interface Testing Sample Data	Stable	4 (Medium/Medium)	Test remediations with the sample data that has already been provided. Additionally, agency liaison(s) create agency-specific sample data to test in ABS'.	Reviewed.
Open and Monitoring	03/28/24		Conversion/Configuration	Inaccurate Completion of Project Tasks	Stable	3 (High/Low)	Submissions will be checked by another PALM	Reviewed.

							Administrator/Agency Liaison prior to submission to the Project; associated SME's and PALM administrators will be invited to attend task talks at the beginning of the task.	
Open and Monitoring	11/04/24		Staffing/Resource Availability Training User Acceptance Testing	Staff Involvement in UAT Preparation	Decreasing	3 (High/Low)	Continue to advertise to fill vacancies in a timely manner.	Reviewed.
Open and Monitoring	04/18/25		Agency Business System	Remediation of Axiom Pro	Stable	2 (Medium/Low)	Owner: F&A Monitoring: DJJ is waiting for Image API to analyze API031 and schedule a meeting prior to 5/31/25 for an update.	Reviewed.

DJJ Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DJJ Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Haye (F&A)	No changes to this assumption during this reporting period. This still remains an active assumption.	
People	All SMEs will be available to work on required PALM-tasks.	Logged	04/17/24	Bureau SMEs	No changes to this assumption during this reporting period. This still remains an active assumption.	
Technology	Software licenses will be available for PMO staff to manage the project.	Logged	04/17/24	Project Management Office	PM has not received the Software license for Microsoft Projects.	
People	There is a commitment from end users to the PALM Project.	Logged	04/23/24	All	Based on the results of the end-user survey, the End-User stakeholders are 53% committed. Additional action steps are in place to increase the commitment of the project within the agency.	
People Technology	PALM funding is maintained at the current level or greater allowing current BU-specific PALM administrators to be kept on staff.	Logged	04/23/24	PMO, F&A, General Services, Budget	DJJ anticipates receiving the same amount of funding to continue operations at the same level for FY2025-26.	
People Processes Data	There will be sufficient engagement from DJJ's SME's who are knowledgeable about agency business processes.	Logged	04/23/24	F&A, Budget, General Services, HR, BPCA, BCM	No changes to this assumption during this reporting period. This still remains an active assumption.	
People Processes Technology Data	The PALM team will provide sufficient and adequate guidance to DJJ.	Logged	04/23/24	F&A, Budget, General Services, HR, BPCA, BCM, PMO	No changes to this assumption during this reporting period. This still remains an active assumption.	
People	DJJ PMO can drive the implementation of the PALM Project with four team members.	Logged	12/03/24	PMO	PMO has been 50% staffed during this reporting period.	
Data	Unreconciled payroll warrants will not be included in the Outstanding Warrant Report (APR018).	Logged	04/21/25	HR	No changes to this assumption during this reporting period. This still remains an active assumption.	
Technology	Image API, the company responsible for remediating Axiom Pro, will have remediated Axiom Pro such that it will be available for agency testing in August 2025.	Logged	04/25/25	F&A	No changes to this assumption during this reporting period. This still remains an active assumption.	
People Technology	Cutover will be no longer than approximately 3 weeks.	Logged	04/30/25	Supplier payments	Awaiting more details on cutover.	
Technology	PALM will incorporate additional interfaces after Go-Live, if needed by DJJ.	Logged	05/01/25	IT, F&A	New assumption logged for this period.	
Technology Data	PALM will not alter the interfaces DJJ has selected.	Logged	05/01/25	IT	New assumption logged for this period.	
Data	If balances on purchase orders in AOD are different than what's in FLAIR, when encumbrance data is converted to PALM, AOD will update to reflect the FLAIR/PALM balances. As long as encumbrance balances are maintained in FLAIR, the full balances of the purchase orders from AOD will not be converted to PALM, potentially causing budget checking issues.	Logged	05/01/25	F&A, Budget, General Services	New assumption logged for this period.	
Data	We assume that all identified Florida PALM roles are included on the export from the PALM website.	Logged	05/05/25	Agency Liaison and SMEs	New assumption logged for this period.	
Data	We assume that all identified Florida PALM reports are included on the export from the PALM website.	Logged	05/05/25	Agency Liaison and SMEs	New assumption logged for this period.	
People Data	Role assignments provided by DJJ are assigned correctly prior to UAT.	Logged	05/02/25	UAT SMEs and SAMs	New assumption logged for this period.	
Processes	DFS A&A will provide agencies with new policies by the start of Florida PALM End User Acceptance Testing (UAT) in December. New policies will allow DJJ to adjust any agency specific test scripts.	Logged	05/08/25	All end users involved in UAT	New assumption logged for this period.	

Agency Sponsor Confirmation

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Agency Sponsor Name: *


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DJJ Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Heather DiGiacomo	heather.digiacomo@fldjj.gov	05/09/25
January - February 2025	Heather DiGiacomo	heather.digiacomo@fldjj.gov	03/10/25

RW Task Timeliness

Direct Impact Task Timeliness




Direct Impact Task Timeliness:

Score = 98.65%

• Submitted On Time = 33
• Submitted Late = 3
• Pending Resubmission = 0

Other Task Timeliness




Other Task Timeliness:

Score = 90.43%

• Submitted On Time = 55
• Submitted Late = 12
• Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness




Direct Task Completeness:

Score = 89.44%

• Submitted Complete = 22
• Submitted Incomplete = 1
• Completed After Submission = 13

Other Task Completeness



Other Task Completeness:

Score = 86.58%

• Submitted Complete = 25
• Submitted Incomplete = 0
• Completed After Submission = 13

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

• Unique Filled Role = 12
• Duplicate Filled Role = 10
• Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	05/07/25	The file format has been identified and provided to Business Unit for Remediation.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/17/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/04/25		Submission Complete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/26/25	3/7/25 RC: Update Mapping to Florida PALM Location Code missing for row 106. Guidance is to map to a default value, note in comments to add the needed value the next config iteration.	Submission Complete	03/17/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/06/25		Submission Incomplete	05/09/25
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/09/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/07/25			

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 26

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 10

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 67

• Related Business Process Groupings = 11/13

Planned Spreadsheet Uploads = 8

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 8

Planned Interfaces = 10

- Inbound Interfaces = 2

- Outbound Interfaces = 8

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

DLA Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	02/26/24		Staffing/Resource Availability	Loss of technical CNN participant	Increasing	9 (High/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	Position is still vacant. 04/23/2024 position is still vacant
Open and Mitigating	04/23/24		Business Process Change	Changes to project scope potentially impacts agency planned mitigation.	Increasing	9 (High/High)	Review BPM's for changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	Review continues 04/23/2024 this is a continuing risk.
Open and Mitigating	04/09/25		Agency Business System	DFS Single Pay Approval Impact on consumer restitution payments and Refunds.	Increasing	9 (High/High)	We need to revise ABS processes to include supplier records being added by DFS then being ingested by ABS which cases delay in payment processing.	New Risk
Open and Mitigating	04/30/25		Role Mapping	Segregation of responsibilities with a Florida PALM user role.	Increasing	6 (Medium/High)	We need to determine if this will be a training issue or if responsibilities will need to be shifted to HR for payroll related activities.	New Risk

DLA Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	04/23/24		Critical - Impacts the abil	Agency Business System	Need ability to make corrections to closed reporting period	Need a solution option	04/14/25	new issue moved from risk-I don't think this has a resolution. 04/23/2024 - still need to understand the transaction correction process in Florida PALM.
Open	11/12/24		Critical - Impacts the abil	Interface	No Single Payer Interface for VANext in PALM for remediation	Need a solution option from PALM.	04/14/25	New. 11/12/2024 - DLA anticipates the use of Single Payer for VANext individual claimants, consumer restitution and refunds. 12/20/2024-A&A has not set a policy on approval process. 2/18/2025 Agency provided response to DFS request for what we need single pay for on. DFS provided approval to use Single Payment vouchers for victim benefit claims that are generated through VANext on 04/24/2025.
Open	12/20/24		Critical - Impacts the abil	Conversion/Configuration	Approval seeking on batch upload to Import process for supporting documents	If there is no project solution it will require considerable staff effort to complete the supporting docs	04/14/25	12/20/2024- No resolution on supporting documents and A&A policy has not been set for support documents. 02/26/2025 It is still outstanding.
Open	02/18/25		Critical - Impacts the abil	Agency Business System	DFS approval to use single pay option for consumer restitution payments and refunds.	Need a solution option from PALM.	07/31/25	2/18/2025 Agency provided response to DFS request for what we need single pay for on. 04/24/2025 DFS did not address our request to use Single Payment Vouchers for consumer restitution and refunds. We have resubmitted the request.
Open	10/31/24		Critical - Impacts the abil	User Acceptance Testing	UAT scheduling conflict due to fiscal year transition.	Need PALM funding to support F&A consultants that will perform the duties of F&A FTEs during UAT.	04/01/25	Outstanding issue- 10/31/2024. It's a continuing concern-12/20/2024. 02/26/2025 We understand that there is a contract amendment to modify the dates but no official notification.

Open	04/09/25		Critical - Impacts the abil	Agency Business System	Manual payroll split for federal grants.	We are hopeful that the future tasks will allow us to rectify the issue	09/25/25	04/9/2025
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DLA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
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
People Processes Technology Data	Final build is complete and available for UAT and Interface Testing	Logged	12/20/24	Finance & accounting, VANExt, EGrants, SQL reporting	New

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Agency Sponsor Name: *

☐ Confirm *

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DLA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	05/09/25
January - February 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/07/25

- [Dashboard Snapshots](#)
- [Knowledge Center](#)
- [Florida PALM Workbook for DMA](#)
- [Readiness Workplan](#)

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

Col. Adam Curry

- Budget Allotments - Control Option =
Option # 2 - Track with Budget

- Outbound Interfaces = 3

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Not Needed

Agency Reported

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

DMA Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	02/24/25		Agency Business System Business Process Change	QuickBooks Replacement	Stable	2 (Medium/Low)	Must ensure that we test the system prior to go-live scheduled in Apr/May timeframe.	Continue to monitor

DMA Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	07/31/25		High - Impacts the ability	Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Start planning process for 2-3 week downtime of system when FLAIR converts to PALM	Continue to monitor	06/01/26	Continue to monitor
Open	02/28/25		Low - All impacts not liste	Agency Business System Business Process Change Training User Acceptance Testing	Lump sum payment made for multiple items that become Assets: a. FLAIR allows these payments to be unitized into Assets by the Asset tag and cost per item. b. Palm allows these payments to be unitized into Assets by dividing the total costs by the total assets averaging the costs per unit rather than by the true costs.	Continue to monitor	10/01/25	Continue to monitor
Open	02/28/25		Low - All impacts not liste	Agency Business System Business Process Change Interface Post Implementation Training User Acceptance Testing	FLAIR Pending table vs PALM staging table	Continue to monitor	10/01/25	Continue to monitor
Open	07/31/25		Low - All impacts not liste	Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Identity Provider (IdP) Post Implementation Staffing/Resource Availability Training User Acceptance Testing	Quickbooks replacement go-live will be prior to PALM go-live. Potential changes may occur in PALM which would require changes to be made to the Quickbooks program.	Continue to monitor	10/01/25	Continue to monitor

DMA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
Processes	Changing of ARRO file format	Logged	03/05/24	Agency has concern about potential file changes that will be required from ARRO without missing any bi-weekly payrolls.	Continue to monitor
People Processes Technology Data	A downtime plan for FLAIR will be in place prior to the conversion to PALM	Logged	07/31/25	All agency business systems	Continue to monitor

Agency Sponsor Confirmation

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Agency Sponsor Name: *

☐ Confirm *


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DMA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	COL Adam Curry	adam.m.curry.mil@army.mil	05/05/25
January - February 2025	COL Adam Curry	adam.m.curry.mil@army.mil	03/04/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.71%

Submitted On Time = 32

Submitted Late = 1

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.57%


Submitted On Time = 58

Submitted Late = 9

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 89.39%

Submitted Complete = 20

Submitted Incomplete = 0

Completed After Submission = 13

Other Task Completeness



Other Task Completeness:

Score = 92.14%

Submitted Complete = 36

Submitted Incomplete = 0

Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 7

Duplicate Filled Role = 6

Vacant Role = 1

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/26/25	March 14: Meetings with PALM tech team to finalize this task set for March 18 and 19. March 26: TRIRIGA team met with PALM tech team on March 19. New interface identified and approved. Documentation updated and attached to Smartsheet.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25	May 2: The final pdf compiled with attachments is saved to this row. Separate files are archived on our DMS Teams site and can be provided upon request.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/25/25	April 25: Updated the SAC table to include an OIT-Unit option. Report shows that this task is completed to date. May 2: Per our discussion we have updated some of the new lines inserted for Task 560 on Tuesday, April 29. However, to fully review and complete the additional information we will need more time and request the deadline be pushed back to next Friday, May 9, 2025. DMS will continue to address completion as quickly as possible. May 6: Edits complete. Task resubmitted.	Submission Complete	05/06/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		Jan 24: Agency Training Plan Survey submitted.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		04-09-25: Addendum readiness columns complete for all interface testing.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/11/25	March 11: DMS PALM Sponsor has approved the dashboard.	Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25	The errors associated with this task were resolved on April 2, 2025. Re-verification from PALM is requested.	Submission Complete	04/02/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/25/25	May 6: Errors corrected. Resubmitted.	Submission Complete	05/06/25
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/07/25	May 7: Conducted an Agency Sponsor dashboard review on May 6. Dashboard confirmed and approved May 7.	Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and				

						Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
Implementation: Planned Florida PALM End Users = 68 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 55	Implementation: Impacted Agency Business Processes = 84 • Related Business Process Groupings = 13/13 • Planned Spreadsheet Uploads = 8	Implementation: Business Systems Planned for Integration = 5 Planned Interfaces = 12 - Inbound Interfaces = 6 - Outbound Interfaces = 6	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

DMS Risks									
Sheet Name	Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Report/Comments
DMS Risks	Open and Mitigating	02/19/25		Business Process Change Training User Acceptance Testing	User Acceptance Testing (UAT) Failure To Ensure Successful End User Training	Increasing	9 (High/High)	<p>Feb 19: Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail to create the UAT tests and End User Training.</p> <p>UAT success will be dependent on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.</p> <p>The success of end-user training and testing for PALM at any state agency is contingent of having detailed instructions of the steps to perform for each Business Process, also called a User Manual. Currently, the "process steps" are not available. Based on the PALM project timeline and need for accurate, uniform information as the basis of testing the training, the PALM Team will need provide these "Process Steps" in the form of a user manual for the Tier 1 and Tier 2 's Business Process before testing and training scripts can be created.</p>	<p>DMS is detailed required and trail the new</p> <p>Owners OIT Pro and Fin Adminis Stepher</p> <p>Moved to open ite</p>
DMS Risks	Open and Monitoring	04/09/25		Interface Post Implementation Staffing/Resource Availability User Acceptance	Interfaces and Possible Redevelopment	Stable	9 (High/High)	Weekly internal technical meetings to review and address. Recommend PALM establish a cutoff date	Weekly technical review & Owners

				Testing				to any changes to fields and interface layouts. Interface testing readiness is crucial to DMS success.	<p> OIT Pro and Fin. Adminis Stepher </p> <p> Moved 1 open ite </p>
DMS Risks	Open and Monitoring	05/01/25		Deployment/Cutover Staffing/Resource Availability User Acceptance Testing	UAT SME Online Timing Dilemma	Stable	9 (High/High)	In mitigation discussions now. May be able to "divide and conquer" using different groups / teams.	<p> We beli the only with this and is a PALM L </p>
FRS Risks	Open and Monitoring	09/22/23		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping User Acceptance Testing	Retiree payroll warrants and EFTs not being processed timely and/or accurately.	Stable	9 (High/High)	Going through confirming requirements, build an acceptable design, extensive testing - especially formal parallel testing to ensure everything is running properly for several cycles. Working with PALM to get more information to better define the programming needs.	<p> 2025-04 from arc item. </p>
FRS Risks	Open and Monitoring	04/08/25		Agency Business System Business Process Change Interface Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping User Acceptance Testing	Cut over and the impact on payroll, both weekly and monthly retirement payroll processing.	Stable	9 (High/High)	timing of when there will be no access – run monthly payroll early or ensure monthly payroll will not be impacted. This will need sign off on not processing weekly payrolls during the "down" time and busiest months.	<p> 2025-04 from arc item. </p>
DMS Risks	Open and Monitoring	10/09/24		User Acceptance Testing	Developing Test Plans Prior to System Availability	Increasing	6 (Medium/High)	<p> Have test environment available prior to UAT execution. </p> <p> Oct 23: UAT Plan currently in development to address this. Waiting on PALM to provide more info. </p> <p> Dec 18: No change. Continuing to monitor. </p> <p> Feb 19: No change. Continuing to monitor and address via tasks. </p>	<p> DMS is detailed requirec and inst are not affected </p> <p> Owners OIT Pro and Fin. Adminis Stepher </p> <p> Moved 1 open ite </p>
DMS Risks	Open and Mitigating	04/27/23		Staffing/Resource Availability Training User Acceptance Testing	PALM and Statutorily Required Tasks Overlap	Stable	6 (High/Medium)	<p> 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. </p> <p> Dec 18: Key staff are required to do fiscal year end close out. Also required to participate in UAT and Training activities. Attempting to mitigate this risk with staff augmentation. </p>	<p> Staff au been or fiscal ye </p> <p> Owner/1 Finance Adminis Thiele </p> <p> Moved 1 open ite </p>
DMS Risks	Open and Mitigating	04/26/23		Agency Business System Business Process Change Interface Conversion/Configuration	Delivering PALM Functionality Required for DMS Operations	Stable	6 (High/Medium)	<p> Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees. </p> <p> PALM is addressing this risk. </p> <p> June 20: PALM is requiring that agencies create and implement their own testing plans. That initiative is in planning. </p> <p> Oct 23: Implementation plan in development. UAT plan is in progress. </p> <p> Dec 18: Still evaluating interface requirements in light of new business requirements. UAT plan will address this and is in progress. </p> <p> Feb 19: In progress. Evaluating training needs and requirements. </p>	<p> Timeline officially testing ; is worki plan to l function operatic negativ </p> <p> Owner/1 Finance Adminis Stepher </p> <p> Moved 1 open ite </p>
MFMP Risks	Open and Monitoring	04/30/24		Business Process Change Interface Conversion/Configuration Deployment/Cutover	DFS Vendor Portal	Stable	6 (High/Medium)	MFMP and Florida PALM continue to design the master vendor data exchange based on MFMP and Florida PALM's existing requirements. MFMP will continue to work with DFS and Florida PALM on planning activities for the new vendor portal; however, based on the current	<p> Began t meeting PALM a regardir Integrat System 23, 202 several on how PALM, ; sync ve ensure integrati </p>

								lack of formal requirements, a defined implementation plan, timeline, etc., MFMP cannot begin building to support the new vendor portal at this time.	three er systems
FRS Risks	Open and Mitigating	11/07/23		Business Process Change	Retirement needs to be able to go negative in specific funds	Decreasing	6 (High/Medium)	Programming needs to be completed to allow for flexibility so funds can be released timely. Continue to work with the PALM team.	2025-04 from arc item.
FRS Risks	Open and Monitoring	11/07/23		Business Process Change Conversion/Configuration Deployment/Cutover Post Implementation	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirements.	Stable	6 (High/Medium)	Plan for report identification and testing. Verify reports are available.	2025-04 from arc item.
FRS Risks	Open and Monitoring	02/17/22		Business Process Change Conversion/Configuration Deployment/Cutover Post Implementation Role Mapping	Any significant change to existing Retiree payroll, EFT processing, BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time.	Stable	6 (High/Medium)	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to create online entries manually in Florida PALM. Working with PALM to get more information to better define the programming needs.	2025-04 from arc item.
STMS Risks	Open and Monitoring	11/06/23		Deployment/Cutover Staffing/Resource Availability Training	Timeline. Competing deadlines immediately prior to go-live.	Stable	4 (Medium/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM.	Review No char
STMS Risks	Open and Mitigating	05/01/25		Conversion/Configuration User Acceptance Testing	Data needs for unit testing.	Stable	4 (Medium/Medium)	STMS team has been manually creating sample data for testing. PALM has provided GLI001 and SDI008 samples for testing.	Review 2025. Remain expecte 2025.
STMS Risks	Open and Monitoring	05/01/25		Business Process Change Interface	API133 - new interface	Increasing	4 (Medium/Medium)	Initial meeting with PALM 5/1/25 to discuss interface. Continue to review the interface and determine the impact to STMS.	Review 2025.
DMS Risks	Open and Monitoring	04/21/23		Training User Acceptance Testing	Sandbox Function	Stable	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. Sandbox status has not changed. PALM is addressing this risk.	Waiting update how the function Owner/ Division Insurance Ottinger Moved to open ite
FRS Risks	Open and Monitoring	11/07/23		Conversion/Configuration	Unknown risks due to changes to major statewide systems during modernizations.	Stable	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format. Continuing to monitor Class Code implications by being aware of what is coming out of HR regarding class codes.	2025-04 from arc item.
PF Risks	Open and Monitoring	09/09/24		Agency Business System Interface Conversion/Configuration	Multiple agencies with different testing schedules and testing needs	Stable	4 (Medium/Medium)	People First is on schedule and anticipates continuing to be in lock step with the project timeline well before the next stage gate. Team has hired a project manager with primary focus on ensuring People First maintains PALM readiness. Additionally, People First will be adding significant staff augmentation to assist us.	Moved to open ite
PF Risks	Open and Monitoring	09/09/24		Interface Deployment/Cutover Staffing/Resource Availability	Late discovery / detail management	Increasing	4 (Medium/Medium)	PALM and People First teams will continue to meet weekly to collaborate on testing timelines and will add additional meetings on special topics as needed. We are continuing to refine our parallel testing schedule to ensure that	Moved to open ite

								we have time built into the schedule for development. People First will continue to send functional design documents to the PALM team to review and provide feedback to minimize surprises during development.	
DMS Risks	Open and Monitoring	05/01/25		Deployment/Cutover	Act of God/ office closure during cut over.	Stable	3 (High/Low)	Key staff in financial wave roles will be identified and included in coop planning for any disasters that occur in the cutover timeframe.	We believe this is the only high risk.
FRS Risks	Open and Monitoring	02/17/22		Agency Business System Business Process Change	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Stable	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. In the process of working through the design with PALM. No work around except using the existing payroll system.	2025-04 from architecture item.
FRS Risks	Open and Mitigating	02/17/22		Agency Business System Business Process Change Interface	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately.	Decreasing	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. The risk would be on IRIS - would be able to take information from the Department of Revenue website and manually enter, reconcile, and adjust in IRIS. Completed everything regarding strategy, need to test in UAT.	2025-04 from architecture item.
FRS Risks	Open and Monitoring	04/29/25		Deployment/Cutover	Act of God/ office closure during cut over.	Stable	3 (High/Low)	Key staff in financial wave roles will be identified and included in coop planning for any disasters that occur in the cutover timeframe.	2025-04 from architecture item.
STMS Risks	Open and Mitigating	11/06/23		Interface	Interface. Inability to design flat file transfer process.	Decreasing	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM continue.	Review 2025. In testing 2025.
STMS Risks	Open and Mitigating	12/19/23		Business Process Change Interface Training	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Decreasing	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. Meetings with PALM continue. CCN and Enterprise Partners are currently collaborating. Close to resolution; will review next cycle.	Review 2025. In progress
MFMP Risks	Open and Monitoring	05/01/24		Staffing/Resource Availability	Project Staff Turnover	Stable	2 (Medium/Low)	MFMP will work with Florida PALM to assist in expediting any knowledge transfer incoming successors require to mitigate delays in design decisions	No staff impacts period.
PF Risks	Open and Mitigating	06/28/24		Interface Conversion/Configuration Deployment/Cutover User Acceptance Testing	Parallel Testing Complexity	Stable	2 (Medium/Low)	Parallel testing meetings Scheduled for August 2024 to ensure that the needs of PALM project team align with the current processes implemented by People First team and vendor. In addition, People First team has brought in a full-time project manager so that the team can maintain PALM readiness and continue day to day operations without sacrificing either. Ongoing weekly sync ups with PALM continue.	Moved 1 open item
PF Risks	Open and Mitigating	10/28/24		Conversion/Configuration	Environment Management	Stable	2 (Medium/Low)	People First team is crafting a change order to add 5 additional environments during the PALM testing period. This will allow us to build contingencies into the testing schedule to accommodate any schedule creep. This will also allow us to hold	Moved 1 open item

								production data from the first payroll run in 2025 until PALM's environment is built to run parallel testing of payroll.	
								Along with Amendment 12, the PALM schedule has extended its testing period, which should mitigate the complexity of testing for People First (in conjunction with enhanced environment management).	
STMS Risks	Open and Mitigating	11/06/23		Interface Conversion/Configuration Staffing/Resource Availability Training	Functionality, Inability to design new STMS user interface for creating vouchers	Decreasing	1 (Low/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 continue.	Review 2025. Design/ progress

DMS Issues									
Sheet Name	Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
DMS Issues	Open	02/19/25		High - Impacts the ability of the agency to meet deadlines or milestones	Role Mapping Training User Acceptance Testing	Risk of User Acceptance Testing (UAT) Failure	Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail create the UAT tests. UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.	07/30/25	UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans. Owner/Coordinator: FMS/ Stephen Russell Moved from archive as open item.
STMS Issues	Open	10/01/24		High - Impacts the ability	Interface	GLI012 - Time out error when testing web service connection	Provided the IPs to whitelist in 4/4/2025. STMS requested another session to confirm PALM is seeing connection attempts. If still an issue, STMS will request Salesforce assistance.		5/1/25 - STMS requested another session to confirm PALM is seeing connection attempts. If still an issue, STMS will request Salesforce assistance
DMS Issues	Open	01/15/25		Low - All impacts not listed as Critical or High	Business Process Change Interface	MIP Interface Selections	Could be manually resolved with more manpower, but would want to make changes to interface selection and possibly the interfaces themselves to account for missing / unknown elements. Oct 23: Confirmed interfaces. MIP has updated and automated internal FLAIR reports. Next steps are in progress - id data fields that need to be integrated with MIP and PALM. Feb 19: Reconfirmed interface selections. Potential interfaces are selected, but may not be initially required.	07/15/25	If we mark "Remediation Complete" on the PALM Smartsheet, does that preclude us from making changes once testing starts? Some remediation complete and some still in progress. Process mapping in progress. Owner/Coordinator: OIT and Production Support Moved from archive as open item.
DMS Issues	Open	08/21/24		Low - All impacts not listed as Critical or High	Staffing/Resource Availability Training	End Users New to DMS and PALM	Consistent monitoring, training and follow up. Regular communication, meetings, and increased involvement in the project Readiness Workplan Tasks.	01/30/26	This issue was logged as low priority because half of the DMS End Users have worked for the state for over 15 years. The remainder have been in the state system for between 6 and 15 years. DMS End Users as a whole are familiar with and have worked in PALM, counteracting their short time with DMS and / or in their current position. These numbers represent minimal risk to the project. Owner/Coordinator: FMS/ Lance Dyal / Eric Thiele Moved from archive as open item.
FRS Issues	Open	09/22/23		Low - All impacts not listed as Critical or High	Agency Business System	Business System (IRIS) upgrade	Testing and training in advance - plan to be developed.	12/31/25	2025-04-29: Moved from archive as open item.

DMS Assumptions						
Sheet Name	Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
DMS Assumptions	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	All DMS PALM end users are impacted.	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. Owner/Coordinator: Division of State Group Insurance / Jason Ottinger Moved from archive as open item.
PF Assumptions	Processes Technology	Funding will continue as needed to maintain People First operationally as well as for changes necessary to implement the PALM project.	Logged	06/28/24	People First, PALM	Moved from archive as open item.
PF Assumptions	People Processes Technology	The additional monies allocated to our vendor to fulfill necessary changes to People First to integrate with PALM will be sufficient for the project.	Logged	06/28/24	People First, PALM	Moved from archive as open item.
FRS Assumptions	Data	The State Retirement file from Bureau of State Payrolls (BOSP) will contain all of the same data elements that it currently contains, the reporting will function as it currently does, and Retirement will continue receiving the same information from People First.	Logged	08/28/24	Bureau of Enrollment and Contributions, IRIS	2025-04-29: Moved from archive as open item.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

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DMS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Lance Dyal	lance.dyal@dms.fl.gov	05/07/25
January - February 2025	Lance Dyal	lance.dyal@dms.fl.gov	03/11/25

FRS Status Report Confirmation			
Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Kathy Gould	kathy.gould@dms.fl.gov	05/05/25
January - February 2025	Kathy Gould	kathy.gould@dms.fl.gov	02/24/25

MFMP Status Report Confirmation			
Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Tyler Brown	tyler.brown@dms.fl.gov	05/05/25
January - February 2025	Tyler Brown	tyler.brown@dms.fl.gov	03/03/25

PF Status Report Confirmation			
Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Tony Lloyd	tony.lloyd@dms.fl.gov	05/06/25
January - February 2025	Tony Lloyd	tony.lloyd@dms.fl.gov	02/28/25

STMS Status Report Confirmation			
Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Casey Taylor	casey.taylor@dms.fl.gov	05/02/25
January - February 2025	Casey Taylor	casey.taylor@dms.fl.gov	02/28/25

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.
Implementation: Planned Florida PALM End Users = 11 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 9	Implementation: Impacted Agency Business Processes = 26 • Related Business Process Groupings = 6/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 1 Planned Interfaces = 1 - Inbound Interfaces = 0 - Outbound Interfaces = 1	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = Not To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

DOAH Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	11/07/24		Agency Business System	If Axiom Pro is not reconfigured for UAT, accountants will be unable to test and verify the functionality of the application with FL PALM..	Stable	6 (High/Medium)	Agency Liaison will collaborate with other agencies and Image API to ensure the reconfiguration is completed prior to UAT. Agency Liaison will request status updates from Image API to ensure timeliness of end product.	Agency Liaison met with an Image API representative on May 6th and discussed they are working with DOH to establish the approach for the reconfiguration. Image API will discuss the approach in late May with agencies.
Open and Mitigating	07/05/23		Staffing/Resource Availability	If resources are not fully trained to do their jobs, go-live will continue but DOAH will not be ready for go-live.	Decreasing	3 (High/Low)	DOAH will work with the DOAH's SMEs and PALM team to ensure staff's capabilities to function in PALM by attending meetings, reviewing information from the Knowledge Center, and Thursday Talks to keep abreast of information. Have affected staff (all end users) participate in testing and training for PALM. All SMEs have participated in Segment III and IV workshops.	Agency Liaison has integrated PALM awareness discussion during weekly staff meetings. Accounting staff are actively participating in completing PALM task CCN and SMEs and future end users are participating in preparing for UAT activities.
Open and Mitigating	08/28/24		Staffing/Resource Availability	The staff's previous experience with system implementations may lead to low or lack of engagement in transitioning to the new financial system.	Decreasing	2 (Medium/Low)	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. SMEs and future end users will participate in Segment IV meetings and meet regularly to discuss PALM implementation in designated meetings so the conversation is focused.*	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff a assisting with completing PALM task DOAH future end user have been introduced to the FL PALM Knowledge Center. CNN Members, SMEs and end users are engaged in preparing for UAT activities.

DOAH Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	02/07/25		High - Impacts the ability	Staffing/Resource Availability	DOAH HQ Move	Management and Staff will communicate regarding prioritizing tasks. Staff will use time blocking to ensure tasks are being addressed and focused on meeting deadlines.	06/30/25	Staff are prioritizing their tasks and activities and are keeping their supervisors informed of any impacts and issues.
Open	04/08/25		High - Impacts the ability	Staffing/Resource Availability	Accounting Supervisor Resigned	Management will review the accounting supervisor's duties and responsibilities to develop a strategy to address the structure of the unit. Based on the analysis, it will be determined how to move forward with position.	09/30/25	Manager is reviewing the accounting supervisor's duties and responsibilities to provide a strategy approach to management.
Open	02/07/25		Low - All impacts not liste	Staffing/Resource Availability	Contract Manager Leaving	Transition Plan to fill the position with overlap time in order for the outgoing staff member to train the new staff.	10/31/25	Manager is developing job advertisement and will ensure there is at least 3 month overlap for the position for training.

DOAH Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People Processes Technology Data	Staff will be able to perform their assigned function proficiently in PALM on Go Live Date	Logged	09/08/23	End Users	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. End Users have been provided awareness of FL PALM's Knowledge Center to review individually and during staff meetings as well as through emails. End users (SMEs) are working with CCN on the User Stories for the UAT.
Technology	Axiom Pro Application will be reconfigured to pull the vouchers in PALM by UAT.	Logged	10/31/24	End Users	Agency Liaison met with Image API on May 6th to discuss reconfiguration steps for the Axiom Pro software. They will provide updates to the agencies at the end of the May to demonstrate their approach for the remediation of the application.
People	All positions will be filled with staff trained on current business processes.	Logged	04/04/25	End Users	Staff are reviewing their desk manuals to ensure all business processes are outlined and they are testing each other desk manuals to ensure they are available to understand and complete the tasks.

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:
March - April 2025	Megan S. Silver	megan.silver@doah.state.fl.us	05/12/25
January - February 2025	Megan S. Silver	megan.silver@doah.state.fl.us	03/07/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Task Completeness:


Score = 96.18%

Submitted On Time = 31

Submitted Late = 2

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 95.08%


Submitted On Time = 54

Submitted Late = 8

Pending Resubmission = 5

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 83.33%

Submitted Complete = 18

Submitted Incomplete = 1

Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 80.27%

Submitted Complete = 25

Submitted Incomplete = 5

Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 9

Duplicate Filled Role = 5

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items											
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress					
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress					
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	Documentation is still in progress. To be completed the according to the rubric, the documentation must be completed.	Submission Incomplete		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress					
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24	Test cases has not been identified yet.	Submission Incomplete		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress					
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress					
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	Pending Resubmission	05/02/25		Submission Incomplete		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	Pending Resubmission	05/02/25		Submission Incomplete		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress					
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25		Submission Complete		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/12/25		Submission Complete		
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	03/31/25	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete		
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete		
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete		
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete		
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	50% - In Progress					
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25						

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.
<u>Implementation:</u> Planned Florida PALM End Users = 124 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 11	<u>Implementation:</u> Impacted Agency Business Processes = 133 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 8	<u>Implementation:</u> Business Systems Planned for Integration = 14 Planned Interfaces = 22 - Inbound Interfaces = 9 - Outbound Interfaces = 13	<u>Implementation:</u> Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DOE Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	02/26/25		Agency Business System Staffing/Resource Availability	DOE is down to one developer causing delays in remediation	Stable	9 (High/High)	Procurement of additional resources	Leadership is recruiting the additional resource
Open and Monitoring	12/13/24		Agency Business System	<p>A potential risk for the TraQ application not being ready for User Acceptance Testing (UAT) is the possibility of incomplete functionality or unresolved bugs. If critical features are not fully implemented or existing issues have not been addressed, it can lead to:</p> <p>1. Delays in Project Timeline: UAT is a crucial phase, and if the application isn't ready, it can push back the overall project schedule, affecting subsequent phases such as deployment and user training.</p> <p>2. Increased Costs: Remediation efforts to fix issues identified during UAT can lead to unexpected costs, particularly if extensive changes are needed or if additional resources are required.</p> <p>3. User Dissatisfaction: If the application does not meet user expectations during UAT, it can result in negative feedback, eroding user confidence and satisfaction, which may impact future adoption.</p> <p>4. Reputational</p>	Stable	4 (Medium/Medium)	<p>Clear Communication: Maintain Transparent Communication with Stakeholders about timelines, potential risk and the importance of maintaining the project schedule.</p> <p>Risk Management Plan: Create a comprehensive risk plan to outline potential risk and the impacts on the application and the timeline of the project.</p>	Meeting schedule to discuss Interface files and testing schedule

				<p>Damage: Failing to deliver a functional product on time can harm the organization's reputation, especially if stakeholders or customers are relying on the application for critical business operations.</p> <p>5. Compliance Risks: If the application is intended to meet specific regulatory or compliance standards, not being ready for UAT could lead to non-compliance issues, resulting in legal or financial repercussions.</p>				
Open and Mitigating	11/22/24		Agency Business System Interface Training User Acceptance Testing	<p>The project is heavily reliant on one individual (Matt Kirkland) who possesses the primary knowledge of the business applications. If this individual becomes unavailable (due to illness, departure, or other reasons), there is a risk of project delays, errors, and reduced efficiency in resolving technical or operational challenges.</p> <p>Impact:</p> <ul style="list-style-type: none"> -Delays in project timelines due to the lack of expertise available to address critical issues. -Reduced quality of deliverables due to incomplete understanding of business applications. -Increased operational and knowledge transfer costs if the individual exits or is unavailable. -Potential for project failure in critical phases where the knowledge is essential. 	Stable	3 (High/Low)	<p>1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members.</p> <p>2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible.</p> <p>3.) Cross-Training: Train other team members to create redundancies in expertise.</p> <p>4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity.</p> <p>5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise.</p> <p>By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity.</p>	Processes and applications are being documented to mitigate the risk.
Open and Mitigating	01/07/25		Agency Business System Business Process Change Interface User Acceptance Testing	<p>Applications (FLAGS, Deposit, Indirect Cost and PARS) Missing Remediation and UAT Due to Resource (Programmers/Developer) Constraint</p> <p>Risk 1: Applications Not Remediated Before Go-Live</p> <ul style="list-style-type: none"> -Description: Critical applications may not be fully remediated, leading to potential failures, security vulnerabilities, or non-compliance with regulations post-launch. - Impact: High – Could result in operational disruptions, financial losses, and damage to reputation. - Likelihood: Medium – Resource constraints are common, but proactive measures can reduce this risk. <p>Risk 2: Missing User Acceptance Testing (UAT)</p> <ul style="list-style-type: none"> - Description: Inadequate UAT can lead to undetected defects and user dissatisfaction, resulting in a product that does not meet user needs or expectations. -Impact: High – Can lead to significant rework, increased costs, and user resistance to adopting the solution. - Likelihood: Medium – UAT is often deprioritized under resource constraints. <p>Risk 3: Delay in Project Timeline</p> <ul style="list-style-type: none"> - Description: Both remediation and UAT delays can extend project timelines, affecting overall delivery and stakeholder satisfaction. 	Stable	2 (Medium/Low)	<p>Risk 1:</p> <ol style="list-style-type: none"> 1. Prioritization of Applications: Assess and prioritize applications based on criticality and impact. Focus remediation efforts on the highest-risk applications first. 2. Resource Allocation: Identify and allocate resources from less critical projects or consider temporary hires/contractors to bolster the team. 3. Phased Rollout: Consider a phased rollout approach where non-critical features are delayed to allow for necessary remediation. 4. Regular Progress Reviews: Implement weekly check-ins to monitor remediation progress and adjust resources as needed. <p>Risk 2:</p> <ol style="list-style-type: none"> 1. Engage Stakeholders Early: Involve key stakeholders early in the process to identify critical functionalities that must be tested. 2. Simplified UAT Processes: Streamline UAT processes by reducing the scope to focus on core functionalities, allowing for quicker testing cycles. 3. Utilize Automated Testing Tools: Implement automated testing tools to supplement manual UAT efforts, increasing efficiency. 4. Schedule UAT in Phases: Conduct UAT in phases aligned with sprint cycles to ensure continual feedback and reduce the backlog of testing. <p>Risk 3</p>	Business owner has created work around for application remediations

				<div>- Impact: Medium – Extended timelines can lead to increased costs and resource contention.</div> <div>- Likelihood: High – Delays are likely if remediation and UAT are overlooked.</div> <div>Summary</div> <div>By actively identifying and addressing the risks associated with applications not being remediated and missing UAT due to resource constraints, Agency can take proactive measures to mitigate potential impacts. Implementing prioritization, effective resource allocation, and streamlined processes will enhance the likelihood of successful project outcomes despite challenges.</div>		<div>1. Clear Timeline Management Use project management tools to visualize timelines and set clear milestones.</div> <div>2. Buffer Periods: Incorporate buffer periods in project schedules to accommodate potential delays.</div> <div>3. Transparent Communication: Maintain open communication with stakeholders about potential risks and delays, managing expectations effectively.</div>	
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DOE Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	04/04/25		High - Impacts the ability	Agency Business System	Developer resource is limited causing delays in remediation	DOE has started the procurement process for the additional needed resource	06/02/25	new issues

DOE Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
People	All staffing needs will be met to complete the project	Logged	03/03/25	Leadership	Currently in the process for procuring developer resource	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

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DOE Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	05/12/25
January - February 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	03/12/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97%

Submitted On Time = 25

Submitted Late = 4

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 67.68%


Submitted On Time = 35

Submitted Late = 31

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 93.33%

Submitted Complete = 25

Submitted Incomplete = 0

Completed After Submission = 5

Other Task Completeness



Other Task Completeness:

Score = 87.50%

Submitted Complete = 35

Submitted Incomplete = 3

Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 3

Duplicate Filled Role = 11

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/21/24	DOEA does not have any business systems interacting with FLAIR and will not have any business systems interacting with PALM.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/31/25	Confirmed with TJ and SMEs that all documents are ready for submission.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25	Confirmed with SMEs that this task could be marked and mapping was completed for each Change Analysis Smartsheet.		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	05/12/25	Confirmed with TJ and RP that documents are ready for submission.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25	Marked as completed due to DOEA not having any business systems interfacing with Florida PALM.	Submission Complete	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25	Confirmed with CE that the SmartSheet is ready to submit.	Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	Confirmed with TF that SmartSheet is ready to submit.	Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25	Confirmed SMEs with TJ and RP during status meeting.		
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25	Sent out quarterly newsletter to end users and CCN/SMEs and gave agency leadership an update during the standing leadership meetings.	Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25	Confirmed with TJ that she signed off on the bimonthly status report.	Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 29

Business Process Groupings = 13/13

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 172

Related Business Process Groupings = 13/13

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

Commitment Control (KK)

Identified Subject Matter Experts = 10

• Planned Spreadsheet Uploads = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

- Budget Allotments - Control Option = Option # 1 - Control

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Not Needed

Agency Reported

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

DOEA Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	09/05/24		Conversion/Configuration	Data Clean Up	Decreasing	4 (Medium/Medium)	Reviewing conversion inventory carefully to minimize post go-live clean up. Communicating new requirements to staff. Also working with contracted staff to aid in the clean up of data.	Continuing to clean up financial records.
Open and Monitoring	09/10/23		Business Process Change	Streamlining Manual Processes	Stable	2 (Low/Medium)	Having internal cross-functional meetings to reduce dependencies on manual/physical processes.	Migrated from old risk log.

DOEA Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	01/16/24		Low - All impacts not listed	Staffing/Resource Availability	Multiple Position Vacancies	Actively filling positions and continuing to update desk procedures to make sure they are up to date.	06/30/26	Migrated from old issue log. Related to risk 3 from Archived Risks log

DOEA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025

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:
March - April 2025	Teresa Johnson	johnsont@elderaffairs.org	05/09/25
January - February 2025	Teresa Johnson	johnsont@elderaffairs.org	03/10/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 100%

Submitted On Time = 35

Submitted Late = 0

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.14%


Submitted On Time = 63

Submitted Late = 4

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 85.71%

Submitted Complete = 18

Submitted Incomplete = 0

Completed After Submission = 17

Other Task Completeness



Other Task Completeness:

Score = 87.38%

Submitted Complete = 29

Submitted Incomplete = 2

Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 16

Duplicate Filled Role = 0

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	Pending Resubmission	06/14/24	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Interface files have updates based on questions or corrections asked to the PALM team, thus interface file is not finalized. 2) Some questions asked about the interfaces from Segment I for remediation are crucial and many technical decisions are made based on the answers provided by PALM 3) Part of remediation and data dependencies are contingent on Segment IV and recap in October	Submission Incomplete	04/25/25
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress	04/25/25	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies are contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 9/27 now 10/4		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress	04/25/25	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 12/13 (Task end date)		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress	04/25/25	"Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. Technical team is now deciphering information and meeting with ABS systems to give this information.		

								3) Coding to reflect and make changes has started but will not complete by 03/14 (Task end date)*		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/21/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	01/16/25		Submission Complete	01/16/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/12/25		Submission Complete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25	Updated 2 records per Dora's email.	Submission Complete	03/20/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/21/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/05/25	Updated the Mitigation and If Impact becomes an issue column. These columns were not required at the initial submission.	Submission Complete	05/08/25
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/06/25		Submission Complete	05/06/25
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
Implementation: Planned Florida PALM End Users = 457 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 14	Implementation: Impacted Agency Business Processes = 62 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 3	Implementation: Business Systems Planned for Integration = 53 Planned Interfaces = 132 - Inbound Interfaces = 30 - Outbound Interfaces = 102	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #3: Family - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DOH Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	04/22/25		Agency Business System	Awaiting confirmation and finalized configurations, conversions, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Stable	9 (High/High)	We are creating DOH's FDW	Discussed in the COR meeting conducted on April 29, 2027

Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Decreasing	9 (High/High)	DOH is reading all the available information on knowledge center to understand Payroll changes.	Discussed in the COR meeting conducted on April 29, 2028
Open and Monitoring	04/22/25		Agency Business System Business Process Change Training User Acceptance Testing	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.	Stable	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	Discussed in the COR meeting conducted on April 29, 2029
Open and Monitoring	04/22/25		Business Process Change	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.	Stable	9 (High/High)	DOH will wait for the Organization codes to be set up by DFS	The volume of Organizational code changes and additions for DOH is rather large and may put stress on DFS resources.
Open and Monitoring	04/22/25		Training User Acceptance Testing	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.	Increasing	9 (High/High)	DOH resources will attend the in-person trainings	Discussed in the COR meeting conducted on April 29, 2029
Open and Monitoring	04/22/25		Business Process Change	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.	Increasing	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability. DOH resources are also reviewing current Grants reports start to end again.	Discussed in the COR meeting conducted on April 29, 2030
Open and Monitoring	04/22/25		Business Process Change	PALM eliminating the IBI field for DOH	Stable	9 (High/High)	DOH is working on a work-around to address this issue.	Discussed in the COR meeting conducted on April 29, 2031
Open and Monitoring	04/22/25		Post Implementation	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.	Stable	9 (High/High)	DOH will await the changes in policies and procedures	Discussed in the COR meeting conducted on April 29, 2033
Open and Monitoring	04/22/25		Business Process Change	"Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in May - June 2026 when PRP is to process in July 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between May-June 2026 when we go to PALM July 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."	Stable	9 (High/High)	DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability.	Discussed in the COR meeting conducted on April 29, 2034
Open and Monitoring	04/22/25		Business Process Change	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management	Stable	9 (High/High)	DOH will await the changes in policies and procedures	Discussed in the COR meeting conducted on April 29, 2035

				System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and a struggle to learn a new system and deal with the influx in sampled trips being returned.				
Open and Monitoring	04/22/25		Interface Deployment/Cutover	Missing or Incomplete information - Clear understanding and instructions from the Project team to the agency to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.	Stable	9 (High/High)	DOH is in constant touch with the Readiness Coordinator to understand / clarify instructions	Discussed in the COR meeting conducted on April 29, 2036
Open and Monitoring	04/22/25		Deployment/Cutover	PALM Go-Live planned during hurricane season	Increasing	9 (High/High)	This may cause possible delays to Go-Live	Discussed in the COR meeting conducted on April 29, 2037
Open and Monitoring	04/22/25		Interface Conversion/Configuration	DOH PALM ABS are required to create test data (Agency Business Systems need more than the 5 rows of data provided by PALM), we could miss scenarios during testing. The sample data provided in the interface files is not accurate.	Increasing	9 (High/High)	DOH is converting a couple of months of old data	Discussed in the COR meeting conducted on April 29, 2038
Open and Monitoring	04/22/25		Staffing/Resource Availability	Go-Live is planned at Year End, this will not give enough time for DOH staff to complete Year end activities, PALM Testing, and completing various activities for Go-Live.	Increasing	9 (High/High)	DOH SMEs will struggle to make time for year-end activities as well as PALM testing and various Go-Live tasks.	Discussed in the COR meeting conducted on April 29, 2039
Open and Monitoring	04/22/25		Training User Acceptance Testing	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	Increasing	6 (High/Medium)	DOH is working on creating Foundational trainings and involved in UAT Pre-requisite meetings with DFS team.	Discussed in the COR meeting conducted on April 29, 2026
Open and Monitoring	04/22/25		Training	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.	Stable	6 (High/Medium)	DOH training team is currently working on metrics to create a UAT plan to manage trainings for all PALM users.	Discussed in the COR meeting conducted on April 29, 2032
Open and Monitoring	04/07/25		Business Process Change Training User Acceptance Testing	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.	Increasing	3 (High/Low)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in August 2025. Upon delivery of this we will remove the risk.	Discussed in the COR meeting conducted on April 29, 2025

DOH Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/01/25		High - Impacts the ability	Training	Changes to PALM website, PALM tasks, and the Interface files: Our agency is taking a lot of effort to educate and train technical and non-technical staff. Constant changes disrupts processes and it takes time to find the same information and retrain staff. For e.g., DOH staff got used to receiving emails for Interface and Report updates, now we have	Resources will check PALM site and Change Log every week	06/30/26	Discussed in the CORE meeting conducted on April 29, 2025

2 or 3 resources who
will check the Change
Log every so often

DOH Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	05/01/25	DOH Finance and Accounting	Discussed in the CORE meeting conducted on April 29, 2025
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	05/01/25	DOH PALM Project team	Discussed in the CORE meeting conducted on April 29, 2026
People Processes Technology Data	Enterprise entities like AG/G's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period	Logged	05/01/25	DOH Finance and Accounting	Discussed in the CORE meeting conducted on April 29, 2027

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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DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Robert Herron	robert.herron@flhealth.gov	05/02/25
January - February 2025	Robert Herron	robert.herron@flhealth.gov	03/06/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.09%

Submitted On Time = 30

Submitted Late = 2

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 98.28%


Submitted On Time = 62

Submitted Late = 2

Pending Resubmission = 3

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 94.84%

Submitted Complete = 25

Submitted Incomplete = 0

Completed After Submission = 6

Other Task Completeness



Other Task Completeness:

Score = 96.94%

Submitted Complete = 34

Submitted Incomplete = 0

Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 5

Duplicate Filled Role = 9

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. We anticipate finalizing the updated documentation within 3 weeks. 5/29 - Documentation for business processes reviewed and completed. Areas which require remediation have been identified and currently being updated by Finance Department. ETC unknown. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		12/2024 - Will not submit until UAT		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/14/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	50% - In Progress				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	Submitted with yellow in Organization. Highest Transactional Organization value not in the drop down: 3600000000	Submission Complete	04/01/25
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	

Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	04/25/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/07/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25					

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.
Implementation: <div>Planned Florida PALM End Users = 22</div> <div>• Business Process Groupings = 11/13</div> <div>Identified Subject Matter Experts = 14</div>	Implementation: <div>Impacted Agency Business Processes = 49</div> <div>• Related Business Process Groupings = 2/13</div> <div>• Planned Spreadsheet Uploads = 1</div>	Implementation: <div>Business Systems Planned for Integration = 6</div> <div>Planned Interfaces = 18</div> <div>- Inbound Interfaces = 4</div> <div>- Outbound Interfaces = 14</div>	Implementation: <div>Configuration</div> <div>• Commitment Control (KK)</div> <div>- Budget Allotments - Control Option = Option # 3 - Track without Budget</div> <div>- Account ChartField Tier Selection = Account Tier #1: Highest</div> <div>- Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree</div> <div>• Org Security Rule = Agencywide</div> <div>• Optional ChartFields</div> <div>- OA1 = To Be Configured</div> <div>- OA2 = To Be Configured</div> <div>- PC Category = To Be Configured</div> <div>- PC Subcategory = To Be Configured</div> <div>- PC Source Type = Not To Be Configured</div> <div>Conversion</div> <div>• Optional Conversions</div> <div>- Accounts Receivable = Not Needed</div> <div>- Assets = Needed</div> <div>- Contracts = Needed</div> <div>- Customers = Not Needed</div> <div>- Encumbrances = Needed</div> <div>- Grants = Not Needed</div> <div>- Projects = Needed</div> <div>- Projects Balances = Not Needed</div>

Agency Reported

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

DOL Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	05/01/24		Agency Business System Business Process Change Post Implementation Staffing/Resource Availability Training User Acceptance Testing	The new Claims and Payment System (CAPS) may delay training efforts in Florida PALM	Stable	4 (Medium/Medium)	Lottery will develop a proactive strategy for the upcoming launch of the new CAPS; will focus on early communication, training for Florida PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	No updates. Lottery will continue to monitor.

DOL Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DOL Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025

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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DOL Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Rebecca Ajhar	ajharb@flalottery.com	05/07/25
January - February 2025	Rebecca Ajhar	ajharb@flalottery.com	03/07/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for DOR](#)
[Readiness Workplan](#)

DOR Status Report Dashboard

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

Reporting Period

March - April 2025

Agency Sponsor

Clark Rogers

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 93.53%

- Submitted On Time = 24
- Submitted Late = 9
- Pending Resubmission = 0

Other Task Timeliness:

Score = 90.87%

- Submitted On Time = 55
- Submitted Late = 12
- Pending Resubmission = 0

Direct Task Completeness:

Score = 91.82%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 11

Other Task Completeness:

Score = 81.46%

- Submitted Complete = 26
- Submitted Incomplete = 0
- Completed After Submission = 15

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/11/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/05/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	04/01/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/27/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/22/25		Submission Complete	04/22/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/09/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	75% - Consolidating/Inputting Information for Submission				

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 210

- Business Process Groupings = 13/13

Identified Subject Matter Experts = 46

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 210

- Related Business Process Groupings = 11/13
- Planned Spreadsheet Uploads = 5

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 25

Planned Interfaces = 30

- Inbound Interfaces = 12
- Outbound Interfaces = 18

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

- Commitment Control (KK)
- Budget Allotments - Control Option = Option # 3 - Track without Budget
- Account ChartField Tier Selection = Account Tier #3: Family

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Needed

Agency Reported

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

DOR Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	06/28/24		User Acceptance Testing	DOR - PALM and ABS UAT	Stable	3 (High/Low)	Unable to mitigate at agency level; must be mitigated by the enterprise.	DOR will be looking for SME UAT results durir Aug/Oct 2025 time period
Open and Monitoring	12/04/24		Post Implementation Training	PALM Reporting and Datawarehouse	Stable	2 (Medium/Low)	Unable to mitigate at agency level; must be mitigated by the enterprise.	Monitoring PALM progress on DW/BI
Open and Monitoring	11/02/23		Agency Business System Staffing/Resource Availability	GTA - Natural Gas Implementation	Decreasing	1 (Low/Low)	Additional Funding allocated to critical resources.	Monitoring the progres of House Bill #7033
Open and Monitoring	10/17/23		Staffing/Resource Availability	GTA - EFile and Pay	Decreasing	1 (Low/Low)	Staff augmentation resources to support Florida PALM activities.	Monitoring EFile Proje plan and implementation
Open and Mitigating	11/02/23		Conversion/Configuration	GTA - Chart of Account values for distribution	Decreasing	1 (Low/Low)	Coordinate with other agencies to gather, confirm and validate ChartField data.	As of April 2025, DOR has received COA values from all 16 agencies.

DOR Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	12/04/24		High - Impacts the ability	Interface Conversion/Configuration	Supplier ID Conversion and Crosswalk	Supplier ID is a required field in Interface Files, and must be provided.	05/31/25	Waiting on the APC001 - PALM Supplier conversion files for Statewide vendors, as part of MOCK 2 Results

DOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	New chart of account data from the configuration workbooks will be loaded by the Florida PALM Project Team into all enterprise business systems.	Logged	03/08/24	All agencies, all agency business systems.	
Data	People First data will be cleansed and updated chart of accounts data will be available in a test environment for UAT.	Logged	04/12/24	All agencies, all business systems that use People First data.	
Processes Data	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	Logged	06/28/24	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

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DOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	05/09/25
January - February 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	03/05/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.03%

Submitted On Time = 28

Submitted Late = 2

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 81.03%


Submitted On Time = 40

Submitted Late = 26

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 79.69%

Submitted Complete = 16

Submitted Incomplete = 2

Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 84.25%

Submitted Complete = 31

Submitted Incomplete = 1

Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 16

Duplicate Filled Role = 0

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/26/24	Agency does not have any agency business systems.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/06/25	At DoS, our business systems will be replaced by PALM, and we currently do not have any test scripts requiring testing. We aim to mark this as complete during the 12/20 DFS touchpoint meeting.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		We are utilizing the attached test cases as a training plan and hope to use this template to gather user stories as well. We also have several staff members using PALM currently who will participate in the "Train the Trainer" program once the program details are available.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25		Submission Complete	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete	03/21/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	04/01/25
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	04/01/25
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25	For task 579, the BPG workbook reflects our current processes in FLAIR, while the SME role mapping outlines the new functionality we plan to implement in PALM. This explains the discrepancies between the two.	Submission Incomplete	05/09/25
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/09/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	75% - Consolidating/Inputting Information for Submission		I've reached out to Jordan Cylatt, our Identity Access Manager—he's currently updating this using an Excel file.		

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.
<u>Implementation:</u> <div>Planned Florida PALM End Users = 18</div> <ul style="list-style-type: none">Business Process Groupings = 12/13 <div>Identified Subject Matter Experts = 9</div>	<u>Implementation:</u> <div>Impacted Agency Business Processes = 15</div> <ul style="list-style-type: none">Related Business Process Groupings = 8/13Planned Spreadsheet Uploads = 0	<u>Implementation:</u> <div>Business Systems Planned for Integration = 0</div> <div>Planned Interfaces = 0</div> <ul style="list-style-type: none">Inbound Interfaces = 0Outbound Interfaces = 0	<u>Implementation:</u> <div>Configuration</div> <ul style="list-style-type: none">Commitment Control (KK)<ul style="list-style-type: none">Budget Allotments - Control Option = Option # 3 - Track without BudgetAccount ChartField Tier Selection = Account Tier #1: HighestOrganization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide TreeOrg Security Rule = AgencywideOptional ChartFields<ul style="list-style-type: none">OA1 = To Be ConfiguredOA2 = Not To Be ConfiguredPC Category = To Be ConfiguredPC Subcategory = To Be ConfiguredPC Source Type = Not To Be Configured <div>Conversion</div> <ul style="list-style-type: none">Optional Conversions<ul style="list-style-type: none">Accounts Receivable = NeededAssets = NeededContracts = Not NeededCustomers = Not NeededEncumbrances = NeededGrants = Not NeededProjects = Not NeededProjects Balances = Not Needed

Agency Reported

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

DOS Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025

DOS Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DOS Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

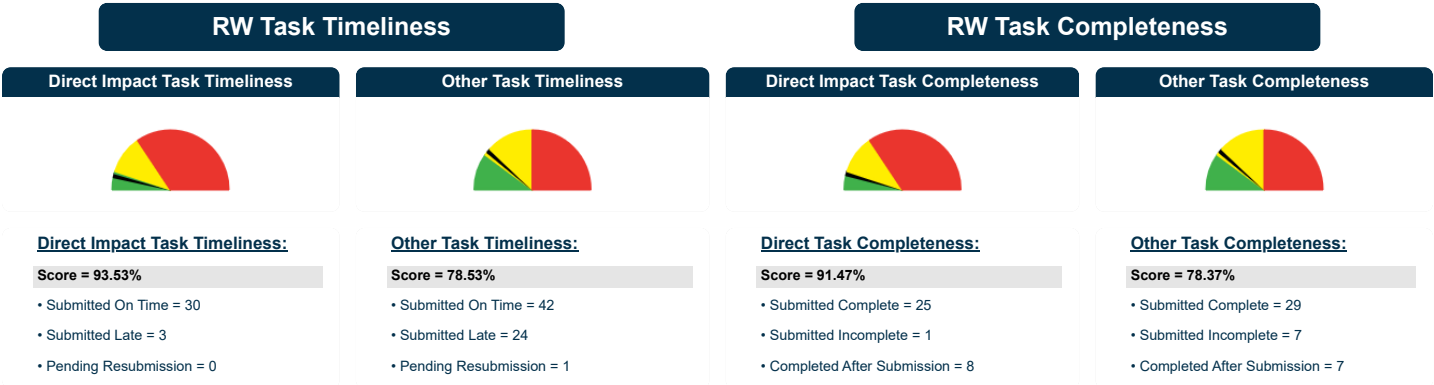
Agency Sponsor Name: *

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DOS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	05/09/25
January - February 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	03/07/25



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.
Implementation: Planned Florida PALM End Users = 63 • Business Process Groupings = 12/13 Identified Subject Matter Experts = 8	Implementation: Impacted Agency Business Processes = 121 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 2	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 2 - Inbound Interfaces = 1 - Outbound Interfaces = 1	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

DVA Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	05/14/25		Staffing/Resource Availability	Staffing shortfalls	Increasing	6 (Medium/High)	Working to hire a new vendor/consultant to assist with key tasks as the current vendor was terminated for work performance.	Requisitioning a new vendor.
Open and Monitoring	05/14/25		Staffing/Resource Availability	Contracting and Procurement Funding	Stable	6 (High/Medium)	Requesting that current funding be reverted and reallocated to support getting the contractual support needed.	Pending approval from Office of Program and Budget
Open and Monitoring	05/14/25		Staffing/Resource Availability	Technology - IT Staffing	Stable	4 (Medium/Medium)	Agency requested additional IT personnel through the LBR process, but these positions were not approved by the legislature. The next legislative session is another year away and the PALM implementation will have begun	Added this requiremer to the upcoming LBR package for submittal for next SFY's legislative session.
Open and Monitoring	05/14/25		Interface	FDVA FLAIR and PALM Data Interface	Decreasing	4 (Medium/Medium)	Staff will incur extra time and productivity lag in trying to learn, crosswalk and translate data outputs. Hopefully training and SOPs will minimize this issue. SOP being developed and revised, and training plan in place to mitigate this issue.	SOPs being developed and/or revised for all functions and processes impacted by PALM implementation.

DVA Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	04/22/25		Low - All impacts not listed	Staffing/Resource Availability	Human Resources Shortfall	Secure a new contractor from State Term Contact listing and bring them onboard NLT 15 May 2025	05/15/25	VACO contractor terminated due to performance. FDVA requisitioning new contractor to support Agency personnel in performing required tasks. Anticipate having a new vendor withing the next 45 days.

DVA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People Processes Technology Data	Funding will be approved/provided by the Florida Legislature to secure personnel or contract vendors to support the Agencies full PALM Transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation/all connected Agency process converted to PALM.	Funding currently on hand for the current fiscal year, but the SFY 25/26 budget has not been approved so the future is unknown.
People Processes Technology Data	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	05/14/25	FDVA PALM required processes (Admin, Fiscal, and Finance and Accounting functions)	Requisitioning our second contractor to assist with PALM implementation. Previous contractor could not deliver on contract agreements. This speaks to the limited contractor resources available to support PALM.
People	FDVA Executive Leadership, including project Sponsor, will support the project by providing resources, access to systems and by supporting the organizational change management strategy created by the project development team.	Logged	09/18/23	Agency Administrative functions (Fiscal and Finance & Accounting)	State provided financial resources but not timely to allow the Agency to secure project management and contract support staff resources. Those agencies undergoing the initial implementation were able to secure contact vendor staff with PALM and related accounting experience. Agency was able to secure a vendor, but that vendor could not deliver on agreed upon deliverables. Vendor pool is even smaller now.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

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DVA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	05/12/25
March - April 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	04/22/25
January - February 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	03/07/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 100%

Submitted On Time = 35

Submitted Late = 0

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 99.43%


Submitted On Time = 66

Submitted Late = 1

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 98.00%

Submitted Complete = 29

Submitted Incomplete = 0

Completed After Submission = 6

Other Task Completeness



Other Task Completeness:

Score = 98.57%

Submitted Complete = 36

Submitted Incomplete = 0

Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 3

Duplicate Filled Role = 12

Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/23/24	n/a This was submitted on time. There are no business systems to update.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/30/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/28/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25					
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Confirmed DEM completion 3/3/2025. Confirmed EOG completion 3/7/2025.	Submission Complete	03/19/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/04/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25	Confirmed DEM completion 3/24/2025.	Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25	Confirmed DEM completion 3/24/2025.	Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/18/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/17/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/08/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/12/25		Submission Complete	
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 9

Business Process Groupings = 13/13

Identified Subject Matter Experts = 5

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 150

Related Business Process Groupings = 13/13

Planned Spreadsheet Uploads = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

Commitment Control (KK)

Budget Allotments - Control Option = Option # 3 - Track without Budget

Account ChartField Tier Selection = Account Tier #2: Groupings

Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Needed

Agency Reported

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

EOG Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	10/31/23		Deployment/Cutover Staffing/Resource Availability	Limited Staff	Stable	9 (High/High)	EOG will monitor transactions and will use UAT for training.	No Additional comments.
Open and Monitoring	02/17/25		Post Implementation Staffing/Resource Availability Training	Limited Staff - Timing	Stable	9 (High/High)	The EOG will monitor staff workload, and will utilize UAT as a training period.	No Additional comments.
Open and Mitigating	12/31/24		Business Process Change Post Implementation	DEM - Separation General	Stable	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries. It was determined that many of the solutions initially discussed will not be able to be effectively implemented. We will continue to monitor and meet with the PALM team as the final design takes shape to determine the best methodologies for the differentiation of data. System configuration will be tested during UAT to determine what will be policy or procedure driven changes vs. what will require additional PALM knowledge or staff resources.	No Additional comments.
Open and Monitoring	08/23/24		Business Process Change Post Implementation	DEM - Separation InterUnit Transactions	Stable	6 (Medium/High)	The EOG has reported the issue and made suggestions to FL PALM as potential solutions. EOG will document errors (should they occur) to the project during UAT.	No Additional comments.
Open and Mitigating	06/06/24		Training	Nomenclature	Stable	6 (Medium/High)	The EOG will work to highlight terminology/naming differences and provide documents to mitigate risk of confusion.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Role Mapping Staffing/Resource Availability	Limited Staff - Roles and Workflow	Stable	6 (High/Medium)	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. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals. DFS policies will most likely still require the spreadsheet upload to be reviewed and approved prior to upload. While this may mitigate some risks, the transactions will still bottleneck to one or two	No Additional comments.

							employees knowledgeable in the specific transactions.	
Open and Mitigating	06/06/24		Business Process Change Post Implementation	DEM - Separation Warrant Management	Stable	6 (High/Medium)	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accomodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Staffing/Resource Availability Training	Limited Staff - Processing Changes	Stable	2 (Medium/Low)	The EOG will monitor staff workload and will utilized UAT as a training period for all staff. EOG will monitor reports and instructional/policy documents provided by the Department of Financial Services and the FL PALM team.	No Additional comments.
Open and Monitoring	10/31/23		Post Implementation Training User Acceptance Testing	Statewide System Revisions/	Stable	2 (Medium/Low)	EOG will monitor all tasks and attempt to report issues to all relevant parties.	No Additional comments.
Open and Monitoring	10/31/23		Business Process Change Training	Attachments	Stable	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.	No Additional comments.

EOG Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

EOG Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
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	04/18/25	Administrative Services	Originally logged 10/31/2023 - no change. This is still a valid assumption.	
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	04/18/25	Administrative Services	Last update to this assumption was 1/23/2024 - no change. This is still a valid assumption.	
People Processes Technology Data	EOG assumes that ALL transactions and functions will be available for User Acceptance Testing to allow for full learning opportunities will prior to system go-live.	Logged	04/18/25	Administrative Services	No additional comments.	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

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EOG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	05/07/25
January - February 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/04/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for FCOR](#)
[Readiness Workplan](#)

FCOR Status Report Dashboard

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

Reporting Period


March - April 2025

Agency Sponsor

Ryan Schenck

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.33%

Submitted On Time = 27

Submitted Late = 2

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 95.36%


Submitted On Time = 61

Submitted Late = 6

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 99.33%

Submitted Complete = 27

Submitted Incomplete = 0

Completed After Submission = 3

Other Task Completeness



Other Task Completeness:

Score = 100.00%

Submitted Complete = 42

Submitted Incomplete = 0

Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 0

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/17/24	FCOR doesn't have any ABS systems to update documentation or remediation needed.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	05/02/25
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/08/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/13/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/05/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete	05/01/25
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/07/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 5

Business Process Groupings = 4/13

Identified Subject Matter Experts = 14

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 17

Related Business Process Groupings = 3/13

Planned Spreadsheet Uploads = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 15

Planned Interfaces = 18

Inbound Interfaces = 0

Outbound Interfaces = 18

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

Commitment Control (KK)

Budget Allotments - Control Option = Option # 3 - Track without Budget

Account ChartField Tier Selection = Account Tier #3: Family

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned
- Org Security Rule = Agencywide
- Optional ChartFields
- OA1 = To Be Configured
- OA2 = Not To Be Configured
- PC Category = To Be Configured
- PC Subcategory = To Be Configured
- PC Source Type = Not To Be Configured

- Conversion
- Optional Conversions
 - Accounts Receivable = Not Needed
 - Assets = Needed
 - Contracts = Needed
 - Customers = Not Needed
 - Encumbrances = Needed
 - Grants = Not Needed
 - Projects = Not Needed
 - Projects Balances = Not Needed

Agency Reported

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

FCOR Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	12/04/24		Staffing/Resource Availability	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Decreasing	6 (High/Medium)	Risk Management Strategy : Mitigate. 1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT Planned closing date: 06/30/25	11/05/2024 : Solution concept shared with th OIT experts to review and guide FDC PALM team on the next step for technical solutionin 11/06/2024 : Initial resourcing plan has been reviewed with Ol leadership and receive alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design ar Technology platform. 2/10/2025: Hiring of staff-aug Reports Developer and Business Analyst has been initiated, interviews are currentl in-progress. 3/25/2025: Reports Developer and Business Analyst resources have been identified and expecte to join the IT team soo 4/16/2025: Business Analyst and Solution Architect has been onboarded. Reports Developer onboarding in-progress.
Open and Mitigating	12/04/24		Training	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Increasing	6 (High/Medium)	Risk Management Strategy : Reduction Action: Develop and Launch to PALM Superusers the pre] PALM 4-Part training series. Training 1.1: Orientation to PALM Business Process Groups. Training 1.2: Orientation to PALM Modules. Training 1.3: Orientation to PALM Business Process Models. Training 1.4: Orientation to PALM Roles & Workflows. Planned closing date: 07/31/25	12/17/2024: CML- Training Development is underway and is on track to be completed by June 30, 2025. 12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated. 2/19/2025: Training liaison has been engaged to prepare fo overall training plan ar training materials. 04/23/2025: CML- Training deployment date was updated to now launch in August 2025 as opposed to June 2025. Development of presentations is still underway and on tract to be completed by Jul 31, 2025.
Open and Monitoring	12/04/24		User Acceptance Testing	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow	Stable	6 (High/Medium)	Risk Mitigation Strategy: Reduction 1. Prepare the UAT testing team thoroughly	12/05/2024: Florida PALM team held across-agency kick-off of the UAT planning activity.

				sufficient time for defect management and retest of fixes.			<p>w.r.to Business processes, Configurations, User roles, PALM trainings, Test scripts.</p> <p>2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management.</p> <p>3. Identify across-agency best practices for UAT planning and execution.</p> <p>4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.</p> <p>Planned closing date: 08/31/25</p>	<p>There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT. Most of the preparatio activities are affected t non-availability of the final system.</p> <p>2/17/2025: Awaiting FL PALM ESC approval o the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan ii Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.</p> <p>3/25/2025: Received F PALM ESC approval o the revised go-live of July/2026. The impact to agency testing activities can be assessed after FL PALM team published the updated Readines Workplan (expected b end-April/2025).</p> <p>4/16/2025: Revised go live of July/2026 removes the overlap between FL PALM System testing and Agency UAT. However agency team continue to work with FL PALM get details on the UAT SME sessions, the UA defect triage / management process and planned collaboration / RACI between Agency and FL PALM planned during UAT sessions.</p>
Open and Mitigating	12/04/24		Business Process Change	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Stable	6 (High/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <p>Action: Develop and Launch Pre-PALM Training Closing Activities.</p> <p>Closing Activity 1: Process Gap Analysis</p> <p>Closing Activity 2: Process Gap Remediation</p> <p>Planned closing date: 09/30/25</p>	<p>12/17/2024: CML- Training Development is underway and will precede the initiation c the Closing Process Gap Analysis and Remediation activities. The deployment of the training Series is on track to launch by February 01, 2025.</p> <p>11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM).</p> <p>2/19/2025: Identificatio of specific gaps and remediation plan has been initiated.</p> <p>4/23/2025: Workplan preparation underway for validation of change impact analysis results on the process.</p>
Open and Mitigating	12/04/24		Staffing/Resource Availability	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Decreasing	6 (High/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <p>1. Identify the areas where it needs the SMEs bandwidth.</p> <p>2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.</p> <p>Planned closing date: 09/30/25</p>	<p>12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing. To continue working or to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supportir activities to ensure agency readiness for PALM project.</p> <p>Identification of specifi remediation plan has been initiated.</p> <p>2/17/2025: Awaiting FL PALM ESC approval o the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan ii Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.</p> <p>4/23/2025: Re-assess the risk based on revised readiness workplan, which is planned to be publishe in May/25.</p>
Open and Mitigating	12/04/24		Agency Business System	Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) could be challenging as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from FL PALM.	Stable	6 (High/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <p>1. Vendor to refer FL PALM knowledge center to plan & design the system remediation.</p> <p>2. Vendor to perform unit testing with the information provided by the FL PALM team.</p> <p>3. FL PALM Team to make sizable and reliable testing data available.</p> <p>4. Vendor to perform</p>	<p>2/17/2025: Vendor is remediating the systems, but continuer to face challenges due to limitations of sample data available, and the change in the interface specifications by FL PALM team.</p> <p>Also identified high dependency on the updated timeline from PALM regarding to conduct.</p> <p>4/16/2025: Vendors ar on-track to start the</p>

							<p>exhaustive technical Testing of the system integration (Cycle 2 - Testing)</p> <p>Planned closing date: 10/30/25</p>	<p>technical testing of the interfaces in Aug/2025 FL PALM team to share further information on the availability of test infrastructure.</p> <p>5/5/2025: ImageAPI team is working on the cost estimates for the agencies to remediate the AxiomPro system in-line with the PALM system transition.</p>
Open and Monitoring	12/04/24		Role Mapping	Insufficient information on access security model and planning of changes to current user roles/responsibilities may impact agency user readiness/ adoption.	Increasing	4 (Medium/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <ol style="list-style-type: none"> 1. Read & understand the access security model and role definition, published by FL PALM. 2. Map the current business teams to the appropriate user role. 3. Identify the users for whom role/ responsibility are changed. 4. Provide required support to the users to adapt to their changed role. <p>Planned closing date: 07/31/25</p>	<p>11/30: Team started exploring the user & security roles definition in the Florida PALM portal.</p> <p>12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topic is & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new work book.</p> <p>12/17/2024: CML-The provision of the RWP 560-"Topicis & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched.</p> <p>2/19/2025: FDC-FCOF PALM project team is awaiting detailed information from FL PALM team on security roles, privileges, and segregation of duty information for Financials wave. Similar details from CMS wave is being considered as a reference.</p> <p>11/15/2024: CML-People Readiness Lead completed the development of the Role Mapping Workbook and socialized workbook with the project team.</p> <p>04/23/2025: Awaiting security model and role definition, when it gets published by FL PALM project team.</p>
Open and Mitigating	12/04/24		Agency Business System	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/ historical data.	Decreasing	3 (High/Low)	<p>Risk Management Strategy : Mitigate.</p> <ol style="list-style-type: none"> 1. Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components. 2. Archive BARS reporting solution, as the reporting tool for the legacy (FLAIR) information. <p>Planned closing date: 07/01/26</p>	<p>11/06/2024 : Overall requirement was reviewed with OIT leadership and receive alignment.</p> <p>Currently in discussion with OIT Systems Management team to identify a solution.</p> <p>Next step is implement and test the solution.</p> <p>1/10/2025: Technical workshop conducted with FDC OIT experts and finalized the architectural design for technology platform.</p> <p>2/10/2025: FDC-FCOF PALM project team and OIT technical teams are currently brainstorming on the scope and approach for BARS archival.</p> <p>4/16/2025: Brainstorming in-progress with the OIT technical and infrastructure team to align with the agency technology roadmap.</p>

FCOR Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	01/30/25		Critical - Impacts the ability to generate reports	Agency Business System	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	<ol style="list-style-type: none"> 1. Setup new database, to remediate 12 agency business systems/tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with 	08/29/25	<p>1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that.</p> <p>Therefore, the FDC/ FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces.</p> <p>2. Solution approach and Architectural design for New</p>

					appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing		Database and CAIRS has been prepared. 3. Team is working on detailed activity planning and hiring resources to perform the IT development activities. 4/16/2025: Team continue to work on the workaround solution to meet reporting/ analytics requirements for FDC and FCOR.	
Open	03/25/25		Critical - Impacts the abil	Agency Business System	Continued changes to the interface specifications by FL PALM due to ongoing system development, may require FDC PALM project team to rework on the solution for agency systems remediation, which could lead to agencies missing the interface testing milestone.	Team to work on minimizing the impact due to this issue. 1. Develop a scalable solution design with system level flexibility built-in. 2. Collaborate closely with the FL PALM interface team, and ensure the FDC PALM team is updated with the recent/ upcoming changes to the interface file structures. 3. Resolve the gaps in the agency system remediation solution. 4. Escalate in case the changes to interfaces are not feasible to be mitigated.	12/31/25	2/25/2025: This risk was discussed with the FL PALM Readiness Coordinator, and understood that these changes to the interface specifications are currently inevitable, since Segment 3 and 4 related interfaces development are in-progress. FDC PALM team to do detailed assessment of the impact and propose remediation plan. 3/20/2025: Team continues to identify changes in the detailed specifications of the identified interfaces, which is leading to rework of the CAIRS data model and downstream systems remediation. Therefore Risk #19 has been escalated to Issue #8. 4/16/2025: Ongoing communication with FL PALM team (as specified in Issue #4). Ongoing monitoring of FL PALM changes has been put in-place, to analyse and plan for the impacted area.
Open	08/21/23		High - Impacts the ability	Staffing/Resource Availability	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency.	12/31/25	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. 4/16/2025: FL PALM go-live has been changed to July/2026, therefore this risk needs to be assessed 6 months prior to the go-live.
Open	02/28/24		High - Impacts the ability	Interface	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets. 3. Continue to communicate with the FL PALM on the impacted delayed deliverables. 4. Re-prioritize/ reorganize the work in agencies to complete the deliverables with minimal impact possible.	07/01/26	1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions. 2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues. 2/19/2025: Highlighted this issue again as part of Thursdays Task Talk topics, and requested FL PALM team to consolidate all updates to the PALM readiness workplan and share at once, with appropriate level of communication. 4/16/2025: Continue to highlight this issue and the cascading impact on the deliverables due to rework. FL PALM team indicated that the details/ specifications expected to go through changes till the IT development activities at FL PALM completes.
Open	07/31/24		High - Impacts the ability	Staffing/Resource Availability	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Onboard additional staff aug position with FLAIR data experience.	10/30/25	1. Created RFQ for an additional staff aug position. 2. The resource has been onboarded in early December 2024. 2/10/2025: New resource to be onboarded as a replacement for the person onboarded in December 2024. Additionally one more resource request has been raised with FDC Contract management team. 3/25/2025: Data cleansing resource has been identified and expected to join the business team soon. 4/16/2025: Functional expert has joined the team and starting working on the data cleansing activities. Challenge identified with the limited bandwidth in the team. 5/5/2025: Identified FLAIR data expert for 2nd staff aug position to assist with data cleansing.
Open	08/31/24		High - Impacts the ability	Staffing/Resource Availability	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes.	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.	11/30/25	9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work. 10/16/2024: UAT high level plan was shared in PALM advisory council meeting. 11/20/2024: BA requirement has been reviewed with the OIT leadership and available vendors are being evaluated. 2/7/2025: Discussion in-progress with the OIT Quality Assurance (QA) vendor to leverage their expertise in UAT planning and preparation of test cases and test scripts. 4/16/2025: Discussions concluded with the QA vendor, QA Analysts to join the team. Shorter engagement to understand how these resources can support in preparing & finalizing UAT Test cases/ scripts.

FCOR Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
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 onboarded and started working 05/06/2024. Onboarded project team from OIT including Project Manager, Business Analyst and Data Analyst. Key SMEs from F&A team has been engaged actively. 4/30/2025: Archived Assumption Id - 002/ 002
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. 4/30/2025: Archived Assumption Id - 003/ 003
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	List of agency business systems are documented, i.e., as-is state, systems in the scope of remediation. Remediation approach for 2 systems is finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach. 4/30/2025: Archived Assumption Id - 004/ 004
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FDC UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team. Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan. 4/30/2025: Archived Assumption Id - 008/ 006
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS. 4/30/2025: Archived Assumption Id - 009/ 007
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team. 4/30/2025: Archived Assumption Id - 010/ 008
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop, it is understood that the IT development activities for enterprise systems are in-progress. 4/30/2025: Archived Assumption Id - 011/ 009
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system.	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency. 4/30/2025: Archived Assumption Id - 012/ 010
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g. ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	4/30/2025: Archived Assumption Id - 013/ 011

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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FCOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	05/07/25
January - February 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	03/05/25

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 93.71%

Submitted On Time = 27

Submitted Late = 7

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 89.85%


Submitted On Time = 53

Submitted Late = 12

Pending Resubmission = 2

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 92.35%

Submitted Complete = 28

Submitted Incomplete = 1

Completed After Submission = 5

Other Task Completeness



Other Task Completeness:

Score = 93.41%

Submitted Complete = 36

Submitted Incomplete = 0

Completed After Submission = 5

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The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

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Duplicate Filled Role = 0

Vacant Role = 0

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RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering		3/7/2025: Task-519 was marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	25% - Beginning Initial Internal Meetings and Information Gathering		This task cannot be completed. This is due to us not have the sufficient information from PALM to complete the remediation of our Agency Business Systems. We are still analyzing the data that they have provided, and will continue to work to complete this task. ETA Unknown. 3/7/2025: Task-504 and Task-544 were marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However, based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/08/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/30/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Incomplete	04/22/25
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission	

N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25		Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
Implementation: Planned Florida PALM End Users = 141 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 38	Implementation: Impacted Agency Business Processes = 156 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 10	Implementation: Business Systems Planned for Integration = 15 Planned Interfaces = 74 - Inbound Interfaces = 1 - Outbound Interfaces = 73	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #3: Family - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

FDC Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	12/04/24		Staffing/Resource Availability	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Decreasing	6 (High/Medium)	Risk Managment Strategy : Mitigate. 1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT Planned closing date: 06/30/25	11/05/2024 : Solution concept shared with th OIT experts to review and guide FDC PALM team on the next steps for technical solutionin 11/06/2024 : Initial resourcing plan has been reviewed with OI leadership and receive alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design ar Technology platform. 2/10/2025: Hiring of staff-aug Reports Developer and Business Analyst has been initiated, interviews are currentl in-progress. 3/25/2025: Reports Developer and Business Analyst resources have been identified and expecte to join the IT team soo 4/16/2025: Business Analyst and Solution Architect has been onboarded. Reports

								Developer onboarding in-progress.
Open and Mitigating	12/04/24		Training	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Increasing	6 (High/Medium)	<p>Risk Management Strategy : Reduction</p> <p>Action: Develop and Launch to PALM Superusers the pre] PALM 4-Part training series.</p> <p>Training 1.1: Orientation to PALM Business Process Groups.</p> <p>Training 1.2: Orientation to PALM Modules.</p> <p>Training 1.3: Orientation to PALM Business Process Models.</p> <p>Training 1.4: Orientation to PALM Roles & Workflows.</p> <p>Planned closing date: 07/31/25</p>	<p>12/17/2024: CML- Training Development is underway and is on track to be completed by June 30, 2025.</p> <p>12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated.</p> <p>2/19/2025: Training liaison has been engaged to prepare fo overall training plan ar training materials.</p> <p>04/23/2025: CML- Training deployment date was updated to now launch in August 2025 as opposed to June 2025.</p> <p>Development of presentations is still underway and on track to be completed by Jul 31, 2025.</p>
Open and Monitoring	12/04/24		User Acceptance Testing	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.	Stable	6 (High/Medium)	<p>Risk Mitigation Strategy: Reduction</p> <p>1. Prepare the UAT testing team thoroughly, w.r.to Business processes, Configurations, User roles, PALM trainings, Test scripts.</p> <p>2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management.</p> <p>3. Identify across-agency best practices for UAT planning and execution.</p> <p>4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.</p> <p>Planned closing date: 08/31/25</p>	<p>12/05/2024: Florida PALM team held across-agency kick-off of the UAT planning activity.</p> <p>There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT.</p> <p>Most of the preparatio activities are affected t non-availability of the final system.</p> <p>2/17/2025: Awaiting FL PALM ESC approval o the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan ii Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.</p> <p>3/25/2025: Received F PALM ESC approval o the revised go-live of July/2026. The impact to agency testing activities can be assessed after FL PALM team published the updated Readines Workplan (expected b: end-April/2025).</p> <p>4/16/2025: Revised go live of July/2026 removes the overlap between FL PALM System testing and Agency UAT. However agency team continue to work with FL PALM get details on the UAT SME sessions, the UA defect triage / management process and planned collaboration / RACI between Agency and FL PALM planned during UAT sessions.</p>
Open and Mitigating	12/04/24		Business Process Change	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Stable	6 (High/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <p>Action: Develop and Launch Pre-PALM Training Closing Activities.</p> <p>Closing Activity 1: Process Gap Analysis</p> <p>Closing Activity 2: Process Gap Remediation</p> <p>Planned closing date: 09/30/25</p>	<p>12/17/2024: CML- Training Development is underway and will precede the initiation c the Closing Process Gap Analysis and Remediation activities.</p> <p>The deployment of the training Series is on track to launch by February 01, 2025.</p> <p>11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM).</p> <p>2/19/2025: Identificatio of specific gaps and remediation plan has been initiated.</p> <p>4/23/2025: Workplan preparation underway for validation of chang impact analysis results on the process.</p>
Open and Mitigating	12/04/24		Staffing/Resource Availability	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Decreasing	6 (High/Medium)	<p>Risk Mitigation Strategy: Mitigate</p> <p>1. Identify the areas where it needs the SMEs bandwidth.</p> <p>2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.</p> <p>Planned closing date: 09/30/25</p>	<p>12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing.</p> <p>To continue working or to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supportir activities to ensure agency readiness for PALM project.</p> <p>Identification of specifi</p>

								remediation plan has been initiated. 2/17/2025: Awaiting FL PALM ESC approval of the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk. 4/23/2025: Re-assess the risk based on revised readiness workplan, which is planned to be published in May/25.
Open and Mitigating	12/04/24		Agency Business System	Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) could be challenging as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from FL PALM.	Stable	6 (High/Medium)	Risk Mitigation Strategy: Mitigate 1. Vendor to refer FL PALM knowledge center to plan & design the system remediation. 2. Vendor to perform unit testing with the information provided by the FL PALM team. 3. FL PALM Team to make sizable and reliable testing data available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing) Planned closing date: 10/30/25	2/17/2025: Vendor is remediating the systems, but continues to face challenges due to limitations of sample data available, and the change in the interface specifications by FL PALM team. Also identified high dependency on the updated timeline from PALM regarding to conduct. 4/16/2025: Vendors are on-track to start the Technical testing of the interfaces in Aug/2025 FL PALM team to share further information on the availability of testing infrastructure. 5/5/2025: ImageAPI team is working on the cost estimates for the agencies to remediate the AxiomPro system in-line with the PALM system transition.
Open and Monitoring	12/04/24		Role Mapping	Insufficient information on access security model and planning of changes to current user roles/responsibilities may impact agency user readiness/adoption.	Increasing	4 (Medium/Medium)	Risk Mitigation Strategy: Mitigate 1. Read & understand the access security model and role definition, published by FL PALM. 2. Map the current business teams to the appropriate user role. 3. Identify the users for whom role/responsibility are changed. 4. Provide required support to the users to adapt to their changed role. Planned closing date: 07/31/25	11/30: Team started exploring the user & security roles definition in the Florida PALM portal. 12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topic is & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new work book. 12/17/2024: CML-The provision of the RWP 560-"Topics & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched. 2/19/2025: FDC-FCOF PALM project team is awaiting detailed information from FL PALM team on security roles, privileges, and segregation of duty information for Financials wave. Similar details from CMS wave is being considered as a reference. 11/15/2024: CML-People Readiness Lead completed the development of the Role Mapping Workbook and socialized workbook with the project team. 04/23/2025: Awaiting security model and role definition, when it gets published by FL PALM project team.
Open and Mitigating	12/04/24		Agency Business System	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/historical data.	Decreasing	3 (High/Low)	Risk Management Strategy: Mitigate. 1. Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components. 2. Archive BARS reporting solution, as the reporting tool for the legacy (FLAIR) information. Planned closing date: 07/01/26	11/06/2024: Overall requirement was reviewed with OIT leadership and receive alignment. Currently in discussion with OIT Systems Management team to identify a solution. Next step is implement and test the solution. 1/10/2025: Technical workshop conducted with FDC OIT experts and finalized the architectural design and technology platform. 2/10/2025: FDC-FCOF PALM project team and OIT technical teams are

								currently brainstorming on the scope and approach for BARS archival. 4/16/2025: Brainstorming in-progress with the OIT technical and infrastructure team to align with the agency technology roadmap.
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FDC Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	01/30/25		Critical - Impacts the ability	Agency Business System	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	08/29/25	1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that. Therefore, the FDC/ FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces. 2. Solution approach and Architectural design for New Database and CAIRS has been prepared. 3. Team is working on detailed activity planning and hiring resources to perform the IT development activities. 4/16/2025: Team continue to work on the workaround solution to meet reporting/ analytics requirements for FDC and FCOR.
Open	03/25/25		Critical - Impacts the ability	Agency Business System	Continued changes to the interface specifications by FL PALM due to ongoing system development, may require FDC PALM project team to rework on the solution for agency systems remediation, which could lead to agencies missing the interface testing milestone.	Team to work on minimizing the impact due to this issue. 1. Develop a scalable solution design with system level flexibility built-in. 2. Collaborate closely with the FL PALM interface team, and ensure the FDC PALM team is updated with the recent/ upcoming changes to the interface file structures. 3. Resolve the gaps in the agency system remediation solution. 4. Escalate in case the changes to interfaces are not feasible to be mitigated.	12/31/25	2/25/2025: This risk was discussed with the FL PALM Readiness Coordinator, and understood that these changes to the interface specifications are currently inevitable, since Segment 3 and 4 related interfaces development are in-progress. FDC PALM team to do detailed assessment of the impact and propose remediation plan. 3/20/2025: Team continues to identify changes in the detailed specifications of the identified interfaces, which is leading to rework of the CAIRS data model and downstream systems remediation. Therefore Risk #19 has been escalated to Issue #8. 4/16/2025: Ongoing communication with FL PALM team (as specified in Issue #4). Ongoing monitoring of FL PALM changes has been put in-place, to analyse and plan for the impacted area.
Open	08/21/23		High - Impacts the ability	Staffing/Resource Availability	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency.	12/31/25	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. 4/16/2025: FL PALM go-live has been changed to July/2026, therefore this risk needs to be assessed 6 months prior to the go-live.
Open	02/28/24		High - Impacts the ability	Interface	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets. 3. Continue to communicate with the FL PALM on the impacted delayed deliverables. 4. Re-prioritize/ reorganize the work in agencies to complete the deliverables with minimal impact possible.	07/01/26	1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions. 2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues. 2/19/2025: Highlighted this issue again as part of Thursdays Task Talk topics, and requested FL PALM team to consolidate all updates to the PALM readiness workplan and share at once, with appropriate level of communication. 4/16/2025: Continue to highlight this issue and the cascading impact on the deliverables due to rework. FL PALM team indicated that the details/ specifications expected to go through changes till the IT development activities at FL PALM completes.
Open	07/31/24		High - Impacts the ability	Staffing/Resource Availability	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Onboard additional staff aug position with FLAIR data experience.	10/30/25	1. Created RFQ for an additional staff aug position. 2. The resource has been onboarded in early December 2024. 2/10/2025: New resource to be onboarded as a replacement for the person onboarded in December 2024. Additionally one more resource request has been raised with FDC Contract management team. 3/25/2025: Data cleansing resource has been identified and expected to join the business team soon. 4/16/2025: Functional expert has joined the team and starting working on the data cleansing activities. Challenge identified with the limited bandwidth in the team. 5/5/2025: Identified FLAIR data expert for 2nd staff aug position to

								assist with data cleansing.
Open	08/31/24		High - Impacts the ability	Staffing/Resource Availability	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes.	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.	11/30/25	9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work. 10/16/2024: UAT high level plan was shared in PALM advisory council meeting. 11/20/2024: BA requirement has been reviewed with the OIT leadership and available vendors are being evaluated. 2/7/2025: Discussion in-progress with the OIT Quality Assurance (QA) vendor to leverage their expertise in UAT planning and preparation of test cases and test scripts. 4/16/2025: Discussions concluded with the QA vendor, QA Analysts to join the team. Shorter engagement to understand how these resources can support in preparing & finalizing UAT Test cases/ scripts.

FDC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
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 onboarded and started working 05/06/2024. Onboarded project team from OIT including Project Manager, Business Analyst and Data Analyst. Key SMEs from F&A team has been engaged actively. 4/30/2025: Archived Assumption Id - 002/ 002	
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. 4/30/2025: Archived Assumption Id - 003/ 003	
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	List of agency business systems are documented, i.e., as-is state, systems in the scope of remediation. Remediation approach for 2 systems is finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach. 4/30/2025: Archived Assumption Id - 004/ 004	
Technology Data	It is assumed that data in FLAIR will exist in a new field in PALM except for fields that are discontinued. For the discontinued fields, it is assumed that PALM project team will communicate the names of the discontinued fields and will be shared as the data dictionary is updated for each Palm Design Segment.	Logged	04/22/24	All agency business systems and the remediation of agency business systems.	The complete data mapping sheet/ crosswalk between FLAIR and PALM data fields are yet to be published by the Florida PALM team. 4/30/2025: Archived Assumption Id - 007/ -	
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FDC UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team. Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan. 4/30/2025: Archived Assumption Id - 008/ 006	
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS. 4/30/2025: Archived Assumption Id - 009/ 007	
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team. 4/30/2025: Archived Assumption Id - 010/ 008	
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop, it is understood that the IT development activities for enterprise systems are in-progress. 4/30/2025: Archived Assumption Id - 011/ 009	
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system.	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency. 4/30/2025: Archived Assumption Id - 012/ 010	
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g. ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	4/30/2025: Archived Assumption Id - 013/ 011	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

Submit

FDC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	05/12/25
January - February 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for FDLE](#)
[Readiness Workplan](#)

FDLE Status Report Dashboard

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

Reporting Period


March - April 2025

Agency Sponsor

Charlotte Fraser

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 94.05%

Submitted On Time = 27

Submitted Late = 9

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 85.36%


Submitted On Time = 53

Submitted Late = 14

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 86.67%

Submitted Complete = 29

Submitted Incomplete = 0

Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 89.51%

Submitted Complete = 35

Submitted Incomplete = 0

Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 7

Duplicate Filled Role = 5

Vacant Role = 2

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/18/25	To be Completed in Task 576	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/01/25	Task Complete	Submission Complete	05/01/25
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	50% - In Progress		5/7/25 - work in progress		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress		Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. Technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by – October 25 (Approx.) 12/6 Remediation Ongoing		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/17/25	Task Complete	Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25	Task Complete	Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	Task Complete	Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	Task Complete	Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25	Task Complete	Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/29/25		Submission Complete	05/05/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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.
Implementation: Planned Florida PALM End Users = 49 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 26	Implementation: Impacted Agency Business Processes = 218 • Related Business Process Groupings = 11/13 • Planned Spreadsheet Uploads = 2	Implementation: Business Systems Planned for Integration = 19 Planned Interfaces = 6 - Inbound Interfaces = 4 - Outbound Interfaces = 2	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

FDLE Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	02/01/25		Interface	Going live in July 2026 which is fiscal year-end, presents new challenges that need to be considered and addressed, as well as months of upfront work.	Increasing	9 (High/High)	Work through the challenges going live at this time will present.	Open
Open and Monitoring	05/16/24		Interface	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Stable	4 (Medium/Medium)	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	Open
Open and Monitoring	08/07/24		Interface	Early visibility of Data Warehouse & Report Query Builder will help us to decide the future scope of custom reports for data validation (well before interface testing)	Increasing	4 (Medium/Medium)	Will address once PALM begins working on the Data Warehouse 05/07 : Waiting for the DW instance access	Open
Open and Monitoring	09/04/24		Interface	FDLE is in need of a comprehensive list of anticipated errors and warnings that may occur in relation to interface interactions and report parameters inputs.	Increasing	4 (Medium/Medium)	Pursue more information /direction from the PALM team. Further delay may impact our ability to meet downstream activities for example UAT.	Open
Open and Monitoring	10/31/24		Interface	The Configuration Review and Update task during UAT poses a potential risk. Changes could affect the UAT timelines and outcomes.	Increasing	4 (Medium/Medium)	Paused	Open

FDLE Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

FDLE Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
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.

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:
March - April 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	05/12/25
January - February 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/07/25

Helpful Links

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

FDOT Status Report Dashboard

Reporting Period

March - April 2025

Agency Sponsor

Lisa Saliba

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

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 90.83%

Submitted On Time = 20

Submitted Late = 15

Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 91.71%

Submitted Complete = 27

Submitted Incomplete = 0

Completed After Submission = 8

Other Task Timeliness:

Score = 79.39%

Submitted On Time = 34

Submitted Late = 29

Pending Resubmission = 4

Other Task Completeness:

Score = 92.89%

Submitted Complete = 27

Submitted Incomplete = 1

Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

- Unique Filled Role = 30
- Duplicate Filled Role = 0
- Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 8/1/2025		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 8/1/2025		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 8/1/2025		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 8/1/2025		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	04/29/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/17/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/27/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/21/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete	

N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/17/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/12/25			
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
<p><u>Implementation:</u></p> <p>Planned Florida PALM End Users = 200</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 30</p>	<p><u>Implementation:</u></p> <p>Impacted Agency Business Processes = 148</p> <ul style="list-style-type: none"> Related Business Process Groupings = 13/13 Planned Spreadsheet Uploads = 3 	<p><u>Implementation:</u></p> <p>Business Systems Planned for Integration = 82</p> <p>Planned Interfaces = 133</p> <ul style="list-style-type: none"> Inbound Interfaces = 32 Outbound Interfaces = 101 	<p><u>Implementation:</u></p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agency Defined Optional ChartFields OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions Accounts Receivable = Needed Assets = Needed Contracts = Needed Customers = Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

FDOT Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	11/01/23		Interface	Batch Schedule Timeliness	Stable	9 (High/High)	Expecting the PALM solution to have timely batch files and the Data Warehouse to be available, or interfaces until the DW is fully available.	Batch schedule will be available in December 2025.
Open and Monitoring	07/30/24		User Acceptance Testing	Late Publication of Batch Schedule	Stable	9 (High/High)	It is an absolute necessity. PALM must provide this. Continue to work with the RC and advise FDOT management. There is great concern of an inconsistent UAT batch schedule for conducting interface testing.	Learned the Batch schedule will be available in December 2025. Any interface testing might be delayed based on that Batch schedule.
Open and Monitoring	07/30/24		Interface	Excel Upload Volume Capacity	Stable	9 (High/High)	Project costing could have a large number of records - an interface to automatically accept our transactions is necessary.	Continued to raise to the Readiness Coordinator. Still do nc have details on what PALM considers as too many records for an Excel file.
Open and Mitigating	09/30/24		Interface	Data Source Indicator - Input or System Generated	Stable	9 (High/High)	If PALM cannot provide the transaction indicator for the data source, we will need to design backup plans and work with the business experts to develop alternative methods.	Part of this has been addressed in the Activity Log. Researching how to design an alternative.
Open and Monitoring	10/24/24		Agency Business System	Project Costing - Manual Inputs	Stable	9 (High/High)	Florida PALM - will advise if it can be through Excel upload.	No comment this period.
Open and Mitigating	07/22/21		User Acceptance Testing	PALM Responses for Detail Information	Decreasing	6 (Medium/High)	Conduct monthly RAID meetings and escalate issues to FDOT leadership and PALM leadership.	Communicate the most important items during the Touchpoint meetings, monitor Question Log, PALM

								Public Log, and Knowledge Center updates.
Open and Mitigating	06/19/24		Agency Business System	FDOT System Complexity	Decreasing	6 (Medium/High)	Broadening the analysis and ensuring that it includes SMEs. Applying early QA processes.	Onboarding additional resources for analysis and remediation.
Open and Monitoring	12/12/24		User Acceptance Testing	Delayed Testing for Excel Uploads	Decreasing	6 (High/Medium)	Awaiting the ability to completely test the upload functionality.	Improving. PALM's extended timeline may allow for an advance pre-test of our interfaces.
Open and Mitigating	12/12/24		Conversion/Configuration	Mock Conversion 2	Stable	6 (High/Medium)	Structure the testing in small units recognizing the problems and limit how far we can effectively test. Need to update Projects (and other config values) in UAT, post go-live, and other configuration values.	Expecting to update configuration workbook post Mock 2 completion for determination of trend/status.
Open and Mitigating	02/18/25		Interface	Interfaces and Data Processing Visibility	Decreasing	6 (High/Medium)	Expect an unknown amount of rework, consider this in planning activities.	Improving. PALM is making special effort to hear our issues and understand our perspective.
Open and Mitigating	04/24/25		User Acceptance Testing	Data Warehouse	Stable	6 (High/Medium)	Request information from the PALM Readiness Coordinator, monitor the Knowledge Center and pose questions.	New risk identified.
Open and Monitoring	05/09/24		User Acceptance Testing	Knowledge Center Change Identification	Decreasing	4 (Medium/Medium)	Requested the Readiness Coordinator for additional communications when there are updates to the Knowledge Center, and what was updated.	Florida PALM has been sending separate emails to advise when there are updates to the Knowledge Center.
Open and Mitigating	02/06/25		Role Mapping	Roles Required	Stable	4 (Medium/Medium)	Moving forward, we are developing a PowerBI dashboard, AARF roles, and SQL-based reports in a flexible manner so that when roles are provided, we can quickly add them.	Received a list of roles from PALM, only CMS Wave, and we have no Financial roles.
Open and Mitigating	07/22/21		Staffing/Resource Availability	Funding to Completion	Stable	3 (High/Low)	Document program funding requirements and communicate with FDOT leadership, the Governor's office, and House/Senate staff.	Budget planning is in progress for the duration of the project.
Open and Mitigating	12/12/24		Conversion/Configuration	Mock Conversion	Decreasing	3 (High/Low)	Continue to collaborate with PALM to work through the process and find a pattern to help identify the problem points.	Awaiting completion and feedback from Mock Conversion 2 for determination of trend/status. Feedback from PALM has offered guidance.

FDOT Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/09/24		High - Impacts the ability	Staffing/Resource Availability	Mainframe capacity	Requested NWRDC/Ensono for 10% increase by end of SFY 2025. A large application (Right of Way Management System) is scheduled to be moved off of the mainframe by end of SFY 2026 which will provide more processing capacity. FDOT Technical resource is looking at offloading flat files to SQL Server by 08/2026.	08/03/26	Monitoring closely and looking at options.
Open	06/13/24		High - Impacts the ability	Interface	Interfaces Continue to Change	Continue to convey the importance to PALM Readiness Coordinator during Touchpoint meetings.	08/01/25	Interfaces are changing some inconsistencies are acknowledged by PALM and they looking into it.
Open	06/13/24		High - Impacts the ability	Staffing/Resource Availability	Limited SMEs	Monitor allocations closely and identify tasks that may be accomplished by another resource. Streamline communications. Set Priorities and work arounds. Escalate to management.	07/01/26	SMEs are contributing answers and guidance, as a PALM priority when they can.
Open	09/16/24		High - Impacts the ability	Interface	Interface Data Relationships	Reach out to PALM regularly for details. Work with PALM to articulate the need and offer examples and communicate how it impacts us.	08/01/25	Moving forward based on assumptions, recognizing rework will be needed. We received 22 out of the 33 ERD's requested, but none in the last month.
Open	10/30/24		High - Impacts the ability	Interface	Need Interface Error Report	Raise to the Technical Coordinator. Run error report next day, soft errors. We do not know how we will receive the fatal errors, work with PALM and by August	08/01/25	Continue to raise to PALM Readiness Coordinator, separate discussion on this issue and PALM will get back to us.

						we expect to have the information.		
Open	12/12/24		High - Impacts the ability	Agency Business System	Functionality Gap	Mapping is progressing, and once we are in UAT we will reassess the impact and mitigation.	07/01/26	Leverage SMEs knowledge and assess business processes.
Open	12/12/24		High - Impacts the ability	Interface	Sample Data Scenarios	PALM said we will not receive sample data. As an alternative we are creating test data to represent the full scenarios.	08/01/25	Created sample test data as we understand the processes and the data interactions.
Open	03/05/25		High - Impacts the ability	User Acceptance Testing	No UAT for Year-end	Being assessed. PALM UAT is unsettled.	04/01/26	Raise to the Readiness Coordinator

FDOT Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
Processes	The Florida PALM Project implementation will replace the current FLAIR functionality and will not encompass FDOT's agency-specific planning and analysis requirements.	Logged	06/30/23	FDOT Florida PALM End Users FDOT Application Owners	Assumption remains valid.	
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	Assumption remains valid.	
People	Adequate staffing, equipment, software, and hardware are primary drivers of the department's FPST Program activities will be available, and there will be funding to support FDOT FPST Program.	Logged	06/30/23	Executive FPST Program Sponsors Chief Information Officer	Assumption remains valid.	
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	Assumption remains valid.	
Technology	FDOT has total dependencies on the PALM Solution Design deliverables.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	Assumption remains valid.	
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	Assumption remains valid.	
Technology	Excel spreadsheet uploads will be entered by business users, and the process will be simple and function smoothly.	Logged	02/20/24	FDOT End Users	Assumption remains valid.	
Data	The 'CFDA' number storage location needed in PALM for expenditure of grants, workaround would be to leverage OA fields and create data relationships.	Logged	04/05/24	FDOT Florida PALM Agency Liaisons FPST Program Managers	Assumption remains valid.	
Data	OA1 and OA2 will fully remain agency specified. This will ensure that PALM will not be using these fields for any PALM functionality that could conflict with other agency's usage of OA1 or OA2.	Logged	05/17/24	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Business Owners	Assumption remains valid.	
Technology	MFMP - System integration between MFMP and PALM will not introduce incompatibility with FDOT.	Logged	06/19/24	FDOT Procurement and Payments	Assumption remains valid.	
Technology	People First - System integration between People First and PALM will not introduce incompatibility with FDOT.	Logged	06/19/24	FDOT Payroll	Assumption remains valid.	
Processes	PALM will provide functionality to allow FDOT to input accounts payables into the system. (Part of the carry forward process last months of the year.)	Logged	10/01/24	FPST Program Managers FDOT Business Owners	Assumption remains valid.	
Data	PALM Data Warehouse and/or PALM Reports will provide the necessary information that our systems and processes require to perform core functionality.	Logged	04/24/25	FPST Program Managers FDOT Business Owners FDOT End Users	Assumption logged this period.	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

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FDOT Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	05/12/25
January - February 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	03/10/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for FGCC](#)
[Readiness Workplan](#)

FGCC Status Report Dashboard

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

Reporting Period


March - April 2025

Agency Sponsor

Lisa Mustain

RW Task Timeliness


Direct Impact Task Timeliness



Direct Impact Task Timeliness:
Score = 97.88%

- Submitted On Time = 26
- Submitted Late = 6
- Pending Resubmission = 0

Other Task Timeliness




Other Task Timeliness:
Score = 97.14%

- Submitted On Time = 58
- Submitted Late = 9
- Pending Resubmission = 0

RW Task Completeness


Direct Impact Task Completeness



Direct Task Completeness:
Score = 94.38%

- Submitted Complete = 26
- Submitted Incomplete = 0
- Completed After Submission = 6

Other Task Completeness



Other Task Completeness:
Score = 86.98%

- Submitted Complete = 31
- Submitted Incomplete = 2
- Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 9
- Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items											
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/14/25		Submission Complete		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	Pending Resubmission	05/02/25		Submission Incomplete		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress					
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress					
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/12/25		Submission Complete		
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete		
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete		
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete		
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/01/25		Submission Complete		
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/24/25		Submission Complete	04/24/25	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	Pending Resubmission	05/12/25		Submission Incomplete	05/12/25	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	50% - In Progress					
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25						

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:
Planned Florida PALM End Users = 18

- Business Process Groupings = 12/13

Identified Subject Matter Experts = 13

Processes

The sequence of procedures to accomplish a business objective.

Implementation:
Impacted Agency Business Processes = 29

- Related Business Process Groupings = 10/13
- Planned Spreadsheet Uploads = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:
Business Systems Planned for Integration = 7
Planned Interfaces = 13

- Inbound Interfaces = 0
- Outbound Interfaces = 13

Data

Information used in or produced from an agency's financial business operations.

Implementation:
Configuration
Commitment Control (KK)

- Budget Allotments - Control Option = Option # 3 - Track without Budget
- Account ChartField Tier Selection = Account Tier #2: Groupings

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

FGCC Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	11/25/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC is unable to receive our source data from Versa (DBPR). Without this source data FGCC will be unable to create revenue inbound interfaces/spreadsheet uploads for interface testing, UAT, and Go Live.	Increasing	9 (High/High)	FGCC is trying to identify alternative methods to create upload interface/spreadsheets	This is an outstanding risk that was original reported on the old risk smartsheet
Open and Monitoring	05/02/24		Agency Business System Business Process Change Interface Conversion/Configuration User Acceptance Testing	The configuration workbooks for FGCC are out of date and there is no timetable set for when or if they will get updated	Increasing	6 (Medium/High)	Originally, FGCC requested that the configurations be updated at this point we are altering our conversion and testing plans to accommodate the lack of configuration data	This is an outstanding risk that was original reported on the old risk smartsheet
Open and Monitoring	09/27/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC has found definitive information about the process, procedures, and schedule related Enterprise systems updating the PALM UAT environment during UAT. This impacts our ability to develop appropriate test plans and may also hinder the ability to input and reconcile PALM UAT data and balances.	Stable	6 (Medium/High)	FGCC requests clarification of the interaction between each Enterprise system and PALM UAT environment during UAT	This is an outstanding risk that was original reported on the old risk smartsheet
Open and Monitoring	06/28/24		Agency Business System Business Process Change Interface Conversion/Configuration User Acceptance Testing	FGCC has not found any definitive information regarding the scope and depth of the conversion testing. Additionally, FGCC has not found definitive information about the available of outbound interface files that can be used to reconcile conversion data in order to identify conversion errors.	Stable	4 (Medium/Medium)	FGCC has bene told that the PALM team is working on process changes between Mock 2 and Mock 3 and that the Mock 3 conversion process will provide more insight	This is an outstanding risk that was original reported on the old risk smartsheet
Open and Monitoring	11/25/24		Agency Business System Business Process Change Interface User Acceptance Testing	FGCC has found no definitive information about the schedule and availability of outbound interface files during UAT.	Stable	4 (Medium/Medium)	FGCC requests clarification that outbound interfaces files will be available on a daily scheduled basis	This is an outstanding risk that was original reported on the old risk smartsheet
Open and Monitoring	09/25/24		Business Process Change Conversion/Configuration User Acceptance Testing	PALM has explained that there are no scheduled resets of initial data loads during UAT. This introduces a risk associated with overall UAT processing. Without reset of initial data loads there is no way to test and confirm fixes associated with errors associated with data conversion that cannot be recreated. This means that the	Stable	1 (Low/Low)	FGCC requests that there be a few scheduled resets of initial conversion data	This is an outstanding risk that was original reported on the old risk smartsheet

same errors may still occur during Go Live.

FGCC Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/12/25		Critical - Impacts the abil	Agency Business System Business Process Change Interface User Acceptance Testing	FGCC is unable to receive our source data from Versa (DBPR).	FGCC is trying to find alternative methods of getting our revenue data		No comment
Open	05/12/25		Low - All impacts not liste	Agency Business System Business Process Change Interface User Acceptance Testing	FGCC will not be able to utilize all of the built-in PALM Interfaces in preparation for UAT and at PALM Go Live. Therefore, FGCC will not be able to utilize all current capability and functionality of the new statewide accounting system. This also means that FGCC will not be able to fully test available functionality during UAT. Additionally, instead of consistent automated business processes, FGCC must utilize a combination of standard interfaces, spreadsheet uploads, and exported hard copy reports in order to piece together process and procedures to send, receive, and reconcile data between agency business systems, PALM, and other state enterprise systems.	There is no action plan to resolve this issue. Currently, FGCC must change our desired business process and procedure to accommodate the lack of access to all PALM functionality.		The available priorities seem to lack options. Critical = can't move forward, High = will miss deadlines, Low = everything else. The agency's ability to adjust agency business systems and process and procedures so that it doesn't miss deadlines in order to address a known issue shouldn't get the issue prioritized the same as all other issues.
Open	05/12/25		Low - All impacts not liste	Agency Business System Business Process Change Interface User Acceptance Testing	The changes in the iterative PALM processes has forced FGCC to change intended business process as well as alter testing plans and preparation. The iterative processes leading to Mock conversions have changed and have limited the ability of FGCC to make intended changes in FLAIR as well as the subsequent related conversion process.	FGCC would like to restore the iterative process is possible.		The available priorities seem to lack options. Critical = can't move forward, High = will miss deadlines, Low = everything else. The agency's ability to adjust agency business systems and process and procedures so that it doesn't miss deadlines in order to address a known issue shouldn't get the issue prioritized the same as all other issues.

FGCC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
Technology Data	FGCC is making the assumption that all Enterprise systems will establish an environment that will coordinate with PALM UAT and that we will be able to enter transactions/data into the enterprise UAT environment and these transactions/data will be integrated into PALM UAT	Logged		Agency Business Ssystems	no comment
Technology Data	FGCC will not have a Versa Replacement system in place prior to PALM Go Live	Logged		Agency Business Ssystems	no comment
Technology Data	FGCC will be able to utilize all PALM interface available to other agencies files at some point after PALM Go Live but will only have the approved PALM Interfaces for PALM Go Live	Logged		Agency Business Ssystems	no comment

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


FGCC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Lisa Mustain	lisa.mustain@flgaming.gov	05/06/25
January - February 2025	Lisa Mustain	lisa.mustain@flgaming.gov	03/12/25

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RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.3%

Submitted On Time = 30

Submitted Late = 6

Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.35%


Submitted On Time = 57

Submitted Late = 8

Pending Resubmission = 2

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 90.00%

Submitted Complete = 24

Submitted Incomplete = 0

Completed After Submission = 12

Other Task Completeness



Other Task Completeness:

Score = 77.14%

Submitted Complete = 28

Submitted Incomplete = 5

Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 2

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Due to the importance of other tasks, and the agency's operational work priorities, this task may not be completed by HSMV.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	04/16/24	We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during UAT testing, when we'll have full access to the PALM screens and testing environment.	Submission Incomplete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during UAT testing, when we'll have full access to the PALM screens and testing environment.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	11/01/24	Submitted 11/1/2024 per previous update.	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/06/25	To be tracked in Task 576 per PALM communication 4/21/25. Last reviewed 4/16/25 w/ Agency; follow up questions for R.C. on PALM's desired responses per review form, vs agency status for doc/remed. Clarification needed to proceed, please. archived comment: 1-Please see our updated comments and statuses in Imp Interfaces & Dev and Interface Test Planning sheets, in context of A12 approval / go live extension. 2-Please ADD interface GLI051 to FLHSMV interface inventory, per email sent 3/6/2025 to our RC. 3-The Implementation Interfaces Details sheet has a yellow cell for AMI002 because the Interface ID is missing from the pulldown (008 or 007 - ?).	Submission Incomplete	05/06/25
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25	Plan V9.0 FINAL is in agency teams library, and attached as PDF to this task for PALM. 5/2/25 Plan v5.0 in agency teams library for review. PALM extended due date from 4/11 to 5/2. Agency approved final (as of then) agency UAT plan on 1/30/25, for submission by original deadline of 1/31/25. Plan held given extended deadline to 3/28/25, to allow for review of PALM UAT plan when published. Agency UAT plan v5.0 shared to Readiness coordinators on 4/2 for review. Plan is being updated with latest project timeline/task dates. Test schedule, Error tracking workbooks, and user story enhancement/test scenarios are in progress DW/BI	Submission Complete	

								reporting will be available in UAT. Project UAT plan will be considered when available.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	01/31/25	Agency reviewed response and updated DM sheet. Approved to resubmit. - 2/14/25 Agency reviewed and completed all 13 workbooks. Two lines in DM workbook require selections that are not available in the field menus: row 1; row 21. Submitting 1/31/25 for analysis, per original deadline. Review of cross-ref reports in process.	Submission Complete	02/19/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		Next meeting w/ LDO: TBA; last meeting: April 28; April 7; Training plan extended to May 2. Planning to use Project UAT stages to capture training aide material and start agency UAT and agency training. Seeking training liaison support from LDO.		
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress		Update: discussion with developer 5/7/25 on replicating current FLAIR process in PALM for support of existing TR2 file pickup. The business does not yet have new TR2 solution in place so development on GLI051 will be ready in October instead of August. We can work around the pending procurement and develop replicated process in PALM for TR2, until new solution can develop connection for automatic TR2 pickup via GLI051. Agency continues development monitoring via daily standups, regular collaborative work sessions. Last interface status discussion: 4/16/25 during April touchpoint agency prep meeting.		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25	Agency approved 2/28/25 Ready for SC review - 2/7	Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/24/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25	Agency reviewed UAT SMEs in collab work session on 4/15/25, again on 4/29/25, in context of UAT plan review on 4/30/25, and on 5/2/25 (Project Lead / PML call) to verify at least 1 SME per process group. All SMEs have contact information provided.	Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25	Resubmitted 5/2/25 but resubmitting again 5/8/25 (did not save?). Reviewed w/ project lead and training liaisons on 4/25. Discussed in 4/16/25 April Touchpoint agency prep meeting.	Submission Incomplete	05/08/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25	Agency Sponsor confirmed sign-off 5/12/25	Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	50% - In Progress		Confirmed via agency tech liaison that FLHSMV IdP names as reported remain correct, pending final confirmation from ISA manager. Meeting on 5/16/25 w/primary and backup IdP contacts, their supervisor, and project leads to review duties and task requirements (contacts and configuration for IdP in UAT). Sent the task 578 sheet w/ IDP configuration notes and IDP contact duties for early review to Eddy, Kevin and Fred on 5/7/25. - KG 5/8/25		
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

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.
<p><u>Implementation:</u></p> <p>Planned Florida PALM End Users = 63</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 24</p>	<p><u>Implementation:</u></p> <p>Impacted Agency Business Processes = 163</p> <ul style="list-style-type: none"> Related Business Process Groupings = 12/13 Planned Spreadsheet Uploads = 0 	<p><u>Implementation:</u></p> <p>Business Systems Planned for Integration = 4</p> <p>Planned Interfaces = 9</p> <ul style="list-style-type: none"> Inbound Interfaces = 5 Outbound Interfaces = 4 	<p><u>Implementation:</u></p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured

- PC Subcategory = To Be Configured
 - PC Source Type = Not To Be Configured
- Conversion
- Optional Conversions
 - Accounts Receivable = Not Needed
 - Assets = Needed
 - Contracts = Needed
 - Customers = Not Needed
 - Encumbrances = Needed
 - Grants = Needed
 - Projects = Needed
 - Projects Balances = Not Needed

Agency Reported

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

FLHSMV Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	12/20/24		Agency Business System Interface Deployment/Cutover User Acceptance Testing	Supplier ID	Stable	9 (High/High)	The agency will test Supplier ID fields and matching as received on each iterative Mock Conversion, and will use the iterative Supplier ID test results	FLHSMV is excitedly awaiting the Supplier Crosswalk which we understand is coming out from Mock 2 data on Monday May 12, 2025. We will closely review that data with our business leads, developers, data managers, and other SMEs. We have already shared this info as "coming soon" in our daily standups. 5/8/25
Open and Monitoring	04/14/25		Interface Deployment/Cutover Training User Acceptance Testing	Interface Error File and Summary Logs	Stable	6 (High/Medium)	HSMV will test the Error Files and Summary Logs when received from PALM (during interface testing).	The agency was advised by PALM that agencies will receive error files and summary logs at Interface Testing. FLHSMV would need to re-evaluate impact if the error files and summary logs are NOT able to be read (further development and testing may be required). Resolving these errors may be delayed in UAT. 5/8/25
Open and Mitigating	12/20/24		Staffing/Resource Availability	Resources - Accounting (train / hire)	Stable	4 (Medium/Medium)	HSMV is actively working to train new staff and provide Florida PALM information. The agency has filled some positions, and continues to work to fill others.	Accounting continues to train, retain and recruit staff, and provide PALM support and knowledge to all users. 5/8/25
Open and Mitigating	09/01/23		Agency Business System	FAME application	Stable	3 (High/Low)	HSMV is working on developing multiple interfaces and has begun developing reports. Changes to the payment batch jobs are in progress.	Updated start to building FAME interface file 5/8/25

FLHSMV Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	11/07/23		High - Impacts the ability	Staffing/Resource Availability	Accounting resources / availability to Florida PALM	HSMV is actively working to fill these positions.	10/01/25	Accounting has 14 vacant positions, and is authorized to fill 8 of these positions.

FLHSMV Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
Data	Florida PALM will provide similar functionality as FLAIR@HSMV	Logged	08/31/23	Impacted Stakeholders include all end users.	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	Impacted ABS could include FAME, Hireback, Asset Management, Service Now, and spreadsheet uploads as they	Internal discussions as of 12/20/24 confirmed all technical units are prepared for the agency internal readiness target date of June 1, 2025 for interface testing, prior to updated PALM timeline indicating UAT Online (SMEs) beginning August 11, 2025 and

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:
March - April 2025	Steve Burch	steveburch@flhsmv.gov	05/12/25
January - February 2025	Steve Burch	steveburch@flhsmv.gov	03/07/25

Helpful Links

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

FWC Status Report Dashboard

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

Reporting Period

March - April 2025

Agency Sponsor

Jessica Crawford

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 97.71%

Submitted On Time = 28

Submitted Late = 6

Pending Resubmission = 0

Other Task Timeliness:

Score = 97%

Submitted On Time = 64

Submitted Late = 3

Pending Resubmission = 0

Direct Task Completeness:

Score = 96.86%

Submitted Complete = 27

Submitted Incomplete = 0

Completed After Submission = 8

Other Task Completeness:

Score = 97.44%

Submitted Complete = 41

Submitted Incomplete = 0

Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

Unique Filled Role = 6

Duplicate Filled Role = 8

Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	02/20/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/29/25		Submission Complete	01/29/25
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	02/18/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	04/29/25		Submission Complete	
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/14/25		Submission Complete	03/19/25
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/28/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/26/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/23/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/16/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/07/25		Submission Complete	
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/06/25			05/06/25
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 145

Business Process Groupings = 13/13

Identified Subject Matter Experts = 21

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 112

Related Business Process Groupings = 11/13

Planned Spreadsheet Uploads = 1

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 5

Planned Interfaces = 3

Inbound Interfaces = 0

Outbound Interfaces = 3

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

Commitment Control (KK)

Budget Allotments - Control Option = Option # 1 - Control

Account ChartField Tier Selection = Account Tier #1: Highest

Organization ChartField Translation Tree

Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Needed

Agency Reported

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

FWC Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for Marc April 2025
Open and Monitoring	11/06/23		Staffing/Resource Availability	Limited subject matter expert (SME) availability	Increasing	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	No change
Open and Monitoring	11/06/23		Staffing/Resource Availability	Team Attrition	Stable	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	No change
Open and Monitoring	11/06/23		Training	Resistance to change	Stable	4 (Medium/Medium)	1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact	No change
Open and Monitoring	11/06/23		Interface	Not all PALM interfaces are fully designed/documented, additionally currently defined interfaces are subject to change.	Stable	4 (Medium/Medium)	1. FWC Analysis and design is being based on calculated assumptions	No change
Open and Monitoring	08/09/24		Training User Acceptance Testing	There is no communication plan between PALM, Enterprise systems and the agencies. FWC is unable to accurately define impacts to processes and potentially agency business systems.	Stable	4 (Medium/Medium)	1. FWC Analysis, design, and system remediation is being based on calculated assumptions	We have reduced the risk rating since the Florida PALM team added an Enterprise partner page to the website. We will continue to monitor communications with Florida PALM and its enterprise partners.

FWC Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

FWC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025

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

FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Jessica Crawford	jessica.crawford@myfwc.com	05/07/25
January - February 2025	Jessica Crawford	jessica.crawford@myfwc.com	03/05/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for JAC](#)
[Readiness Workplan](#)

JAC Status Report Dashboard

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

Reporting Period


March - April 2025

Agency Sponsor

Alton L. "Rip" Colvin, Jr.

RW Task Timeliness

Direct Impact Task Timeliness




Direct Impact Task Timeliness:

Score = 91.39%

- Submitted On Time = 27
- Submitted Late = 8
- Pending Resubmission = 0

Other Task Timeliness




Other Task Timeliness:

Score = 81.71%

- Submitted On Time = 45
- Submitted Late = 22
- Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness




Direct Task Completeness:

Score = 90.00%

- Submitted Complete = 21
- Submitted Incomplete = 0
- Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 79.76%

- Submitted Complete = 23
- Submitted Incomplete = 1
- Completed After Submission = 18

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 2
- Vacant Role = 0

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

The dials above 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.

RW Tasks - Completed or Open Items										
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	12/17/24		Submission Complete	12/17/24
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	Pending Resubmission	05/02/25	Discussed at monthly Touchpoint - now have instructions to complete this task asap. 5/7/25 EH	Submission Incomplete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress	04/11/25	4/11/25:RC requested submission be changed back to 50%. JAC continues remediation and unit testing. Addendum completion does not complete task.		
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25					
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25					
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/25/25		Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/25/25		Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/25/25		Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25	JAC	Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25		Submission Complete	

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 244

- Business Process Groupings = 13/13

Identified Subject Matter Experts = 31

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 134

- Related Business Process Groupings = 10/13

Planned Spreadsheet Uploads = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 10

Planned Interfaces = 13

- Inbound Interfaces = 2

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

- Commitment Control (KK)

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Outbound Interfaces = 11

- Account ChartField Tier Selection =
Account Tier #1: Highest

- Organization ChartField Translation Tree
Selection = Translation Tree #2: Agency-
Defined Tree

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Not Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

JAC Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Monitoring	04/30/25		Post Implementation	Downtime during transition	Increasing	6 (Medium/High)	Monitor schedule and plan accordingly, constant communication with the JROs and vendors on the delay and timelines.	JAC is monitoring and awaiting Florida PALM project direction as this will affect all agencies.
Open and Monitoring	05/09/25		Business Process Change Staffing/Resource Availability Training User Acceptance Testing	User Acceptance Testing (UAT) and complete test coverage	Increasing	6 (High/Medium)	JAC is developing materials and communications aimed at preparing staff for UAT, including user stories and quick reference guides, and training materials targeted at supporting staff in their roles.	JAC hired a UAT coordinator in late April
Open and Monitoring	05/09/25		Agency Business System Business Process Change Deployment/Cutover Post Implementation	Large volume of activities required to gather future state business process documentation in PALM could result in delays	Increasing	6 (High/Medium)	Working with other Agency groups, documenting and sharing information, attending PALM executive steering committee and advisory council meetings to gather PALM information, and use internal change management and training teams to develop and publish content across JAC and the JROs.	JAC continues to move toward UAT. As the Project releases more information, the agency is attempting to survey the Knowledge Center etc to have the most up-to-date information.
Open and Monitoring	05/05/25		Agency Business System	Limited Sample Data	Stable	4 (Medium/Medium)	Waiting for more test data to be available during interface testing and UAT	JAC will continue to monitor communication from the Project regarding how this should be accomplished.
Open and Monitoring	05/12/25		Agency Business System Post Implementation	Transfer of FLAIR IW data to PALM DW fails.	Stable	3 (High/Low)	As of May 2025, we will monitor the plan. In the future, we may need a more robust plan	This risk was brought to our attention by the IV&V Vendor.
Open and Mitigating	04/30/25		Business Process Change User Acceptance Testing	Project/Grant Tracking - Revenue and Disbursement	Decreasing	3 (High/Low)	We are working with each JRO to set up projects they need to be tracked.	JAC is planning how to manage this increased workload
Open and Monitoring	05/09/25		Agency Business System Staffing/Resource Availability	Funding Risk	Stable	3 (High/Low)	JAC has requested funding from the legislature to secure funding for FY 2025-26.	Both the House and the Senate had our LBR amount in their budgets. As of May 12 the Legislature is at a stalemate. JAC will continue to monitor legislative actions.
Open and Monitoring	05/09/25		Agency Business System	Business Management Operations System (BOMS)	Stable	3 (High/Low)	JAC formed an Advisory Council comprised of JRO leaders to work with the vendor on remediation activities. JAC will continue to assist the Advisory Council when requested regarding activities related to BOMS, to support the successful remediation	BOMS remediation is moving forward. JAC will continue to monitor the vendor's progress.

							of the system and associated processes.	
Open and Monitoring	04/30/25		Post Implementation	Lack of clarity regarding process to create certified forward payables during the cutover period from FLAIR to PALM.	Stable	1 (Low/Low)	JAC is monitoring information published by the PALM team surrounding the Carry Forward process. As new information is available, JAC will adjust its processes to maintain compliance with the established carry forward guidance.	As recently as the ESC meeting on April 23, th Project declined to share information regarding this issue. JAC will continue to monitor communications for direction from the Project.

JAC Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

JAC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	
People Processes	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 delays	Logged	05/09/25	All Stakeholders and Systems	As the work increases, we assume that JAC will have access to both internal and external stakeholders.	
People Processes	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	05/09/25	All Stakeholders and Systems	Our decision log is growing but we are assuming that decisions will be made in a timely manner.	
People Processes Technology Data	The Florida PALM project will go live in July 2026	Logged	05/09/25	All Stakeholders and Systems	During the previous reporting period, the Florida PALM Go-Live date was changed. We assume Go-Live will continue as July 2026.	
People Processes Technology Data	A hard cutover from FLAIR to Florida PALM will occur in July 2026 and FLAIR will no longer be operational	Logged	05/09/25	All Stakeholders and Systems	We assume that FLAIR will be shut down. However, we are still awaiting information such as how Year-End for FY 2025-26 will be completed; in FLAIR or PALM?	
Technology	There will be no technical barriers to the integrations required for future-state data exchange between JAC systems and those impacted by PALM.	Logged	05/09/25	All Agency Business Systems	We assume that all technology will work as planned.	
People Processes Data	We assume that the data in PALM is secured at the org security level in the modules identified as secure.	Logged	04/30/25	JAC would assume a significant amount of additional workload form the JROs if the security is not as promised.	There is nothing to report for this period; we continue to monitor	
Data	JAC assumes data will be fully cleansed, and remain cleansed, prior to go-live.	Logged	05/09/25	All JAC staff, including JRO fiscal staff.	This is a new assumption; JAC will increase our efforts to improve the Master Balance file.	
People Processes Technology	JAC will recieve requested funding throughout the duration of the PALM project lifecycle.	Logged	05/09/25	All JAC staff	As of 05/12/2025, the legislature is at an impasse. We assume this will be resolved and JAC will receive funding for FY 2025-26.	
People Processes Technology	All JAC agency business system remediation projects that require direct interface with PALM will successfully achieve PALM and JAC requirements.	Logged	05/09/25	All JAC staff	All remediation efforts are on track.	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

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JAC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	05/12/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/08/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/08/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	02/27/25

- [Dashboard Snapshots](#)
- [Knowledge Center](#)
- [Florida PALM Workbook for LEG](#)
- [Readiness Workplan](#)

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

Lee Boatwright

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.
<p><u>Implementation:</u></p> <p>Planned Florida PALM End Users = 48</p> <ul style="list-style-type: none"> • Business Process Groupings = 10/13 <p>Identified Subject Matter Experts = 11</p>	<p><u>Implementation:</u></p> <p>Impacted Agency Business Processes = 112</p> <ul style="list-style-type: none"> • Related Business Process Groupings = 8/13 • Planned Spreadsheet Uploads = 3 	<p><u>Implementation:</u></p> <p>Business Systems Planned for Integration = 11</p> <p>Planned Interfaces = 18</p> <ul style="list-style-type: none"> - Inbound Interfaces = 12 - Outbound Interfaces = 6 	<p><u>Implementation:</u></p> <p>Configuration</p> <ul style="list-style-type: none"> • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection =

Account Tier #3: Family

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

LEG Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	08/26/24		Agency Business System	Procurement of a new Travel Management System to be implemented and integrated commensurate with PALM implementation	Stable	9 (High/High)	Continue to work through issue with partners	Risk has been reviewed and is current
Open and Mitigating	10/28/24		Post Implementation	EDR and Auditor General Data needs	Stable	9 (High/High)	Continue to work through issue with partners	Risk has been reviewed and is current
Open and Mitigating	08/26/24		Agency Business System	Procurement of a new Asset Management System to be implemented and integrated commensurate with PALM implementation	Stable	6 (Medium/High)	Continue to work through issue with partners	Risk has been reviewed and is current

LEG Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

LEG Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	

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

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	05/09/25
January - February 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	03/10/25

Helpful Links

[Dashboard Snapshots](#)
[Knowledge Center](#)
[Florida PALM Workbook for PSC](#)
[Readiness Workplan](#)

PSC Status Report Dashboard

Reporting Period

March - April 2025


Agency Sponsor

Apryl Lynn

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

RW Task Timeliness

Direct Impact Task Timeliness




Direct Impact Task Timeliness:

Score = 95.93%

- Submitted On Time = 16
- Submitted Late = 10
- Pending Resubmission = 0

Other Task Timeliness




Other Task Timeliness:

Score = 96.52%

- Submitted On Time = 54
- Submitted Late = 12
- Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness




Direct Task Completeness:

Score = 87.86%

- Submitted Complete = 20
- Submitted Incomplete = 1
- Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 87.32%

- Submitted Complete = 29
- Submitted Incomplete = 1
- Completed After Submission = 11

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

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

The dials above 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.

RW Tasks - Completed or Open Items											
Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment		Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/29/24			Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	05/02/25				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	03/27/25			Submission Complete	04/22/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress					
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	02/13/25			Submission Complete	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/13/25			Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/04/25			Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/27/25			Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/27/25			Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	04/25/25			Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/25/25	Shared documents were attached when submitted; each group received the same shared update -Katisha FH: Please attach support to each row separately I have updated the worksheet. Katisha 5/12/25		Submission Complete	05/12/25
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/05/25	There aren't any risk, issues, or assumptions. Katisha 5/12/25		Submission Complete	05/12/25
Indirect	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	100% - Submitted	05/06/25				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	50% - In Progress					

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 11/13

Identified Subject Matter Experts = 3

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 18

- Related Business Process Groupings = 9/13

Planned Spreadsheet Uploads = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Data

Information used in or produced from an agency's financial business operations.

Implementation:

Configuration

- Commitment Control (KK)
- Budget Allotments - Control Option = Option # 2 - Track with Budget
- Account ChartField Tier Selection = Account Tier #2: Groupings

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree
- Org Security Rule = Agencywide
- Optional ChartFields
- OA1 = To Be Configured
- OA2 = Not To Be Configured
- PC Category = To Be Configured
- PC Subcategory = To Be Configured
- PC Source Type = Not To Be Configured
- Conversion
- Optional Conversions
- Accounts Receivable = Not Needed
- Assets = Needed
- Contracts = Needed
- Customers = Not Needed
- Encumbrances = Needed
- Grants = Not Needed
- Projects = Not Needed
- Projects Balances = Not Needed

Agency Reported

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

PSC Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025

PSC Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

PSC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025	

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: *

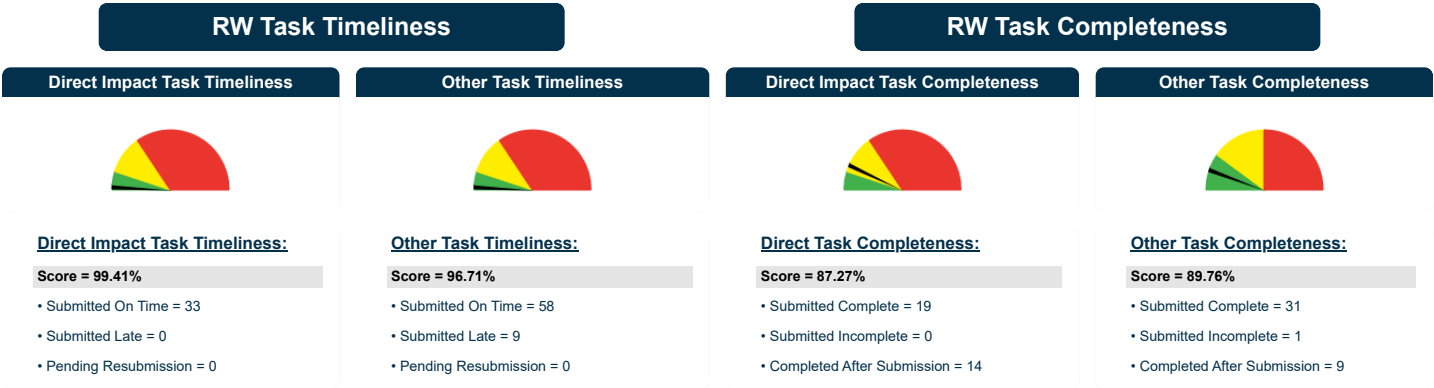
☐ Confirm *

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PSC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Apryl Lynn	alynn@psc.state.fl.us	05/05/25
January - February 2025	Apryl Lynn	alynn@psc.state.fl.us	03/03/25



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.
<u>Implementation:</u> <div>Planned Florida PALM End Users = 141</div> <div>• Business Process Groupings = 10/13</div> <div>Identified Subject Matter Experts = 9</div>	<u>Implementation:</u> <div>Impacted Agency Business Processes = 37</div> <div>• Related Business Process Groupings = 12/13</div> <div>• Planned Spreadsheet Uploads = 3</div>	<u>Implementation:</u> <div>Business Systems Planned for Integration = 4</div> <div>Planned Interfaces = 12</div> <div>- Inbound Interfaces = 3</div> <div>- Outbound Interfaces = 9</div>	<u>Implementation:</u> <div>Configuration</div> <div>• Commitment Control (KK)</div> <div>- Budget Allotments - Control Option = Option # 2 - Track with Budget</div> <div>- Account ChartField Tier Selection = Account Tier #1: Highest</div> <div>- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned</div> <div>• Org Security Rule = Agency Defined</div> <div>• Optional ChartFields</div> <div>- OA1 = To Be Configured</div> <div>- OA2 = Not To Be Configured</div> <div>- PC Category = To Be Configured</div> <div>- PC Subcategory = To Be Configured</div> <div>- PC Source Type = Not To Be Configured</div> <div>Conversion</div> <div>• Optional Conversions</div> <div>- Accounts Receivable = Not Needed</div> <div>- Assets = Needed</div> <div>- Contracts = Not Needed</div> <div>- Customers = Not Needed</div> <div>- Encumbrances = Needed</div> <div>- Grants = Not Needed</div> <div>- Projects = Needed</div> <div>- Projects Balances = Not Needed</div>

Agency Reported

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

SCS Risks								
Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	05/02/25		Agency Business System Interface Conversion/Configuration	If PALM is not fully operations in UAT, then SCS schedules, timelines, and delivery dates in SCS IMS will be delayed. Depending on what UAT feedback...	Increasing	6 (High/Medium)	Requested through IV&V to have PALM communicate directly to all agencies their progress against plan on establish "control thresholds information" on a regular basis. Followed up with PALM...	Reached out to IV&V for assistance.

SCS Issues								
Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025
Open	05/07/25		High - Impacts the ability	Business Process Change Conversion/Configuration Role Mapping Staffing/Resource Availability User Acceptance Testing	SCS is adopting new PALM HR/Payroll processing requirements, designs, & reporting: - This will impact internal SCS ABS Timekeeping with PALM and SCS HRIS system	Validating updated processing with SCS HR, F&A, & OIT	07/31/25	Mitigating

SCS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People Processes Technology Data	SCS is assuming that PALM will provide full application functionality for all modules & business processes to support SCS's modified production performance model. SCS is creating internal ABS testing scenarios that will integrate a complete "end-to-end" testing scenario between SCS, Enterprise Partners, & PALM	Logged		SCS Business Units: - F&A - Budget - Contracts & Grants - HR/Payroll - OIT - Courts Administration	Monitoring

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 *

SCS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Eric W. Maclure, State	(macluree@flcourts.org	05/07/25
January - February 2025	Eric W. Maclure, State	(macluree@flcourts.org	03/10/25

The following reports
were not confirmed by the
agency:

FSDB