

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:

November – December 2025

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

AHCA Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Jon Manalo

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 = 96.94%

- Submitted On Time = 39
- Submitted Late = 9
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 90.83%

- Submitted Complete = 42
- Submitted Incomplete = 1
- Completed After Submission = 5

Other Task Completeness:

Score = 92.94%

- Submitted Complete = 44
- 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.

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

- Change Champion Network:
- Unique Filled Role = 8
 - Duplicate Filled Role = 6
 - Vacant Role = 1

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 | | 1/14/2026: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan. | | |
| 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 | | 1/14/2026: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan. Additionally, the agency is addressing the process change for recording AR(s) monthly instead of annually. | | |
| 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 | | 1/14/2026: AHCA BAs continue to work with the Bureau of Financial Services for documenting the processes to include processes that are part of the Certification 1 mitigation plan. | | |
| N/A | Technology | 547 | Remediate Agency Business Systems based on Segment III | 07/22/24 | 12/13/24 | 75% - Consolidating/Inputting Information for Submission | | 1/14/2026: Agency Tier 2 application (VERSA) remediation is in progress for the creation of the ARI010. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | 12/19/2025: Initial UAT Load | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/31/25 | 10/31/2025: Reviewing some Encumbrances but completed the cleansing activity for Mock 3 Conversion | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | 11/04/2025: Will need to create 2 new Location codes in next mock conversion (AM). Mapped those to existing IDs. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/31/25 | 9/10/2025 - GL Configurations have been completed. Other configurations are in progress. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/22/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

| | | | | | | | | | | |
|--------|--------|-----|--|----------|----------|---|--|--|--|--|
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 11/25/24 | | Deployment/Cutover | Unavailability of Accounting System | Increasing | 9 (High/High) | If there is not an accounting system available in December 2026/January 2027, AHCA will not be able to complete the Weekly Medicaid Runs and will not have the ability to pay the providers, costing the State, millions of dollars in fines/penalties. | 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 December/January. Note: Banks are still operational | Millions of dollars in interest/fines/penalties. | 1/13/2026 - Beginning the meetings to determine the steps that the agency needs to take to address the absence of accounting system |
| Open and Monitoring | 07/09/25 | | Agency Business System | Continued Implementation of SunFocus enhancements | Stable | 6 (High/Medium) | To enhance operational efficiencies, we are conducting an analysis and implementing identified improvements using our development resources. | 1) Complete Mitigation plans for SunFocus Remediation (which will the identification of additional technical resources 2) Leadership Prioritization of SunFocus Remediation vs. SunFocus Enhancements | Deployment/Cutover | 12/30/3035 - Dedicated staff is working Florida PALM remediation and new resource is working operational incidents and enhancements |
| Open and Monitoring | 07/18/25 | | Agency Business System | Non remediated Tier 1 ABS (Delayed SunFocus Remediation) | Increasing | 6 (High/Medium) | If SunFocus is not remediated by 06/30/2026 then the Bureau of Financial Services may need to manually perform the operational tasks that are currently in SunFocus. | The critical business processes (Weekly Medicaid Run module and Invoicing modules) will be 100% remediated by 02/01/2026 and three cycles of the Medicaid Runs have been tested and validated as a success criterion. Manual processes have been documented to perform the functions for the remaining modules. | Extensive manual processing in the Bureau of Financial Services | 12/30/2025 - The Medicaid Module of SunFocus has been remediated to meet the minimum requirements for completing the Weekly Medicaid Run. The module needs to be system tested over the next four weeks. |
| Open and Mitigating | 01/31/25 | | Agency Business System | Known Impacted ABS | Decreasing | 1 (Low/Low) | If remediation for In-house ABS applications that are impacted with the implementation of Florida PALM have not been planned for by 3/30/2026, AHCA may have resource constraints for the remediation, resulting in the inability of AHCA processes to function. | 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 - In progress 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 ABS: FX-No Impact ABS: AHCA Network - In Progress ABS: CATS - N/A | PAR will need to be completed manually | 1/13/2026 - Minimal impacts to AHCA. PeopleFirst views are being incorporated into AHCA network impacts. |

| AHCA Issues | | | | | | | | | | |
|-------------|-------------|-------------|----------------------------|-------------------------|--|--|--|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 09/30/24 | | High - Impacts the ability | User Acceptance Testing | ABS Remediation Schedule different than Florida PALM | Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness metric to continue to be | 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. | 01/30/26 | 1/13/2026 -Awaiting final Florida PALM Outbound file to be received. | |

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|------|----------|--|-----------------------------|--------------------------|---|--|---|----------|--|
| | | | | | | ments to continue to be low. | | | |
| Open | 09/06/24 | | High - Impacts the ability | Staffing/Resource Availa | Florida PALM Tasks and SunFocus Operations Competing Resources | Production incidents and time sensitive activities will continue to interfere with the resource tight bureau. Accept the issue and work with the Florida PALM Project to identify when a deliverable will be late. | Leadership will prioritize the activities | 12/31/26 | 12/30/2025 - Dedicated technical staff is working operational incidents. |
| Open | 10/28/24 | | Low - All impacts not liste | Agency Business System | FY25-26 Lack of Funding for Third-Party Vendor supported Agency Business System | Funding was not requested for Third Party Vendor-Supported applications for the FY25-26 due to analysis of agencies business systems being done concurrently with the deadline for the submission of the Legislative Budget Request. Those applications that have now been identified are ePAR (electronically routed PAR app) the is impacted by PeopleFirst changes and CATS (agency contract application that feeds FACTS). | 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. | 01/30/26 | 1/13/2026 - PARs can be processed manually. |

| AHCA Assumptions | | | | | |
|-------------------------------|------------|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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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| AHCA Status Report Confirmation | | | |
|---------------------------------|----------------------|-------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Jon Manalo | jon.manalo@ahca.myflorida.com | 01/14/26 |
| September - October 2025 | Jon Manalo | jon.manalo@ahca.myflorida.com | 11/07/25 |
| July - August 2025 | Jon Manalo | jon.manalo@ahca.myflorida.com | 09/10/25 |
| May - June 2025 | Jon Manalo | jon.manalo@ahca.myflorida.com | 07/10/25 |
| 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


November - December 2025

Agency Sponsor

Rose Salinas

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 97.88%

Submitted On Time = 49

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 99.89%


Submitted On Time = 83

Submitted Late = 1

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 83.14%

Submitted Complete = 33

Submitted Incomplete = 4

Completed After Submission = 14

Other Task Completeness



Other Task Completeness:

Score = 90.70%

Submitted Complete = 41

Submitted Incomplete = 0

Completed After Submission = 16

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 = 11

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | 6/5 - APD is working on all UAT stories with teams and initiating the Smartsheet Workbook updated for each team - in person reviews - week of 6/9 6/9 - all teams are working their team Smartsheet to complete at least 3-5 user samples 6/19 - teams are actively working on their stories in Smartsheet - APD 7/23 - continued work in progress - APD separate within Agency Smartsheet's 8/5 - finalizing the task sheet to transfer over to task due sheet 8/11 - working with individual team members and SME's on all updates - documented UAT resources and sample 9/23 - working with teams on greater detail and inventory outside of PALM to reflect the UAT stories that will be tested when needed 10/2-all reports loaded in all team sheets - team review in progress 10/29 Teams in re-write and adding test cases with revisions to the original stories - UAT colab team will standardize and working on collaborating efforts 11/5 - team meetings with SME's working in next 2 weeks - to review/re-write and update all stories for UAT | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | 7/16 - read 7/23 - reviewing matrix and all participant roles review with teams 8/5 - teams validation being checked 8/12 - Working thru APD structure and tea alignment with SAM and leadership 9/8 - working all teams - APD working to get things completed 9/23 - working with teams on greater detail and inventory outside of PALM to reflect the UAT stories that will be tested when needed 10/2 - mapping review with alignment - using user roles in place - tb done by 10/10 10/29 - team is in review and with Pre-UAT can be useful as there are updates that don't align with original legacy system 11/5 - end user survey sent out by 11/10 for updates to positioning and use of system 12/19 - completed with review and justification for SOD - core team - all updated for UAT - contractor Position numbers are identified differently than state employees per PALM | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | 8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress | Submission Complete | |

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|----------|------------|-----|---|----------|----------|--|----------|--|-------------------------------------|--|
| | | | | | | | | 9/23 - all workbooks are in progress 9/23 - working with teams on greater detail and inventory outside of PALM to reflect the UAT stories that will be tested when needed 10/2 - workbooks with teams for updates and review with HB 10/29 - updates reviewed with team and submission pending Friday submission 11/5 - remaining updates - HB 11/7 - HB has ready to submit today | | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | 8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress 9/23 - working with teams on greater detail and inventory outside of PALM to reflect the UAT stories that will be tested when needed 10/2 - workbooks with teams for updates and review with HB 10/29 - reviewed with teams - updates in progress Wednesday submission | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | 8/12 - APD Team is reviewing the Conversion Files/Documentation and required updates 9/8 - all workbooks are in progress 9/23 - working with teams on greater detail and inventory outside of PALM to reflect the UAT stories that will be tested when needed 10/2 - workbooks with teams for updates and review with HB Wednesday Submission | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/06/25 | 11/5 - updates being posted to Smartsheet sending to Rose for review 11/6 11/6 - review on status call - Rose to sign off - email sent | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | 11/5 - updates being reviewed with the team - interface files with corrections submitted to PALM 11/5 - updated files submitted for testing - status tracking in progress | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | 12/15 - updating an in progress - reviewed by team 12/19 - rereviewing updates 12/23 - mitigation plan updates 12/29 - contact Rose S for sign off and completion | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/07/26 | 12/15 - updating an in progress - reviewed by team 12/19 - done but checking | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | 12/15 - updating an in progress - reviewed by team 12/19 - progress on updes and using the PALM temp schedule 1-5-2026 - updated with all the UAT documentation meeting the rubric - reviewing Thursday morning to submit on 1-8-2026 1/8 - attached updated plan based on Task 688 rubric. | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | 12/15 - updating an in progress - reviewed by team 12/19 - we will be ready!! 1-7-2026 - updated with mitigation notes - to be submitted 1-8-2026 1-9-2026 - Rose Salinas Signed off on the sheet today - email response | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | 1-7-2026: working on this whole task 1/12 - risks/issues/assumptions all updated for current activities and reviewed by teams | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 75% - Consolidating/Inputting Information for Submission | | 1-7-2026: getting updates on a couple of interface testing files 1/12 - team has cleared several test files and updates ongoing/80% mark now | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 99/99/99 | | | | | |
| N/A | Processes | 602 | Update Agency Business Process Documentation | 01/12/26 | 06/26/26 | 50% - In Progress | | 1/12 - conitnues effort by teams to help with documentation during UAT | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 50% - In Progress | | 1/12 - updates being documented for submission - BM | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 09/08/25 | | User Acceptance Testing | Compressed schedule reduces time for end-user training | Stable | 9 (High/High) | Internal training assistance will be hired in early 2026 | Adjust training schedule dynamically; prepare modular training that can be updated quickly; ensure "train-the-trainer" resources are ready. | Compressed schedule reduces time for end-user training | 1/12 - Continued as in progress and reviewed by the teams 2026 - timeline change allows for approx 9 months of training on line activities |
| Open and Monitoring | 09/08/25 | | Agency Business System | Encumbrance ID and the ABC re-write change from FLAIR | Decreasing | 9 (High/High) | Because the encumbrance id is not generated in real time and requires an overnight feed - this poses a huge impact on the flow of work/process in the ABC system | Discussion with PALM team to review options and see how things can be worked thru | process change will impact the way ABC handles transactions | 1/12 - Continued as in progress and reviewed by the teams UAT Determination |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|--|------------|-----------------|--|---|--|--|
| Open and Monitoring | 09/10/25 | | Post Implementation | PALM Security - audit and transaction history trail for ALL activity within the system - currently noted as it pertains to transactions in the active CMS Framework. | Stable | 9 (High/High) | Current Transaction was initiated in CMS and was posted with a successful view on screen/online, however the transaction was GONE the next day. The follow up with PALM was that they could not or had no way of knowing who interacted with this transaction - why was it gone, who did it, what is the history, where did it go? and the solution from PALM was they didn't know - NOT A GOOD ANSWER - and that the agency should retract/delete the transaction and re-do it - without understanding if this would cause a duplication etc. | PALM for CMS is currently in use- the APD Team is working to try and find a SME on the issue with explanation and there is not a solution or fix on tracking the history of what took place for audit - understanding - for how to fix and find | HUGE - it causes a loss of integrity - a loss of trust in the system - a need to challenge the security parameters used for this application | 1/12 - Continued as in progress and reviewed by the teams PALM and A&A updates to all agencies needed on the post Go Live audit capabilities with all buttons flipped to allow for transaction history and audit Note - PALM is aware |
| Open and Monitoring | 05/02/25 | | User Acceptance Testing | Limited time for user testing due to technical delays - interface changes and updates not finalized | Stable | 6 (Medium/High) | APD IT Teams preparation and training and UAT | Create a risk buffer in schedule for testing; prioritize high-value scripts - IT Team working sprint and actively testing as you go | Missed defect discovery leading to production errors | 1/12 - Continued as in progress and reviewed by the teams 2026 - improving and UAT determination |
| Open and Monitoring | 07/07/25 | | User Acceptance Testing | Testers Lack Knowledge of the New PALM Platform | Stable | 6 (Medium/High) | No one has seen that actual PALM application - logged on or used it yet - this will be a learn by fire scenario | Training, mentorship, guides expecting PALM direction and initial effort with teams/agencies | Challenged during UAT to fully test the system | 1/12 - Continued as in progress and reviewed by the teams 2026 - practice in UAT and Training to assist |
| Open and Monitoring | 09/08/25 | | Post Implementation | Increased support demand post go-live due to rushed testing/training | Stable | 6 (Medium/High) | Post implementation support is questions for both IT and functional efforts | Strengthen hypercare team; extend support hours post go-live; provide quick reference guides and job aids. | Increased support demand post go-live due to rushed testing/training | 1/12 - Continued as in progress and reviewed by the teams UAT will help with this determination |
| Open and Monitoring | 05/02/25 | | Interface | Legacy system interfaces mapping with ABS-PALM APIs | Stable | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Develop interface translation layers; validate APIs early - continual review and update | Critical data exchanges fail; project delays and costly rework | 1/12 - Continued as in progress and reviewed by the teams 1/2026 - all API's to date are successful with PALM Training - very few remain to be tested with PALM |
| Open and Monitoring | 05/02/25 | | User Acceptance Testing | Inadequate cloud platform performance under high user load due to multi agency impact | Increasing | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Conduct load testing in pre-production; scale infrastructure proactively | Users face slow performance; loss of trust in system usability | 1/12 - Continued as in progress and reviewed by the teams 2026 - will evaluate in UAT - pre-req team noted system speed |
| Open and Monitoring | 05/02/25 | | Post Implementation | Security configuration gaps during system transition | Stable | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Security audits and review access controls before go-live | Data breaches or access violations; potential audit or legal issues | 1/12 - Continued as in progress and reviewed by the teams 2026 - identified and updating internally with IT Plan |
| Open and Monitoring | 05/02/25 | | Conversion/Configuration | Data corruption or loss during migration process | Stable | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Perform dry-run migrations; ensure backups are tested and validated - need PALM Conversion Plan as soon as ready o Perform multiple rounds of test migrations before UAT o Use automated reconciliation tools to compare legacy vs. cloud data o Include specific test cases for historical data validation o Assign a dedicated data QA team | Permanent loss of financial or transactional data | 1/12 - Continued as in progress and reviewed by the teams 1/2026 - adding to collaborative Risk Team log as an agency wide concern due to historical replication/audit trail/help desk support |
| Open and Monitoring | 05/02/25 | | Deployment/Cutover | Failure of third-party integrations post-migration - unknowns for peripheral systems - STMS/MFMP/etc | Decreasing | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Engage vendors early; build fallback interface plans - APD attending all meetings at this time | Failure to process essential transactions like payroll or grants | 1/12 - Continued as in progress and reviewed by the teams 2026 - will clear as the Enterprise systems are aligning with PALM |
| Open and Monitoring | 05/02/25 | | Post Implementation | Inadequate disaster recovery or backup strategy during cutover - new system - what if's | Stable | 6 (High/Medium) | APD IT Teams preparation and training and UAT | Implement robust backup and rollback strategies; conduct failover tests - once understanding of PALM conversion plan is in place - adjust and ready | Irreversible data loss or extended downtime during transition | 1/12 - Continued as in progress and reviewed by the teams 2026 expectations of PALM for disaster recovery overviews and training |
| Open and Monitoring | 07/07/25 | | User Acceptance Testing | Incomplete or Incorrect Test Scenarios | Stable | 6 (High/Medium) | APD Finance Teams creation of testing stories for UAT inadequate | o Involve key accounting SMEs in test case design o Map test cases to migrated business processes and compliance requirements o Conduct a pre-UAT review/approval of test scripts o Use traceability matrix to ensure coverage | unable to test fully | 1/12 - Continued as in progress and reviewed by the teams UAT Determination |
| Open and Monitoring | 09/08/25 | | User Acceptance Testing | Delay in UAT completion pushes back project go-live | Stable | 6 (High/Medium) | Planning due to PALM PAUSE | Build buffer into project plan; prioritize critical test cases; agree on criteria for UAT sign-off; escalate blockers quickly. | Delay in UAT completion pushes back project go-live | 1/12 - Continued as in progress and reviewed by the teams Jan 2026 - Exec Com Mtg for Stage gate pass and certification #2 |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------------|--|------------|-------------------|---|--|---|--|
| Open and Monitoring | 09/08/25 | | Conversion/Configuration | Data migration defects not identified in time due to late UAT | Stable | 6 (High/Medium) | Use of Config workbook data from current Mock versions - making certain the data is APD's | Perform early mock data conversions; include data validation as a separate workstream; increase data reconciliation effort post-UAT. | Data migration defects not identified in time due to late UAT | 1/12 - Continued as in progress and reviewed by the teams UAT practice and go live reconciliation plan will be designed internally for the teams to validate all data has moved |
| Open and Monitoring | 09/08/25 | | Conversion/Configuration | Cutover rehearsal shortened or skipped | Increasing | 6 (High/Medium) | Determine of Freeze timeframe is critical to all transactions | Lock cutover rehearsal windows early; use dry-runs even if UAT lags; ensure rollback procedures are validated. | Cutover rehearsal shortened or skipped | 1/12 - Continued as in progress and reviewed by the teams PALM Conversion Plan still outstanding |
| Open and Monitoring | 05/02/25 | | Training | 1. Inadequate trainer knowledge | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Conduct Train-the-Trainer programs; certify trainers before rollout | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams UAT expected 2/2 - will determine |
| Open and Monitoring | 05/02/25 | | Training | 3. Inconsistent training across departments | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Standardize training materials and delivery; track attendance and completion | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams 2/2026 - UAT will help create post install documentation that can be used by the agency |
| Open and Monitoring | 05/02/25 | | Training | 4. Technical issues during training (e.g., system crashes) | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Test systems in advance; have IT support on standby during training | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams 2026 - IT team is working their internal roll out plan with target of march 2026 to complete and work internal UAT effort for ABS changes |
| Open and Monitoring | 05/02/25 | | Training | 6. Training not aligned with actual job functions | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Customize training per role; gather pre-training feedback | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams UAT dependent |
| Open and Monitoring | 05/02/25 | | Training | 7. Knowledge retention loss post-training | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Provide job aids, refreshers, and post-training support | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams UAT deliverables from internal teams for post install documentation |
| Open and Monitoring | 05/02/25 | | Training | 8. Delayed training timeline | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Build buffer into project schedule; monitor progress regularly | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams PALM TBD - Phase noted on timeline - but dates are not defined |
| Open and Monitoring | 05/02/25 | | Training | 9. Overwhelming training content | Stable | 4 (Medium/Medium) | APD Teams preparing for PALM Training | Break into modules; offer self-paced options | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams UAT To Determine |
| Open and Monitoring | 05/02/25 | | Staffing/Resource Availability | Delay in configuring role-based access and permissions - changes updates learned during training and UAT | Stable | 4 (Medium/Medium) | APD IT Teams preparation and training and UAT | Map all roles early; perform iterative testing with key users - advantage during UAT | Access issues for users; delay in operations post-migration | 1/12 - Continued as in progress and reviewed by the teams UAT determination |
| Open and Monitoring | 09/08/25 | | Training | Training content misaligned with final system functionality | Stable | 4 (Medium/Medium) | Revisions and adjustments are dynamic and currently being supported | Develop training with placeholders for UAT updates; plan for quick revisions; validate training content with UAT leads. | Training content misaligned with final system functionality | 1/12 - Continued as in progress and reviewed by the teams UAT Determination |
| Open and Monitoring | 09/08/25 | | User Acceptance Testing | User resistance and loss of confidence due to perceived instability | Stable | 4 (Medium/Medium) | Communication of expectations remains | Maintain clear communication about reasons for delay; involve super users in UAT to advocate system readiness; reinforce benefits of new system. | User resistance and loss of confidence due to perceived instability | 1/12 - Continued as in progress and reviewed by the teams UAT Determination |
| Open and Monitoring | 05/02/25 | | Training | 2. Low user engagement or attendance | Stable | 3 (High/Low) | APD Teams preparing for PALM Training | Mandatory training policy; offer flexible schedules and formats | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams -Pre-requisites completed and will add training as PALM Provides |
| Open and Monitoring | 09/08/25 | | Post Implementation | Missed regulatory or financial reporting deadlines if go-live slips | Stable | 3 (High/Low) | deadlines and cutoffs for APD are very important | Identify critical reporting deadlines; prepare contingency plan (e.g., run legacy system in parallel); escalate early if deadlines are at risk. | Missed regulatory or financial reporting deadlines if go-live slips | 1/12 - Continued as in progress and reviewed by the teams Pending updates to decisions on timeline |
| Open and Monitoring | 05/02/25 | | Staffing/Resource Availability | 5. Resistance to change from employees | Stable | 2 (Medium/Low) | APD Teams preparing for PALM Training | Communicate benefits early; involve staff in design and feedback | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams 2026 - continue communications plan |
| Open and Monitoring | 05/02/25 | | User Acceptance Testing | 10. Lack of evaluation and feedback mechanisms | Stable | 2 (Medium/Low) | APD Teams preparing for PALM Training | Implement surveys, quizzes, and performance tracking | Training is a work in progress and will adjust with any PALM received direction - PALM roll out in progress | 1/12 - Continued as in progress and reviewed by the teams 2026 Communication Plan |

| APD Issues | | | | | | | | | | |
|------------|-------------|-------------|--|------------------------|--------------------------|---|---|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 05/01/25 | | High - Impacts the ability of the agency to meet deadlines or milestones | Agency Business System | PALM Project Mapping Key | APD IT Teams preparation and training and UAT | Develop interface translation layers; validate APIs early - continual review and update | 05/30/25 | 2026 continual review along side of UAT | |

| APD Assumptions | | | | | | |
|-------------------------------|--|--------|------------------------|---|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 | |
| People Data | Legacy system data is complete and accurate | Logged | 05/12/25 | Finance, IT, Audit, All modules using historical data | UAT Determination | |
| Processes | Chart of Accounts structure will be successfully mapped to the | Logged | 05/12/25 | Budget, General Ledger, | Post Go Live Determination | |

| | | | | | |
|----------------------------------|---|---------|----------|---|---|
| Technology | new system | | | Accounting Leads | |
| People Processes | All critical business processes are documented | Logged | 05/12/25 | All accounting teams, Change Management, Training Team | UAT Exercise while teams learn PALM |
| Technology Data | Cloud system will support all required functionalities | Logged | 05/12/25 | Program and Financial Users, System Admins | PALM Test during UAT |
| People Processes Technology Data | Interfaces with peripheral systems will remain compatible | Logged | 05/12/25 | IT, Third-Party Vendors, Grants/Payroll/Procurement Units | Testing in progress |
| Processes Technology Data | Data migration will occur with minimal downtime | Logged | 05/12/25 | All staff, especially Payroll, Accounts Payable, and Receivables | Approval and approvers will learn roles |
| People Processes Technology Data | End users will receive adequate training prior to go-live | Logged | 05/12/25 | All functional end users | UAT and training - hoping for the full 9 months |
| People Processes | Security roles and access permissions will be properly configured | Logged | 05/12/25 | Security Admins, HR, Supervisors, External Auditors | APD Will re-align as needed with the UAT exercises |
| Processes Technology Data | Reports used in the legacy system will be recreated accurately | Logged | 05/12/25 | Finance, Program Managers, Oversight Agencies | PALM Reports review in UAT will be critical to updated business process |
| People Processes Technology Data | Project timeline will remain on schedule despite unknowns | Logged | 05/12/25 | Project Managers, Executive Sponsors, All involved teams | Stage gate vote coming up in Jan 2026 |
| People Processes Technology Data | UAT - the system requirements and user stories reflect the real-world processes and accounting requirements of the end users. | Logged | 07/07/25 | UAT - Critical features may be missing or behave incorrectly, requiring rework late in the project | UAT Determination |
| People Processes Technology Data | UAT Testers have sufficient training or knowledge of the new system as they execute UAT from PALM instruction, are able to validate the accounting processes. | Logged | 07/07/25 | UAT - hard to determine false positives and false negatives. | APD is taking into considerations perfect path vs errors |
| People Processes Technology Data | Assuming that connected systems (e.g., payroll, enterprise systems, all modules, tax engines, banks) are available and simulate live interaction appropriately for UAT | Logged | 07/07/25 | UAT - Errors may appear that are integration-related (enterprise systems) rather than related to the core application, delaying sign-off. | UAT Determination |
| People Processes Technology Data | Timeline & Scheduling Assumptions • The overall project timeline will shift, or downstream activities (training, cutover prep, data migration) will need to be compressed or re-sequenced. • A buffer must be assumed for additional test cycles or defect resolution, since issues may be uncovered later than planned. • Project milestones tied to UAT completion (e.g., training readiness, go-live rehearsals) will also shift. | Logged | 09/08/25 | Schedule - dates - timelines must change | UAT determination and Next phase approval |
| People Processes Technology Data | Resource & Cost Assumptions • Additional time will be required from testers, business SMEs, trainers, and project team members, potentially leading to higher project costs. • Extended overlap of legacy system and new system (e.g., parallel runs, dual licensing, support contracts) must be assumed. • Overtime or additional resources may be required to handle compressed activities. | Logged | 09/08/25 | Impact of financial is all overarching to all aspects of the project | UAT determination |
| People Processes Technology Data | Training & Change Management Assumptions • Training materials may need revisions after UAT is complete, as final system behaviors/configurations may not yet be validated. • End-user training may need to be shortened, delivered closer to go-live, or delivered in waves (e.g., super-user first, general users later). • Users may have less time to adapt before cutover, so additional hypercare/support must be assumed post go-live. | Logged | 09/08/25 | All Users are affected | UAT determination |
| People Processes Technology Data | Quality & Risk Assumptions • Not all test scenarios may be fully executed if UAT time is reduced, so assumptions must include higher risk of defects surfacing post go-live. • Data migration validation may be less thorough, requiring additional reconciliation effort during hypercare. • Post-go-live support demand will likely be higher than originally planned due to reduced user readiness. | Logged | 09/08/25 | All Users are affected | Agency stories challenges will provide insight - UAT Determination |
| People Processes Technology Data | Stakeholder & Communication Assumptions • Stakeholders must assume increased communication needs to manage expectations and maintain user confidence. • Executive sponsors may need to assume greater tolerance for go-live risk or accept the trade-off of delaying further. | Logged | 09/08/25 | All Users are affected | Vote from Exec Comm is understood for true and accurate status |
| People Processes Technology Data | UAT for August - version being tested includes all features required for accounting functions and is free of critical/blocking bugs. | Removed | 11/06/25 | UAT Tests may not reflect true accounting workflows, leading to gaps or inability for validation. | PALM UAT activities being re-defined |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

Submit

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APD Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|---------------------------|--------------------|
| November - December 2025 | Rose Salinas | rose.salinas@apdcares.org | 01/13/26 |
| September - October 2025 | Rose Salinas | rose.salinas@apdcares.org | 11/06/25 |
| July - August 2025 | Rose Salinas | rose.salinas@apdcares.org | 09/09/25 |
| May - June 2025 | Rose Salinas | rose.salinas@apdcares.org | 07/07/25 |
| 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

November - December 2025

Agency Sponsor

Rosa Walsh

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 = 89.11%

Submitted On Time = 30

Submitted Late = 14

Pending Submission = 1

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 78.41%

Submitted Complete = 28

Submitted Incomplete = 5

Completed After Submission = 11

Other Task Completeness:

Score = 77.96%

Submitted Complete = 37

Submitted Incomplete = 9

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 = 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 | Pending Resubmission | 05/27/25 | | Task Closed - Submission Incomplete | |
| 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 | 558 | Update Agency Business System Documentation | 11/18/24 | 01/10/25 | Pending Resubmission | 04/16/25 | | Submission Incomplete | |
| N/A | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 05/02/25 | Pending Resubmission | | The Change Analysis Tool provided by Florida PALM does not conform to the methodology selected by Citrus. As such, we have deferred this task indefinitely and will complete the required analysis as part of the completion of Task 574. | Task Closed - Submission Incomplete | |
| 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 | | | Citrus has delayed this task to begin until September 2025 due to budget and operational constraints. Citrus is using only outbound interfaces, and their completion does not pose a risk to the overall project timeline. 11/13/25 RC set status back to 25%. Pending resubmission is not an accurate account of task status. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 08/07/25 | Per the task instructions, Citrus is using Option 3: Agency-specific format which is attached to this tracker. | Submission Incomplete | 01/08/26 |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/28/25 | Citrus updated Conversion Inventory to reflect full completion of activities on 11/7/25. | Submission Complete | 11/07/25 |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/28/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IDP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | | | | |

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|----------|--------|-----|--|----------|----------|---|--|--|--|--|
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 50% - In Progress | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 02/28/25 | | Staffing/Resource Availa | Funding Alignment | Stable | 9 (High/High) | The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed. | 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. | This is a risk we re monitoring, and we do not anticipate it becoming an issue. | This risk is valid for this reporting period. |
| Open and Monitoring | 02/28/25 | | Business Process Chang | Design Misalignment | Stable | 9 (High/High) | Florida PALM designs fail to take into account the reporting and business needs of the agencies, requiring each agency to develop alternative solutions to meet their existing business needs currently met by FLAIR. | Citrus is working to resolve the reporting issues we anticipate through the use of interfaces from PALM. | Lack of reporting to our governing body. | This risk is valid for this reporting period. |
| Open and Monitoring | 02/28/25 | | Business Process Chang | Foreign Currency Transactions | Stable | 6 (Medium/High) | Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank). | 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. | If the issues is not resolved, information in FACTS could be incomplete/inaccurate. | This risk is valid for this reporting period. |
| Open and Monitoring | 09/19/23 | | Training | New IT Staff | Decreasing | 2 (Low/Medium) | Citrus has newer IT staff with no knowledge of PALM. | 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. | IT systems not capable of meeting the needs of PALM implementation. | This risk is valid for this reporting period. |

| CITRUS Issues | | | | | | | | | | |
|---------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| CITRUS Assumptions | | | | | | |
|----------------------------------|--|--------|------------------------|---|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |
| 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 | This assumption is still valid. | |

| | | | | | |
|---|--|--------|----------|---|---------------------------------|
| People Processes Technology Data | The DFS Florida PALM project will provide key information identifying the functionality, business processes, and timeline of the larger project in a timely manner to facilitate planning and execution. | Logged | 08/30/24 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is still valid. |
| Processes Technology Data | The DFS Florida PALM project team will provide a reporting solution at go-live to support the business needs of the Department. | Logged | 11/14/23 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is still valid. |
| Processes Data | The DFS Florida PALM project team will provide information regarding the data fields to support all Chart of Accounts values Citrus currently uses (such as OCA's). | Logged | 11/14/23 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is still valid. |
| Technology | The DFS Florida PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc. | Logged | 11/14/23 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is still valid. |
| People | The DFS Florida PALM project team will provide both in-person, on-line, and recorded training for CCN's, SMEs, and all accounting staff. | Logged | 11/14/23 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is still valid. |
| People Processes Technology Data | Key tasks, such as user maintenance, vendor maintenance, vendor payment registration, etc. will be done outside of PALM in their respective enterprise systems, e.g. AOD, STMS, VIP, etc. | Logged | 02/09/24 | PALM Project Team, Citrus Accounting Dept, CCN's | This assumption is 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: *

☐ Confirm *

Submit

| CITRUS Status Report Confirmation | | | |
|-----------------------------------|----------------------|------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Rosa Walsh | rwalsh@citrus.myflorida.com | 01/15/26 |
| September - October 2025 | Rosa Walsh | rwalsh@citrus.myflorida.com | 11/12/25 |
| September - October 2025 | Rosa Walsh | rwalsh@citrus.myflorida.com | 11/07/25 |
| July - August 2025 | Rosa Walsh | rwalsh@citrus.myflorida.com | 09/10/25 |
| May - June 2025 | Christine Marion | cmarion@citrus.myflorida.com | 07/10/25 |

Helpful Links

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

COM Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Tisha Womack

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 Completeness

Other Task Completeness




Direct Impact Task Timeliness:
Score = 98%

- Submitted On Time = 42
- Submitted Late = 7
- Pending Submission = 0




Other Task Timeliness:
Score = 96.36%

- Submitted On Time = 75
- Submitted Late = 9
- Pending Submission = 0



Direct Task Completeness:
Score = 88.37%

- Submitted Complete = 38
- Submitted Incomplete = 4
- Completed After Submission = 7



Other Task Completeness:
Score = 94.24%

- Submitted Complete = 53
- Submitted Incomplete = 1
- Completed After Submission = 5

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | Submission Complete | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/21/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | Submission Complete | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 75% - Consolidating/Inputting Information for Submission | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 08/26/24 | | Business Process Change | Lack of support for Life-to-Date Accounting and Reporting | Stable | 9 (High/High) | Commerce needs LTD balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module that has some type of LTD capability but details are not known to agencies at this time. Contingency plans have been identified and Commerce is currently working to determine best response if Project Costing module will not provide needed support. | Create internal life-to-date reporting system. | Commerce will face significant disruptions in financial oversight, reconciliation, and compliance. This gap will hinder our ability to produce accurate historical financial reports, negatively impact audit readiness, and delay decision making processes that rely on cumulative financial data. | Palm resources acquired to create internal life-to-date reporting system. |
| Open and Mitigating | 12/12/24 | | Business Process Change | Documentation Tracking Process | Decreasing | 9 (High/High) | Team identified the need for a consistent documentation tracking process. | 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. | If there is no documentation tracking process in place, then documentation updates may be missed, causing delays, inconsistencies, or errors in project deliverables. | Internal Sharepoint site has been created as a centralized location. Documentation for each business unit is being reviewed/updated at this time. Documentation is prioritized based on proposed UAT topic schedule. This task is iterative; each procedure will be reviewed/updated throughout UAT as process steps are released. |
| Open and Mitigating | 12/12/24 | | Training | Common Understanding of Florida PALM project goals | Decreasing | 6 (Medium/High) | Florida PALM project impacts many business units in Commerce's F&A area. Team acknowledges there must be unity in understanding of project goals. | 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. | If there is no common understanding of the PALM project goals, then there could be misalignment among team members, leading to potential misunderstandings, inconsistent priorities, and inefficiencies in project task execution. | Information is shared via Teams channels, based on business units. Face to face PALM team meetings are scheduled weekly to identify impacts. |
| Open and Mitigating | 01/30/25 | | Conversion/Configuration | Data Migration Process | Stable | 4 (Medium/Medium) | Proactive efforts by project team to identify potential data-related risks. | <ul style="list-style-type: none"> - Perform a comprehensive data audit before migration to identify and resolve inconsistencies - Use automated data validation tools to 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 | If the data migration process from FLAIR to PALM encounters inconsistencies or errors, then critical financial data could be compromised, leading to reporting inaccuracies and delays in operational processes. | Technical team meets regularly to monitor this risk. |
| Open and Mitigating | 01/07/25 | | Training | End User Training | Stable | 3 (High/Low) | Proactive efforts by project team to identify potential end user risks. | <ul style="list-style-type: none"> - 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" | If end users are not adequately trained or fail to adapt to Florida PALM, then system usage could be inefficient, causing a decrease in productivity and potential disruption to daily operations. | SMEs will meet with teams to demo test environment so that end users are familiar before accessing environment. Sharepoint site has been created to house demo videos. |
| Open and Mitigating | 01/07/25 | | Interface | FLAIR Integrations | Stable | 2 (Medium/Low) | Proactive efforts by project team to identify potential interface risks. | <ul style="list-style-type: none"> - 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 | If FLAIR does not seamlessly integrate with existing Commerce applications and third-party interfaces (MFMP, etc.), then there could be disruptions in data exchange, resulting in operational bottlenecks and delayed financial transactions. | Technical team meets regularly to monitor this risk. |

| | | | | | | | | | | |
|---------------------|----------|--|-------------------------|--|--------|----------------|--|---|---|--|
| | | | | | | | | any issues promptly using Florida PALM help desk* | | |
| Open and Mitigating | 01/07/25 | | Business Process Change | Business Processes Alignment with Florida PALM | Stable | 2 (Medium/Low) | Proactive efforts by project team to identify potential business process risks. | <ul style="list-style-type: none"> - 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 | If existing business processes are not adequately reviewed and aligned with Florida PALM, the inefficiencies may persist or new process gaps could emerge, leading to operational delays and reduced system effectiveness. | Internal Sharepoint site has been created as a centralized location. Documentation for each business unit is being reviewed/updated at this time. Documentation is prioritized based on proposed UAT topic schedule. This task is iterative; each procedure will be reviewed/updated throughout UAT as process steps are released. |
| Open and Monitoring | 09/25/25 | | User Acceptance Testing | Loss of Engagement | Stable | 2 (Medium/Low) | Postponing UAT may lead to disengagement or loss of momentum among SMEs and End Users due to shifting priorities or project fatigue. | <ul style="list-style-type: none"> - Maintain familiarity with user stories, training materials, and expected UAT responsibilities during weekly PALM team meetings. - Monitor SME readiness and reconfirm availability to the rescheduled UAT timelines. - Implement a communication strategy to keep SMEs informed and engaged during the delay. | If User Acceptance Testing (UAT) continues to be postponed for an extended period of time, then SMEs/End Users may become disengaged or deprioritize project-related activities, potentially resulting in reduced participation and lower testing quality during UAT execution. | Commerce PALM team will continue to monitor this risk at this time. |

| COM Issues | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| | | | | | | | | | |

| COM Assumptions | | | | | |
|-------------------------------|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 maintains this assumption at this time. |
| 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 | Commerce maintains this assumption at this time. |
| 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 maintains this assumption at this time. |
| Processes Technology | It is assumed that the user stories, business procedures, and training materials created to date will still be relevant with minimal changes required when UAT resumes. | Logged | 09/25/25 | Commerce F&A Stakeholders | Commerce team will continue to monitor through the first round of testing, at least. |

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

COM Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|---------------------------------|--------------------|
| November - December 2025 | Tisha Womack | caroline.womack@commerce.fl.gov | 01/14/26 |
| September - October 2025 | Tisha Womack | caroline.womack@commerce.fl.gov | 11/10/25 |
| July - August 2025 | Tisha Womack | caroline.womack@commerce.fl.gov | 09/08/25 |
| May - June 2025 | Tisha Womack | caroline.womack@commerce.fl.gov | 07/14/25 |
| March - April 2025 | Tisha Womack | caroline.womack@commerce.fl.gov | 05/12/25 |

Helpful Links

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

DACS Status Report Dashboard

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

Reporting Period

November - December 2025

Agency Sponsor

Alan Edwards

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 100%

Submitted On Time = 48

Submitted Late = 0

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 99.36%

Submitted Complete = 44

Submitted Incomplete = 0

Completed After Submission = 3

Other Task Completeness:

Score = 99.81%

Submitted Complete = 52

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 | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/30/25 | | Submission Complete | | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/18/25 | | Submission Complete | | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/07/26 | | Submission Complete | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 50% - In Progress | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 50% - In Progress | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 10/31/24 | | Agency Business System | Florida PALM UAT Plan details needed for batch processing | Stable | 3 (High/Low) | Pending information about UAT testing details will impact our internal management of this risk. The Department is waiting on more information from PALM regarding their full end to end testing plans. | 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 testing (PALM Technical Team communications, AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing timeline. On | FL PALM Project Full end to end UAT Plan details unknown at this time. FL PALM must be running regular batch processing during UAT to allow FDACS to interface Agency Business System test scenario data (API002, ARI007, ARI009, ARI011, IUI002, POI002, POI006, SDI009) to PALM during the testing window. Failure to successfully test batch processing is detrimental to the departments planning and preparation for go live fiscal operations. | 12/2025 - Continuing to monitor risk through Full End to End UAT. Scheduled as February - November 2026. |
| Open and Monitoring | 10/31/24 | | Interface | Florida PALM UAT Plan details needed for Outbound Interfaces | Stable | 3 (High/Low) | The department has requested 30 interfaces for PALM and ALL are ready for Cycle 2 Testing. We have successfully loaded 20 outbound interface files out of 21 requested; we have successfully loaded all inbound interfaces of the 9 requested. Oracle provided a patch for AMI004 to PALM on 12/15/2025 and FDACS was able to successfully complete testing of AMI004/AMI008 on 12/31/2025. We are incorporating testing data as it becomes available in our ABS remediation to ensure we have valid data ready for UAT and go-live. This risk remains open until successful completion of testing of all Outbound Interfaces. | Internal management and mitigation of this risk is dependent on the successful continuation of Interface Testing with the PALM Project. We have had a few of the outbound files that did not get successfully loaded and have communicated issues with the Florida PALM Technical Readiness team. Outside of our internal monitoring of testing activities, our Agency CCN and PALM Readiness Technical Team collectively continues to monitor any updates related to testing (PALM Technical Team communications, AC meetings, ESC meetings, Florida PALM Website, Florida PALM Knowledge Center, Task Talk, etc.) Dates and timing impacts correlate to the Projects testing timelines and the availability of interface testing files. | FDACS must be able to continue to receive and test outbound interface file data from PALM that will contain records associated with the agency test data and foundational data such as the chart of account values, chartfield combinations, and budget information. Failure to successfully test these outbound interface files and data is detrimental to the departments planning and preparation for go live fiscal operations. | 12/2025 - Cycle 2 Interface Testing activities continue, pending updates on ARI020. Due to delayed file share from the PALM Project for outbound interface ARI020, FDACS had to indicate Cycle 2 Interface Testing not completed (95%) in Overall Technology Readiness status comments on the Agency Readiness Certification #2. This risk remains open until successful completion of testing of all Outbound Interfaces, or an issue is opened related to the delayed files. (PALM indicates updates expected the week of 01/12/2026) |

| DACs Issues | | | | | | | | | | |
|-------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| DACs Assumptions | | | | | | |
|-------------------------------|---|--------|------------------------|--|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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. | 12/2025 - Assumption stands until completion of UAT, at minimum. | |
| 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 | 12/2025 - Assumption stands until completion of UAT, at minimum. | |
| 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 | 12/2025 - Assumption stands until completion of UAT, at minimum. | |
| 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 | 12/2025 - Assumption stands until completion of UAT, at minimum. | |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

DACS Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|------------------------|--------------------|
| November - December 2025 | Alan Edwards | alan.edwards@fdacs.gov | 01/13/26 |
| September - October 2025 | Alan Edwards | alan.edwards@fdacs.gov | 11/05/25 |
| July - August 2025 | Alan Edwards | alan.edwards@fdacs.gov | 09/03/25 |
| May - June 2025 | Alan Edwards | alan.edwards@fdacs.gov | 07/01/25 |
| March - April 2025 | Alan Edwards | alan.edwards@fdacs.gov | 05/01/25 |
| January - February 2025 | Alan Edwards | alan.edwards@fdacs.gov | 03/03/25 |

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DBPR Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Sally Huggins

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 = 93.6%

Submitted On Time = 41

Submitted Late = 8

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 91.20%

Submitted Complete = 44

Submitted Incomplete = 4

Completed After Submission = 2

Other Task Completeness:

Score = 98.18%

Submitted Complete = 54

Submitted Incomplete = 1

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 = 9

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 75% - Consolidating/Inputting Information for Submission | | User Stories are 100% complete. Test cases are in progress | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 12/02/25 | GLC001 is being researched by A&A research closing entries from 2018. DBPR work on this task is complete. | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/30/25 | All code issues have been resolved. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/30/25 | All code issues have been resolved | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/21/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | File will be placed in secure folder Monday, 12/29 | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 75% - Consolidating/Inputting Information for Submission | | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | 01/11/2026 FL PALM: Submitted on behalf of agency based on AS signoff and completion of worksheets | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | Submission Complete | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 01/13/25 | | Agency Business System | 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 | Decreasing | 9 (High/High) | DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed. | Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT | There may not be enough time for DBPR IT to make modifications in time to be retested | Interface Testing is in progress, and more testing will be done the week of 12/29 |
| Open and Mitigating | 02/19/25 | | User Acceptance Testing | If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up | Stable | 4 (Medium/Medium) | Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities. | Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025. | DBPR SMEs will have minimal time to catch up review of business processes | 20251125(LL): DBPR business processes are being mapped using test cases that are based on multiple user stories since it takes multiple PALM processes to make up one DBPR complete business process that adds value. |
| 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) | Documentation on Future-State business processes is being provided by The Project on the PALM website. | 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. | Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness | 20251125 (LL): Those attending Pre-UAT are familiar. |
| 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) | Down time and other conditions need to be planned for to ensure a smooth transition. | Create a Cutover Plan that identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations. | Key business processes may not be able to be completely timely and could have negative consequences | Informal discussions regarding the cutover plan have begun. |
| 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 | Stable | 2 (Medium/Low) | It would be better to have real transfers occur involving the actual real-life players to get more real testing and to reduce the likelihood of unanticipated errors. | Identify an Agency that we can partner up with and coordinate send/receive testing with them | UAT testing could be inadequate and could negatively impact DBPR PALM readiness | 20251125 (LL): IU Transactions will be tested in UAT both Inter/Intra and Sending and Receiving s DBPR business processes require. |
| Open and Mitigating | 08/19/24 | | Conversion/Configuration | 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 | Stable | 2 (Medium/Low) | We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world. | Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT | DBPR may not have the desired email notification flexibility once we go to production with PALM | While email notifications have been working during Pre-UAT Testing, adding proxies or other methods of communication must be researched. |

| DBPR Issues | | | | | | | | | |
|-------------|-------------|-------------|-----------------------------|------------------------|---|--|--|-----------------------------------|---|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 06/04/25 | | Critical - Impacts the abil | Interface | ABS Versa Regulation remediation is behind schedule | DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule. | Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT. | 10/31/25 | DBPR has produced output and will be ready for another test on Monday, 12/29. A file will be placed in the secure folder for loading into PALM. |

| DBPR Assumptions | | | | | | |
|---|---|--------|------------------------|--|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 | |
| 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 | 20251125 (LL): We have been able to get the spreadsheet upload templates working (security issue) so testing can begin. | |
| Processes Technology Data | The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule. | Logged | 04/01/24 | All DBPR stakeholders | Florida PALM's updates to process steps in UAT continue to provide the detail needed to understand process changes. | |
| 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 | Process changes are being reviewed as part of test case completion. They will be tested during full UAT. | |
| 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 | 20251125 (LL): With Full UAT scheduled for 11 months, DBPR will have ample time to perform the rigorous testing and retesting, so cutting over to the new system is expected to be minimally eventful. | |
| 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 | 20251125 (LL): Pre-UAT SMEs have already assisted in testing efforts and reporting issues directly to PALM staff. (Other agencies had already entered SNOW tickets for the issues reported.) | |
| 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 | PALM Smartsheets are tracking some traceability, and DBPR is tracking agency specific user stories to test cases to cover any DBPR specific requirements. | |
| 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 | 20251222: There have not been any unique requirements discovered so far. | |
| 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 | 20251222: DBPR staff continue to emphasize changes in language and glossary terms between FLAIR and Florida PALM. | |
| 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 | 20251222: PALM has provided data elements in reports but DBPR is responsible for those created by DBPR such as OA1 and OA2. | |
| 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 Finance & Accounting Bureau Chief Project Sponsor | 20251222: To this date, DBPR has been responsible for testing DBPR agency systems and has not been approached to test other agency systems. | |
| 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 | 20251222: There have not been any requirements unique to DBPR. | |
| 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 | 20251222: PALM is working on a schedule update. The Project Management Plan will be updated once this is published. | |
| 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 | 20251222: PALM interfaces are included in Full UAT testing. | |
| 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 | 20251222: This will be addressed once Versa interface testing is complete. | |
| 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 | 20251222: This will be addressed once Versa interface testing is complete. | |
| People Processes | In addition to identifying various scenarios and anomalies at Future State, DBPR will review details associated to | Logged | 12/05/24 | All DBPR division/office staff Project Manager | 20251222: Use stories have been completed. Test cases will contain | |

| Category | Current-State Business Processes, Systems Necessary to create/enhance all user stories will also be an objective out of the sessions | | | Project Manager Organizational Change Manager | Only information that is necessary for project team and training. |
|---|--|---------|----------|--|---|
| 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 | 20251222: The file will be moved to the secure file share for additional testing on Monday, 12/29 |
| 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 | 20251222: There are no challenges to training at this time. |
| People Processes Data | DBPR as well as the Project will follow PMI best practices and Rule 60GG statute. | Logged | 05/28/25 | IV&V endorses this. | 20251222: The project is being tracked as required. |
| People | Resources will be available to support the agreed-upon schedule. | Removed | 11/25/25 | All DBPR division/office staff | 20251125 (LL): Resources have always been available. This assumption is removed. |
| People Processes | There will be sufficient engagement by division/office resources knowledgeable about their organization business processes. | Removed | 11/25/25 | All DBPR division/office staff | 20251125 (LL): Engagement continues to be active and responsiveness has not been an issue. Removing this assumption. |
| People Processes Data | Division/Offices act on the CCN/PALM Readiness information and direction. | Removed | 11/25/25 | All DBPR division/office staff | 20251125 (LL): Business groups are not only acting on the CCN/PALM Readiness Information, they are also taking the initiative to investigate changes on their own. Removing this assumption. |
| Processes Technology Data | All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed. | Removed | 11/25/25 | All DBPR stakeholders | 20251125 (LL): This is a "given" not an assumption. We are creating DBPR/PALM operational workflows by combining multiple PALM processes and subprocesses to fulfill the requirements for the operational flow, and to meet reporting, audit and statutory demands. |
| People Processes | The Florida PALM Project will prepare and provide training and related training materials. | Removed | 11/25/25 | All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief | 20251125 (LL): PALM has provided Pre-UAT Steps, LMS Training courses, and Training Materials specific to PALM. This is no longer an assumption. |
| 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. | Removed | 11/25/25 | All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor | 20251125 (LL): Removing this as a duplicate of #12 |
| People Processes Technology Data | A Test environment will be made available to F&A staff so they can learn/confirm | Removed | 12/22/25 | All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief | 20251222: PALM has provided UAT environments for all UAT Testing and will continue to do so for FULL UAT. |
| 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 | Removed | 12/22/25 | Project Manager Business Analyst | 20251222: PALM is providing process steps but test cases with test scripts have been written by DBPR for UAT Testing. |
| 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 | Removed | 12/22/25 | All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief | 20251222: PALM is providing videos for future state processes, but DBPR must put those together to match the DBPR user stories for agency process completion. |
| Data | All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes) | Removed | 12/22/25 | All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor | 20251222: The reports contain OA2 fields. DBPR entered Object Codes as OA2 fields. |
| 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. | Removed | 12/22/25 | All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor | 20251222: Data from PALM will be in reports in PALM and from reports and DW/BI information in the Data Warehouse. |
| 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 | Removed | 12/22/25 | All DBPR division/office staff Project Manager Organizational Change Manager | 20251222: Crosswalks have been completed and will continue to be reviewed as test cases are completed. |
| 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. | Removed | 12/22/25 | Project Manager Business Analyst | 20251222: Agency Collaboration meetings have proven that agencies are indeed writing test scripts for their own systems. This is something to be tracked by PALM, not DBPR. |
| 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 | Removed | 12/22/25 | Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor | 20251222: The schedule and task completions continue to be reviewed at least once weekly. |
| 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 | Removed | 12/22/25 | Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor | 20251222: Change Analysis sheets were updated and completed 12/19/2025 |

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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DBPR Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|------------------------------------|--------------------|
| November - December 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 01/14/26 |
| September - October 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 11/10/25 |
| July - August 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 09/10/25 |
| May - June 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 07/08/25 |
| March - April 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 05/12/25 |
| January - February 2025 | Sally Huggins | sally.huggins@myfloridalicense.com | 03/06/25 |

Helpful Links

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

DCF 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

November - December 2025

Agency Sponsor

Chad Barrett

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 93.96%

Submitted On Time = 37

Submitted Late = 15

Pending Submission = 0

Other Task Timeliness:

Score = 78.64%

Submitted On Time = 49

Submitted Late = 35

Pending Submission = 0

Direct Task Completeness:

Score = 83.65%

Submitted Complete = 39

Submitted Incomplete = 5

Completed After Submission = 8

Other Task Completeness:

Score = 78.47%

Submitted Complete = 39

Submitted Incomplete = 1

Completed After Submission = 19

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 = 7
 - Duplicate Filled Role = 7
 - 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 | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 05/02/25 | Pending Resubmission | 06/10/25 | This indirect task is ongoing. Many of our business processes will be mapped out during and post UAT. | Submission Incomplete | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 08/04/25 | | | 01/09/26 | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/04/25 | | Submission Complete | | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Task Closed - Submission Incomplete | | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 12/31/25 | | Submission Complete | 12/31/25 | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 75% - Consolidating/Inputting Information for Submission | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 11/18/25 | | Business Process Change | Loss of Cross-Agency Payroll Processing Capability in PALM | Increasing | 9 (High/High) | DCF currently has the ability in FLAIR to process salary and OPS payroll payments for employees of other state agencies based on People First permissions. In PALM, this functionality will be restricted and DCF will only be able to issue payments for DCF employees, eliminating the cross-agency payroll processing capability that DCF currently provides. | Collaborate with PALM team to identify and implement a long-term solution that restores cross-agency payroll processing capability or establishes a sustainable alternative process. | <p>Loss of Current Functionality: Elimination of established business capability that DCF performs for other state agencies</p> <p>Workflow Disruption: Interruption to current payroll processing workflows for non-DCF employees</p> <p>Service Impact: Potential service interruption for other state agencies that depend on DCF for payroll processing</p> <p>Process Redesign Required: May necessitate establishment of new inter-agency coordination procedures and process changes</p> <p>Relationship Impact: Could affect DCF's service relationships with other state agencies</p> | No comments for this reporting period. |
| Open and Monitoring | 05/06/25 | | Agency Business System | 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) | The Florida PALM Project has imposed a deadline for agencies to identify and have in place the interfaces for systems that will connect to PALM. Risk of not completing system development/remediation by that deadline for interface testing approval, potentially resulting in exclusion from PALM end-to-end testing. Since many of the development teams that will address these builds and remediations are newly online, there is a high likelihood that work will not be completed by this deadline. | 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 | Missing development deadlines can exclude the project from critical testing phases, impacting overall project success and delivery. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availability | Out-of-balance prioritization of PALM with other business processes | Increasing | 6 (Medium/High) | Potential negative impacts to user acceptance training, business interface development and deployment, and readiness for go-live may result if activities related to the transition to Florida PALM are raised to the same (or higher) priority than other, legacy business processes in and around FLAIR. | 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 | Imbalanced prioritization can strain resources and affect the efficiency of other business processes, leading to operational challenges. | No comments for this reporting period. |
| Open and Monitoring | 12/30/25 | | Business Process Change | DCF Budget Consolidation to Headquarters - Impact on PALM Systems and Functionality | Increasing | 6 (Medium/High) | DCF is planning a major organizational change to consolidate all budget authority to Headquarters (Org L2=20 or 30) at the department level, moving away from the current regional budget structure (L2=31, 32, 33, etc.). While expenditures will continue at the regional level, all budgetary control and authority will be centralized. This significant policy and structural change is planned for implementation on July 1, 2026, and may have substantial impacts on existing systems, particularly AJT/CJT functionality and future FRC functionality within PALM. | Conduct comprehensive impact analysis through cross-functional working group to identify all system, process, and organizational barriers prior to July 1, 2026 implementation. Develop mitigation plans for each identified impact area and coordinate with PALM implementation timeline. | If critical system limitations identified, escalate to executive leadership for policy modification or timeline adjustment. | No new comments since this is a newly identified risk |
| Open and Mitigating | 05/06/25 | | Business Process Change | If encumbrances are not accomplished in MFMP then sufficient | Increasing | 6 (High/Medium) | DCF accumulates expenses that are payable from multiple fund sources (Federal, Grant, GF, etc.). In FLAIR, encumbrances | Mitigate. Provide training and job guides to teach that budget check must be conducted before making purchase order | Failure to accomplish encumbrances can lead to budgetary issues and financial mismanagement, affecting report funding | No comments for this reporting period. |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|---|------------|-------------------|---|--|---|--|
| | | | | Current budget may not be available for purchase even though purchase order is approved. | | | Personnel changes could be made against a single fund, regardless of whether or not that fund was sufficient to pay the obligations. When the expenses were realized, they were split across multiple funds to accumulate a sufficient amount. Since MFMP will budget check against PALM at the time of the encumbrance, a new business process will be needed to replace prior one. | Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff. | Similar to management turnover, this can cause delays in operations but can be managed with proper documentation and training. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Operational Staff Turnover - General | Stable | 4 (Medium/Medium) | Personnel changes are an ever-present risk to the project. | Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff. | Similar to management turnover, this can cause delays in operations but can be managed with proper documentation and training. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Agency Business System | 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) | FL PALM's inclusion of Speed Keys, particularly with Enterprise Applications, may not be able to support current business processes that utilize Expansion Option with front end processing. | 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. | Improper integration of speed keys can disrupt business processes, requiring additional resources to develop new applications and potentially causing delays. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Agency Business System | Incomplete/Imp Data Cleansing Activities | Increasing | 4 (Medium/Medium) | FL PALM initiated agency data cleansing activities in September 2024 with Mock 1. After the first error dump, it was discovered that there were algorithmic errors the precluded the Mock 2 data extraction on November 30, 2024. Since that time, the focus of the data cleansing timeline has shifted to meet stage gates on the PALM schedule rather than focus on data integrity. | Avoid. Continue data cleansing activities, otherwise UAT testing with the data sets will produce unexpected and inaccurate results. | Inaccurate data cleansing can lead to flawed data analysis and decision-making, affecting the reliability of project outcomes. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Agency Business System | Incomplete/Imp Current State Analysis | Stable | 4 (Medium/Medium) | DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis. | 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. | Misunderstanding the current state can result in flawed project planning and execution, leading to inefficiencies and potential project failure. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Deployment/Cutover | Incomplete/Imp UAT planning and execution | Decreasing | 4 (Medium/Medium) | With the approval of Amendment 12, UAT has shifted to a two-fold purpose: 1) test PALM; 2) Train on how to use PALM. The second of these two purposes could derail deliberate focus on testing PALM and connected ABSs. | 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. | Poor user acceptance testing can result in untested processes and system failures post-implementation, affecting project success. | No comments for this reporting period. |
| Open and Monitoring | 05/06/25 | | Business Process Chang | Federal Grant System Integration Approval Requirements | Increasing | 4 (Medium/Medium) | Potential delays or complications in obtaining federal approval for transition of GRANTS remediation/replacement when interfacing with Florida PALM versus current FLAIR system. This may impact federal grant management and reporting capabilities. | 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 | Delays in approval can affect project timelines and funding, potentially jeopardizing project success. | No comments for this reporting period. |
| Open and Monitoring | 05/06/25 | | Training | 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) | The PALM Project team has mentioned statewide training a number of times, only to remove commitments from discussion at a later date. The common rationale is that the agencies will be responsible for training. | 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. | Lack of adequate training materials can hinder user adoption and system effectiveness, affecting overall project outcomes. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Project Manager/Agency Liaison Turnover | Stable | 2 (Medium/Low) | Personnel changes are an ever-present risk to the project. | Mitigate. Ensure project approach and status are well-documented. | Disruption in leadership can lead to communication breakdowns and loss of project momentum. New leadership may require time to understand project intricacies, potentially causing delays in project timelines and affecting team morale. | No comments for this reporting period. |

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|---------------------|----------|--|--------------------------|--|------------|----------------|--|---|--|--|
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Project Staff Turnover | Stable | 2 (Medium/Low) | Personnel changes are an ever-present risk to the project. | Accept. Ensure project staff responsibilities are well defined and documentation is up-to-date | While manageable, staff turnover can lead to temporary disruptions in workflow and productivity. It may require additional resources for recruitment and training, impacting project costs and timelines. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Business Process Chang | Operational Management Turnover - General | Stable | 2 (Medium/Low) | Personnel changes are an ever-present risk to the project. | Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff. | Changes in operational management can lead to inefficiencies in process execution and decision-making. It may require time for new managers to adapt, potentially affecting project deliverables and stakeholder satisfaction. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Department Leadership Turnover | Decreasing | 2 (Medium/Low) | Personnel changes are an ever-present risk to the project. | Accept. Monitor political developments as they unfold, and adapt as needed. | A shift in department leadership can alter project priorities and affect strategic alignment, potentially leading to changes in project scope or objectives. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Financial Leadership Distraction by competing priorities | Decreasing | 2 (Medium/Low) | Including EOY activities, the budget process, and day-to-day resource challenges, the agency has many distractions that may impact the ability to focus on PALM at key times in the project lifecycle. | Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project. | If financial leadership is distracted, it can lead to mismanagement of resources and financial oversight, affecting project funding and resource allocation. | No comments for this reporting period. |
| Open and Monitoring | 05/06/25 | | Training | Not enough time for training before go live. | Stable | 2 (Medium/Low) | The announced plan for rollout of PALM UAT suggests the window for SME Training will be too small for adequate training given the competing priorities for legacy business activities and processes. | Monitor. Continue to promote the importance of prioritizing the PALM transition at a level equal to or greater than performance of legacy business processes. | Insufficient training can lead to user errors and operational inefficiencies, affecting the smooth transition to new systems. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Business Process Chang | Potential for inaccurate or inconsistent mapping of organizational codes during transition from FLAIR to PALM, affecting financial tracking, reporting, and departmental accountability. | Stable | 2 (Medium/Low) | The changes to chartfield purposes and lengths with PALM have necessitated a complete org code restructuring for the agency. This new structure will not be fully testable until access to PALM is provided. | Mitigate. Conduct a Comprehensive audit of existing FLAIR org codes. Documentation of mapping logic and decisions. Stakeholder validation of crosswalk methodology | Inaccurate mapping can affect financial tracking and accountability, leading to compliance issues and financial discrepancies. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Project Sponsor Turnover | Stable | 1 (Low/Low) | Personnel changes are an ever-present risk to the project. | Ensure sponsor commitments and operational plans are well documented and rationale is well established. | May result in delays in decision-making, potential loss of funding, and a decrease in stakeholder engagement. The project may struggle to align with organizational goals, leading to potential scope changes or project cancellation. | No comments for this reporting period. |
| Open and Mitigating | 05/06/25 | | Staffing/Resource Availa | Operational Staff Turnover - Key Personnel | Stable | 1 (Low/Low) | Personnel changes are an ever-present risk to the project. | Accept. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure. | Loss of key personnel can create significant knowledge gaps and operational inefficiencies, impacting project execution and outcomes. | No comments for this reporting period. |
| Open and Monitoring | 05/06/25 | | Deployment/Cutover | Cutover date from FLAIR to PALM not formally established | Stable | 1 (Low/Low) | Amendment 12 shifted go live to July 26 and is now aligned with end-of-year activities. At an ESC meeting earlier this year, one of the discussion items pertained to the cutover date. As of this date, we do not have confirmation of a specific date when cutover will occur. | 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. | Uncertainty in transition timelines can disrupt planning and resource allocation, leading to potential delays and confusion. | No comments for this reporting period. |

| DCF Issues | | | | | | | | | |
|------------|-------------|-------------|---|------------------------|--|---|---|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 05/08/25 | | Critical - Impacts the ability of the agency to move forward with work without resolution | Agency Business System | Cost Allocation Not Available in PALM. (See attachments) | DCF is revisiting as plans for remediating internal applications for PALM. Several overtures have been made to PALM RA to communicate functional impacts to DCF processes and requesting one or more sessions with PALM technical and DFS F&A staff regarding DCF | On going pending SpeedKey and other conversation with Enterprise applications | 08/28/26 | No comments for this reporting period. |

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|------|----------|--|---|--------------------------|---|---|--|----------|--|
| Open | 05/08/25 | | Critical - Impacts the ability of the agency to move forward with work without resolution | Agency Business System | DCF's journal distribution process | Given information provided, DCF team has concluded there are 2 viable options: building a front end application to perform front end splits or utilize Speed Key functionality (amongst PALM and Enterprise Applications) to simulate splits. Further conversation will be had post Segment 4 as of 8/20. | 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. | 08/28/26 | No comments for this reporting period. |
| Open | 05/08/25 | | Critical - Impacts the ability of the agency to move forward with work without resolution | Agency Business System | Budget Funding Process since PTAXX cannot be loaded in FACTS. | DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis. | Develop alternate budgeting process for TANF processing that estimates and budgets revenue per year. | 08/28/26 | No comments for this reporting period. |
| Open | 05/08/25 | | High - Impacts the ability of the agency to meet deadlines or milestones | Business Process Change | 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. | Given information provided, DCF team has concluded there are 2 viable options: building a front end application to perform front end splits or utilize Speed Key functionality (amongst PALM and Enterprise Applications) to simulate splits. Further conversation will be had post Segment 4 as of 8/20. | 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 | 08/28/26 | No comments for this reporting period. |
| Open | 05/08/25 | | High - Impacts the ability of the agency to meet deadlines or milestones | Deployment/Cutover | Agency often experiences delays between requests for meetings and other communication with various PALM teams and acknowledgement of these requests. | PALM RCs are placed between agencies and SMEs on various topics. This has proven to cause confusion and miscommunication on several occasions. | Continue to submit requests and follow-up with RCs to ensure message is received and appropriate prioritization occurs. | 08/28/26 | No comments for this reporting period. |
| Open | 05/08/25 | | High - Impacts the ability of the agency to meet deadlines or milestones | Conversion/Configuration | Staffing challenges in General Services are presenting difficulties with readiness workplan tasks related to assets, leading to voids in data migration. | DCF's project strategy shifted after the due dates of several of the initial current state assessment tasks had lapsed. In light of this change, current state analysis has occurred on an evolving basis. | Meet with impacted stakeholders to create strategy for resolving personnel and training shortfalls. | 08/28/26 | No comments for this reporting period. |

DCF Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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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DCF Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-------------------------------|--------------------|
| November - December 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 01/09/26 |
| September - October 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 11/07/25 |
| July - August 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 09/08/25 |
| May - June 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 07/10/25 |
| March - April 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 05/12/25 |
| January - February 2025 | Chad Barrett | chad.barrett@myflfamilies.com | 03/13/25 |

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DEM Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Jeremy Smith

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 Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 99.55%

Submitted On Time = 42

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness:

Score = 97.74%

Submitted On Time = 72

Submitted Late = 12

Pending Submission = 0

Direct Task Completeness:

Score = 95.35%

Submitted Complete = 41

Submitted Incomplete = 2

Completed After Submission = 0

Other Task Completeness:

Score = 98.21%

Submitted Complete = 55

Submitted Incomplete = 1

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 = 5
- 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 | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/05/26 | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Task Closed - Submission Incomplete | | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/13/25 | | Task Closed - Submission Incomplete | | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | | | | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/09/26 | | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 05/21/25 | | Agency Business System | Interface need fulfillment | Stable | 6 (High/Medium) | If the PALM interfaces do not cover all required data elements as currently engaged by DEMES to FLAIR connections, then either the elements will need to be accessed via the data warehouse or DEMES will need to be changed to interact correctly with the new PALM structure | 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 | Cost will be added to the DEMES development project. | No change from previous month |
| Open and Mitigating | 06/20/25 | | Agency Business System | New Interfaces Required due to changing ABS functionality | Increasing | 4 (Medium/Medium) | If there is no way to ask for new interface connections to our ABS starting now moving into the future then any new (or overlooked) functionality that requires an interface connection not initially | If new interface needs arise, email our Readiness Coordinator and technical coordinator with the new need and what new interface is requested. | Wasted Development Dollars, decreased ABS functionality | No change from previous month |

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|---------------------|----------|--|-------------------------|--|------------|----------------|---|---|--|-------------------------------|
| | | | | | | | listed will be impossible | | | |
| Open and Monitoring | 05/21/25 | | Interface | EOG/DEM Interface relationship | Stable | 2 (Medium/Low) | EOG and DEM interfaces and elements are under the same OLO umbrella. | Working directly with Kelley Sasso in EOG to put process agreements in place. | Increased lead time in access aspects of processes or reporting confusion when summarizing agency workload | No change from previous month |
| Open and Mitigating | 05/21/25 | | Agency Business System | PA Payment Process | Increasing | 2 (Low/Medium) | Many projects related to DEM incidents are built by an enterprise business system Florida PA. If the Florida PA development team is not aware of the inbound and outbound Project information interface needs the process of creating projects related to an incident may become more complex | Will socialize with Florida PA users and then the poc for those users to ensure the appropriate interface conversation is had | IT spend will be used to upgrade Florida PA or create a secondary process/system for data movement | No change from previous month |
| Open and Monitoring | 05/21/25 | | Post Implementation | Need PALM Promoters | Stable | 2 (Low/Medium) | If PALM is seen as creating work or uncertainty then the finance team will be unwilling to explore further functionality | Communication about PALM including changes and updates is ongoing, frequent and positively positioned | The FDEM agency Will have trouble with accounting post PALM launch | No change from previous month |
| Open and Monitoring | 06/20/25 | | Interface | Backend Report Information | Stable | 2 (Low/Medium) | If no information is released about how reports are created using interface data then the teams building ABS functionality from reports will be unable to replicate report information in the regular exports and a manual process will need to be used | Monitoring the Knowledge Center to determine if new information is released | Inclusion of a manual process and person hour requirements in ABS updates | No change from previous month |
| Open and Monitoring | 05/21/25 | | Business Process Chang | Payroll Process | Increasing | 1 (Low/Low) | If the payroll processes built in PALM cannot support the needs of the FDEM Payroll team, then the payroll system currently managed by FDEM IT may need continuing support meaning the Payroll process may become more complex/expensive | Highlighting Payroll within UAT as an important module with downstream impact so we can quickly close or escalate this risk | We cannot sunset the Payroll system and we may require IT spend to update | No change from previous month |
| Open and Mitigating | 05/21/25 | | Conversion/Configurator | Grant LTD balances | Stable | 1 (Low/Low) | If life to date balances are not transferred either as a datum or as a concept between FLAIR grant tracking and PALM project costing then a system of balance tracking processes will need to be built to managed life to date reporting | 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 | Process complexity will be added to the Finance team | No change from previous month |
| Open and Mitigating | 05/21/25 | | Conversion/Configurator | Fund Data Freshness | Stable | 1 (Low/Low) | If stale funds are carried over into the project costing module then the day to day operation of project accounting will increase in complexity | The budget team in the finance bureau has been tasked with clearing stale funds/project ids out of our system | Project costing module will create less value for the accounting team | No change from previous month |
| Open and Monitoring | 05/21/25 | | Deployment/Cutover | FLAIR to PALM shutdown around Year End | Stable | 1 (Low/Low) | If FLAIR shuts down before PALM goes live then our business processes will be delayed | Request more information from Felecia | We will lose effectiveness on PALM rollout as well as day to day business execution | No change from previous month |

DEM Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| | | | | | | | | | |

DEM Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | No change from previous month |
| 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; Slalom Development Team | No change from previous month |
| 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; | No change from previous month |
| Data | The PALM Data Warehouse will be accessible by appropriate agency staff for self service reporting | Logged | 05/12/25 | DEMES; FDEM IT; Slalom Development Team; Finance | No change from previous month |
| Processes Data | Project information and OA1 & 2 can be added to PALM if needed for data conversion post Configuration | Logged | 05/12/25 | Finance | No change from previous month |
| 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 | No change from previous month |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

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DEM Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-------------------------------|--------------------|
| November - December 2025 | Jeremy W. Smith | jeremy.smith@em.myflorida.com | 01/09/26 |
| September - October 2025 | Jeremy W. Smith | jeremy.smith@em.myflorida.com | 11/12/25 |
| July - August 2025 | Jeremy W. Smith | jeremy.smith@em.myflorida.com | 09/12/25 |
| May - June 2025 | Jeremy W. Smith | jeremy.smith@em.myflorida.com | 07/10/25 |
| 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 |

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DEP 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


November - December 2025

Agency Sponsor

Karen Armstrong

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 100%

Submitted On Time = 47

Submitted Late = 0

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 99.87%


Submitted On Time = 77

Submitted Late = 1

Pending Submission = 3

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 99.80%

Submitted Complete = 48

Submitted Incomplete = 0

Completed After Submission = 1

Other Task Completeness



Other Task Completeness:

Score = 100.00%

Submitted Complete = 51

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 = 20
- 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 | 547 | Remediate Agency Business Systems based on Segment III | 07/22/24 | 12/13/24 | 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 UAT. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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.

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| DEP Risks | | | | | | | | | | |
|---------------------|-------------|-------------|--------------------------|--|------------|-----------------|--|--|---|--|
| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 11/04/24 | | Agency Business System | Timeline for ABS system testing and PALM UAT | Stable | 9 (High/High) | <p>PALM Process Changes were introduced in a staggered approach which impacted ABS remediation efforts until PALM changes and impacts were completed.</p> <p>As a result, some ABS system testing may not be fully completed until all agency UAT.</p> | Continuing to monitor remediation progress. Remediation is anticipated to complete in advance of all agency UAT start date. | Will require ABS testing to be continued during UAT | DEP has completed interface testing with PALM and some internal interface testing. |
| Open and Monitoring | 08/31/23 | | Staffing/Resource Availa | Loss of knowledge due to staff turnover and time to get added staff trained to meet expectations | Stable | 6 (High/Medium) | Accounting for staff turnover that may occur during the implementation phase of the project. | Ensure job-specific processes are properly documented, staff are cross trained and backups are trained on processes. | Will require retraining of new resources and potential reshuffling of existing resources which could affect the agency's ability to meet critical deadlines | DEP continues to monitor this risk, which has now leveled off with several vacancies being filled. |
| Open and Mitigating | 11/20/24 | | User Acceptance Testing | PALM data availability for ABS testing of remediated applications | Increasing | 6 (High/Medium) | <p>Based on preliminary information about PALM's mock conversion data and configuration processes, agencies will not have access to PALM data files until full UAT in February 2026.</p> <p>Waiting for full UAT training with PALM files could create testing and remediation delays that would coincide with PALM UAT and agency training efforts.</p> | <p>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 values.</p> <p>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.</p> | The movement of Full UAT to February 2026 from December 2025 will cause a delay in completing ABS testing activities and validating system processes and reports. | DEP has created test files for some ABS data testing, though complete PALM interface files with PALM data will be used in all agency UAT. |
| Open and Mitigating | 11/20/24 | | Business Process Chang | Availability of reports through PALM | Increasing | 6 (High/Medium) | <p>PALM reporting information is being provided in a staggered cadence, with many reports dependent on the outcome of the data warehouse design which will extend report definitions and mockup completion until February 2026. Reports not provided by PALM, will require agency resources to build reports utilizing a mix of interface data and DW/BI custom reporting.</p> <p>There is a risk that agency reporting needs may not be identified until UAT, depending on when PALM releases DW/BI information to the agencies. Delayed identification of reports needed for PALM could cause additional strain on agency remediation schedules and the ability to provide management reporting needs in time for go-live.</p> | <p>DEP is monitoring changes to PALM reports through the knowledge center.</p> <p>DEP is now mitigating this by identifying critical reports that PALM will not provide or may be provided in the data warehouse. These critical reports will be developed in DEP applications.</p> | Will require additional agency resources to build suitable reports for PALM using DW/BI and ABS systems data which could cause delays in critical information needs for management. | DEP has identified the initial critical reports needed to be developed for PALM and began remediation to complete them. Due to DW/BI author functionality not being available until the summer of 2026, this functionality will not be relied on for reporting needs unless there is not another option. DEP will be focusing on finalizing the remediation priorities and using PALM reports as needed. |
| Open and Mitigating | 09/06/24 | | Training | Training and Testing Resource Conflicts | Increasing | 6 (High/Medium) | Internal training efforts for agency users is dependent on agency SME's completing PALM system training and testing during UAT efforts, test ABS, develop agency training material, and being able to train agency end users while also being expected to conduct all agency UAT. | PALM has moved Full UAT start date to February 2026. Formal training for PALM is scheduled for October 2026, so DEP will need to build internal training to assist end users. | <p>SMEs would be unfamiliar with the new systems to confidently complete UAT and unable to properly train end users, which would lead to incomplete and inaccurate UAT results.</p> <p>Invalid UAT results would potentially lead to an unsuccessful go-live.</p> | DEP continues to move forward with planning initial SME priority testing at the beginning of all agency UAT with a phased implementation of end user testing. SMEs will also be coordinating with staff to ensure daily FLAIR related tasks are completed while PALM testing and training are conducted. |
| Open and Monitoring | 05/08/25 | | Business Process Chang | Changing Requirements and Impacts on Resources and Delivery | Stable | 6 (High/Medium) | <p>High volume and impact changes to PALM processes and interfaces could negatively impact the agency's ability to remediate and test ABS prior to interface testing and UAT.</p> <p>Changes are anticipated to continue, though large volume or late developing updates in these areas have to be analyzed for impact and work redirected to change remediation</p> | <p>The agency will continue to monitor the PALM Change log and proactively seek to understand how to allocate resources and knowledge transfer across the agency (SMEs and End Users).</p> <p>Pre-UAT testing has allowed SME's to review PALM screen functionality for the first time and understand how PALM may work prior to Full UAT.</p> | <p>Business system remediation could be delayed or extended impacting interface testing and business system testing and preparedness. Impacts to interface testing have already been realised.</p> <p>Additionally, impacts to role assignments and workload estimations could occur.</p> | DEP has identified only minor changes to interface requirements to date through PALM interface testing. Additional testing is needed for both PALM and internal testing during the all agency UAT. |

| | | | | | | | | | | |
|---------------------|----------|--|-------------------------|-------------------------------|--------|-------------------|---|---|---|---|
| | | | | | | | and process knowledge efforts. Changes in requirements and replanning of activities due to unforeseen changes can lead to rescheduling of project activities. This can disrupt project flow, affect dependencies, and require changes to resource allocations in a short time leading to unforced errors, overloaded resources and delayed delivery schedules. | | | |
| Open and Monitoring | 05/02/25 | | Training | UAT Preparation and Readiness | Stable | 4 (Medium/Medium) | The extended timeframe between design sessions and UAT and the unknown details of PALM training could lead to SMEs being unfamiliar with PALM processes and their affect on agency processes which could lead to inefficient or inaccurate end user training and testing. UAT preparation activities are dependent on agency staff reviewing knowledge center resources, using newly developed agency workgroup materials, and preparing testers for the PALM UAT testing process, updated agency processes, defect tracking, and coordinating ABS updates. The DEP PALM team will be responsible for ensuring SMEs and end users are equipped with the knowledge and information to be efficient and successful during UAT. | DEP is a member of the PALM workgroups that are producing UAT preparation materials and is developing tasks for SMEs to be prepared for UAT. The PALM core team is also creating reference guides based on PALM process steps to aid users ability to perform various tasks. | Lack of training and preparedness for testing and detailed PALM navigation and process steps could potentially affect the efficiency and effectiveness of SME UAT. This could lead to uncertainty and delays in preparing end users for testing and completing full integration testing. | DEP continues to closely monitor new additions and changes to PALM processes and related information through the knowledge center. Additional training and reference materials are being created to aid SMEs with testing and training. |
| Open and Mitigating | 01/12/26 | | User Acceptance Testing | Test Case Identification | Stable | 4 (Medium/Medium) | Due to the variety and volume of processes changing due to PALM, the agency may not identify all needed scenarios that need to be tested. | DEP continues to analyze test cases as changes are identified, testing multiple roles for the same test cases, participating in cross agency collaborations for test cases, scripts, etc., identifying negative test scenarios, and multiple data inputs/options for processing transactions. | Critical processes or scenarios not tested could lead to critical issues upon PALM implementation, delaying recording and reporting information timely. | DEP is working to identify the multiple scenarios for each task and update test cases as new information is identified. |
| Open and Monitoring | 12/29/25 | | Role Mapping | Role Mapping and Premissions | Stable | 2 (Low/Medium) | Role mapping exercises were initially believed to be utilized as a result of the lessons learned from SME UAT. Due to the switch to Pre-UAT testing with limited SMEs, the ability for role assignments to be tested was delayed. Additionally, SME testing was removed from PALM scope and agencies were asked to include SME testing as part of Full UAT testing. This risks the ability of role assignments to be properly tested within the agencies to a window at the end of the UAT cycle. | DEP has assigned roles with no long term conflicts for the initial phase of all agency UAT. DEP will perform testing to mimic end user role conflicts during the first phase of testing to prepare for their end users testing efforts and role needs. | There will be a short UAT window for agency SMEs to work with end users on role assignments to help plan for an efficient and effective work flow. This may lead to some re-arrangement of roles within the agency prior to go-Live or post go-live. | DEP is continually adjusting test cases to include testing role assignments on the same tasks. |

DEP Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| | | | | | | | | | |

DEP Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
|-------------------------------|--|--------|------------------------|--|---|
| People Processes Technology | Agency critical tier 1 and tier 2 processes and business systems are successfully tested with PALM UAT environment and have zero "critical" defects prior to recommending readiness for go-live. | Logged | 06/30/25 | All Tier 1, 2 and 3 systems and interfaces and DEP business processes affected by PALM. | DEP is completing ABS unit testing to minimize the impacts on full integration testing along with future all agency PALM UAT. |
| People Processes Technology | Agency SME's have completed initial testing and are ready to train end users prior to fiscal year end. | Logged | 06/30/25 | All SME's and end-users scheduled for training and end user testing. This impacts agency's ability to certify readiness for go-live by SG4 in November 2026. | The assumption has been updated due to the implementation schedule change and the elimination of the unique SME testing phase. DEP will now coordinate splitting full UAT into two phases, with SME testing initially and later end user testing. To help prepare for all agency testing, DEP provided knowledge transfer sessions with SME's in Pre-UAT to display and test PALM functionality, |
| People Processes Technology | PALM process steps, navigation guides, and other UAT materials will be provided in a timely fashion in advance of end user UAT to allow SMEs to develop DEP training content for end users | Logged | 06/30/25 | SMEs would be required to create all PALM training materials and end users will be unable to effectively test PALM | A large volume of PALM Process Steps were provided for Pre-UAT, though additional process steps and demo videos are needed for DW/BI and payroll prior to all agency UAT. |

| | | | | | |
|-----------------------------|---|--------|----------|---|---|
| | and more. | | | users to ensure they test their functionality during the full UAT testing phase. | |
| People Processes Technology | Final changes to external systems such as MFMP, Works, STMS, People First and FACTS will be provided by the respective enterprise partners, along with process impacts, in advance of UAT, to allow time for specific content to be incorporated into DEP training. | Logged | 06/30/25 | SMEs would be required to create enterprise training materials and end users will be unable to effectively test enterprise systems functionality during the full UAT testing phase. | It is unclear if all enterprise systems will be available to test at the beginning of all agency UAT and for what time periods. |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

Submit

Privacy Policy

Report Abuse

| DEP Status Report Confirmation | | | |
|--------------------------------|----------------------|-----------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Karen Armstrong | karen.e.armstrong@floridadep.gov | 01/14/26 |
| September - October 2025 | Shamara D. Bostic | shamara.bostic@floridadep.gov | 11/04/25 |
| July - August 2025 | Darinda McLaughlin | darinda.mclaughlin@floridadep.gov | 09/10/25 |
| May - June 2025 | Darinda McLaughlin | darinda.mclaughlin@floridadep.gov | 07/10/25 |
| March - April 2025 | Darinda McLaughlin | darinda.mclaughlin@floridadep.gov | 05/09/25 |

Helpful Links

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

DFS Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Scott Fennell

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 Completeness

Other Task Completeness

Score = 99.8%

Submitted On Time = 46

Submitted Late = 1

Pending Submission = 0

Score = 90.12%

Submitted On Time = 68

Submitted Late = 13

Pending Submission = 0

Score = 97.35%

Submitted Complete = 44

Submitted Incomplete = 0

Completed After Submission = 5

Score = 96.98%

Submitted Complete = 51

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 = 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | As of 1/9/2026 DFS Proper has collected 100% of the Project recommended standard test scenerios. | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 09/29/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/28/25 | Initially submitted on 9/30/25, because of recent changes, we will be submitting once we address those changes. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/31/25 | Initially submitted on 9/30/25, because of recent changes, we will be submitting once we address those changes. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/31/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | | 01/13/26 |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 99/99/99 | | | | | |
| N/A | Processes | 602 | Update Agency Business Process Documentation | 01/12/26 | 06/26/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. Dec. 2025 |
| Open and Monitoring | 04/17/25 | | Conversion/Configuration | ENTERPRISE A&A - Conversion and Data Validation: | Stable | 9 (High/High) | There is a risk that the agencies' data conversion validation process may not be thorough or accurate, leading to incomplete or incorrect data being converted to Florida | • A&A will work closely with the Project to understand where agencies need support and additional guidance in understanding their agency's FLAIR data. | This could result in operational inefficiencies, data integrity issues, potential delays in project timelines, and incorrect trial balance information in Florida | Added mitigation to risk. A&A continues to monitor this risk closely since it has critical impacts to the Project and our financial reporting. |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|--|--------|-----------------|--|--|---|---|
| | | | | | | | <p>PALM.</p> <ul style="list-style-type: none"> • 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 working with project and agencies on mock conversion results to find solutions. • Reviewing Conversion Validation Approach to mitigate risk | <p>PALM, which could impact financial reports.</p> | | |
| Open and Monitoring | 10/20/23 | | Deployment/Cutover | ENTERPRISE A&A - Project Timeline. | Stable | 9 (High/High) | <ul style="list-style-type: none"> • The Project timeline is very conservative regarding flexibility, and A&A's involvement is critical for project success. A&A Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&A change management and internal preparation for A&A preparedness activities have already started, but having adequate resources will be key to successful implementation. | <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 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. • 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 was approved for for 9 FTEs to be onboarded for FY 2026. | It can hinder successful implementation of project. | No changes. Monitoring and mitigation strategies are on-going. |
| Open and Monitoring | 10/11/23 | | Staffing/Resource Availa | ENTERPRISE A&A - Resource Impacts. | Stable | 9 (High/High) | <ul style="list-style-type: none"> Resource impacts due to A&A operational staff spending a significant amount of time performing Project related tasks. • Project tasks may require additional time outside employees designated working hours to attend meetings, review time sensitive documents, or contribute to critical tasks. Some positions are not granted flexibility to flex time throughout the month, but they must flex it within the week. This policy limitation causes a strain on availability of resources. Allowing current staff more flexibility to flex their time beyond the work week would help with resource allocation. • As we get closer to implementation, the number of items that will require attention will continue to increase. This will include, assisting agencies with data management, preparing enterprise data for conversion, developing cut-over and FLAIR close out plans, participating in all levels of integration and UAT testing, validating testing results, participation and validation of mock and production conversions, developing policy around new processes. | <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. | Pulling resources from operations, will increase workloads, and will cause stress and an increased chance of employee burnout. | No changes. Monitoring and mitigation strategies are on-going. |
| Open and Monitoring | 10/11/23 | | Staffing/Resource Availa | ENTERPRISE A&A - Risk of External Impacts on Business Processes. | Stable | 6 (Medium/High) | <ul style="list-style-type: none"> A&A serves all other agencies; therefore, our processes are at risk from external impacts: • Agencies – All A&A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for | <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. | This will cause significant issues for A&A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&A staff around go live. | No changes. Monitoring and mitigation strategies are on-going. A&A learned a lot through Pre-UAT, and we are working to incorporate that knowledge into our processes and our people. We should have a better understanding of this risk when we get into end-to-end testing. |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|--|------------|-----------------|--|--|---|--|
| | | | | | | | <p>implementation, this will cause significant issues for A&A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&A staff around go live.</p> <p>• Project – There may be changes in Project directions or decisions that negative affect A&A that would cause an increase of time and resources or provide confusion and lack of clarity among A&A's expectations.</p> <p>• Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&A's operations.</p> | <p>• Participate with all FFMIS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon.</p> <p>• Assist agencies with readiness tasks such as data analysis and cleansing.</p> <p>• Develop contingency plans for agencies that are not prepared for Florida PALM implementation.</p> <p>• Monitor activities, changes in rules and regulations, and agencies competencies.</p> <p>• Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible.</p> <p>• 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.</p> | | |
| Open and Monitoring | 10/08/24 | | Agency Business System | ENTERPRISE A&A - ABS Testing. | Increasing | 6 (Medium/High) | <p>A&A is responsible for several enterprise business systems, some of which are interdependent. Testing each system through the entire process, from start to finish, will be critical to determine success. This will require testing to be synchronized according to the Interdependencies and workflow. Failure to do so could result in functions not being appropriately tested. This risk is really meant to address the issue around the complication of staging multiple business systems and the data within them for testing. This requires a huge effort and any misalignment of data, or refresh dates, can impact testing results, or the ability to test processes. Both Interface Testing and User Acceptance Testing can be impacted.</p> | <p>• Identify all enterprise business systems that will need to be tested.</p> <p>• 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.</p> <p>• 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.</p> <p>• A&A has onboarded a UAT Testing Team, and is currenting working to onboard an HCM functional expert to assist with transformation.</p> | <p>It has potential to impact, or delay go live if agency enterprise systems cannot be fully tested in the allotted time. The enterprise owners and systems impacted includes STMS, PeopleFirst, PCard Works, FACTs, LASPBS, and other critical agency business systems that interface with Florida PALM.</p> | No changes.. Monitoring and mitigation strategies are on-going. |
| Open and Monitoring | 01/25/24 | | Deployment/Cutover | TREASURY - Outstanding warrants at cutover | Stable | 6 (High/Medium) | <p>Discussions relating to the status of outstanding warrants at the cutover from June 2026 to July 2026 has not been finalized and could, potentially have impacts to warrant recipients and reconciliation processes.</p> | <p>• Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants.</p> <p>• 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.</p> | <p>Could potentially have impacts to warrant recipients and reconciliation processes.</p> | Cutover timeframe should be December 2026 to January 2027. Cutover meetings will resume as soon as 1/13/26 and this will be a topic for discussion and planning. |
| Open and Monitoring | 12/13/23 | | Conversion/Configuration | TREASURY - Concentration account | Increasing | 6 (High/Medium) | <p>The current Deposit Concentration Account was issued in 2016 contract ends in March of 2026. DFS has already invoked one 5-year renewal and does have one 6-month extension available. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM.</p> <p>The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, RAI</p> | <p>• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</p> <p>• 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</p> | <p>Although unlikely, if Wells Fargo does not agree to extend their contract, this could result in agencies not being able to make deposits into their accounts and impacting agencies revenue.</p> | Negotiations are ongoing. Information regarding contract award will be shared when it is able to be shared. Once a contract is awarded, planning will commence. |

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| | | | | | | | <p>codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. Agencies would also need to receive and distribute new depository supplies to their locations.</p> <p>This could also impact User Acceptance Testing if processes are validated using current contractor and new vendor values are not in the UAT environment.</p> | <p>• Stay in close communications with Edward Nabong within 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.</p> | | |
| Open and Monitoring | 02/19/24 | | Business Process Change | CCN - Potential loss of CCN resources. | Stable | 6 (High/Medium) | <p>The loss of CCN resources would constrain current CCN staff capacity and could result in the loss of critical functional and institutional knowledge, which is imperative to the success of the Florida PALM Project.</p> | <p>• 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.</p> <p>• Use of dedicated back-up CCN Liaisons will aid in the short-term continuity.</p> | It could result in the loss of critical functional and institutional knowledge. | Risk has been reviewed and continues to be monitored. |
| Open and Monitoring | 10/11/23 | | Deployment/Cutover | ENTERPRISE A&A - Planning. | Decreasing | 6 (High/Medium) | <p>Planning for some critical activities has not been done. Until these plans have been developed, A&A cannot adequately determine needed resources, time and effort.</p> <p>• Cutover planning • FLAIR retirement planning • Stabilization period planning • Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll • Financial Reporting mappings and data rollup</p> | <p>• 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 are in progress</p> | Lack of required resources to support around go live and beyond. | No changes. Monitoring and mitigation strategies are on-going. |
| Open and Mitigating | 11/13/25 | | Interface | TREASURY - Operations. | Stable | 6 (High/Medium) | <p>June 12th 2025-First meeting with JPM. Testing was originally scheduled for August, PALM requested we move the timeline to June so we can start early. June 23rd was the second meeting and a weekly schedule was established for Mondays.</p> <p>The lack of engagement from the task owner is causing delays to the execution of the test plan.</p> <p>The following tasks need to complete for a successful implementation of JP Morgan Interface Financial wave disbursements test files.</p> <p>Lack of engagement from task owner at the Florida PALM implementation vendor could lead to implementation delays. The key resource who is also a task owner has not participated in meetings to provide updates and / or confirmation that the following tasks will be completed in a timely manner:</p> <p>Confirm approval to transition BAI2 file to the production environment Send first Positive Pay test file for review Send first ACH file for review Task Owner to provide Technical SME (JP Morgan) with production server details Confirm approval to move Bank Title File to Production.</p> | <p>Mitigation Plan: Treasury will escalate to Accenture as per the escalation matrix to get confirmations from Task Owner or senior management</p> <p>Mitigation Status Update: Treasury escalated to Accenture and task owner has attended multiple recent meetings and is appearing to be engaged.</p> | <p>JPM acknowledge the risk that these delays would impact further interface testing that should be completed before UAT begins. If testing is not complete and verified timely, the project go live date could be impacted. DFS would not be able to send ACH origination files and positive pay files to the bank and would not be able to receive and reconcile disbursement activity from the bank. The potential for fraud is a high risk as well.</p> <p>INBOUND FILES: /ARP01-POSITIVE PAY FILE-API005,PRI045 /ACH01-ACH FILE-CMI002,CMI016, PRI012, PRI056 OUTBOUND FILES: /H2H01-PREVIOUS DAY BANK STATEMENT-CMI003 /RET-ACH RTN FILE-CMI001 /ACK-ACH ACKNOWLEDGMENT-CMI006 /ABA-AUTHORIZED BANK FILES-API030</p> | Ongoing meetings are occurring between Florida PALM and JPMorgan to work through connection and file issues. |

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| Open and Monitoring | 12/13/23 | | Conversion/Configuration | TREASURY - CMIA | Stable | 4 (Medium/Medium) | Relating to CMIA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMIA reporting. | <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. | If PALM cannot track and calculate the clearance pattern for CMIA, Federal reporting will be impacted | No new information has been provided related to CMIA reports in PALM. Testing was not available in pre-UAT. |
| Open and Mitigating | 02/27/24 | | User Acceptance Testing | OIT/ABS - Third Party Vendors | Stable | 4 (Medium/Medium) | Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation activities. | <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. | This could impact the Department's ability to meet the scheduled finish dates for Florida PALM Readiness Workplan tasks related to design, build, and testing activities. | Risk has been reviewed and continues to be monitored. |
| Open and Mitigating | 10/20/23 | | Staffing/Resource Availa | OIT/ABS - Resource Impacts. | Stable | 4 (Medium/Medium) | Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities. | <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. | It could cause delays in the ABS Remediation timeline. | Risk has been reviewed and continues to be monitored. |
| Open and Monitoring | 10/11/23 | | Business Process Chang | ENTERPRISE A&A - Process Changes. | Increasing | 4 (Medium/Medium) | <ul style="list-style-type: none"> All bureaus within the division will have significant process changes. Insufficient preparation or reluctance to adopt and adapt to changes could result in delays; operational deficiencies; and critical operations, tools, technologies, and resources not being available. Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output. | <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 knowledge transfers for known gaps. A&A has contracted with a People Soft experienced resource to help with implementation activities, including identifying staffing model changes and process changes. A&A onboarded a UAT Testing Team, and is working to onboard an HCM functional expert to assist with transformation. | Due to the unique activities that A&A performs at an enterprise level, reduced performance could have a negative impact on agencies. | No changes. Monitoring and mitigation strategies are on-going. A&A learned a lot through Pre-UAT, and we are working to incorporate that knowledge into our processes and our people. |

DFS Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| | | | | | | | | | |

DFS Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
|-------------------------------|---|--------|------------------------|--|---|
| Technology | The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces | Logged | 10/20/23 | Agency Business Systems | Assumption has been reviewed as is still valid. |

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|------------|---|--------|----------|-------------------------|---|
| | complete requirements for agency business system changes and business processes with enough detail and time to implement the changes according to the Florida PALM schedule. | | | | |
| 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 | Assumption has been reviewed as is still valid. |
| Technology | The Go-Live date for Florida PALM is expected to occur in January 2027 based on the Florida PALM Project's decision to move the Financials, Payroll, and Data Warehouse/BI implementation. | Logged | 10/23/25 | Agency Business Systems | Assumption has been reviewed as is 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: *

☐ Confirm *


Submit

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| DFS Status Report Confirmation | | | |
|--------------------------------|----------------------|--------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Scott Fennell | scott.fennell@myfloridacfo.com | 01/13/26 |
| September - October 2025 | Scott Fennell | scott.fennell@myfloridacfo.com | 11/10/25 |
| July - August 2025 | Scott Fennell | scott.fennell@myfloridacfo.com | 09/10/25 |
| May - June 2025 | Scott Fennell | scott.fennell@myfloridacfo.com | 07/10/25 |
| 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 = 98.54%

Submitted On Time = 42

Submitted Late = 5

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 89.31%


Submitted On Time = 64

Submitted Late = 20

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 84.78%

Submitted Complete = 35

Submitted Incomplete = 4

Completed After Submission = 7

Other Task Completeness



Other Task Completeness:

Score = 98.93%

Submitted Complete = 52

Submitted Incomplete = 0

Completed After Submission = 4

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 = 13

Duplicate Filled Role = 0

Vacant Role = 1

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/21/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/05/26 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 12/03/24 | | User Acceptance Testing | Separation of Qualified Employees - F&A | Stable | 9 (High/High) | If DJJ loses quality staff, then the agency may be at risk of losing historical agency knowledge. The Reporting and Reconciliation supervisor has recently left the agency. This person was included as role for UAT SME. | Libby will be the SAM until the training, then it will change to Marcia so that Libby can operate other roles; SME end user roles will need to be reviewed and if applicable, reassigned to other employees. Encourage SMEs to document and archive | Bureau staff may not be as prepared for UAT SME. | Risk changed from mitigating to monitoring. |

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| | | | | | | | | 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. | | |
| Open and Monitoring | 12/22/25 | | User Acceptance Testing | Limited SME and Staff availability for UAT could negatively impact testing and its outcome | Increasing | 9 (High/High) | Project SMEs and staff performing UAT also need to perform their regular duties during the same period. This implies limited availability for either UAT or regular duties, which could affect UAT negatively. Attempts are being made by the affected bureaus to boost staffing, but the gaps still remain because is has been difficult to find capable persons to fill vacant positions. | Escalate the staffing issue to leadership; Request additional hiring resources. | UAT and regular work delays, reduced deliverable quality and increased risk of rework. | Limited SME and Staff availability for UAT could negatively impact testing and its outcome |
| Open and Monitoring | 01/05/25 | | User Acceptance Testing | Limited Guidance Provided prior to UAT Regarding PALM Payroll Processing | Increasing | 9 (High/High) | Information and process steps have been released by the Project, but not for any payroll-related processes. Biweekly payroll will be tested the third week of February and the only information DJJ has is what has been provided in the Knowledge Center and Advisory Council meetings. | Check with PALM Coordinator about when materials, process steps, and/or guidance may be available for training environment before UAT starts. Bureau staff should review the business process steps provided in the Knowledge Center prior to their in-person UAT meeting to familiarize themselves again with the payroll process in Florida PALM. | Staff will not be as prepared heading into UAT; testing payroll may take longer than expected. | New risk added due to limited information surrounded testing payroll processing during UAT. |
| Open and Mitigating | 08/19/25 | | User Acceptance Testing | Delay In Documenting Test Scripts | Stable | 6 (Medium/High) | If SMEs wait for the PALM Project to provide test procedures before writing UAT test scripts, they may be overwhelmed and not have sufficient time to complete the creation of their UAT test scripts. | Use the current business processes documented by DJJ to draft/create generic aspects of tests of the scripts with assistance from PMO, and then complete the scripts with the PALM Project test procedures when they become available. However, F&A has opted to wait for PALM to provide more specific and actionable information before proceeding; they are prepared to work overtime, including weekends, if needed, to get this done. | SMEs could be overwhelmed trying to create the test scripts from scratch during UAT. | No changes to this risk during the reporting period. |
| Open and Monitoring | 11/04/24 | | User Acceptance Testing | Limited Staff for UAT | Stable | 6 (High/Medium) | Vacancies and competing priorities within bureaus heavily affected by the implementation of PALM have caused less time to work on preparing for UAT. | Mitigation Plan: bureaus are actively advertising, interviewing, and recruiting for vacancies as they occur. Additionally, bureaus are training backups to work emergency activations, so if needed, they can free up SME's for UAT. | Bureau SME's and staff may be unavailable for UAT if positions are not filled and competing priorities not realigned. | No changes to this risk during the reporting period. |
| Open and Mitigating | 02/28/25 | | Business Process Change | Reliance on Florida PALM and Data Warehouse for Reporting Functionality | Stable | 6 (High/Medium) | FLAIR @ DJJ is an agency system that staff rely on to pull financial information and to conduct research. When PALM goes live, FLAIR @ DJJ will only maintain financial historical information; it will not be remediated to incorporate PALM financial information. Because of this, users will need to rely on untested PALM and Data Warehouse reports for their duties, potentially leading to challenges. | 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. | Reporting functionality will be severely hindered. | No changes to this risk during the reporting period. |
| Open and Monitoring | 11/04/24 | | User Acceptance Testing | Staff Involvement in UAT Preparation | Stable | 6 (High/Medium) | Vacancies and competing priorities within the bureaus responsible for UAT preparation are limited with the amount of time spent on preparing for UAT. | Bureau Chiefs are monitoring vacancies and are striving to fill them within a timely manner so that preparation of UAT is not impacted; PALM Administrators within Budget and Finance and Accounting are preparing the majority of the test scripts with input from the SMEs when available. | Preparation and understanding of expectations during UAT will not be learned by UAT SMEs. UAT will be less informed and may take longer to get through test scripts; Staff will not have a sufficient knowledge base or understanding of the elements of PALM, which could lead to frustration, lack of motivation, and prolonged participation in UAT. | No changes to this risk during the reporting period. |
| Open and Monitoring | 08/11/25 | | User Acceptance Testing | Test Scenarios Unidentified | Stable | 6 (High/Medium) | Required testing items may be inadvertently omitted during UAT. | Newly identified test scenarios will be documented and test | Untested scenarios can result in post-deployment defects | No changes to this risk during the reporting period. |

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| | | | | | | | | scripts will be created as UAT testing evolves. | and/or unmet functional requirements. | |
| Open and Monitoring | 07/01/25 | | User Acceptance Testing | People First UAT Unknown | Stable | 6 (High/Medium) | We don't have any information about when People First UAT will begin, what's going to be included, or how it will be structured. | There isn't anything to mitigate at this point. DJJ staff will wait until we receive information from People First about UAT. | If we are unable to test People First during end-to-end UAT, the agency will not be able to see how PALM works with People First and how the data looks. Additionally, not having any information about the PF UAT timeline prevents HR staff from preparing for end-to-end testing and developing internal training materials. | Still waiting for any updates on People First UAT |
| Open and Mitigating | 04/21/25 | | Conversion/Configuration | Encumbrance Conversions into Florida PALM | Stable | 6 (High/Medium) | Current business processes do not include the reconciliation of encumbrances between AOD and FLAIR and contract encumbrances are not managed by bureaus so that they remain in balance with approved allotments. The management of encumbrances is done manually in FLAIR. | Budget: Budget PALM Administrator and FCO Analyst actively monitor the FWOS, the FCO Tracking Log, and FLAIR Encumbrance report to reconcile actual expenditures vs. encumbrance balances. Contract activations can be manually updated in FLAIR by F&A, but changes needed to AOD encumbrances require updates made by requestors within the bureaus. Email requests are sent to requestor requesting updates in AOD as to not further disconnect the relationship of encumbrance between AOD and FLAIR. | If encumbrance balances are correct in FLAIR, but not in AOD, the AOD PALM Realm will be updated so that FLAIR balances are converted. This impact will be minimal since encumbrances are managed in FLAIR. Duplicate encumbrances and contract encumbrances not properly managed will consume budget when converted to PALM. This will reduce the remaining allotment available to pay invoices to vendors. | No changes to this risk during the reporting period. |
| Open and Monitoring | 06/06/25 | | Interface | People First DB Links | Increasing | 4 (Medium/Medium) | People First is yet to deliver the DB Links used by DJJ's agency business systems. Upon reaching out to People First directly, we did not receive confirmation that the DB links will be available before interface testing. People First impacted DB links list is shared with all agencies, the date by which People First DB links will be ready is still not known. expected to look for additional information | Currently systems are remediated with the information provided by People First. | Will not be able to test the ABS that has been remediated for PALM without the updated DB Links from People First. Impacted ABS: HRES | Risk is increasing during this reporting period. As we get closer to UAT, the files will be needed from People First so that we can fully test DJJ's business systems. |
| Open and Mitigating | 06/03/25 | | Conversion/Configuration | Data Cleansing Maintenance - Projects | Decreasing | 4 (Medium/Medium) | Prior to PALM, Project IDs were not deactivated or deleted in FLAIR and there was not a process to do so. In preparation for Go-Live, the Budget PALM Administrator and Facility Services staff researched all Project IDs and determined those that needed to be deactivated and deleted. A script was created and run to mark those Project IDs as I or D in FLAIR. These data need to be reviewed on a recurring basis so that inaccurate or incomplete information is not converted to Florida PALM. | Mitigation plan has ensured that the additional details associated with Project IDs are being correctly input in FLAIR by F&A staff (those fields that are required for conversion into PALM). Additionally, the Facility Work Order System (DJJ's ABS to manage Projects) has been remediated to incorporate a financial reconciliation and Project ID close-out workflow. For monitoring, Budget is actively reviewing, updating, and/or correcting Project Data to ensure the data requirements for conversion are met. | Inaccurate Project data converted into PALM will result in conversion failures, too many records being converted, or inaccurate records being recorded. This would require additional efforts to clean the data in multiple system. | Budget has reviewed the Project title file for both months. Risk trend is decreasing now that F&A is inputting all data into the FLAIR title file and the FWOS has incorporated a financial reconciliation piece to the process flow. |
| Open and Mitigating | 10/31/25 | | User Acceptance Testing | PALM Administrator Vacancy in HR | Increasing | 4 (Medium/Medium) | This vacancy in the HR PALM Administrator role may delay UAT preparation and execution. This position is essential for validating test scripts, coordinating HR input, and ensuring timely issue resolution. Interim support may be needed to maintain testing timelines. | Continue aggressive effort to recruit OPS; work with PMO to begin UAT prep | UAT preparation and execution may be delayed. This could result in incomplete or delayed test script validation, reduced coordination of HR input, slower issue resolution, and overall disruption to UAT timelines and quality. | Still working on hiring a suitable candidate for this position |

DJJ Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| | | | | | | | | | |

DJJ Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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) | Reviewed for current period. Still applicable. |
| People | All SMEs will be available to work on required PALM-tasks. | Logged | 04/17/24 | Bureau SMEs | Reviewed for current period. Still applicable. |
| People | There is a commitment from end users to the PALM Project. | Logged | 04/23/24 | All | Reviewed for current period. Still applicable. |
| 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 | Reviewed for current period. Still applicable. |

| | | | | | |
|---|--|--------|----------|--|--|
| 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 | Reviewed for current period. Still applicable. |
| 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 | Reviewed for current period. Still applicable. |
| People | DJJ PMO can drive the implementation of the PALM Project with four team members. | Logged | 12/03/24 | PMO | Reviewed for current period, Still applicable. |
| Data | Unreconciled payroll warrants will not be included in the Outstanding Warrant Report (APR018). | Logged | 04/21/25 | HR | Reviewed for current period. Still applicable. |
| People Technology | Cutover will be no longer than approximately 3 weeks. | Logged | 04/30/25 | Supplier payments | Reviewed for current period. Still applicable. |
| Technology | PALM will incorporate additional interfaces after Go-Live, if needed by DJJ. | Logged | 05/01/25 | IT, F&A | Reviewed for current period. Still applicable. |
| Technology Data | PALM will not alter the interfaces DJJ has selected. | Logged | 05/01/25 | IT | Reviewed for current period. Still applicable. |
| Data | If balances on purchase orders in AOD are different than what's reported 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 | Reviewed for current period. Still applicable. |
| Data | We assume that Florida PALM is updating the user role export document as changes are made and enhancements are added from Pre-UAT testing. | Logged | 05/05/25 | Agency Liaison and SMEs | Reviewed for current period. Still applicable. |
| Data | We assume that Florida PALM is updating the report export document as changes are made and enhancements are added from Pre-UAT testing. | Logged | 05/05/25 | Agency Liaison and SMEs | Reviewed for current period. Still applicable. |
| Data | Zero dollar contracts in FACTS will not be converted to PALM | Logged | 10/15/24 | BCM, F&A contract disbursement payments | Reviewed for current period. Still applicable. |
| People Processes Technology | FACTS will be available to test when end-to-end user testing for PALM begins. When asking FACTS about UAT, the response was that "...we are still in the testing phases with Florida PALM. We will provide the agencies with an update when the UAT environment becomes available." | Logged | 06/26/25 | BPCA, Contract Tracking System (ABS), and F&A Contract employees | Still waiting on UAT for FACTS |
| Processes | The BOSP Beneficiary Form will be updated from FLAIR to PALM account values and provided to the agencies prior to PALM Go-Live | Logged | 07/25/25 | Human Resources | Reviewed for current period. Still applicable. |
| People Data | Employees will be provided training on the object code to account crosswalk. | Logged | 08/20/25 | UAT SMEs and End-Users involved in UAT Full | Reviewed for current period. Still applicable. |
| Data | Regarding old FCO categories associated with active assets - the Project will implement a change for this in future conversions. This will allow for the asset records to be converted to Florida PALM. | Logged | 09/04/25 | Asset and property conversion data (General Services) | Reviewed for current period. Still applicable. |
| People | Identified SMEs and end users will be available throughout UAT and will have documented and understood the test cases assigned to them prior to execution. | Logged | 09/05/25 | UAT SMEs and End-Users | Reviewed for current period. Still applicable. |
| Technology | The Florida PALM system will remain continuously available and accessible for the full duration of User Acceptance Testing (UAT). | Logged | 09/05/25 | All End-Users | More information to be provided soon. |

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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| DJJ Status Report Confirmation | | | |
|--------------------------------|----------------------|------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 01/14/26 |
| September - October 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 11/10/25 |
| July - August 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 09/05/25 |
| May - June 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 07/09/25 |
| March - April 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 05/09/25 |
| January - February 2025 | Heather DiGiacomo | heather.digiacomom@fldjj.gov | 03/10/25 |

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 98.98%

Submitted On Time = 44

Submitted Late = 4

Pending Submission = 2

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 85.63%

Submitted Complete = 30

Submitted Incomplete = 4

Completed After Submission = 14

Other Task Completeness:

Score = 85.36%

Submitted Complete = 39

Submitted Incomplete = 2

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.

Change Champion Network:

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

Unique Filled Role = 16

Duplicate Filled Role = 13

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 |
| 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 | | Blocked due to missing Single Pay procedures, which prevents testing. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 75% - Consolidating/Inputting Information for Submission | | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | 11/25/25 |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

| DLA Risks | | | | | | | | | | |
|---------------------|-------------|-------------|--------------------------|---|------------|-----------------|--|--|--|---|
| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 01/13/26 | | Staffing/Resource Availa | Limited SME availability and Potential SOD Conflicts during UAT Due to Operational Workload | Increasing | 9 (High/High) | Agency SMEs are responsible for supporting Florida PALM UAT activities while also managing day-to-day operational responsibilities. Due to limited staffing and overlapping responsibilities, SMEs may encounter potential segregation of duties(SOD) conflicts during testing. | The risk was discussed with PALM team. Agency will monitor SME availability and potential SOD conflicts during UAT and adjust participation as needed based on operational priorities. | Delays or gaps in UAT execution may occur, resulting in reduced test coverage, delayed defect identification and resolution, and potential impacts to overall project readiness and go-live timelines. | Risk acknowledged due to limited SME availability during UAT. |
| Open and Monitoring | 01/13/26 | | Deployment/Cutover | Potential System Downtime During PALM-FLAIR Transition | Increasing | 9 (High/High) | During the transition from FLAIR to Florida PALM, there may be anticipated periods where system availability is reduced. Clarification has been requested from the PALM team regarding any planned downtime. | Agency raised the question with PALM RCs and is awaiting confirmation regarding anticipated system downtime. Agency will monitor updates. | It may delay processing activities, impact UAT execution, and affect day-to-day operational tasks during the transition period. | Agency raised the question and is monitoring for confirmation on any anticipated system downtime. |
| Open and Monitoring | 01/14/26 | | User Acceptance Testing | UAT Data Readiness Dependency on Mock Conversion 4 | Increasing | 9 (High/High) | Data cleansing based on Mock Conversion 4 is scheduled to be completed by March 13, while UAT is planned to begin in February. If UAT begins before Mock Conversion 4 data is available or validated, testing may need to proceed with incomplete or non-final data. | Agency has raised the concern with PALM RCs and is awaiting guidance on UAT data expectations. | UAT execution may be delayed or limited, resulting in reduced test coverage, increased work, and potential impacts to testing timelines. | Risk identified and discussed with PALM team. Agency is monitoring Mock Conversion 4 timelines and awaiting confirmation on data availability to support planned UAT start. |
| Open and Mitigating | 04/30/25 | | Role Mapping | Segregation of responsibilities with a Florida PALM user role. | Increasing | 6 (Medium/High) | FLAIR user access allows the agency to restrict functions but Florida PALM user roles do not allow for restricting activities. | 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. | HR will have to assume additional responsibilities. | Issue is still open |
| Open and Monitoring | 01/13/26 | | Deployment/Cutover | Inter-Agency PALM Go-Live Readiness Impacting DLA Operations | Stable | 6 (Medium/High) | Agency relies on Inter-agency transactions and coordination to support day-to-day operations. If one or more dependent agencies are not ready for Florida PALM go-live, required inter-agency processes and transactions may be delayed or disrupted, potentially impacting agency's operational continuity. | The risk was previously discussed with PALM RCs. Agency will continue to monitor updates from DFS and adjust planning as needed to minimize operational priorities. | Delays or disruptions in inter-agency processes may impact DLA's day-to-day operations and require interim or manual procedures until all dependent agencies are fully live in Florida PALM | Risk discussed with appropriate team. Agency is monitoring statewide readiness and will adjust planning as needed to minimize impact. |

| DLA Issues | | | | | | | | | | |
|------------|-------------|-------------|-----------------------------|--------------------------|--|--|---|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 12/20/24 | | Critical - Impacts the abil | Interface | Approval seeking on batch upload to Import process for supporting documents | The need for batch upload approval was identified to improve the efficiency of importing supporting documents. | If there is no project solution it will require considerable staff effort to complete the supporting docs | 04/14/25 | Issue is still open | |
| Open | 04/09/25 | | Critical - Impacts the abil | Business Process Chang | Manual payroll split for federal grants. | Manual process may be required to split payroll costs related to federal grants rather than utilizing Florida PALM payroll accounting functions. | We are hopeful that the future tasks will allow us to rectify the issue | 09/25/25 | Issue is still open | |
| Open | 05/21/25 | | Critical - Impacts the abil | User Acceptance Testing | Data Warehouse | we have no way to test whether the new data warehouse will function the way that it does today because it's not available for us to test it. | We will explore optional reporting solutions. | 06/30/26 | Issue is still open | |
| Open | 09/10/25 | | High - Impacts the ability | Conversion/Configuratio | Review and validation of extensive APLM Supplier file | The PALM Supplier file is significantly large, making it difficult for F&A staff to complete reviews within the required timeframe. This may impact timely validations and downstream processes. | Extend review timelines or allocate additional resources to ensure accurate validation of supplier data. | 11/07/25 | Issue is still open | |
| Open | 09/02/25 | | Low - All impacts not list | Staffing/Resource Availa | Project Team Member out on extended FMLA who had expertise working with our grants and property areas. | This individual is currently the only person who handles our property inventory and works with the agency business system application that is a part of the inventory tracking. He is also the primary person for out grant reporting. | Key resource remains unavailable. Monitoring will continue until the individual returns or additional support is secured. | 11/07/25 | Issue is still open | |

| DLA Assumptions | | | | | |
|---|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
| Processes | Processes will require modification to accommodate new roles | Logged | 09/07/23 | Finance & Accounting | Assumption is still open. |
| Data | Data field changes will impact systems | Logged | 09/07/23 | Finance & accounting, VANExt, EGrants, SQL reporting | Assumption is still open and under review. |
| 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 | Assumption is still open and under review. |
| Processes Data | Supplier records were added by DLA, but PALM and FLAIR outputs show discrepancies that need clarification. | Logged | 09/10/25 | Finance & Accounting | Open assumption; pending validation. |

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

DLA Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|-------------------------|------------------------------------|--------------------|
| November - December 2025 | Darlene Faris - Interii | darlene.faris@myfloridalegal.com | 01/14/26 |
| September - October 2025 | Darlene Faris - Interii | darlene.faris@myfloridalegal.com | 11/10/25 |
| July - August 2025 | Darlene Faris - Interii | darlene.faris@myfloridalegal.com | 09/10/25 |
| May - June 2025 | Sabrina Donovan | sabrina.donovan@myfloridalegal.com | 07/10/25 |
| March - April 2025 | Sabrina Donovan | sabrina.donovan@myfloridalegal.com | 05/09/25 |

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 99.39%

Submitted On Time = 46

Submitted Late = 3

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 98.93%


Submitted On Time = 77

Submitted Late = 7

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 87.96%

Submitted Complete = 34

Submitted Incomplete = 3

Completed After Submission = 12

Other Task Completeness



Other Task Completeness:

Score = 91.07%

Submitted Complete = 40

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.

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/16/25 | 11/17: | Added column for initial UAT load, due to change in UAT approach. Task status reset to 75%. | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/22/25 | | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/22/25 | | Grant IDs are not applicable due to DMA using Quickbooks to track Cooperative Agreements. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Speedkeys created today and will not show on spreadsheet until next day. Placed temporary speedkeys and will update the sheet when it becomes available again. | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | | Task Closed - Submission Incomplete | 11/17/25 |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/19/25 | | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/17/25 | | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/10/25 | | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/05/26 | | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/06/26 | | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 01/05/26 | | Agency Business System | ARRO interface testing. | Increasing | 3 (High/Low) | Need to test ARRO interface Jan/Feb 26 | Test interface prior to Go-Live. | DMA/FSG will not be paid. | Working with ARRO and PALM to conduct testing of interface. |

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| DMA Issues | | | | | | | | | |
|------------|-------------|-------------|-----------------------------|------------------------|---|---|---------------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 07/31/25 | | High - Impacts the ability | Agency Business System | Start planning process for 2-3 week downtime of system when FLAIR converts to PALM | DMA Staff must plan and implement downtime process necessary for the potential FLAIR offline due to conversion to PALM. | Continue to monitor | 06/01/26 | Currently working plan. |
| Open | 02/28/25 | | Low - All impacts not liste | Agency Business System | 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. | Cost averaging is ok if every asset has the exact same cost but there are many assets purchased together where the costs are completely different. This will result in inaccurate asset valuations. Example would be a skid steer with multiple attachments. | Continue to monitor | 10/01/25 | Continue to monitor |
| Open | 02/28/25 | | Low - All impacts not liste | Agency Business System | FLAIR Pending table vs PALM staging table | a. FLAIR allows for pending items to be deleted. If payments are made for assets that fall outside the threshold of property by State and Agency requirements. These can be deleted. b. Palm allows for the pending item to be skipped but its can never be deleted. | 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 Nov. - Dec. 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. | ARRO is working the changes. Testing will be conducted NLT Jan/Feb 26. |
| 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 | Working plan. |
| People Processes Technology Data | Florida State Guard data will be managed by DMA. | Logged | 09/04/25 | FSG is currently managed by DMA and is a separate agency. Need to ensure that our DMA accounting staff has access and can manage FSG. | FSG accounting staff have been added to PALM worksheet. Continue to monitor for changes. |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

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| DMA Status Report Confirmation | | | |
|--------------------------------|----------------------|---------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | COL Adam Curry | adam.m.curry.mil@army.mil | 01/06/26 |
| September - October 2025 | COL Adam Curry | adam.m.curry.mil@army.mil | 11/07/25 |
| July - August 2025 | COL Adam Curry | adam.m.curry.mil@army.mil | 09/09/25 |
| May - June 2025 | COL Adam Curry | adam.m.curry.mil@army.mil | 07/08/25 |
| 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 |

Helpful Links

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

DMS Status Report Dashboard

Reporting Period

November - December 2025


Agency Sponsor

Lance Dyal

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 = 99.59%

Submitted On Time = 46

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.01%


Submitted On Time = 73

Submitted Late = 11

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 84.38%

Submitted Complete = 31

Submitted Incomplete = 4

Completed After Submission = 13

Other Task Completeness



Other Task Completeness:

Score = 90.70%

Submitted Complete = 49

Submitted Incomplete = 1

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 = 8
- 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Midpoint Check-in due Sept 12 - completed Sept 8. Sept 22: Complete. Jan 8: Final review and updates to End User Stories to date complete. All materials to date archived on DMS PALM Training page. Further development is ongoing. | Submission Complete | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | Sept 3: Holding review meetings. Dec 18: Additional review meetings complete. Added PF and STMS. MFMP may be added during second load. | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | In progress in Nov/Dec: Scheduling the meeting to discuss the Florida PALMs migration from Azure to Okta. Once a migration date is confirmed, SAMs will ensure it is included in the DMS PALM communications. Will need to coordinate a meeting with the ForgeRock partners for UAT, as well as with the Florida PALMs Solution Center to complete the production setup. DMS SAMs will work closely with Evelyn Harrison, DMS PALM Agency Liaison / Project Manager, to coordinate both meetings with PALM. Given that UAT is scheduled to begin in February 2026, DMS will perform due diligence to complete the migration prior to UAT, if feasible, unless otherwise advised by the PALM team. A DMS OIT Employee Actions Request has been submitted (Ticket #10842083350) to add End Users to IdP UAT in Prod | Submission Complete | |

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| | | | | | | | | End Users will move over to Okta during the migration cited above. 01-06-26: All End Users have been added to current IdP for UAT and Prod. Meeting scheduled 01-07-26 to discuss migration from Azure to Okta for UAT. 01-08-26: UAT IdP migration to Okta has been completed and tested. The Project needs to update the locked columns in this sheet to reflect this | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Updated plan is confirmed and attached. | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Agency Sponsor, Sponsor Backup, and Technical Support have been briefed. Task is confirmed. | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 99/99/99 | | | | | |
| N/A | Processes | 602 | Update Agency Business Process Documentation | 01/12/26 | 06/26/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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 | | | | | | | | | | | |
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| Sheet Name | Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| STMS Risks | Open and Monitoring | 07/29/25 | | | Cycle 2 Testing Delays | Decreasing | 9 (High/High) | Cycle 2 testing delays in getting the error log or outbound file. | Continue to monitor the timeframe when files are sent to PALM and results returned. | Delays in schedule. | All interface files have been tested in Cycle 2. Only the web service connection remains. |
| DMS Risks | Open and Mitigating | 02/19/25 | | User Acceptance Testing | User Acceptance Testing (UAT) Failure To Ensure Successful End User Training | Increasing | 9 (High/High) | Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction. Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training. Owner: Stephen Russell, DSGI | 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. UAT success will be dependent on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans. 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. | This will negatively impact the validity of testing DMS business processes in the new PALM system and conduct lucrative End User Training. Not having the Business Process steps available in early enough time to allow state agencies to create test scripts and training courses, creates a HIGH risk of failure to UAT. | As of Dec 17, this continues to pose a risk. |
| DMS Risks | Open and Monitoring | 04/09/25 | | Interface | Interfaces and Possible Redevelopment | Increasing | 9 (High/High) | Interfaces Late discovery of defects, requirements changes, or any other event that could cause redevelopment for DMS could strain resources on the DMS team. Owner: OIT / Production Support | Weekly internal technical meetings to review and address. Recommend PALM establish a cutoff date to any changes to fields and interface layouts. Interface testing readiness is crucial to DMS success. | Changes will negatively affect the interface reliability. | PALM continues to make layout changes. |
| FRS Risks | Open and Monitoring | 09/22/23 | | Conversion/Configuration | Retiree payroll warrants and EFTs not being processed timely and/or accurately. | Stable | 9 (High/High) | Retiree payroll warrants and EFTs (approximately \$12 billion per year for 472,000+ payees) not being processed timely and/or accurately. Currently, because we are using the accounts payable module, instead of a payroll module, we may not be able to schedule payrolls with a specific timing. We may not be guaranteed that the payments will be made timely, or the checks will be printed prior to the | 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. | FL Statute mandates that FL retirees are paid on the last business day of each month and dates are set one year in advance. Members are aware that their benefit is received on the last business day of the month. RP cannot coordinate to print ""Early"" as retirees will have a false understanding of monthly timing. If checks are deposited on a different day other | Reviewed with team 12/23/2025 |

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| | | | | | | | | pay date. • Pay dates for Retired Payroll is set a year in advance. After going through an approval process, these dates are sent to DFS every year before December prior to the year beginning. (Payroll schedule attached.) o This may need to be adjusted on the fly for natural disasters. o Pay date for Retired Payroll is the last business day of every month, as required by statute (F.S. 121.091(1), F.S. 121.091(3), and F.S. 121.091(4)). o Florida PALM needs to be responsible for scheduling changes or adjustments. • We believe we can make this work using the Accounts Payable (AP) module, however, this could be an extremely human driven and coordinated process, if this cannot be pre-established with supplemental and monthly fixed dates. • Of other known retirement systems, none process benefit payments through Accounts Payable (AP) modules. • Potential Options: o Have a direct interface with the state disbursement bank (currently JP Morgan) (this is how other states function). o Third Party sending bank files to and from our state disbursement bank account. o Build the AP module around our pay cycle. (Supplemental and Monthly) | | than the last business day of the month, tax payments/accounting will be affected as well. | |
| FRS Risks | Open and Monitoring | 04/08/25 | | Deployment/Cutover | Cut over and the impact on payroll, both weekly and monthly retirement payroll processing. | Stable | 9 (High/High) | Cut over and the impact on payroll, both weekly and monthly retirement payroll processing: - Timing if down in July, impacts COLA, service retirement and DROP exit; - EFT Reversals; - Direct Deposit starts/stops (Sun-Thur); - Need to know in advance so we can send communication to members regarding the Direct Deposit starts and stops; - Holds/in Lieu of list where the member has direct deposit set up, but we have put them on the in lieu of list to create a physical warrant in lieu of direct deposit. - Legacy warrants paid in the DFS system conversion into PALM | 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. | RetiredPayroll will not be able to run weekly or monthly payrolls. The monthly payroll is mandated by statute and tax monies and retiree payments will have to be allocated prior to the transition time. | This is impacted by the go-live date changing from July to January. Added: Legacy warrants paid in the DFS system conversion into PALM |
| FRS Risks | Open and Monitoring | 07/11/25 | | Deployment/Cutover | Active Retirement Receipts and Report Processing during transition period from the legacy system to PALM. | Stable | 9 (High/High) | Affected: • M30 FRS monthly/SUSORP, SMSOAP biweekly retirement data files (PALM PRI030). • Receipt processing by Division for retirement files for state and non-state agencies. • Payments submitted to Retirement through the Dept. of Revenue (DOR) for non-state agencies. Pursuant to chapter 121 F.S. (various references) contributions are due to the Division of Retirement no later than the 5th working day of the month immediately following the month during which the payroll period ended. Accompanying payroll data must be transmitted concurrent with the contributions. Submissions that are not able to process (missing data/contribution or out of balance), are considered delinquent. | Factors outside of the Division's control: <input type="checkbox"/> Dependent on when it occurs and the length of time. <input type="checkbox"/> Dependent on DOR's accommodations for the transition. Factors within the Division's control: The assessment of penalties (delinquency fees) is programmed into IRIS based on dates data or contributions are received and/or when a submission balances. (A waiver would not fall within the intent of the law, and granting such may require approval from the Governor's office.) <input type="checkbox"/> The Division could program IRIS to not assess delinquency fees for late submission for a period of time, but this would be a blanket approach covering all agencies. (Note, the state's submissions are not assessed delinquency fees.) <input type="checkbox"/> Payments received | Any delay in processing could affect the timely transfer of funds for the FRS Investment Plan or SUSORP/SMSOAP to member accounts for investment. While there may not be a loss of earnings assessed (if a moratorium is short term), there may be pushback from the membership, especially on the SUSORP side. If DOR if does not provide accommodation for the transition, what will happen? There are over 900 agencies of which the state is considered one. We do not track the agencies that use DOR and cannot force agencies to pay in a particular way, and many agencies have their own limitations on the way they can remit payment, and any change may require broader approval from their leadership/board or constituent group. | Reviewed with team 12/23/2025 |

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| | | | | | | | | and a penalty is assessed. SUSORP/SMSOAP are on a biweekly schedule. The Division receives payment from the Bureau of State Payrolls for the state's submissions. Non-state agencies have the option to remit payment through DOR and through other sources. Concern: During the transition period to PALM, if there is a moratorium enacted on processing, without an allowance for parallel processing under the legacy system, and it falls on either the monthly or biweekly due dates 1) Preventing the state's monthly and/or biweekly from being submitted 2) Preventing non-state agencies from transmitting funds through DOR 3) Preventing the Division's Accounting team from receiving funds transmitted from any source (EFT/ wire transfer, check) 4) Preventing the Division's Accounting teams entering logging information (in FLAIR?) The impact could be far reaching. | from non-state agencies (outside of DOR) could be held internally, if they are logged into IRIS and allocated with the actual receipt date. If this occurs properly, IRIS will not register a delinquency. | | |
| STMS Risks | Open and Monitoring | 11/06/23 | | | Timeline. Competing deadlines immediately prior to go-live. | Increasing | 6 (Medium/High) | Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to departmental and enterprise systems affected by PALM implementation, at the same time. The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users. | Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM. | Unable to meet timelines to go-live. | Closely monitoring schedule and resources. |
| STMS Risks | Open and Mitigating | 12/30/25 | | User Acceptance Testing | UAT Start Date Delays | Stable | 6 (Medium/High) | UAT is tentatively scheduled to begin 2/2/26. STMS beginning UAT in alignment with PALM requires no delays in receiving interface file, role mapping, and seamless migration to UAT environment. | Continue to monitor schedule and tasks. If delays occur, STMS will begin UAT as soon as possible. | Delay in UAT. | Monitoring. |
| DMS Risks | Open and Mitigating | 04/27/23 | | Staffing/Resource Availa | PALM and Statutorily Required Tasks Overlap | Stable | 6 (High/Medium) | Timeline and Resources. There are multiple overlapping Palm tasks with due dates that utilize the same personnel resources as statutorily required tasks during year end. Owner: Eric Thiele, FMS | 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. | This will negatively impact the testing and training tasks prior to GoLive. | No change. Some staff aug in place. Continuing to monitor. |
| MFMP Risks | Open and Monitoring | 04/30/24 | | Business Process Chang | DFS Vendor Portal | Stable | 6 (High/Medium) | On March 1, 2024, the Department of Financial Services (DFS), Division of Accounting and Auditing (A&A) team met with the MFMP program to discuss its vendor management initiative. This initiative includes analyzing existing vendor management business processes, determining improvements, and developing a data clean-up plan. DFS A&A also proposed a new vendor portal solution that will impact the vendor registration and master vendor data exchange between MFMP and Florida PALM. DFS issued a competitive solicitation in July 2024 for the new portal, executing a contract in mid-FY2024-25. The project has started before Florida PALM's July 2026 go-live date with a phased approach to full implementation by | 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 lack of formal requirements, a defined implementation plan, timeline, etc., MFMP cannot begin building to support the new vendor portal at this time. | Failure to successfully integrate supplier records between MFMP, Florida PALM, and FLIPS would cause several critical issues within the Procure to Pay process in the State of Florida. | Still monitoring with PALM |

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| | | | | | | | | Florida PALM Go-Live, MFMP, Florida PALM, and DFS are discussing integration and interface requirements, including the master data vendor exchange. Launching a design, test, and implementation effort for a new DFS vendor portal parallel with MFMP's Florida PALM implementation activities and during the current build schedule presents significant risk the MFMP to Florida PALM integration and interface implementation. | | | |
| MFMP Risks | Open and Monitoring | 06/06/25 | | Interface | MFMP Florida PALM Testing Delays | Stable | 6 (High/Medium) | <p>Due to a lack of return data from Florida PALM mock testing, MyFloridaMarketPlace (MFMP) was unable to participate in Mock One testing and did not have Mock Two PALM conversion data until the end of May 2025 to begin evaluating. Florida PALM not returning Mock Two conversation data to MFMP until six business days before the planned start of Florida PALM's Interface Cycle Two Testing (June 2025) presents significant risk with the two programs being unable to evaluate possible errors and valid or invalid failure reasons until shortly before the start of Cycle Two testing. Mock One and Two testing was intended to begin exploring conversion results and troubleshooting issues that arise prior to the start of Cycle Two Testing.</p> <p>Based on these events and according to Florida PALM's current timeline, this puts MFMP a full cycle behind in testing efforts from the Florida PALM data perspective. MFMP has continued to complete all system and integration design, build, and test activities in its timeline that it has control over; however, any testing requiring data from Florida PALM is behind the anticipated schedule. Although these testing efforts can be completed during Cycle Two testing, this requires several activities to occur later in the cycle than originally anticipated, introducing risk on both sides of the project to meet the completion dates in preparation for User Acceptance Testing, End-to-End testing, and Go-Live Dry-Run testing.</p> | The Department will continue to monitor timely completion of testing activities and openly communicate with the Florida PALM project when data return deadlines are not met. If these return deadlines continue to have delays, they may result in an overall delay in the MFMP and Florida PALM testing timelines. | Continued delays in receipt of testing data from Florida PALM to MFMP will hinder the Department's ability to complete testing activities that have a dependency on available Florida PALM testing return data. | Still monitoring with PALM |
| FRS Risks | Open and Mitigating | 11/07/23 | | Business Process Chang | Retirement needs to be able to go negative in specific funds | Decreasing | 6 (High/Medium) | <p>Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.</p> <p>Retirement needs to be able to go negative in specific funds, not all funds have been approved that are required to be able to go into negative cash balances. Specifically fund 70500 (need to invest Health Insurance Subsidy (HIS) and Investment Plan (IP) Investment Vouchers need to post even if the fund is negative in cash), other funds needed were previously approved. The current process has allowed us</p> | <p>Programming needs to be completed to allow for flexibility so funds can be released timely.</p> <p>Continue to work with the PALM team.</p> | If the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts, we will be forced to pay more loss of earnings which would negatively affect the Florida Retirement System (FRS) Trust Fund. | Added National Guard comment. |

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| | | | | | | | to keep loss of earnings at a minimum, however, if the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts we will be forced to pay more loss of earnings which would negatively effect the Florida Retirement System (FRS) Trust Fund. Including National Guard supplementals. | | | | |
| FRS Risks | Open and Monitoring | 11/07/23 | | Conversion/Configuration | Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirements. | Stable | 6 (High/Medium) | Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication. | Plan for report identification and testing. Verify reports are available. | If the information in FL PALM is not complete or correct, and/or we are not able to pull reports, the ACFR will not be accurate and will cause an audit finding. | Reviewed with team 12/23/2025 |
| FRS Risks | Open and Monitoring | 02/17/22 | | Interface | 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) | Any significant change to existing Retiree payroll, EFT processing (EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop payments, etc., not being automated or not being processed timely and/or accurately.), BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time. | 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. | If EFTs and Direct Deposit stops are not done timely it could result in monies being put into a fraudulent, closed or the wrong account. The impact could also include overpayments due to death. | Reviewed with team 12/23/2025 |
| STMS Risks | Open and Monitoring | 05/01/25 | | | API133 - new interface | Stable | 4 (Medium/Medium) | New interface for voucher errors likely to be used by STMS. This will provide error messages for vouchers. | Initial meeting with PALM 5/1/25 to discuss interface. Continue to review the interface and determine the impact to STMS. | Possible delay in schedule with adding a new interface. | Received API133. |
| DMS Risks | Open and Monitoring | 04/21/23 | | Deployment/Cutover | Sandbox Function | Stable | 4 (Medium/Medium) | Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date? Owner: Jason Ottinger, DSGI | 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. | This remains a risk until UAT goes into production. | No change. Continuing to monitor. |
| DMS Risks | Open and Monitoring | 06/30/25 | | Identity Provider (IdP) | Testing Environment Access | Stable | 4 (Medium/Medium) | In reference to Task 591 - Confirm IdP Configuration for Florida PALM, both DMS SAMS successfully logged in to test access. However, loading of the page and the search function was excessively delayed. This may cause backlog issues in the UAT environment during testing activities. This note appears in the comments column of the DMS UAT IdP Smartsheet. Owner: OIT / Production Support | The Project has acknowledged this potential risk and will keep DMS informed re: mitigation. | This may cause backlog issues in the UAT environment during DMS PALM testing activities. | No change. Continuing to monitor. |
| 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) | Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System) | 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. | IRIS is designed based on the way the classification system is today. If the system is changed, operation and administration of Special Risk, EOC and SMSC will be affected. A complete overhaul may be needed. | Reviewed with team 12/23/2025 |
| PF Risks | Open and Monitoring | 09/09/24 | | Business Process Change | Multiple agencies with different testing schedules and testing needs | Stable | 4 (Medium/Medium) | With development happening in multiple systems held by multiple organizations, schedule variance in different areas can have | People First is on schedule and anticipates continuing to be in lock step with the project timeline well before the next stage | Certain tests may not be possible in the defined timeframe if stakeholders aren't ready | As UAT Full approaches, the testing approach for People First / PALM connectivity continues to be defined. |

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| | | | | | | | | unforeseen impacts on People First development. If developments become too out of sync, it could cause issues with productivity and the ability to pass stage gates successfully. | gate. | | Previously, the People First team didn't anticipate that there would be agency involvement in the People First UAT environment. This approach is being revisited to allow agency testing of People First and PALM connectivity (scoped to payroll). Ultimately, this change increases complexity and People First team workload. However, it will create more opportunity for defect discovery in UAT. |
| PF Risks | Open and Monitoring | 09/09/24 | | Conversion/Configuration | Late discovery / defect management | Stable | 4 (Medium/Medium) | Late discovery of defects, requirements changes, or any other event that could cause redevelopment for People First could strain resources on the People First team and our vendor. | 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. COMPLETE: We are continuing to refine our parallel testing schedule to ensure that 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. | If a defect is identified too late and People First and / or PALM has to enter re-development, it could strain resources and potentially cause delays or loss of functionality/ | Changes in requirements for conversion data hierarchy has increased development and redevelopment time. |
| DMS Risks | Open and Monitoring | 05/01/25 | | Deployment/Cutover | Act of God/ office closure during cut over. | Stable | 3 (High/Low) | If an Act of God (Pandemic, Hurricane, Tornado, Snow, etc.) were to cause office closures during the deployment/cutover from FLAIR to PALM there would be great risk to accurate, timely participation. Owner: Stephen Russell, DSGI / Eric Thiele, FMS | Key staff in financial wave roles will be identified and included in coop planning for any disasters that occur in the cutover timeframe. | If risk becomes an issue COOP Plan must be activated. | No change. Continuing to monitor. |
| FRS Risks | Open and Monitoring | 02/17/22 | | Agency Business System | 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) | 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. | 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. | The delay will affect allocations to balance the retirement reports, which will delay posting of contribution data in IRIS. This will result in the delay of fund transfers to Investment Plan member accounts, which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to the Division of Retirement. For the pension plan, the trust fund will have a loss of investment earnings, which are needed for benefit payments. | Reviewed with team 12/23/2025 |
| FRS Risks | Open and Mitigating | 02/17/22 | | 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) | Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately. This risk includes the timely and accurate posting of revenues in PALM. (These transactions record the receipt of retirement contributions of approximately \$6 billion per year.) If this risk happens, Retirement would not be able to receive the revenue and be able to invest (loss of earnings) and allocate to employer's accounts (the delay will affect allocations to balance the retirement reports which will delay posting of contribution data in IRIS which delays funds transfers to Investment Plan member accounts which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to Retirement). | 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. | The delay will affect allocations to balance the retirement reports, which will delay posting of contribution data in IRIS. This will result in the delay of fund transfers to Investment Plan member accounts, which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to the Division of Retirement. For the pension plan, the trust fund will have a loss of investment earnings, which are needed for benefit payments. | Reviewed with team 12/23/2025 |
| FRS Risks | Open and Monitoring | 04/29/25 | | Deployment/Cutover | Act of God/ office closure during cut over. | Stable | 3 (High/Low) | If an Act of God (Pandemic, Hurricane, Tornado, Snow, etc.) | Key staff in financial wave roles will be identified and included | If risk becomes an issue COOP Plan must be activated. | Less likelihood with a January go-live than July go-live. |

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| | | | | | | | | were to cause office closures during the deployment/cutover from FLAIR to PALM there would be great risk to accurate, timely participation. | in coop planning for any disasters that occur in the cutover timeframe. | | |
| MFMP Risks | Open and Monitoring | 05/01/24 | | Staffing/Resource Availa | Project Staff Turnover | Stable | 2 (Medium/Low) | Over time, the Florida PALM project team has encountered staff turnover. This can present risk associated with knowledge transfer, or lack thereof, between the existing resource and their successor. New project staff must be informed and prepared to continue open integration and interface design decisions. Delayed or incomplete knowledge transfers for the successor may delay design decisions, thus risking the implementation of the MFMP to Florida PALM integration according to the existing timeline. | MFMP will work with Florida PALM to assist in expediting any knowledge transfer incoming successors require to mitigate delays in design decisions | Insufficient transfer of knowledge can result in delays in design decision making, putting the implementation timeline or quality of design efforts at risk. | Still monitoring with PALM |
| PF Risks | Open and Mitigating | 06/28/24 | | User Acceptance Testing | Parallel Testing Complexity | Stable | 2 (Medium/Low) | The need for parallel testing will increase the complexity of operations. Data will need to be maintained in a new environment and the legacy environment and could lead to inconsistencies. | Ongoing weekly sync ups with PALM continue to brainstorm solutions, sync on results, and align on test success criteria. Complete: 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. | Testing results may not match expected outcomes if data desynchronization happens. | Delays in go-live date for the PALM project increase the length of time that parallel payroll testing will continue. This is a resource constraint as the People First team will have to maintain and procure more environments for a longer duration than previously anticipated. |
| STMS Risks | Open and Mitigating | 11/06/23 | | | Functionality. Inability to design new STMS user interface for creating vouchers | Decreasing | 1 (Low/Low) | Concern about creating UI for vouchers. | 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. | Training issues with end users. | The voucher UI has been created and completed Cycle 2 testing. Continuing to work with PALM on the web service connection. |

| DMS Issues | | | | | | | | | | |
|-----------------------------|--------|-------------|-------------|--|-------------------------|---|---|--|-----------------------------------|--|
| Sheet Name | Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| DMS Issues | Open | 02/19/25 | | High - Impacts the ability of the agency to meet deadlines or milestones | User Acceptance Testing | Risk of User Acceptance Testing (UAT) Failure Owner: Stephen Russell | Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction. Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training. | 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. 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 | PALM has pushed out process steps and provided more info in the Knowledge Center. DMS will close this list if this info is applicable. |
| MFMP Issues | Open | 06/06/25 | | High - Impacts the ability | Interface | DFS Vendor Portal | The Department was originally made aware in March 2024 of a new vendor portal project the Department of Financial Services (DFS) was pursuing to replace their current W9 portal and vendor electronic funds transfer (EFT) business process. After further discussions with DFS, the Department logged a risk for this vendor portal in April 2024, citing the concern that a new DFS vendor portal design, build, and test process operating parallel with MFMP and | The Department will continue to meet with DFS A&A and Florida PALM to confirm business and functional requirements. Once those are confirmed, MFMP will make changes in VIP, AOD, and our interfaces to accommodate the changes in approach. MFMP will include these changes in its testing efforts to ensure everything is functioning as expected. Agency Customer education will be essential in mitigating this issue, emphasizing the | TBD | Still monitoring with PALM |

| | | | | | | | | | | |
|-----------------------------|--------|----------|----------|--|--------------|---|---|--|----------|--|
| | | | | | | | 2025. Based on all of these considerations, DMS is raising the risk originally logged in April 2024 to an issue as of June 2025. | | | |
| | | | | | | | 2. Supplier Data Connection and Remit Information – As of June 5, 2025, less than one week before Interface Cycle 2 Technical Testing is scheduled to begin, it has been communicated to the Department by DFS A&A that they have decided the expectation is for MFMP to not send any supplier data to Florida PALM or FLIPS. DFS A&A intends on all supplier data responsible for direction of the payment process to originate from FLIPS and be sent over to Florida PALM for creation of a PALM Supplier ID. Florida PALM would then send remittance address information to MFMP for inclusion in the MFMP Vendor Information Portal (VIP) and Ariba On Demand (AOD). This introduces issues with connecting vendor records between all three enterprise systems, requiring remittance data to be applied in MFMP strictly at the Tax ID level because no unique identifier will be integrated between MFMP and Florida PALM prior to FLIPS sending | | | |
| STMS Issues | Open | 10/01/24 | | High - Impacts the ability | Interface | GLI012 - Time out error when testing web service connection | PALM & STMS Teams are troubleshooting the connection issue. Multiple meetings have been scheduled. STMS provided the IPs to the sandboxes for whitelisting. | 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. | 07/31/25 | Continuing to work through the web service connectivity. Chris Slay is scheduling a Teams meeting in January 2026. Sumathi created a case with Salesforce to confirm the Training sandbox is configured as required. |
| STMS Issues | Closed | 10/28/25 | 12/30/25 | High - Impacts the ability | Interface | Cycle 2 Testing Delays | Cycle 2 testing delays in receiving interface files. API031, API133 | API031 is in testing for PALM internally, but is not ready for Cycle 2 testing. API133 is in development. | 11/28/25 | API031, API133, POI007 were all received for Cycle 2 testing. |
| STMS Issues | Open | 10/28/25 | 12/30/25 | High - Impacts the ability | Interface | Interface Changes required after errors received from processing Inbound files. | Raised concern about inconsistency in POI006 Interface with error log received after processing file. The Receipt Quantity should be 1 when Amount Only Flag = Y. The current interface for Receipt Quantity is "Conditionally Required when the "Amount Only Flag" = 'N'. The Quantity should always be a positive value and should not be a negative value. Zero is allowed. The Receipt Line Quantity should not exceed the remaining quantity on the PO Line Quantity." | 11/4/25 - PALM is updating the processing rules. After review, it will be posted to Knowledge Center. | 11/28/25 | POI006 was successfully processed after PALM changes. |
| DMS Issues | Open | 01/15/25 | | Low - All impacts not listed as Critical or High | Interface | MIP Interface Selections Owner: OIT / Production Support | MIP interfaces selected may not be 100% remediated without testing. | 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 | Response time from the project is averaging a month. Still waiting on PALM for full interface testing. |
| DMS Issues | Open | 08/21/24 | | Low - All impacts not listed as Critical or High | Role Mapping | End Users New to DMS and PALM | The majority of the DMS End Users are | Consistent monitoring, training and follow up. | 06/30/26 | Continuing to monitor and address this issue. |

| | | | | | | | | | | |
|--|--|--|--|--|--|-----------------------------|--|---|--|--|
| | | | | | | Owner: Evelyn Harrison, OOS | new to DMS. An even larger percentage have held their current jobs at DMS for less than 5 years. | Regular communication, meetings, and increased involvement in the project Readiness Workplan Tasks. | | Multiple meetings and learning sessions using the Knowledge Center have been held to address the End User Role Mapping task for UAT. |
|--|--|--|--|--|--|-----------------------------|--|---|--|--|

| DMS Assumptions | | | | | | |
|---------------------------------|----------------------------------|--|--------|------------------------|---|---|
| Sheet Name | Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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. Owner: Evelyn Harrison, OOS | This is being mitigated through consistent communications, planning and training. There will always be unexpected staff changes. Staff are being required to identify back ups. It is the intent of management to reduce lag in areas with staff retirements and separations before, during and after PALM UAT and GoLive. |
| 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 | Remains a valid assumption |
| 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 | Remains a valid assumption |
| 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 | Working with the Florida PALM team - received a payroll file that included state file with details. Testing is in progress. |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

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| DMS Status Report Confirmation | | | |
|--------------------------------|----------------------|-----------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Lance Dyal | lance.dyal@dms.fl.gov | 01/13/26 |
| September - October 2025 | Lance Dyal | lance.dyal@dms.fl.gov | 11/07/25 |
| July - August 2025 | Lance Dyal | lance.dyal@dms.fl.gov | 09/08/25 |
| May - June 2025 | Lance Dyal | lance.dyal@dms.fl.gov | 07/08/25 |
| March - April 2025 | Lance Dyal | lance.dyal@dms.fl.gov | 05/07/25 |

| FRS Status Report Confirmation | | | |
|--------------------------------|--------------------------|------------------------|--------------------|
| Reporting Period | Enterprise Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Kathy Gould | kathy.gould@dms.fl.gov | 01/06/26 |
| July - August 2025 | Kathy Gould | kathy.gould@dms.fl.gov | 08/28/25 |
| May - June 2025 | Kathy Gould | kathy.gould@dms.fl.gov | 07/07/25 |
| 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: |
| November - December 2025 | Ayanna Bridges | ayanna.bridges@dms.fl.gov | 01/12/26 |
| November - December 2025 | Ayanna Bridges | ayanna.bridges@dms.fl.gov | 01/12/26 |
| July - August 2025 | Ayanna Bridges | ayanna.bridges@dms.fl.gov | 08/29/25 |
| May - June 2025 | Tyler Brown | tyler.brown@dms.fl.gov | 06/25/25 |
| 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: |
| November - December 2025 | Jesse Johnston | jesse.johnston@dms.fl.gov | 01/12/26 |
| July - August 2025 | Jesse Johnston | jesse.johnston@dms.fl.gov | 09/05/25 |
| May - June 2025 | Jesse Johnston | jesse.johnston@dms.fl.gov | 07/02/25 |
| 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: |
| November - December 2025 | Casey Taylor | casey.taylor@dms.fl.gov | 12/30/25 |
| September - October 2025 | Casey Taylor | casey.taylor@dms.fl.gov | 11/04/25 |
| July - August 2025 | Casey Taylor | casey.taylor@dms.fl.gov | 08/27/25 |
| May - June 2025 | Casey Taylor | casey.taylor@dms.fl.gov | 07/02/25 |
| 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 |

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 97.61%

Submitted On Time = 43

Submitted Late = 2

Pending Submission = 0

Other Task Timeliness:

Score = 93.49%

Submitted On Time = 74

Submitted Late = 9

Pending Submission = 1

Direct Task Completeness:

Score = 96.44%

Submitted Complete = 42

Submitted Incomplete = 1

Completed After Submission = 2

Other Task Completeness:

Score = 96.67%

Submitted Complete = 51

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 = 4

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 | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 05/02/25 | 75% - Consolidating/Inputting Information for Submission | | | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 50% - In Progress | | Goal is to have the task completed by 2/16/2026. | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 08/26/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | AL shared that AS reviewed/confirmed certification before 5p via phone. RC confirmed and moved to 100% submitted. | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | Submission Complete | 01/14/26 |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

| DOAH Risks | | | | | | | | | | |
|---------------------|-------------|-------------|---------------------------|--|------------|-----------------|---|--|--|---|
| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 07/05/23 | | Training | If resources are not fully trained to do their jobs, go-live will continue but DOAH will not be ready for go-live. | Decreasing | 6 (High/Medium) | DOAH is a small agency with limited workforce. There are eight purchasing and accounting positions, one budget director, and one personnel director that perform functions in FLAIR today. It is critical these personnel are able to perform their function in PALM. | 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. | DOAH will not effectively function in PALM and business processes will be delayed for completion. This will effect our internal and external customers. | During this quarter, all purchasing and accounting positions were filled. Our focus has been on training new staff in their core functions while ensuring day-to-day operations are maintained within appropriate timeframes. |
| Open and Mitigating | 11/07/24 | | User Acceptance Testing | If Axiom Pro is not reconfigured for UAT, accountants will be unable to test and verify the functionality of the application with FL PALM. | Decreasing | 2 (Medium/Low) | DOAH utilizes the Axiom Pro application for our voucher schedule workflow approval and as a repository for our voucher schedules. | 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. | Staff will make plans to test the process using our previous method of assembling and storing our vouchers. | Docufree/Image API has received the API031 Report from DOAH and they are working on reconfiguring Axiom Pro to ensure its available during UAT. |
| Open and Mitigating | 08/28/24 | | Staffing/Resource Availal | The staff's previous experience with system implementation may lead to low or lack of engagement in transitioning to the new financial system. | Decreasing | 1 (Low/Low) | Staff's experience with the previous rollout of the CMS was did not go well. They are anxious about transitioning to a new system. | 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. | Staff will not be actively engaged and will hinder the testing and training with PALM. Thus, not having trained staff to function in PALM on the Go-Live date. | Current and new staff members have begun the prerequisite trainings in preparation for UAT. All end users will participate which will assisting with transitioning to PALM. |

| DOAH Issues | | | | | | | | | |
|-------------|-------------|-------------|-----------------------------|---------------------------|---------------------------------------|---|--|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Closed | 09/03/25 | 12/29/25 | Low - All impacts not liste | Staffing/Resource Availal | Accountant III-Revenue Resigned | Accountant III-Revenue resigned their position on September 3rd. New Accountant III-Revenue resigned on October 10, 2025. | Accountant II will be placed in the Accountant III role with assigned duties and responsibilities effective September 12th. This will create a vacancy with the Accountant II position. Advertise and fill Accountant II position. | 11/03/25 | Position was filled on 12/29/2025. |
| Closed | 09/26/25 | 10/20/25 | Low - All impacts not liste | Staffing/Resource Availal | Accountant III-Disbursements Resigned | Accountant III-Disbursements resigned their position on September 26th. | Advertise and fill the position | 11/30/25 | Position was filled on 10/20/2025 |

| DOAH Assumptions | | | | | | |
|---|--|--------|------------------------|--|---|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | Current and new staff members have begun the prerequisite trainings in preparation for UAT. All end users will participate which will assisting with transitioning to PALM. | |
| Technology | Axiom Pro Application will be reconfigured to pull the vouchers in PALM by UAT. | Logged | 10/31/24 | End Users | Docufree/Image API has received the API031 Report from DOAH and they are working on reconfiguring Axiom Pro to ensure its available during UAT. | |
| People | All positions will be filled with staff trained on current business processes. | Logged | 04/04/25 | End Users | As of December 29, all purchasing and accounting vacancies have been filled. Current efforts are focused on training new staff members on the day-to-day core functions of their duties and responsibilities. | |

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.

DOAH Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-------------------------------|--------------------|
| November - December 2025 | Megan S. Silver | megan.silver@doah.state.fl.us | 01/14/26 |
| September - October 2025 | Megan S. Silver | megan.silver@doah.state.fl.us | 11/10/25 |
| July - August 2025 | Megan S. Silver | megan.silver@doah.state.fl.us | 09/08/25 |
| May - June 2025 | Megan S. Silver | megan.silver@doah.state.fl.us | 07/08/25 |
| March - April 2025 | Megan S. Silver | megan.silver@doah.state.fl.us | 05/12/25 |

Agency Sponsor Name: *

☐ Confirm *

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RW Task Timeliness

Direct Impact Task Timeliness

Direct Task Completeness:

Score = 96.94%

Submitted On Time = 45

Submitted Late = 3

Pending Submission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 90.34%

Submitted On Time = 69

Submitted Late = 15

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 79.38%

Submitted Complete = 25

Submitted Incomplete = 5

Completed After Submission = 18

Other Task Completeness

Other Task Completeness:

Score = 85.93%

Submitted Complete = 42

Submitted Incomplete = 3

Completed After Submission = 14

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 = 7

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 | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/08/26 | Row 58 information deleted (position removed). | Submission Complete | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Submission Complete | | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | 11/17/25 | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/29/25 | | Submission Complete | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/15/26 | | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 01/07/25 | | Agency Business System | ABS Applications (FLAGS, Deposit, Indirect Cost and PARS) risk being not ready for UAT and go-live | Stable | 4 (Medium/Medium) | DOE has encountered development delays resulting from moving interface file standards with the Project and lacked one developer for applications. | Monitor. Prioritize Applications: Assess and prioritize applications based on criticality and impact. Focus remediation efforts on the highest-risk applications first; Reallocate resources: | Significant delays could occur | FLAGS completion schedule has slipped two months to the right causing increased concern and elevating the probability rating for this risk. |

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| | | | | | | | | | | |
|---------------------|----------|----------|--------------------------|--|------------|-------------------|---|---|--|--|
| | | | | due to insufficient remediation. | | | | Identify and allocate resources from less critical projects or consider temporary hires/contractors to bolster the team; implement phased rollout; Consider a phased rollout approach where non-critical features are delayed to allow for necessary remediation; Conduct regular progress reviews; Implement weekly check-ins to monitor remediation progress and adjust resources as needed. | | |
| Open and Mitigating | 07/02/25 | | Staffing/Resource Availa | Operational Staff Turnover - General | Stable | 4 (Medium/Medium) | Staff turnover is an ever-present risk and is especially significant when contemplating a new financial platform. | Mitigate. Ensure job-specific processes are documented and generic enough to permit retraining of new, incoming staff. | Delays could occur. | Additional personnel are becoming increasingly involved in UAT readiness. As a result, the impact rating is reduced. |
| Open and Mitigating | 07/15/25 | | Interface | Weak integration plan between legacy agency systems and PALM | Stable | 4 (Medium/Medium) | Current agency systems may not align or integrate cleanly with PALM data structures or workflows. | Mitigate: Continue to evaluate ABS during PALM testing. | Delays in data flow and reporting; potential data loss or duplication. | Delays in cycle 2 readiness testing have drawn the focus of the development project teams, leaving less time for integration planning. |
| Open and Monitoring | 07/15/25 | | Training | No training plan or materials provided for end users | Increasing | 4 (Medium/Medium) | Training needs assessment not conducted; PALM training assets not yet distributed. | Monitor. Coordinate with PALM training team; develop internal training schedule and delivery method. | Low adoption, user errors, and surge in post-go-live support needs. | The rightward shift of UAT for the agency has elevated the risk of training departures impacting go-live. |
| Open and Monitoring | 07/29/25 | | Staffing/Resource Availa | Overlapping UAT and Training Development | Increasing | 4 (Medium/Medium) | Critical path activities such as SME testing and internal training design are scheduled simultaneously. | Monitor. Separate workstreams with distinct leads and buffer schedules. | Reduced availability of key resources and delays in readiness activities. | The rightward shift of UAT for the agency has elevated the risk of training departures impacting go-live. |
| Open and Mitigating | 07/29/25 | | Conversion/Configurator | Data Integrity Issues During FLAIR-to-PALM Conversion | Increasing | 4 (Medium/Medium) | Data extracted from the legacy FLAIR system may be incomplete, inconsistent, or poorly structured, posing conversion challenges. | Mitigate. Perform multiple test conversions and reconciliations; involve business SMEs to verify data mapping accuracy. | Financial records may be inaccurate, requiring extensive reconciliation and delaying go-live. | Schedule compression for UAT has confused timelines for data cleansing activities and mock data versioning for testing. |
| Open and Mitigating | 11/22/24 | | Staffing/Resource Availa | The project leans on several key people who possesses the primary knowledge of the business applications. If these individuals become 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. | Stable | 2 (Medium/Low) | Matt has extensive knowledge of the Comptroller's business applications. The staff that backs Matt up knowledge of the applications are limited and would cause delays if the Matt becomes unavailable. | Mitigate. 1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members. 2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible. 3.) Cross-Training: Train other team members to create redundancies in expertise. 4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity. 5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise. By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity. | -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. | Additional personnel are becoming increasingly involved in UAT readiness. As a result, the impact rating is reduced. |
| Open and Mitigating | 07/29/25 | | Business Process Chang | Moderate OCM efforts. | Stable | 2 (Medium/Low) | Organizational Change Management efforts have been minimal, risking user adoption and SME readiness. | Mitigate. Accelerate internal OCM activities, engage leadership, deliver targeted messaging. | Delayed adoption and lack of preparedness during implementation. | New OCM onboarded and working with assistance from PML. |
| Open and Mitigating | 07/29/25 | | Interface | ABS and interface compatibility with PALM | Stable | 2 (Medium/Low) | Interfaces and legacy systems may fail to transmit or receive PALM-compatible data. | Mitigate. System integration testing, interface validation, early defect tracking. | Critical data failures during financial processing or reporting. | Delays in cycle 2 readiness testing have drawn the focus of the development project teams, leaving less time for integration planning. |
| Open and Mitigating | 07/29/25 | 12/19/25 | Staffing/Resource Availa | Competing Responsibilities for Key Roles During Testing | Increasing | 1 (Low/Low) | Key agency staff fulfilling Project Team roles (e.g., BAs, Liaisons, Workgroups) are also managing core business responsibilities, limiting availability for PALM testing and training. | Mitigate. Secure dedicated time allocations through resource management planning and escalate conflicts to Sponsor for prioritization. | UAT execution may be delayed or insufficient, leading to missed defects and rework. | Additional personnel are becoming increasingly involved in UAT readiness. As a result, the probability rating is reduced. |

| DOE Issues | | | | | | | | | | |
|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|------------------|-------------------------------|--|
| Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period | Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| DOE Assumptions | | | | | |
|----------------------------------|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
| People | All staffing needs will be met to complete the project | Logged | 03/03/25 | Leadership | No change from previous period. |
| People | The PALM central project team will provide deadlines, templates, and support for key deliverables. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| People Processes | Business process knowledge is fragmented but recoverable through interviews and document reviews. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| Processes Data | The division has access to or can obtain relevant FLAIR documentation and historical process flows. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| People Processes | End-user community is unaware of upcoming changes and will require structured, repeated communication. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| People Processes Technology Data | Data conversion from FLAIR will rely heavily on existing systems and internal technical SMEs. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| People Processes Technology Data | UAT will require active participation from functional staff. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous period. |
| People Processes | PALM stakeholders will respond positively to constructive engagement. | Logged | 07/15/25 | SMEs, Leadership, End Users | No change from previous 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 *

Submit

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| DOE Status Report Confirmation | | | |
|--------------------------------|----------------------|----------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Matt Kirkland | matt.kirkland@fldoe.org | 01/15/26 |
| September - October 2025 | Suzanne Pridgeon | suzanne.pridgeon@fldoe.org | 11/07/25 |
| July - August 2025 | Suzanne Pridgeon | suzanne.pridgeon@fldoe.org | 09/05/25 |
| May - June 2025 | Suzanne Pridgeon | suzanne.pridgeon@fldoe.org | 07/18/25 |
| 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

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 98%

Submitted On Time = 40

Submitted Late = 4

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 91.11%

Submitted Complete = 38

Submitted Incomplete = 2

Completed After Submission = 5

Other Task Completeness:

Score = 90.55%

Submitted Complete = 48

Submitted Incomplete = 3

Completed After Submission = 4

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | SMEs documented different testing scenarios and started creating training documentation. | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | Confirmed with SMEs that the updates have been completed. | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/29/25 | Confirmed with SMEs that the updates have been completed. | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | Confirmed with SMEs that the updates have been completed. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | Confirmed with the SMEs that the updates have been completed. Updated SpeedKey configuration to include PCard SpeedKey. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | Confirmed with TJ that the report was submitted. | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/21/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/19/25 | Confirmed with IdP SMEs that the required updates were made. | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

| DOEA Risks | | | | | | | | | | |
|---------------------|-------------|-------------|--------------------------|------------------------------------|------------|-------------------|--|---|---|--|
| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 09/05/24 | | Conversion/Configuration | Data Clean Up | Decreasing | 4 (Medium/Medium) | While cleaning up existing data, making sure new data entered meets PALM requirements for conversion. This was Risk 4 from the archived Risk log. | 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. | Inflated workload post go-live for Agency staff. | Continuing to monitor risk. Conversion percentages continue to improve. |
| Open and Monitoring | 10/21/25 | | Training | Lack of information on PCard Works | Increasing | 4 (Medium/Medium) | This risk is to document the concern about the lack of information being shared by the PCard Works vendor regarding the coming changes due to Florida PALM. Other vendors (STMS and MFMP) have had meetings on a regular basis regarding the PALM Changes. The concern is that the Department won't be able to create training documents and test scripts for that system in a timely manner (i.e. the training documentation gets communicated to end users after go-live or a few weeks before go-live). | Regularly communicate with the PALM project on the status of the PCard Works. | The Department won't be able to create training documents and test scripts for that system in a timely manner (i.e. the training documentation gets communicated to end users after go-live or a few weeks before go-live). | Continuing to monitor risk. Have not received any information from the PCard vendor regarding the changes for the Florida PALM implementation. |
| Open and Monitoring | 09/10/23 | | Business Process Change | Streamlining Manual Processes | Stable | 2 (Low/Medium) | Agency has been dependent on manual and/or outdated processes prior to data entry currently in FLAIR. This is replacing Risk 1 from the archived Risk log. | Having internal cross-functional meetings to reduce dependencies on manual/physical processes. | Minimal impact - more work for the training team and staff to learn in tandem with new system. | Continuing to monitor risk. Cross-functional meetings are continuing to happen. |

| DOEA Issues | | | | | | | | | | |
|-------------|-------------|-------------|------------------------------|--------------------------------|---------------------|---|---|-----------------------------------|---|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 01/16/24 | | Low - All impacts not listed | Staffing/Resource Availability | New Staff Knowledge | Filled vacancies and new hires are being trained but still have knowledge gaps. This increases the workload on existing staff | Continue training new hires, and continuing to update desk procedures to make sure they are up to date. | 06/30/26 | Updated the issue to reflect current staffing levels. | |

| DOEA Assumptions | | | | | | |
|-------------------------------|------------|--|--|--------|------------------------|--|
| Critical Operational Elements | Assumption | | | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) |
| | | | | | | |

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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Report Abuse

| DOEA Status Report Confirmation | | | |
|---------------------------------|----------------------|---------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Teresa Johnson | johnsont@elderaffairs.org | 01/14/26 |
| September - October 2025 | Teresa Johnson | johnsont@elderaffairs.org | 11/07/25 |
| July - August 2025 | Teresa Johnson | johnsont@elderaffairs.org | 09/09/25 |
| May - June 2025 | Teresa Johnson | johnsont@elderaffairs.org | 07/09/25 |
| 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 = 50

Submitted Late = 0

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.44%


Submitted On Time = 80

Submitted Late = 4

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 81.63%

Submitted Complete = 28

Submitted Incomplete = 4

Completed After Submission = 17

Other Task Completeness



Other Task Completeness:

Score = 91.73%

Submitted Complete = 40

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.

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 09/22/25 | Task completed. Had meeting with PALM on 9/22 reviewing task before submittal. | | 12/19/25 |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | New requirements were added by PALM team. | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/19/25 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/12/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 04/22/25 | | Business Process Change | 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 | Stable | 9 (High/High) | N/A | DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability. | DOH will have to continue working on remediation with the information they have. | This risk is monitored and reviewed on a monthly basis by the CORE team |

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| | | | | | | | | | | |
|---------------------|----------|--|------------------------|---|------------|---------------|-----|--|--|---|
| | | | | Account field which combines the current FLAIR General Ledger Code and Object Code. | | | | | | |
| Open and Monitoring | 04/22/25 | | Business Process Chang | 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) | N/A | DOH will wait for the Organization codes to be set up by DFS | This will delay things for DOH | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Training | 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) | N/A | DOH resources will attend the in-person trainings | DOH will have to have expedite the testing and training. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Business Process Chang | 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) | N/A | 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. | DOH will have to continue working on remediation with the information they have. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Business Process Chang | PALM eliminating the IBI field for DOH | Stable | 9 (High/High) | N/A | DOH is working on a work-around to address this issue. | DOH will have to continue working on remediation with the information they have. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| 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) | N/A | DOH will await the changes in policies and procedures | DOH will have to prepare for possible delays. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Business Process Chang | "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? | Stable | 9 (High/High) | N/A | DOH is reviewing all the information available on Knowledge center to understand and implement changes to the best of ability. | DOH will have to continue working on remediation with the information they have. | This risk is monitored and reviewed on a monthly basis by the CORE team |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|--|------------|---------------|-----|--|--|---|
| | | | | This is specific for Payroll Reallocation, but this will be true for all Vouchers." | | | | | | |
| 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 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. | Stable | 9 (High/High) | N/A | DOH will await the changes in policies and procedures | DOH will be prepared for delays. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | 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) | N/A | DOH is in constant touch with the Readiness Coordinator to understand / clarify instructions | DOH PM will be in touch with the PALM Project Readiness Coordinator | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Deployment/Cutover | PALM Go-Live planned during hurricane season | Increasing | 9 (High/High) | N/A | This may cause possible delays to Go-Live | Possible delays in Go-Live activities | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | 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 | Increasing | 9 (High/High) | N/A | DOH is converting a couple of months of old data | DOH technical team is working with Terri Mulkey to create data for testing | This risk is monitored and reviewed on a monthly basis by the CORE team |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|---|------------|-------------------|--|---|---|---|
| | | | | in the interface files is not accurate. | | | | | | |
| Open and Monitoring | 04/22/25 | | Staffing/Resource Availa | 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 staff works almost fulltime on Yearend closing activities in May, June and July. | DOH SMEs will struggle to make time for year-end activities as well as PALM testing and various Go-Live tasks. | DOH will struggle to Go-Live with Year end activities | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 10/22/25 | | Agency Business System | Cross Agency: Timely completion of AxiomPro system remediation | Stable | 9 (High/High) | AxiomPro is a 3rd party managed Agency business system, which is used by at least 9 different agencies. | 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 sample/ test files available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing) and complete defect fixes. 5. Agency to monitor the progress of the system remediation and provide support/ consultations. | ABS remediation of several agencies will be impacted. Some agency may have manual workaround however this may impact go-live readiness for a few agencies. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 10/22/25 | | Conversion/Configurator | Cross Agency: Uncertainty around Data Warehouse Data and Access may cause a delay in agency planning or rework. | Increasing | 9 (High/High) | The answer to this risk affects our designs for agency data structure. | Check documents released by the PALM Team to confirm assumptions or resolve end user needs by creating reports in FDW | The longer that this design is delayed the more likely that rework will be required at the agency level to meet historical data needs for Agency Business Systems and Users, which will potentially put the Go-Live Date at risk. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 10/22/25 | | Business Process Chang | Cross Agency: Interface file structure, file format/ layout and requirements changes may lead to rework for agencies. | Stable | 6 (Medium/High) | The Project should provide ample advanced notice of any pending or possible interface file changes. | DOH monitors PALM site for updates to the interface regularly. This activity takes about 4-6 hours of work for a Business Analyst, Tech Lead and PM to review and analyze the changes and impact. | ABS remediation readiness hampered, delayed, and perhaps stalled. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Training | 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) | N/A | DOH is working on creating Foundational trainings and involved in UAT Pre-requisite meetings with DFS team. | DOH will have to have expedite training. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| 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) | N/A | DOH training team is currently working on metrics to create a UAT plan to manage trainings for all PALM users. | DOH will have to have expedite training. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 09/09/25 | | Agency Business System | Timely completion of AxiomPro system remediation. | Stable | 4 (Medium/Medium) | AxiomPro is a 3rd party managed Agency business system, which is used by at least 9 different agencies. | DOH is working with Image API to identify the requirements and the final report. | DOH will work with Image API on an alternate solution. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 10/22/25 | | Interface | Cross Agency: Challenges around availability of Interface files (Inbound and Outbound) and timely communication may lead agencies not to be able to complete the Cycle 2 testing | Decreasing | 4 (Medium/Medium) | Cycle 2 Testing requires multiple interface submissions to identify all issues with interface submissions. With some of the interfaces using agency data for this, implementing development changes requires more coordination than normal as to not interfere with interface testing. | Interface testing with the PALM Project team until we get the files in successful status from PALM | Agencies may not successfully complete Cycle 2 testing under the current schedule with the amount of time the PALM team is taking for responses to interface submissions. This is also slowing development implementations due to testing concerns. | This risk is monitored and reviewed on a monthly basis by the CORE team |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|--|------------|-------------------|---|--|--|---|
| | | | | by October/ 2025. | | | | | | |
| Open and Monitoring | 10/22/25 | | Conversion/Configuration | Cross Agency: Limited use of special characters may lead to rework/ additional work at agencies | Stable | 4 (Medium/Medium) | The project could have automated the removal of special characters. Configurations and conversions were updated by technical resources. | Configurations and conversions Smartsheets were updated by technical resources. | Rework/additional work will be needed | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/07/25 | | 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) | N/A | 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. | DOH will have to have expedite the testing and training. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| 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 | 3 (High/Low) | N/A | We are creating DOH's FDW | DOH will have to continue working on remediation. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 04/22/25 | | Training | 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 | 3 (High/Low) | N/A | DOH is reading all the available information on knowledge center to understand Payroll changes. | DOH will have to continue working on remediation with the information they have. | This risk is monitored and reviewed on a monthly basis by the CORE team |
| Open and Monitoring | 10/22/25 | | Business Process Change | Cross Agency: Uncertainty Around Batch Schedule during E2E Interface Testing, may create challenge for agency ability to perform E2E Testing | Decreasing | 3 (High/Low) | We can't know when new information is going to be coming from PALM to schedule processes to populate Agency Business Systems with up to date financial information. | Worked closely with the PALM team to coordinate and resolve issues that arise during Interface Testing. | The later that this is delayed the more likely that there will be impacts at the agency level that will require rework to meet the PALM Batch Schedule and potentially put the Go-Live Date at risk at the agency level. | This risk is monitored and reviewed on a monthly basis by the CORE team |

| DOH Issues | | | | | | | | | |
|------------|-------------|-------------|----------------------------|------------------------|---|--|--|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 05/01/25 | | High - Impacts the ability | Agency Business System | 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 2 or 3 resources who will check the Change Log every so often | DOH staff got used to receiving emails for Interface and Report updates, now we have 2 or 3 resources who will check the Change Log every so often | Resources will check PALM site and Change Log every week | 06/30/26 | DOH team is monitoring the PALM site and tasks frequently. |

| DOH Assumptions | | | | | |
|----------------------------------|---|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | This assumption is still valid. |
| People | PALM will maintain the project "On schedule" | Logged | 05/01/25 | DOH PALM Project team | This assumption is still valid. |

| | | | | | |
|----------------------------------|---|--------|----------|----------------------------|---------------------------------|
| Processes Technology Data | | | | | |
| People Processes Technology Data | Enterprise entities like AG/IG'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 | This assumption is 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: *

☐ Confirm *

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| DOH Status Report Confirmation | | | |
|--------------------------------|----------------------|----------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Robert Herron | robert.herron@flhealth.gov | 01/12/26 |
| September - October 2025 | Robert Herron | robert.herron@flhealth.gov | 11/04/25 |
| July - August 2025 | Robert Herron | robert.herron@flhealth.gov | 09/04/25 |
| May - June 2025 | Robert Herron | robert.herron@flhealth.gov | 07/07/25 |
| March - April 2025 | Robert Herron | robert.herron@flhealth.gov | 05/02/25 |
| January - February 2025 | Robert Herron | robert.herron@flhealth.gov | 03/06/25 |

Helpful Links

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

DOL Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Becky Ajhar

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 = 99.35%

Submitted On Time = 44

Submitted Late = 2

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 94.22%

Submitted Complete = 38

Submitted Incomplete = 1

Completed After Submission = 6

Other Task Completeness:

Score = 95.60%

Submitted Complete = 46

Submitted Incomplete = 1

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:

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

- Unique Filled Role = 4
- 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 | 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 | | |
| Indirect | People | 536-C | Create Agency Specific User Acceptance Testing Plan | 12/09/24 | 05/02/25 | Pending Resubmission | 07/22/25 | | Submission Incomplete | |
| 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 | | | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/23/25 | | Submission Complete | |

| | | | | | | | | | |
|----------|------------|-----|---|----------|----------|------------------|----------|--|--|
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/09/26 | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 06/02/25 | | Business Process Change | Delay in monthly transfer to the EETF. This occurs on the 20th of each month. | Increasing | 9 (High/High) | A&A will schedule the close each month. It has been suggested that close will take place after interest has been received each month. Currently, interest is not available until after the 20th which will put us behind in our monthly transfers. | Discuss with Florida PALM closer to go-live to develop resolution. | DOE will not receive monthly transfer. | DOL continues to monitor and will provide updates once available. |
| Open and Mitigating | 10/06/25 | | Interface | PRI007 (Outbound Salary Detail File) - contains PII information that is not encrypted. | Stable | 9 (High/High) | PRI007 contains sensitive data; as a result, unable to upload file to centralized location. | Data Management will work with ISM to create a secure folder that will store file. | The unintended release of PII | Work in progress |
| Open and Monitoring | 05/01/24 | | Business Process Change | The new Claims and Payment System (CAPS) may delay training efforts in Florida PALM | Stable | 4 (Medium/Medium) | The implementation of Lottery's new Claim and Payment System (CAPS) is tentatively scheduled to go-live during FY 26-27. The implementation may impact Florida PALM training activities. The new CAPS will be replacing the current system known as Fortune. | 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. | There may be resource constraints which may result in scheduling delays and project slippage. | There are no updates to the CAPS project that would impact the agency's monitor/mitigation plan or resolution at this time. |
| Open and Mitigating | 05/26/25 | | Business Process Change | Fiscal year-end agency audits will overlap with Florida PALM go-live | Stable | 4 (Medium/Medium) | New go-live date will conflict with the audit schedule and may impact go-live and UAT. | Lottery will develop a mitigation and communication plan to ensure successful end of year close-out activities and go-live transition. | There may be resource constraints which may result in delays. | DOL continues to monitor and will provide updates once available. |

| DOL Issues | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| | | | | | | | | | |

| DOL Assumptions | | | | | | |
|-------------------------------|------------|--------|------------------------|--|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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

| DOL Status Report Confirmation | | | |
|--------------------------------|----------------------|-----------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Rebecca Ajhar | ajharb@flalottery.com | 01/09/26 |
| September - October 2025 | Rebecca Ajhar | ajharb@flalottery.com | 11/07/25 |
| July - August 2025 | Rebecca Ajhar | ajharb@flalottery.com | 09/05/25 |
| May - June 2025 | Rebecca Ajhar | ajharb@flalottery.com | 07/08/25 |
| March - April 2025 | Rebecca Ajhar | ajharb@flalottery.com | 05/07/25 |
| January - February 2025 | Rebecca Ajhar | ajharb@flalottery.com | 03/07/25 |

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 95.42%

Submitted On Time = 38

Submitted Late = 9

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 92.76%


Submitted On Time = 72

Submitted Late = 12

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 87.87%

Submitted Complete = 33

Submitted Incomplete = 3

Completed After Submission = 11

Other Task Completeness



Other Task Completeness:

Score = 86.25%

Submitted Complete = 40

Submitted Incomplete = 0

Completed After Submission = 16

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/06/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/23/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/22/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 99/99/99 | | | | | |
| N/A | Processes | 602 | Update Agency Business Process Documentation | 01/12/26 | 06/26/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 06/28/24 | | User Acceptance Testing | DOR - PALM and ABS UAT | Stable | 2 (Medium/Low) | 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 end of reporting period. | Unable to mitigate at agency level; must be mitigated by the enterprise. | Work with SMEs, PALM Projects and DOR remediation Teams | UAT to begin in February 2026 |

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| | | | | | | | | | | |
|---------------------|----------|--|-----------------------------|--|--------|----------------|--|--|---|--|
| | | | | | | | processing actual data generated by normal business processes in the test environment. Originally filed by Shannon Segers | | | |
| Open and Monitoring | 12/04/24 | | Business Process Change | PALM Reporting and Datawarehouse | Stable | 2 (Medium/Low) | With Agency Reporting Systems like RABBIT and FICAS retiring away, DOR will solely rely on PALM Reports and the proposed PALM Datawarehouse for all its reporting needs. Until the PALM Data warehouse is available, DOR is not sure whether it can meet its reporting needs. PALM Datawarehouse is proposed to be available in June 2025. | Unable to mitigate at agency level; must be mitigated by the enterprise. | With no other ABS planned for RABBIT and reporting systems, DOR will explore datawarehouse capability for its reporting needs | DW/BI Author access to be available in April 2026 |
| Open and Monitoring | 10/17/23 | | Staffing/Resource Available | GTA - EFile and Pay | Stable | 1 (Low/Low) | The GTA E-services project may be conducted at the same time agency business system remediation is conducted. Originally filed by Business Technology Office | Staff augmentation resources to support Florida PALM activities. | Need to ensure PALM resources are not diverted to EFile & Pay until SUNTAX remediation is completed. | E-file Project phase 2 went live in Dec 2025. Phase 3 tentative dates are between April-June 2026. |
| Open and Monitoring | 09/24/25 | | Interface | Interface testing delays and file structure, file format/ layout, requirements changes | Stable | 1 (Low/Low) | As ABS testing with PALM continues, interface file changes in structure and requirements can set remediation progress back and cause agency development efforts rework. The response on interface testing errors is uncertain, unclear and no ETA are available to the agency. | The Project should provide ample advanced notice of any pending or possible interface file changes. If an SIR is filed due to errors on an interface, agencies should be notified with an expected timeline to resolve the issues. | ABS remediation readiness hampered, delayed, and perhaps stalled. | Most interfaces have been tested successfully. Waiting on the remaining to be resolved. |

| DOR Issues | | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| DOR Assumptions | | | | | |
|-------------------------------|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
| 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. | Mock 4 to be loaded in January 2026 |
| 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. | Waiting for PeopleFirst UAT Information |
| 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. | UAT to begin in February 2026 |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

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| DOR Status Report Confirmation | | | |
|--------------------------------|----------------------|---------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Clark M. Rogers | clark.rogers@floridarevenue.com | 01/13/26 |
| September - October 2025 | Clark M. Rogers | clark.rogers@floridarevenue.com | 11/06/25 |
| July - August 2025 | Clark M. Rogers | clark.rogers@floridarevenue.com | 09/10/25 |
| May - June 2025 | Clark M. Rogers | clark.rogers@floridarevenue.com | 07/10/25 |
| March - April 2025 | Clark M. Rogers | clark.rogers@floridarevenue.com | 05/09/25 |

Helpful Links

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

DOS Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Antonio Murphy

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 Completeness

Other Task Completeness

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.

Direct Impact Task Timeliness:

Score = 99.33%

- Submitted On Time = 42
- Submitted Late = 2
- Pending Submission = 0

Other Task Timeliness:

Score = 84.4%

- Submitted On Time = 54
- Submitted Late = 28
- Pending Submission = 0

Direct Task Completeness:

Score = 80.45%

- Submitted Complete = 25
- Submitted Incomplete = 4
- Completed After Submission = 15

Other Task Completeness:

Score = 85.19%

- Submitted Complete = 43
- Submitted Incomplete = 3
- Completed After Submission = 8

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 = 0
- Vacant Role = 2

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 75% - Consolidating/Inputting Information for Submission | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Task Closed - Submission Incomplete | 01/06/26 |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | People | 666 | Share Florida PALM Updates | 10/13/25 | 10/24/25 | Pending Resubmission | 10/21/25 | Meeting held with F&A chief to discuss current status of outstanding tasks. | Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/10/25 | Agency current has no interfaces selected for testing. | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/18/25 | Agency current has no interfaces selected for testing. | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 100% - Submitted | 01/09/26 | Department has no interfaces to test currently. | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| | | | | | | | | | | |

| DOS Issues | | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

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| DOS Assumptions | | | | | |
|-------------------------------|------------|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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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| DOS Status Report Confirmation | | | |
|--------------------------------|----------------------|----------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Antonio Murphy | antonio.murphy@dos.myflorida.com | 01/09/26 |
| September - October 2025 | Antonio Murphy | antonio.murphy@dos.myflorida.com | 11/10/25 |
| July - August 2025 | Antonio Murphy | antonio.murphy@dos.myflorida.com | 09/10/25 |
| May - June 2025 | Antonio Murphy | antonio.murphy@dos.myflorida.com | 07/11/25 |
| 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 |

Helpful Links

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

DVA Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

AI Carter

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 Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 95.51%

Submitted On Time = 45

Submitted Late = 3

Pending Submission = 0

Other Task Timeliness:

Score = 81.95%

Submitted On Time = 58

Submitted Late = 26

Pending Submission = 0

Direct Task Completeness:

Score = 91.04%

Submitted Complete = 37

Submitted Incomplete = 2

Completed After Submission = 9

Other Task Completeness:

Score = 83.79%

Submitted Complete = 43

Submitted Incomplete = 3

Completed After Submission = 12

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 = 17

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/17/25 | Looking to bring new vendor on board August 1. Then will incorporate them into the process of working training matters. End User Role mapping is nearly complete. | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/06/25 | | Submission Complete | 11/25/25 |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/12/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/21/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | Agency working through stories and its inherent problems given the revised guidance from the State PALM leadership. | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Agency user stories - 55 of 55 completed, Continuing to work role mapping and prerequisite training for end users. | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | Agency user stories submitted and accepted. Standing by for system feedback. Also, prerequisite training has begun for Accounts Receivable personnel to learn end user roles. | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 100% - Submitted | 01/14/26 | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
|---------------------|-------------|-------------|-----------------------------|-------------------------------------|------------|-------------------|---|--|---|---|
| Open and Mitigating | 05/14/25 | | Staffing/Resource Available | Staffing shortfalls | Increasing | 6 (Medium/High) | FDVA has one person performing most functions and must keep PALM tasks on track while simultaneously performing day-to-day required tasks. Also, staff turnover is an issue as some of these personnel are retiring or terminating employment due to increased workload. Additionally, major cyclic operations and events like year-end closeout and hurricane season becomes priority for these singularly manned positions. | Working to hire a new vendor/consultant to assist with key tasks as the current vendor was terminated for work performance. | Tasks will not be accomplished in a timely manner, if at all. | FDVA is still one person deep in most functions, but the Katydid contractor has assisted greatly with filling the void. We are poised to meet tasks and complete revised SOP's to support PALM integration. |
| Open and Monitoring | 05/14/25 | | Staffing/Resource Available | Contracting and Procurement Funding | Stable | 6 (High/Medium) | Our Agency is unique and may require contractor support to meet implementation requirements and ensure our processes and procedures align to meet State, federal and local requirements, and that it supports the transition of staff. It could impact the Agencies ability to meet deliverables. Processes that don't align with PALM will have to be retooled to do so. Technology expertise may not be resident to perform retooling requirements. | Requesting that current funding be reverted and reallocated to support getting the contractual support needed. | PALM and Agency required processes won't synchronize leading to the Agency having to do manual processes. | Agency is comfortable with vendor and making great progress on tasks and requirements. However, we are still not confident that funding will be available and provided to bring us through the PALM implementation date and mitigation period that follows. |
| Open and Monitoring | 05/14/25 | | Interface | Technology - IT Staffing | Stable | 4 (Medium/Medium) | Existing IT Staffing has limited knowledge of PALM system and will take time to get trained up, especially given their existing Agency requirements. Agency requested additional personnel through the LBR process but positions to date, have not been approved. | 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 | Agency will not be able to meet IT requirements timely, if at all, if IT personnel can't support. | Agency is beginning its training of its Accounts Receivable Team. |
| Open and Monitoring | 05/14/25 | | Interface | FDVA FLAIR and PALM Data Interface | Decreasing | 4 (Medium/Medium) | FLAIR and Florida PALM data will be different in its input and likely representation, which may cause challenges when performing data analysis as well as input errors. | 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. | Data errors or data lag in inputting data. | The staff will still incur extra time to learn PALM. Training has begun, and our Executive Director has authorized overtime to meet requirements given that we are one person deep in most of our functions. |

DVA Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|------------------------------|-----------------------------|---------------------------|--|--|-----------------------------------|--|
| Open | 04/22/25 | | Low - All impacts not listed | Staffing/Resource Available | Human Resources Shortfall | VACO Consultants were hired to assist Agency with PALM Transition 9 months ago, but had to fire them due to performance issues on 15 April 2025. | Secure a new contractor from State Term Contract listing and bring them onboard NLT 15 May 2025. A new vendor contract is being worked and we anticipate the new contractor being on board on 1 August 2025. | 08/01/25 | New contractor - Katydid is on site and performing well. They have assisted greatly in the Agency being able to perform its task in accordance with State PALM Schedule. |

DVA Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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. | FDVA has funding to last to the end of the fiscal year. No approval has been provided as to additional funding to bring us to the new PALM initiation date - 2027. |
| 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) | PALM tasks are being met and processes updated to adhere to PALM requirements and standards. |
| 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) | FDVA will provide support to project as allocated by the State of Florida. |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

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DVA Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-----------------------|--------------------|
| November - December 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 01/14/26 |
| November - December 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 12/29/25 |
| September - October 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 11/12/25 |
| July - August 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 09/10/25 |
| May - June 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 07/01/25 |
| March - April 2025 | ALFRED D. CARTER | al.carter@fdva.fl.gov | 05/12/25 |
| 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 = 50

Submitted Late = 0

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:


Score = 99.51%

Submitted On Time = 82

Submitted Late = 1

Pending Submission = 0

Direct Impact Task Completeness



Direct Task Completeness:


Score = 94.38%

Submitted Complete = 40

Submitted Incomplete = 2

Completed After Submission = 6

Other Task Completeness



Other Task Completeness:

Score = 98.91%

Submitted Complete = 49

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 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 08/05/25 | | Submission Complete | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/12/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | Confirmed DEM completion 11/3/2025. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/03/25 | Confirmed DEM completion 11/3/2025. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/20/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/07/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | Submission Complete | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 100% - Submitted | 01/13/26 | | Submission Complete | |

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.

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EOG Risks

| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
|---------------------|-------------|-------------|--------------------------|---|------------|-----------------|---|---|---|--|
| Open and Monitoring | 10/31/23 | | Staffing/Resource Availa | Limited Staff | Stable | 9 (High/High) | The EOG has limited staff and technical/training resources. | EOG will monitor transactions and will use UAT for training. It should be noted that on boarding temporary additional staff may not be the most effective method to handle additional workload, as the same individuals that are participating in UAT, training, and FLAIR work are also the same individuals that would be training onboarded new staff. Onboarding temporary new staff may place a greater work strain on current staff than none at all. | Efficiency and accuracy of transactions will be hindered. | No change. |
| Open and Monitoring | 02/17/25 | | Staffing/Resource Availa | Limited Staff - Timing | Increasing | 9 (High/High) | There are/will be many competing priorities for staff working on this project. Staff on the project serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work. Some of the FL PALM tasks coincide with some of the busiest times for financial/budget/accounting agency resources. The training period of July - October timeframe is the busiest of the fiscal year with most duties falling to a very limited number of individuals. The cutover and go-live for FL PALM: November, 2026- early 2027 is an elected official transition period. This timeframe affects the workload of all Administrative Services (PALM end user) staff. The cutover period may affect abilities to transact and to update payroll and personnel changes timely during the transition period December 2026/January 2027 time period. | The EOG will monitor staff workload, and will utilize UAT as a training period to be ready to support the incoming administration. The EOG will reach out to DFS (and PALM) and other enterprise agencies for assistance should we not be able to properly assist the incoming administration on important matters necessitating timely input and processing that cannot be accomplished in systems closed due to cutover. | Efficiency, pace, and timeliness of transactions will be hindered. Timely processing of payroll and personnel revisions and other financial transactions may not be accomplished during cutover. | No change. |
| Open and Monitoring | 12/31/24 | | Business Process Chang | DEM - Separation General | Stable | 9 (High/High) | The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems. | 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. | Incorrect, inaccurate reporting; combined transactions and payments that will have to be re-vouchered; incorrect personnel inputting or approving transactions not related to the correct individual's roles/responsibilities | No change. |
| Open and Monitoring | 08/23/24 | | Business Process Chang | DEM - Separation InterUnit Transactions | Stable | 6 (Medium/High) | The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outlined in Risk Line 007 relates to payment management. In reviewing Segment IV -Inter-Unit transactions, we noted that all receiving transactions may be rolled together with no ability to discern 'ownership' of the transaction since only OLO/Business Unit is required. Sent suggestions to the | 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. | Incorrect transfers will be incorrectly approved or will not be approved, since staff will not know to whom the transfer belongs. | No change. |

| | | | | | | | | | | |
|---------------------|----------|--|-------------------------|-------------------------------------|--------|-----------------|---|---|---|------------|
| | | | | | | | PALM team requesting additional fields be mandatory. Also requested that search menus be available on each workcenter screen to filter out unneeded transactions to only those relevant to DEM or EOG. | | | |
| Open and Monitoring | 06/06/24 | | Training | Nomenclature | Stable | 6 (Medium/High) | Nomenclature is changing in from FLAIR terms to PALM terms. Some fields in PALM are named the same as in FLAIR but with different meanings/uses. Examples are category, asset location, etc. This will primarily be a training challenge; however, there exists the risk that procedures, guidelines, data, queries, etc will be misinterpreted or not updated properly. | The EOG will work to highlight terminology/naming differences and provide documents to mitigate risk of confusion. Users are participating in prerequisite overview training. | Incorrect fields or incomplete transactions posted due to misinterpretation. | No change. |
| Open and Monitoring | 10/31/23 | | Business Process Change | Limited Staff - Roles and Workflow | Stable | 6 (High/Medium) | FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There are not enough appropriate staff available to assign unique backup processors and approvers. | 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 employees knowledgeable in the specific transactions. EOG will work with DFS to request roles that are currently unallowable due to separation of duty prohibitions. | Efficiency, pace, and timeliness of transactions will be hindered. | No change. |
| Open and Monitoring | 06/06/24 | | Business Process Change | DEM - Separation Warrant Management | Stable | 6 (High/Medium) | The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Risk Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant. | 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 accommodate. 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. We will review reports during early phases of UAT to seek a solution, since end to end UAT will not be available during the early testing periods. | If warrants combine, the entire warrant will need to be deleted and invoices re-vouchers. This is an efficiency and effectiveness issue that will need to be addressed. | No change. |
| Open and Monitoring | 10/31/23 | | Training | Limited Staff - Processing Changes | Stable | 2 (Medium/Low) | Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed. | The EOG will monitor staff workload and will utilize 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. | Inaccurate or incomplete data/reports may result (depending on the requirement). | No change. |
| Open and Monitoring | 10/31/23 | | Training | Statewide System Revisions/ | Stable | 2 (Medium/Low) | With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in UAT and early implementation | EOG will monitor all tasks and attempt to report issues to all relevant parties. | Transactions will be incorrectly processed (or not processed timely) - inefficiencies in issue resolution. | No change. |

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|---------------------|----------|--|----------|-------------|--------|-------------|--|---|---|------------|
| Open and Monitoring | 10/31/23 | | Training | Attachments | Stable | 1 (Low/Low) | transaction processing. Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM. | 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. | Incorrect/improper record keeping of documentation. | No change. |
|---------------------|----------|--|----------|-------------|--------|-------------|--|---|---|------------|

| EOG Issues | | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|------------------|-------------------------------|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period | Comments for Nov. - Dec. 2025 |
| | | | | | | | | | | |

| EOG Assumptions | | | | | |
|-----------------------------------|---|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
| People Processes Technology | EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals. | Logged | 04/18/25 | Administrative Services | No change. |

Agency Sponsor Confirmation

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

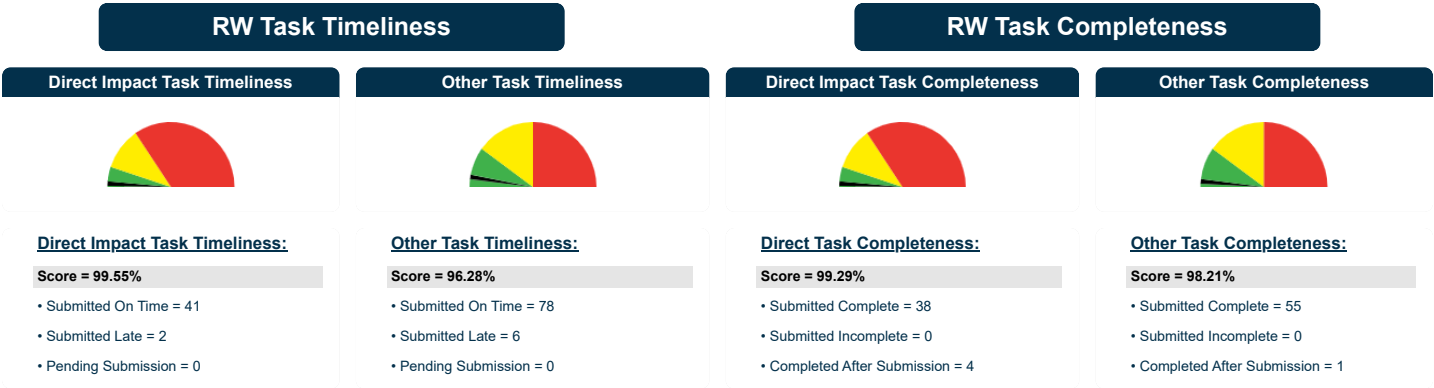
Agency Sponsor Name: *

☐ Confirm *

Submit

EOG Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-------------------------------|--------------------|
| November - December 2025 | Dawn Hanson | dawn.hanson@eog.myflorida.com | 01/13/26 |
| September - October 2025 | Dawn Hanson | dawn.hanson@eog.myflorida.com | 11/04/25 |
| July - August 2025 | Dawn Hanson | dawn.hanson@eog.myflorida.com | 09/04/25 |
| May - June 2025 | Dawn Hanson | dawn.hanson@eog.myflorida.com | 07/08/25 |
| 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 |



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| | | | | | | | | Target Closure Date: 2/28/2026 | | |
| 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 012/ 009 | 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. Target Closure Date: 3/31/2027 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Currently archival of BARS is planned in March/2027, based on the PALM go-live in January/2027. Agency data analysis will continue based on Mock 4 data being available in February/2026, which is essential to build agency specific reports. |
| 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 014/ 011 | Risk Mitigation Strategy: Reduction 1. Prepare the UAT testing team thoroughly, w.r.t to Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk. Target Closure Date: 8/31/2026 | Fail to achieve the mandatory success measure of User Acceptance Testing for PALM Go-Live. | 1/7/2026: High level Testing schedule has been discussed in the PALM advisory council, which it still in the 'draft' stage. FL PALM project team is expected to share a detailed plan including schedule for defect fixes and implement Security Access module in the later part of the UAT. |
| 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) | Archived Risk Id: 015/ 012 | Risk Mitigation Strategy: Mitigate Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation Target Closure Date: 06/30/2026 | Fail to achieve the mandatory success measure Business Process readiness for PALM Go-Live. | 1/7/2026: Agency will continue to finalize specific process gaps (change) based on the experiences in first part of the UAT. |
| Open and Mitigating | 12/04/24 | | Staffing/Resource Availability | Unavailability of IT resources with required skillset may impact timely remediations of agency business systems. | Increasing | 6 (High/Medium) | Archived Risk Id: 010/ 007 | 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 Target Closure Date: 3/31/2026 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Limited 'Technology lead' bandwidth in the current team which is impacting the pace of the development activities. Therefore started working with agency OIT executive leadership to onboard additional/ shared bandwidth. |
| 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 017/ 014 | Risk Mitigation Strategy: Mitigate 1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth. Target Closure Date: 12/31/2026 | Fail to achieve the mandatory success measure User Acceptance Testing, User training and People readiness for PALM Go-Live. | 1/7/2026: Agency is currently able to manage the increased volume of activities with the existing resources by prioritizing their workplan. |
| Open and Mitigating | 06/25/25 | | Deployment/Cutover | Lack of clear guidelines from the Florida PALM Program on preparing for Cutover activities and setting up Operations support for the agencies. | Stable | 6 (High/Medium) | Newly added, on 6/25/2025 | Risk Management Strategy: Mitigate 1. Identify the agency specific cutover activities for the agency systems and readiness activities to prepare for operations support. 2. Add the agency specific cutover activities and operations support preparation to agency plan. 3. Continue to progress on the agency specific plan and ongoing monitoring | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: FL PALM project team presented a high level draft plan, which indicated the deployment/ cutover period, and more information is expected to be made available by June/2026. |

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|---------------------|----------|--|--------------|---|--------|-------------------|----------------------------|---|---|--|
| 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. | Stable | 4 (Medium/Medium) | Archived Risk Id: 013/ 010 | <p>Target Closure Date: 11/30/2026</p> <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>Target Closure Date: 12/31/2026</p> | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Currently working with DMS to assign UAT pre-requisite trainings to the SMEs/ end-users. |
| 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. | Stable | 4 (Medium/Medium) | Archived Risk Id: 016/ 013 | <p>Risk Mitigation Strategy: Mitigate</p> <p>1. Read & understand the access security model and role definition, published by FL PALM.</p> <p>2. Map the current business teams to the appropriate user role.</p> <p>3. Identify the users for whom role/ responsibility are changed.</p> <p>4. Provide required support to the users to adapt to their changed role.</p> <p>Target Closure Date: 12/30/2026</p> | Fail to achieve the mandatory success measure User Acceptance Testing and Go-Live Readiness for PALM Go-Live. | 1/7/2026: Agency completed the role mapping for all SMEs/ end-users based on the current understanding of documentations from the FL PALM project team. This may need to be revisited based on the experiences from the first part of UAT. |

| FCOR Issues | | | | | | | | | | |
|-------------|-------------|-------------|-----------------------------|------------------------|---|-----------------------------|--|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 01/30/25 | | Critical - Impacts the abil | Agency Business System | Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system. | Archived Issue Id: 007/ 006 | <p>1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data.</p> <p>2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports.</p> <p>3. Remediate Agency based systems to integration to CAIRS and internal functional testing</p> | 02/28/26 | 1/7/2026: Cycle 2 Testing for all agency managed interfaces are completed; however delayed receipt of a few interfaces impacted Cycle 2 Testing of 3rd party managed Agency business systems. Ongoing discussion with FL PALM project team for needed support and remediate timeline challenges. | |
| 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. | Archived Issue Id: 008/ 007 | <p>Team to work on minimizing the impact due to this issue.</p> <p>1. Develop a scalable solution design with system level flexibility built-in.</p> <p>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.</p> <p>3. Resolve the gaps in the agency system remediation solution.</p> <p>4. Escalate in case the changes to interfaces are not feasible to be mitigated.</p> | 02/28/26 | 1/7/2026: Ongoing discussion with FL PALM project team on resolving errors in the Outbound interface file (AMI004), which is essential for remediating Bar Code Scanning tool. | |
| Open | 10/01/25 | | Critical - Impacts the abil | Agency Business System | Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) is impacted as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from State PALM. | FDC/ FCOR Risk Is: 007/ 008 | <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 sample/ test files available.</p> <p>4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing) and complete defect fixes.</p> | 02/28/26 | 1/7/2026: Delayed receipt of a few interfaces impacted Cycle 2 Testing of 3rd party managed Agency business systems. Ongoing discussion with FL PALM project team for needed support and remediate timeline challenges. Ongoing discussion with FL PALM project team on resolving errors in the Outbound interface file (AMI004), which is essential for remediating Bar Code Scanning tool. | |
| Open | 10/23/25 | | Critical - Impacts the abil | Agency Business System | Not having a comprehensive crosswalk for FLAIR data elements to PALM may impact agency systems remediation | FDC/ FCOR Risk Is: 012/ 012 | <p>1. Identify the FLAIR data elements is required for the agency and prepare crosswalk, based on the available information.</p> | 12/31/26 | 1/7/2026: Discussion with FL PALM project team reveals that there is no direct crosswalk between FLAIR and PALM systems, even data elements with similar names may differ in context. Agency resumed the data analysis to identify | |

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| | | | | | and its effectiveness. | | 2. Reach out to PALM for their support in validating and providing the data elements cross walk from FLAIR to PALM. 3. Agency to consider the crosswalk from PALM as the basis for internal systems remediation and agency internal activities. Target Closure Date: 12/31/2026 | | PALM data requirements by referencing existing resources and Mock 4 data, which is expected to be available in February/2026. |
| Open | 02/28/24 | | High - Impacts the ability | Deployment/Cutover | 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. | Archived Issue Id: 004/003 | 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 | 1/7/2026: FL PALM project team proposed a Testing schedule and plan, which is still in 'draft' state, which is used by the agency to finalize UAT plan. Any changes to the 'draft' Testing plan may have significant impact and rework and impact to the agency. |
| Open | 07/31/24 | | High - Impacts the ability | Staffing/Resource Availa | Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness. | Archived Issue Id: 005/004 | Onboard additional staff aug position with FLAIR data experience. | 06/30/26 | 1/7/2026: Agency was able to complete majority of the data cleansing and data configuration activities with the current financial analysts. Team to continue working on data cleansing activities based on observations from Mock 4 conversion and experiences from UAT testing. |
| Open | 08/31/24 | | High - Impacts the ability | Staffing/Resource Availa | Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes. | Archived Issue Id: 006/005 | 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. | 02/28/26 | 1/7/2026: FL PALM project team shared revised guidelines on UAT plan and User stories documentation in late November; however agency was able to complete the UAT plan and UAT documentation activities to the extent possible. FL PALM project team proposed a Testing schedule and plan, which is still in 'draft' state, and is used by the agency to finalize UAT plan. Any changes to the 'draft' Testing plan may have significant impact and rework and impact to the agency. |
| Open | 08/21/23 | | High - Impacts the ability | Staffing/Resource Availa | Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity. | Archived Issue Id: 001/001 | 1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency. | 12/31/26 | 1/7/2026: Continuing to monitor and reassess 6 months prior to Go-Live. |

| FCOR Assumptions | | | | | |
|---|--|--------|------------------------|---|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 |
| 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 | No change this period. |
| 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 | No change this period. |
| 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 | No change this period. |
| 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 | No change this period. |
| 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. | No change this period. |
| 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. | No change this period. |
| People Processes Technology Data | Enterprise systems shall be available for User Acceptance Testing including respective business processes. | Logged | 12/20/24 | All UAT Testers. | No change this period. |
| 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. | No change this period. |
| 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. | No change this period. |
| Technology | State PALM team to provide necessary support to the agency for Cycle-2 Technical Interface Testing | Logged | 08/20/25 | All agency business systems and the remediation of agency business systems. | No change this period. |

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for

FCOR Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|------------------------------|--------------------|
| November - December 2025 | Ryan C. Schenck | ryanschenck@fcor.state.fl.us | 01/09/26 |
| September - October 2025 | Ryan C. Schenck | ryanschenck@fcor.state.fl.us | 11/05/25 |

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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| | | | |
|-------------------------|-----------------|------------------------------|----------|
| July - August 2025 | Ryan C. Schenck | ryanschenck@fcor.state.fl.us | 09/05/25 |
| May - June 2025 | Ryan C. Schenck | ryanschenck@fcor.state.fl.us | 07/10/25 |
| 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 |

Helpful Links

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

FDC Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Mark Tallent

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 = 95.1%

- Submitted On Time = 41
- Submitted Late = 8
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 85.21%

- Submitted Complete = 36
- Submitted Incomplete = 5
- Completed After Submission = 7

Other Task Completeness:

Score = 95.00%

- Submitted Complete = 49
- Submitted Incomplete = 0
- Completed After Submission = 5

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 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 | 50% - In Progress | | 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. 10/28/25: Still waiting on all interfaces for Cycle 2 Testing to be sent. | | |
| N/A | Technology | 558 | Update Agency Business System Documentation | 11/18/24 | 01/10/25 | 50% - In Progress | | 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. 10/28/25: Still waiting on all interfaces for Cycle 2 Testing to be sent. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 09/25/25 | Based on our Touchpoint meeting 10/28/25, we are reducing our task progress back to 25% to re-evaluate the whole task. Updated to 75% on 12/29/25. | | 01/08/26 |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/17/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission | |

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| | | | Testing | | | | | | Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/17/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/29/25 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 06/25/25 | | Deployment/Cutover | Several readiness deliverables for agencies have been removed from the Florida PALM Program plan. | Stable | 6 (Medium/High) | Newly added, on 6/25/2025 | Risk Management Strategy: Mitigate 1. Analysis of the removed readiness workplan tasks which are still applicable to the agencies. 2. Agencies to add the applicable deliverables as part of agency specific activities. 3. Continue to progress these agency specific deliverables and ongoing monitoring. Target Closure Date: 2/28/2026 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Revised readiness workplan is expected by end of January/2026. |
| 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 012/009 | 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. Target Closure Date: 3/31/2027 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Currently archival of BARS is planned in March/2027, based on the PALM go-live in January/2027. Agency data analysis will continue based on Mock 4 data being available in February/2026, which is essential to build agency specific reports. |
| 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 014/011 | Risk Mitigation Strategy: Reduction 1. Prepare the UAT testing team thoroughly, w.r.to Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk. Target Closure Date: 8/31/2026 | Fail to achieve the mandatory success measure of User Acceptance Testing for PALM Go-Live. | 1/7/2026: High level Testing schedule has been discussed in the PALM advisory council, which it still in the 'draft' stage. FL PALM project team is expected to share a detailed plan including schedule for defect fixes and implement Security Access module in the later part of the UAT. |
| 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) | Archived Risk Id: 015/012 | Risk Mitigation Strategy: Mitigate Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation Target Closure Date: 12/30/2025 Paused Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation Target Closure Date: | Fail to achieve the mandatory success measure Business Process readiness for PALM Go-Live. | 1/7/2026: Agency will continue to finalize specific process gaps (change) based on the experiences in first part of the UAT. |

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|---------------------|----------|--|--------------------------|---|------------|-------------------|---------------------------|--|---|--|
| Open and Mitigating | 12/04/24 | | Staffing/Resource Availa | 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. | Increasing | 6 (High/Medium) | Archived Risk Id: 017/014 | 06/30/2026 Risk Mitigation Strategy: Mitigate 1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth. Target Closure Date: 12/31/2026 | Fail to achieve the mandatory success measure User Acceptance Testing, User training and People readiness for PALM Go-Live. | 1/7/2026: Agency is currently able to manage the increased volume of activities with the existing resources by prioritizing their workplan. |
| Open and Mitigating | 12/04/24 | | Staffing/Resource Availa | Unavailability of IT resources with required skillset may impact timely remediations of agency business systems. | Increasing | 6 (High/Medium) | Archived Risk Id: 010/007 | 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 Target Closure Date: 3/31/2026 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Limited "Technology lead" bandwidth in the current team which is impacting the pace of the development activities. Therefore started working with agency OIT executive leadership to onboard additional/ shared bandwidth. |
| Open and Mitigating | 06/25/25 | | Deployment/Cutover | Lack of clear guidelines from the Florida PALM Program on preparing for Cutover activities and setting up Operations support for the agencies. | Stable | 6 (High/Medium) | Newly added, on 6/25/2025 | Risk Management Strategy: Mitigate 1. Identify the agency specific cutover activities for the agency systems and readiness activities to prepare for operations support. 2. Add the agency specific cutover activities and operations support preparation to agency plan. 3. Continue to progress on the agency specific plan and ongoing monitoring Target Closure Date: 11/30/2026 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: FL PALM project team presented a high level draft plan, which indicated the deployment/ cutover period, and more information is expected to be made available by June/2026 |
| 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. | Stable | 4 (Medium/Medium) | Archived Risk Id: 013/010 | 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. Target Closure Date:12/31/2026 | Fail to achieve the mandatory success measure of agency systems readiness for PALM Go-Live. | 1/7/2026: Currently working with DMS to assign UAT pre-requisite trainings to the SMEs/ end-users. |
| 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. | Stable | 4 (Medium/Medium) | Archived Risk Id: 016/013 | 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. Target Closure Date: 12/30/2026 | Fail to achieve the mandatory success measure User Acceptance Testing and Go-Live Readiness for PALM Go-Live. | 1/7/2026: Agency completed the role mapping for all SMEs/ end-users based on the current understanding of documentations from the FL PALM project team. This may need to be revisited based on the experiences from the first part of UAT. |

| FDC Issues | | | | | | | | | | |
|------------|-------------|-------------|-----------------------------|------------------------|---|----------------------------|---|-----------------------------------|--|-------------------------------|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period | Comments for Nov. - Dec. 2025 |
| Open | 01/30/25 | | Critical - Impacts the abil | Agency Business System | Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system. | Archived Issue Id: 007/006 | 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 | 02/28/26 | 1/7/2026: Cycle 2 Testing for all agency managed interfaces are completed; however delayed receipt of a few interfaces impacted Cycle 2 Testing of 3rd party managed Agency business systems. Ongoing discussion with FL PALM project team for needed support and remediate timeline challenges. | |

| | | | | | | | | | |
|------|----------|--|-----------------------------|--------------------------|---|-----------------------------|---|----------|--|
| | | | | | | | solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing | | |
| 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. | Archived Issue Id: 008/007 | 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. | 02/28/26 | 1/7/2026: Ongoing discussion with FL PALM project team on resolving errors in the Outbound interface file (AMI004), which is essential for remediating Bar Code Scanning tool. |
| Open | 10/01/25 | | Critical - Impacts the abil | Agency Business System | Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) is impacted as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from State PALM. | FDC/ FCOR Risk Is: 007/ 008 | 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 sample/ test files available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing) and complete defect fixes. | 02/28/26 | 1/7/2026: Delayed receipt of a few interfaces impacted Cycle 2 Testing of 3rd party managed Agency business systems. Ongoing discussion with FL PALM project team for needed support and remediate timeline challenges. Ongoing discussion with FL PALM project team on resolving errors in the Outbound interface file (AMI004), which is essential for remediating Bar Code Scanning tool. |
| Open | 10/23/25 | | Critical - Impacts the abil | Agency Business System | Not having a comprehensive crosswalk for FLAIR data elements to PALM may impact agency systems remediation and its effectiveness. | FDC/ FCOR Risk Is: 012/ 012 | 1. Identify the FLAIR data elements is required for the agency and prepare crosswalk, based on the available information. 2. Reach out to PALM for their support in validating and providing the data elements cross walk from FLAIR to PALM. 3. Agency to consider the crosswalk from PALM as the basis for internal systems remediation and agency internal activities. Target Closure Date: 12/31/2026. | 12/31/26 | 1/7/2026: Discussion with FL PALM project team reveals that there is no direct crosswalk between FLAIR and PALM systems, even data elements with similar names may differ in context. Agency resumed the data analysis to identify PALM data requirements by referencing existing resources and Mock 4 data, which is expected to be available in February/2026. |
| Open | 02/28/24 | | High - Impacts the ability | Deployment/Cutover | 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. | Archived Issue Id: 004/003 | 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 | 1/7/2026: FL PALM project team proposed a Testing schedule and plan, which is still in 'draft' state, which is used by the agency to finalize UAT plan. Any changes to the 'draft' Testing plan may have significant impact and rework and impact to the agency. |
| Open | 07/31/24 | | High - Impacts the ability | Staffing/Resource Availa | Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness. | Archived Issue Id: 005/004 | Onboard additional staff aug position with FLAIR data experience. | 06/30/26 | 1/7/2026: Agency was able to complete majority of the data cleansing and data configuration activities with the current financial analysts. Team to continue working on data cleansing activities based on observations from Mock 4 conversion and experiences from UAT testing. |
| Open | 08/31/24 | | High - Impacts the ability | Staffing/Resource Availa | Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes. | Archived Issue Id: 006/005 | 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. 4. Continue to monitor the effectiveness/ | 02/28/26 | 1/7/2026: FL PALM project team shared revised guidelines on UAT plan and User stories documentation in late November; however agency was able to complete the UAT plan and UAT documentation activities to the extent possible. FL PALM project team proposed a Testing schedule and plan, which is still in 'draft' state, and is used by the agency to finalize UAT plan. Any changes to the 'draft' Testing plan may have significant impact and rework and impact to the agency. |

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|------|----------|--|----------------------------|--------------------------|--|----------------------------|---|----------|---|
| | | | | | | | productivity of the QA resources from OIT and make course-corrections, as required. | | |
| Open | 08/21/23 | | High - Impacts the ability | Staffing/Resource Availa | Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity. | Archived Issue Id: 001/001 | 1. Crosstrain staff to ensure adequate backup. 2. Cross training to be completed during the PALM project to ensure operational resiliency. | 12/31/26 | 1/7/2026: Continuing to monitor and reassess 6 months prior to Go-Live. |

| FDC Assumptions | | | | | | |
|----------------------------------|--|--------|------------------------|---|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 2025 | |
| 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. | No change this period. | |
| 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. | No change this period. | |
| 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 | No change this period. | |
| 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 | No change this period. | |
| 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 | No change this period. | |
| 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. | No change this period. | |
| 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 | No change this period. | |
| 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. | No change this period. | |
| 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. | No change this period. | |
| People Processes Technology Data | Enterprise systems shall be available for User Acceptance Testing including respective business processes. | Logged | 12/20/24 | All UAT Testers. | No change this period. | |
| Technology | State PALM team to provide necessary support to the agency for Cycle-2 Technical Interface Testing | Logged | 08/20/25 | All agency business systems and the remediation of agency business systems. | No change 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 *

Submit

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| FDC Status Report Confirmation | | | |
|--------------------------------|----------------------|--------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Mark Tallent | mark.tallent@fdc.myflorida.com | 01/09/26 |
| September - October 2025 | Mark Tallent | mark.tallent@fdc.myflorida.com | 11/05/25 |
| July - August 2025 | Mark Tallent | mark.tallent@fdc.myflorida.com | 09/05/25 |
| May - June 2025 | Mark Tallent | mark.tallent@fdc.myflorida.com | 07/10/25 |
| 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 |

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Helpful Links

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

FDLE Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Mike Moore

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 Completeness

Other Task Completeness

Direct Impact Task Timeliness:
Score = 95.38%
• Submitted On Time = 41
• Submitted Late = 10
• Pending Submission = 0

Other Task Timeliness:
Score = 88.26%
• Submitted On Time = 69
• Submitted Late = 14
• Pending Submission = 1

Direct Task Completeness:
Score = 84.51%
• Submitted Complete = 40
• Submitted Incomplete = 3
• Completed After Submission = 8

Other Task Completeness:
Score = 92.46%
• Submitted Complete = 51
• 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 = 5
- Duplicate Filled Role = 9
- 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 | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 05/02/25 | 75% - Consolidating/Inputting Information for Submission | | 10/10/25 - Delayed, FDLE New Target Goal of 12/19/25 with 573-B | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | 1/9/26 - Done | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | Completed | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | 11/07/25 - Validated Mock 3 Conversion Workbook was updated to reflect Data Cleansing Status. | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | 10/28/25 On Track for 11/05/25 - All ok | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | 10/29/25- Configuration WB for AM, AR, CM, CM, GL, PC and org security rule verified complete 11/05 Completed SpeedKey and PR Funding worksheet. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | Submitted Sponsorship approval on 11/10/25. | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/19/25 | 11/20 - Updated Risks on 11/20/25. | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/29/25 | Completed | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/17/25 | Completed on 12/17/25 Azure Enterprise Apps needs to be updated in FDLE UAT IdP Smart Sheet. | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Done - 1/9/26 | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Done - 1/9/26 | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | 1/6/26 - On Track for 1/14/26 | | 01/15/26 |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | 1/6/26 - On track | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 11/18/25 | | Interface | Cycle 2 interface testing completes on December 19th and Axiom-Pro completes their QA and UAT in Mid-December. There is a RISK that Cycle 2 file fixes will be needed from FL PALM for Axiom-Pro after the FL PALM Cycle 2 testing has closed. | Increasing | 6 (Medium/High) | AxiomPro is a 3rd party managed Agency business system, which is used by at least 9 different agencies. | There needs to be a buffer after Mid-December to allow for Cycle 2 file fixes that may come out of the AXIOM Q/A and UAT or add another FL PALM interface testing cycle. | The Impact if this Risk becomes an Issue is that critical bugs found in the Axiom-Pro QA and UAT may not be fixed by the FL PALM Cycle 2 interface team. | Update to Feb 2026 |
| Open and Monitoring | 05/16/24 | | Post Implementation | FDLE 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) | Many of our budget and grant tasks required life-to-date tracking and research. | Develop crosswalk methodology if the new Data Warehouse will not provide this capability. | None for now | 12/18 - Reviewed and still applicable. |
| Open and Monitoring | 11/18/25 | | Interface | If the Interface file structure, file format/ layout and requirements change, then there is a Risk that this may lead to rework for agencies. | Increasing | 4 (Medium/Medium) | The Project should provide ample advanced notice of any pending or possible interface file changes. | Cosmetic Changes can be done, but functional or structural changes will require resources to be extended. | If this Risk becomes an Issue, then the Impact to FDLE would be that remediation readiness hampered, delayed, and perhaps stalled. | No changes so far.. |
| Open and Monitoring | 09/23/25 | | Deployment/Cutover | There is a RISK that FDLE will not receive a Cut-over plan in time to plan the Agency's cut over from FLAIR to PALM. FDLE needs this plan at least 6 months prior to the PALM go live. This plan will help FDLE plan their Code Freeze. | Increasing | 3 (High/Low) | Question sent to PALM Readiness Coordinator on 9/18/25: Can you please let FDLE ITS know when and how the PALM team is planning to cut over from FLAIR to PALM? It is my understanding that FDLE will need to coordinate this with the Interfaces to PALM. We would like to see a comprehensive plan on how the PALM system will be cutover from FLAIR, so FDLE can plan to cut over it's interfaced applications and business systems from FLAIR to PALM. | Appropriate cutover details will be shared in support of RW Task 586 Create Agency Deployment Plan and Cutover Checklist to Prepare for Go-Live. This is currently scheduled for January 2026, but will be rebaselined to publish in June/July of 2026 due to the go-live date change to January 2027. | FDLE will not be able to go Live without Coordination with the PALM team providing a CUT OVER Plan from FLAIR to PALM. | 12/18-Needed by June 2026 |
| Open and Monitoring | 09/04/24 | | Deployment/Cutover | There is a RISK that FDLE will not receive a comprehensive list early enough of anticipated errors and warnings that may occur in relation to interface interactions and report parameters input. This is needed at least 6 months prior to go live in order to have ITS code and Test error handling across Florida PALM functions including interfaces and online functionality. | Decreasing | 2 (Medium/Low) | Waiting for the updates that are planned for Spring of 2026 according to the Question Log/Answer #0520 | The project is developing a comprehensive Error Handling Matrix that will be released in early Spring next year (2026). This matrix will cover errors across Florida PALM functions including interfaces and online functionality. | Scope : Mitigate the Interface Errors Cost : Development time may increase Schedule : Implementation timeline will be affected | 12/18 -Needed by June 2026 |
| Closed | 11/04/25 | 12/18/25 | User Acceptance Testing | There is a RISK that confidential information is being used in the UAT environment and is not masked, scrubbed, encrypted or substituted | Increasing | 2 (Medium/Low) | It is standard IT-Security practices not to use Production Data i.e. confidential data within a Test environment, even a UAT | If Production (Mock 3 and 4 data) is being used for testing purposes, then all confidential data should be masked, scrubbed, | If this Risk becomes an issue, then the State of Florida is risking confidential data being exposed if there is a breach of the UAT | Risk is no longer-Spoke to Matt Breeding regarding the Security. |

| FDLE Issues | | | | | | | | | | |
|-------------|-------------|-------------|----------------------------|------------------------|--|--|--|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| Open | 09/08/25 | | High - Impacts the ability | Deployment/Cutover | The task "Update Reports Inventory" is missing from the new 'Agency Implementation Roadmap.' There is no visibility of the Data Warehouse reporting tool in the current roadmap. | This RISK was opened up on 2/17/25 and we have yet to receive updates as to when the Data Warehouse work will be started and completed. | FDLE is analyzing the reports needed and mapping them over to the PALM equivalent through the information provided within the Knowledge Center. FDLE was informed that the Data Warehouse and BI will be ready for full UAT starting on 2/2/26 along with documentation to support and build out the DW queries. FDLE has 22 queries that need to be analyzed and compared to the PALM queries. Awaiting DWBI on 2/2/26. | 03/27/26 | Awaiting access to FULL UAT to Verify pre-built queries from the DWBI. | |
| Open | 01/09/26 | | High - Impacts the ability | Interface | Test file issues provided by PALM team with API031 & AMI004 are not allowing FDLE to complete Cycle 2 Interface Testing by 12/19/25. | A working test file from PALM to test API031 was not ready until 11/14/25. This delay caused the functional testing with Axiom-Pro to be delayed and is now targeted to complete in February 2026. A working test file from PALM to test AMI004 was not ready until 12/19/25. AMI008 is dependent on AMI004, causing AMI008 Interface testing to be delayed. | FDLE is working with the Vendors and Cycle 2 Test Teams to complete the functional testing of Interfaces API031 and AMI008. A timeline issue has been documented related to these delays. | 02/27/26 | Issue added | |
| Open | 01/09/26 | | High - Impacts the ability | Interface | Delays in developing and testing integration | Dependent on Issue #4 Axiom-Pro and | Working with Cycle 2 Test team and vendors | 02/27/26 | Issue added | |

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|--|--|--|--|--|--|
| | | | | to complete the functional testing before the End 2 End integration testing scenarios are to be developed jointly with FDLE. | |
|--|--|--|--|--|--|

| FDLE Assumptions | | | | | |
|----------------------------------|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | 12/18- After Full UAT starts will revisit. |
| Data | PALM will provide similar functionality as ABS 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 | 12/18-Revisit after Full UAT Start |
| 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 | 12/18-Awaiting full UAT start. |
| Data | PALM transactional data will be moved to Palm Warehouse on daily basis. We assume that this will stay for indefinite time in Warehouse. | Logged | 07/02/25 | All agency business systems | 12/18-Revisit after Full UAT Start |
| Processes Technology Data | FDLE assumes that the PALM Team will provide a comprehensive Cut-over plan from FLAIR to PALM. | Logged | 09/09/25 | All agency business systems | 12/18-Needed 6 months prior to cut over. |
| Processes Technology | If Confidential data is used in the UAT environment, then it is assumed that the PALM Security Team has taken the appropriate steps to protect this information. | Logged | 11/05/25 | All PALM Agencies | 12/18- On going Assumption |

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

FDLE Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|----------------------------------|--------------------|
| November - December 2025 | Mike Moore | mikemoore@fdle.state.fl.us | 01/15/26 |
| September - October 2025 | Mike Moore | mikemoore@fdle.state.fl.us | 11/10/25 |
| July - August 2025 | Mike Moore | mikemoore@fdle.state.fl.us | 09/10/25 |
| May - June 2025 | Charlotte Fraser | charlottefraser@fdle.state.fl.us | 07/08/25 |
| 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 |

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 93.2%

- Submitted On Time = 33
- Submitted Late = 16
- Pending Submission = 1

Other Task Timeliness:

Score = 79.77%

- Submitted On Time = 51
- Submitted Late = 33
- Pending Submission = 0

Direct Task Completeness:

Score = 87.96%

- Submitted Complete = 36
- Submitted Incomplete = 3
- Completed After Submission = 10

Other Task Completeness:

Score = 95.09%

- Submitted Complete = 45
- 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.

Change Champion Network:

- Unique Filled Role = 25
- Duplicate Filled Role = 0
- 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 |
| 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 | | Update from 11/7/25: Interface testing data has improved progress on ensuring ABS are ready for cycle 2 testing. This list has been updated and will continue to be a living document until all systems are ready. Currently 17% remaining. | | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/08/26 | Option 3: Agency Specific format, with copy of results to User Story Inventory worksheet (Option 2). 4127 stories shared; 574 Midpoint Check-in completed. Will be a living list of User Stories | Submission Complete | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | Initial load staff are accurate while some Pre-UAT and others have SOD conflicts that will be resolved in Full UAT before enforcement. Remaining role mapping users will continue to be updated through Full UAT. | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 09/25/25 | | Submission Complete | 11/06/25 |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | For Grant ID - 20224 is an active program, also shows as active in FACTS, but maybe not yet in the FLAIR Title file? The 'PALM Grant ID' dropdown should list this Grant as 20224. Need more guidance as to exactly why this did not past conversion. | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | AM, AR, CM, GL, KK, PC, ORG Security Rule workbooks for 10/29 are 100% complete. PR and SK complete on 11/5. | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | 01/15/26 |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
|---------------------|-------------|-------------|--------------------------------|--|------------|-----------------|---|--|---|--|
| Open and Monitoring | 07/30/24 | | User Acceptance Testing | Late Publication of Batch Schedule | Stable | 9 (High/High) | PALM Interfaces - Not knowing the batch schedule will leave agencies little time to remediate processes as needed. (39) | Continue to work with the Readiness and Technical Coordinators. Plan to align the UAT batch schedule with business processing as part of interface testing and Cycle 3 testing. | The FDOT file processing is performed in a specific order and priority, within a defined timeframe. Interruption or the inability to align with our system design will impact the effectiveness of the remediation or cause data mismatches and errors. | No comment for this reporting period. |
| Open and Monitoring | 07/30/24 | | Interface | Excel Upload Volume Capacity | Stable | 9 (High/High) | PALM Interfaces - The inability to efficiently enter large amounts of records via Excel uploads will incur delays on account of providing technical solutions for mass entry. (41) | Project costing could have a large number of records - an interface to automatically accept our transactions is necessary. | If volume exceeds capacity and the upload is interrupted, it will undermine the success of the record processing. | No comment for this reporting period. |
| Open and Mitigating | 09/30/24 | | Interface | Data Source Indicator - Input or System Generated | Stable | 9 (High/High) | PALM Technical - Need to identify the "Input and Automated" records in extracts. FLAIR indicates whether records are input manually, automated, or system generated. FDOT uses this indicator for various reporting and balancing methods. (47) | 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. | PALM not having this indicator could cause major impacts to Cost Allocation and Cash Forecasting, especially if the automated records do not come across in the extracts. | No comment for this reporting period. |
| Open and Monitoring | 08/21/25 | | Conversion/Configuration | Handling Historical Data & Unclear Data Warehouse Structure & Access | Stable | 9 (High/High) | Related to Decision 100 & 101, currently unclear how we'll be storing historical data that is going away with the elimination of OOC Table 31 & 33 and SAMAS Table 16. (76) | Will monitor for Data Warehouse design & access to be provided to identify what agency options are to resolve this risk | Will delay our development when we don't have a full idea of the design of the PALM Data Warehouse and what we will have access to. | No comment for this reporting period. |
| Open and Monitoring | 09/15/25 | | Conversion/Configuration | Payables - FLAIR to PALM Conversion Process | Stable | 9 (High/High) | Uncertainty in how these existing payables will be converted to PALM will result in uncertainty as to how we track and relieve these financial liabilities once PALM goes live (81). | Can only monitor the risk until more information is provided about the conversion process. | This will need to be resolved before FDOT can fully utilize the PALM system. | No comment for this reporting period. |
| Open and Monitoring | 09/15/25 | | Conversion/Configuration | FLIPS - Unclear TIN Verification Process | Increasing | 9 (High/High) | The process for TIN verification in the FLIPS system is still unclear and may impact supplier verification and payments. (83) | Will be monitoring for more information on this verification process. | This will probably be an issue/risk for other if not all state agencies, and will need to be resolved before PALM Go-Live. | No comment for this reporting period. |
| Open and Mitigating | 09/25/25 | | Interface | Delay with Cycle 2 Interface Testing Results | Increasing | 9 (High/High) | Interface Cycle 2 Testing Responses are taking 2-3 weeks to return to the agency. These greatly reducing the amount of time for the agency to make changes within the Cycle 2 Testing Schedule and putting our successful completion of testing in jeopardy. (82) | Cycle 2 Testing requires multiple interface submissions to identify all issues with interface submissions. With some of the interfaces using agency data for this, implementing development changes requires more coordination than normal as to not interfere with interface testing. | Delays in PALM responses impose roadblocks or unplanned downtime for agency resources and impacts agency schedule | No comment for this reporting period. |
| Open and Mitigating | 06/12/25 | | Staffing/Resource Availability | PALM Changes late in Development | Stable | 6 (Medium/High) | PALM changes occurring late in any phase introduces uncertainty when phase activities are in progress and functioning properly. Late changes are a step backward, jeopardizing quality and the timeline. (66) | Stay informed of PALM notices and changes, and raise questions early. | Difficult to meet the deadlines when simultaneously handling changes, and assessing completeness or quality. | No comment for this reporting period. |
| Open and Mitigating | 08/06/25 | | User Acceptance Testing | Outbound Interface Testing | Stable | 6 (Medium/High) | Not receiving a Delta File for Interface Testing impedes the ability to validate the outbound files. PALM is providing Master Files, the master file that they sent had about 60k projects on it and want us to use that, which isn't a realistic daily interface file that we will normally get. Also, not all records are included in this file, causing extra time to be taken using the provided master file for validation. (71) | Using our own 20 records that we're using to validate our testing rather than the provided master file. PALM will be providing these Delta files in a few months. | Using the master file will not be a realistic opportunity to test this process, since a delta file will be provided to agency after Go-Live. | No comment for this reporting period. |
| Open and Monitoring | 08/07/25 | | User Acceptance Testing | Online UAT Schedule Delay | Stable | 6 (Medium/High) | PALM is likely going to push Online UAT back a few weeks which may shorten the testing and bug resolution window for agencies. (72) | Monitoring at this time to see what the new start date will be for UAT. | FDOT won't have the proper testing and resolution time to be prepared and ready for Go-Live. | No comment for this reporting period. |
| Open and Monitoring | 10/24/24 | | Agency Business System | Project Costing - Manual Inputs | Decreasing | 6 (High/Medium) | PALM Technical - Project Costing Module | Florida PALM - will advise if it can be | Hiring staff will be more expensive than | No comment for this reporting period. |

| | | | | | | | | | | |
|---------------------|----------|--|-------------------------|--|------------|--|---|---|--|---------------------------------------|
| | | | | | | Manually adding additional data into Florida PALM for over 15,000 projects is not feasible. (51) | through Excel upload. | developing an interface. Average 70-90 updates a day. Manual entry may introduce errors. | | |
| Open and Monitoring | 12/12/24 | | User Acceptance Testing | Delayed Testing for Excel Uploads | Decreasing | 6 (High/Medium) | PALM Interfaces - Uploading data files through the use of Excel is critical for interface testing, yet there is no mechanism in place to test this in advance of our unit testing. (54) | Awaiting the ability to completely test the upload functionality. | Not having a way to test in advance removes the opportunity to work through errors or unknowns and be prepared for implementation. | No comment for this reporting period. |
| Open and Mitigating | 02/18/25 | | Interface | Interfaces and Data Processing Visibility | Decreasing | 6 (High/Medium) | PALM Technical - Unresolved questions and issues regarding the PALM interfaces, including details on the layouts and contents of the interfaces, limits the ability to remediate Agency Business Systems. (61) | Expect an unknown amount of rework, consider this in planning activities. | When the data interpretation or system expectations are incorrect, the agency's downstream systems may have errors in testing with PALM. | No comment for this reporting period. |
| Open and Mitigating | 04/24/25 | | User Acceptance Testing | Data Warehouse | Stable | 6 (High/Medium) | Not knowing the FLAIR data that will be part of the PALM's Data Warehouse can affect our mitigation planning for several risks. (63) | Request information from the PALM Readiness Coordinator, monitor the Knowledge Center and ask questions. | The ambiguity of the data contained in the Data Warehouse impacts the validity of some risk mitigations because we are assuming specific data will be available. | No comment for this reporting period. |
| Open and Mitigating | 06/12/25 | | Deployment/Cutover | FY Balances and Fund Availability | Stable | 6 (High/Medium) | From a business perspective, year-end processes like certified, carry forward, and others have changed massively, and the unknowns cannot be identified until they are fully worked through. (65) | Define scenarios and data variations for a complex and comprehensive testing strategy. | Balances may be incorrect, funds for payables may be insufficient. | No comment for this reporting period. |
| Open and Mitigating | 08/07/25 | | Interface | Encumbrances Not Linked to Chart of Accounts Fields Used | Stable | 6 (High/Medium) | New Risk, based on PALM Line Ref # 1289: Needs Encumbrance Balance available on POI001 (Outbound Encumbrance Extract) and IUI003 (Outbound Inter/Intra Unit Interface) interfaces at the Distribution/Line (lowest) level so that it is linked to the Chart of Accounts (COA) fields used. Agencies were advised to use reports, such as KKR018 in to achieve this, but it has the following issues: KKR018 doesn't have all pertinent information in it (just as a quick example, Organization is not on the output), so it really requires multiple reports to be run and chained together to track the balances (at minimum 3 reports would need to be chained together). Reports aren't easily digestible through automated processes, due to the non-tabular format, and chaining multiple ones together adds even more complexity. This risk could be alleviated if the Data Warehouse tracks the balances at a level that links it to the COA string. (73) | Monitoring, seeing if PALM will change course on this decision. | Will require complex coordination and manipulation of reports to resolve this risk without PALM changing course on this design. | No comment for this reporting period. |
| Open and Monitoring | 09/17/25 | | Interface | Inbound Interface file identification inconsistencies between input and output | Increasing | 6 (High/Medium) | Process IDs on the files in the archive folder match for the .log and .err files but differ from the Process IDs on the .txt (input) files. The .log (and .err) files also do not match the .txt files within the archive folder. This was evident in AMI006 and other interfaces as of 9/17/25. The lack of correlating information makes it difficult or impossible to match data sent to PALM and resulting processing information. This could cause significant maintenance and resolution handling issues resulting in additional work, more PALM-Agency technical involvement, and critical delays on transaction processing. (89) | Monitor, this will only be a problem if the agency sends multiple of the same file in one day, or if PALM processes multiple of the same file for the agency in one day. If this occurs the error files send back by PALM will not be able to be synced up to the files that were sent by the agency. Not expected to experience this issue much, if at all, but it will require manual action to go through the logs if it does occur. | Will require agency resources to go through files and logs manually to sync them, which will take time and effort to do. | No comment for this reporting period. |
| Open and Mitigating | 07/22/21 | | User Acceptance Testing | PALM Responses for Detail Information | Decreasing | 4 (Medium/Medium) | PALM Response - FDOT not receiving clear answers from Florida PALM in a | Continue to have our open/new questions as part of our PALM Touchpoint meetings, | Not having information to understand the interoperations of Florida PALM will lead | No comment for this reporting period. |

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|---------------------|----------|--|--------------------------------|---|------------|-------------------|---|---|--|---------------------------------------|
| | | | | | | | increase the duration to perform the remediation. Responses are marked as Completed when the question may not be answered. (15) | Readiness Coordination between meetings if we are blocked.. | to complete the incorrect remediation of systems. | |
| Open and Mitigating | 02/06/25 | | Role Mapping | Roles Required | Stable | 4 (Medium/Medium) | PALM Functionality - There is a concern that more PALM user roles will be added in the future before go-live. If additions are not communicated timely there is a risk going forward that some roles may not be captured in AARF/SailPoint right away, delaying our ability to set up user roles. (62) | 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. | Additional rework is required, and limitations for users' access. | No comment for this reporting period. |
| Open and Mitigating | 08/12/25 | | Interface | Inbound/Outbound Payment Linking | Stable | 4 (Medium/Medium) | No unique identifier to link outbound payments from EED to inbound confirmations from PALM. Current Limitation: PALM generates journal IDs post-processing, making it impossible to pre-link. (75) | Potential Work Around: Use Supplier ID + Invoice ID as a composite key. Consider populating the document number field in the outbound voucher line with a custom tracking ID. Use line and distribution line numbers to increase granularity. Be cautious: repeated document numbers across multiple distribution lines may reduce uniqueness. Possibility of duplicate payments, we won't know what happened to payments if we don't get a successful acknowledgment from PALM, not only related to EED. | Will require some sort of workaround by the agency to link outbound payments from Agency Business System (EED) to inbound confirmations from PALM. | No comment for this reporting period. |
| Open and Monitoring | 09/25/25 | | Conversion/Configuration | FLIPS - Conversion Complexity | Increasing | 4 (Medium/Medium) | Multiple active supplier accounts with different remittance addresses may be difficult to convert into a single supplier record, leading to possible errors or loss of information. Missing conversion records for suppliers with multiple active names may result in incomplete or inaccurate data migration. (85) | Conversion is occurring now, once comparison has been completed agency will sample and compare to internal records for conversion. | Will require agency resources to go through supplier accounts and analyze and research which accounts to use in the case of duplicates | No comment for this reporting period. |
| Open and Mitigating | 07/22/21 | | Staffing/Resource Availability | Funding to Completion | Stable | 3 (High/Low) | PALM Funding - Allocations may not be available through to completion for all systems. (6) | Document program funding requirements and communicate with FDOT leadership, the Governor's office, and House/Senate staff. | Unable to remediate and test systems within the timeline, and the Florida PALM implementation may not be successful. | No comment for this reporting period. |
| Open and Mitigating | 12/12/24 | | Conversion/Configuration | Mock Conversion | Decreasing | 3 (High/Low) | PALM Data - The Mock Conversion is problematic, having conversion errors that are inaccurate. (56) | Continue to collaborate with PALM to work through the process and find a pattern to help identify the problem points. | Some of the data conversions may be inaccurate causing erroneous processing or failure and impacting the goal of successful UAT. | No comment for this reporting period. |
| Open and Monitoring | 09/23/25 | | Interface | Interfaces lacking data considered as testing complete. | Stable | 3 (High/Low) | GLI002 contains some records from the current PALM/CMS productions environment that are missing some chart of account values. The records will be reclassified and the missing chartfields will be present in UAT Full (Mock 4 data). - PALM TC. A similar issue exists with PCI001 where some portions are pending. (90) | Monitor and stress for contingency plans: Planning to re-test at a future date when additional testing cycles, such as UAT full, are available. | Will require agency to retest specific interfaces at a later time (outside of the intended phase) once PALM has completed interface design to ensure correct functionality again | No comment for this reporting period. |
| Open and Monitoring | 05/09/24 | | User Acceptance Testing | Knowledge Center Change Identification | Decreasing | 2 (Medium/Low) | PALM Technical - Knowledge Center does not have version history on what was changed. It is a manual compare effort. This would require agencies to check each field in every interface to implement technical changes and some changes may be missed. (27) | Requested the Readiness Coordinator for additional communications when there are updates to the Knowledge Center, and what was updated. | Missing essential PALM changes for the remediation work. | No comment for this reporting period. |

| FDOT Issues | | | | | | | | | |
|-------------|-------------|-------------|------------------------|-------------------------|---------------------|-------------------------|-----------------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 03/05/25 | | Critical - Impacts the | User Acceptance Testing | No UAT for Year-end | In the PALM timeline, a | Assessing how we will | 04/01/26 | No comments for this reporting period. |

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|------|----------|--|--|--------------------------------|------------------------------------|--|--|----------|--|
| | | | | | | scenario will not be replicated in the PALM UAT phase. The parallel work stream with year-end is a major increase in complexity for PALM Go-Live. Half of the functionality in the old system and half in the new PALM system. (19) | Go-Live and year-end tasks, a gargantuan effort that would involve a number of resources already at capacity. People and computer processing resources. | | |
| Open | 05/09/24 | | High - Impacts the ability to process transactions | Staffing/Resource Availability | Mainframe capacity | FDOT - Low on mainframe available capacity and space to allocate for separate PALM environments. (6) | 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 | No comments for this reporting period. |
| Open | 06/13/24 | | High - Impacts the ability to process transactions | Interface | Interfaces Continue to Change | PALM Interfaces – Interfaces continue to change and the documentation is incomplete in some areas. This impacts our design, remediation, and integration with our systems. And any updates to the interface structure requires the agency to restart testing and resets testing progress up to that point. (10) | Continue to convey the importance to PALM Readiness Coordinator during Touchpoint meetings. | 08/01/25 | No comments for this reporting period. |
| Open | 06/13/24 | | High - Impacts the ability to process transactions | Staffing/Resource Availability | Limited SMEs | FDOT - SME Resources limited for business processes and the technical knowledge experts are overallocated. (12) | Monitor allocations closely and identify tasks that may be accomplished by another resource. Streamline communications. Set Priorities and work arounds. Escalate to management when necessary. | 07/01/26 | No comments for this reporting period. |
| Open | 09/16/24 | | High - Impacts the ability to process transactions | Interface | Interface Data Relationships | PALM Interfaces - Cannot provide ERD's or DDL for the interface files reduces the understanding of the data relationships. There is insufficient detail on parent/child/sibling, one:one, or one:many, relationships, or optional record types. There is a need for ERD diagrams to answer these questions for remediation efforts. (15) | Reach out to PALM regularly for details. Work with PALM to articulate the need and offer examples and communicate how it impacts us, particularly in the way we adhere to data integrity at the database level. | 08/01/25 | No comments for this reporting period. |
| Open | 10/30/24 | | High - Impacts the ability to process transactions | Interface | Need Interface Error Report | PALM Interfaces - Submission feedback: In the Interface layouts, the tab containing the feedback the agencies will receive after file processing was removed. This information is necessary to know of successful entries, or which ones had errors and the cause; need the format/layout and definition of feedback we will receive. (17) | Raise to the Technical Coordinator. Run error report next day, soft errors. We do not know how we will receive feedback on the fatal errors. Continue to work with PALM and by August we expect to have more information. | 08/01/25 | No comments for this reporting period. |
| Open | 12/12/24 | | High - Impacts the ability to process transactions | Agency Business System | Functionality Gap | FDOT Applications - Switching from the FLAIR transactions to the internal PALM functionality is considerably different for our internal systems. (16.b) | Business processes, functionality, and data mapping is progressing, and once we are in UAT we will reassess any gaps, the impact and mitigation. | 07/01/26 | No comments for this reporting period. |
| Open | 12/12/24 | | High - Impacts the ability to process transactions | Interface | Sample Data Scenarios | PALM Technical - The sample data for the interface files is standalone and does not represent the complete set of transactions. Without data continuity examples that support workflow scenarios the accuracy of the internal edits and quality checks may be incorrectly assessed. (18) | PALM advised that we will not receive sample data. As an alternative we are creating test data to represent the full scenarios. | 08/01/25 | No comments for this reporting period. |
| Open | 06/12/25 | | High - Impacts the ability to process transactions | Staffing/Resource Availability | RW Tasks expanded after they start | The Florida PALM Readiness Work tasks are being expanded beyond the original description, often after the tasks' start date and without extending the dates that the RW tasks are to be completed. For example, the requirements for | Request a longer lead time before the task start date. Request the full scope of the task and instructions when the task is added. | 12/31/25 | No comments for this reporting period. |

| | | | | | | | | |
|--------|----------|----------|--|-------------------------|--|---|----------|--|
| | | | | | configuration have had ongoing changes, and new tasks are being added with short notice. (21) | | | |
| Closed | 08/06/25 | 08/08/25 | High - Impacts the ability to communicate with PALM's MFT server from the FDOT Launch Pad server due to connection blockers (i.e. whitelisting)*. (22) | API Connection Block | Not able to communicate with PALM's MFT server from the FDOT Launch Pad server due to connection blockers (i.e. whitelisting)*. (22) | Currently have a workaround, but this is unsustainable for the purposes of UAT. Raised the issue to PALM Staff and attempting to work with technical staff to resolve the connection issue. Need to resolve before Full UAT. | 12/01/25 | Opened and closed this reporting period. |
| Open | 09/15/25 | | High - Impacts the ability to communicate with PALM's MFT server from the FDOT Launch Pad server due to connection blockers (i.e. whitelisting)*. (22) | Interface | Delay with Cycle 2 Interface Testing Results | Interface Cycle 2 Testing Responses are taking 2-3 weeks to return to the agency. These greatly reducing the amount of time for the agency to make changes within the Cycle 2 Testing Schedule and putting our successful completion of testing in jeopardy. (23) | 01/15/26 | No comments for this reporting period. |
| Open | 10/01/25 | | High - Impacts the ability to communicate with PALM's MFT server from the FDOT Launch Pad server due to connection blockers (i.e. whitelisting)*. (22) | Interface | Interface Dependencies causing delays in System Remediation | Testing paused by PALM for GLI-006 and API-002, this affects the agencies ability to test the outbound interfaces GLI-051 and API-031. (24) | 12/01/25 | No comments for this reporting period. |
| Open | 10/16/25 | | High - Impacts the ability to communicate with PALM's MFT server from the FDOT Launch Pad server due to connection blockers (i.e. whitelisting)*. (22) | Business Process Change | No Year-End Functionality in PALM Design | No year-end processes or functionality have been communicated to exist in the design for PALM. Year-end processes are important for FDOT's internal applications and processes. (25) | 02/16/26 | No comments for this reporting period. |

| FDOT Assumptions | | | | | |
|-------------------------------|--|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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. (1) | Logged | 06/30/23 | FDOT Florida PALM End Users FDOT Application Owners | No comments for this reporting period. |
| Processes | FPST work efforts classified as operations and maintenance (O&M) will follow the established standards for O&M activities. (5) | Logged | 06/30/23 | FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers | No comments for this reporting period. |
| 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. (6) | Logged | 06/30/23 | Executive FPST Program Sponsors Chief Information Officer | No comments for this reporting period. |
| 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. (8) | Logged | 06/30/23 | Executive FPST Program Sponsors | No comments for this reporting period. |
| Technology | FDOT has total dependencies on the PALM Solution Design deliverables. (10) | Logged | 06/30/23 | FDOT Florida PALM Agency Liaisons FPST Program Managers | No comments for this reporting period. |
| 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. (11) | Logged | 06/30/23 | Executive FPST Program Sponsors | No comments for this reporting period. |
| Technology | Excel spreadsheet uploads will be entered by business users, and the process will be simple and function smoothly. (13) | Logged | 02/20/24 | FDOT End Users | No comments for this reporting period. |
| 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 | No comments for this reporting period. |
| 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. (18) | Logged | 05/17/24 | FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Business Owners | No comments for this reporting period. |
| Technology | MFMP - System integration between MFMP and PALM will not introduce incompatibility with FDOT. (19) | Logged | 06/19/24 | FDOT Procurement and Payments | No comments for this reporting period. |
| Technology | People First - System integration between People First and PALM will not introduce incompatibility with FDOT. (20) | Logged | 06/19/24 | FDOT Payroll | No comments for this reporting period. |
| 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.) (22) | Logged | 10/01/24 | FPST Program Managers FDOT Business Owners | No comments for this reporting period. |
| Data | PALM Data Warehouse and/or PALM Reports will provide the necessary information that our systems and processes require to perform core functionality. (23) | Logged | 04/24/25 | FPST Program Managers FDOT Business Owners FDOT End Users | No comments for this reporting period. |
| Data | Testing during Cycle 3 will be comprehensive and inclusive of our business scenarios, volume testing, and error conditions to assess how failures are handled. Cycle 2 testing is primarily a connectivity test, but some error records can still be submitted. (24) | Logged | 06/27/25 | FPST Program Managers FDOT Business Owners | No comments for this reporting period. |
| Data | The Sub Funds functionality that will be used for FDOT local funds will need to be updated in the GL module and that should be comparable to the Funds used today. (25) | Logged | 07/10/25 | FPST Program Managers FDOT Business Owners | No comments for this reporting period. |
| Processes Data | Related to Decision 97, assuming that PALM is going to treat Asset ID in Production the same way that it is right now, first asset will be 11 zeros and a 1, second will be 11 zeros and a 2, and so on. If they don't, this will create a problem with how we're utilizing Journal ID and Asset ID (26) | Logged | 08/07/25 | Agency Business Systems that utilize AMI003. | No comments for this reporting period. |

| | | | | | |
|----------------|--|--------|----------|------------------------|--|
| Processes | The Retainage payout process will continue as it does today, through manual entry in the EED system, with no expected process changes. (28) | Logged | 09/15/25 | Accounts Payables | No comments for this reporting period. |
| Processes Data | It is assumed that PALM and FLIPS will eventually support multiple remittance addresses, though this is not currently available (29) | Logged | 09/15/25 | Supplier Records | No comments for this reporting period. |
| Data | From conversion interface, APC001, the "Legact Supplier ID" column for the first 120 records does not contain a leading "F" or an "S". (FEIN or SSN) We are interpreting these as FEIN (F). (31) | Logged | 10/10/25 | Supplier Records (TVI) | No comments for this reporting period. |
| Data | From conversion interface, APC001, values in the first 120 records for the "Legact Sequence Number" column only contain one- and two-digit numbers. We will pad these short values with leading zeroes. (32) | Logged | 10/10/25 | Supplier Records (TVI) | No comments for this reporting 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: *

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| FDOT Status Report Confirmation | | | |
|---------------------------------|----------------------|--|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Lisa Saliba | lisa.saliba@dot.state.fl.us | 01/14/26 |
| September - October 2025 | Lisa Saliba | lisa.saliba@dot.state.fl.us | 11/10/25 |
| July - August 2025 | Lisa Saliba | lisa.saliba@dot.state.fl.us | 09/09/25 |
| May - June 2025 | Lisa Saliba | lisa.saliba@dot.state.fl.us | 07/09/25 |
| 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


November - December 2025

Agency Sponsor

Lisa Mustain

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:


Score = 98.51%

Submitted On Time = 40

Submitted Late = 6

Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.39%


Submitted On Time = 73

Submitted Late = 11

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:


Score = 95.22%

Submitted Complete = 38

Submitted Incomplete = 0

Completed After Submission = 8

Other Task Completeness



Other Task Completeness:

Score = 89.11%

Submitted Complete = 41

Submitted Incomplete = 2

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 = 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/03/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/03/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/03/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/12/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 12/01/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/23/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IDP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/15/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 11/25/24 | | Agency Business System | 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) | This risk is the results of current meetings with DBPR | FGCC is trying to identify alternative methods to create upload interface/spreadsheet | This risk has lead to an issue | FGCC has made some progress with receiving our raw dat from DBPR |
| Open and Monitoring | 09/27/24 | | User Acceptance Testing | FGCC has not found definitive information | Increasing | 6 (Medium/High) | This risk was uncovered by reviewing the | FGCC requests clarification of the | Additional changes to process, procedures, | This is still an outstanding risk |

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| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|---|------------|-------------------|--|--|--|-----------------------------------|
| | | | | 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. | | | available information from knowledge center and multiple PALM workshops | interaction between each Enterprise system and PALM UAT environment during UAT | and testing plans | |
| Open and Monitoring | 06/28/24 | | Conversion/Configuration | 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. | Increasing | 4 (Medium/Medium) | This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops | 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 | Additional changes to our Go Live process and procedures will need to occur in order to identify and address any conversion errors that are identified after Go Live | This is still an outstanding risk |
| Open and Monitoring | 11/25/24 | | Interface | FGCC has found no definitive information about the schedule and availability of outbound interface files during UAT. | Increasing | 4 (Medium/Medium) | This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops | FGCC requests clarification that outbound interfaces files will be available on a daily scheduled basis | May impact the ability to complete Testing objectives and reconciliation during UAT | This is still an outstanding risk |
| Open and Monitoring | 09/25/24 | | 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 same errors may still occur during Go Live. | Increasing | 1 (Low/Low) | This risk was uncovered by reviewing the available information from knowledge center and multiple PALM workshops | FGCC requests that there be a few scheduled resets of initial conversion data | Adding additional steps to process and procedures to identify and address errors in cutover promptly | This is still an outstanding risk |

| FGCC Issues | | | | | | | | | | |
|-------------|-------------|-------------|------------------------|------------------------|---|---|---|-----------------------------------|------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period | Comments for Nov. - Dec. 2025 |
| Open | 05/12/25 | | Critical - Impacts the | Agency Business System | FGCC is unable to receive our source data from Versa (DBPR). | This has been an outstanding issue from the beginning | There is no action plan to resolve this issue. FGCC is trying to find alternative methods of getting our revenue data | 06/30/26 | | FGCC has made some progress in receiving our raw dat from DBPR |
| Open | 09/17/25 | | Critical - Impacts the | Interface | <p>Outbound interface GLI001 is unavailable to FGCC. Without the ability for FGCC to download any changes to the PALM COA values it prevents FGCC from developing Agency Business Systems as well as business process and procedures from ensuring that proper COA coding is used when creating and verifying any inbound interfaces and spreadsheets. In addition, FGCC is limited in its ability to develop process and procedures to validate proper coding on any manual transaction prior to direct input into PALM.</p> <p>This outbound interface is not a financial wave interface. GLI001 is a CMS wave interface that has been in production for years.</p> <p>This is not an issue for PALM UAT as the PALM project has made the current COA values available via download from the Knowledge Center for testing and mock conversion purposes. However, these stop gap measures will not continue to be available as we approach Go Live or after Go Live. FGCC is completely blocked from developing automated scheduled jobs to utilize GLI001 in order to maintain accurate PALM COA values within Agency Business Systems. Inbound Interface/Spreadsheet</p> | This issue has been identified during interface development and testing | FGCC requests that DFS provide this production outbound interface file to FGCC as soon as possible | 11/30/25 | | This is still a critical issue |

| | | | | | | | | | |
|------|----------|--|----------------------|-------------------------|--|---|--|----------|------------------------------------|
| | | | | | files, and other agency business processes. | | | | |
| Open | 09/05/25 | | High - Impacts the a | User Acceptance Testing | <p>The Knowledge Center business process screen shots, descriptions, and explanations tend to be incomplete. This coupled with the delay in access to UAT environment impacts the ability to verify and validate interface file layouts, developing updated agency business processes, and finalizing agency system remediation.</p> <p>For example, when you go to the knowledge center for Acquire and Setup Assets 40.1 there are 4 sub process. 40.1.2 Online Asset Add is described as "creates individual asset records from details through direct input in Asset Management (AM)." This page contains zero screen shots and zero instructions for how an Agency AM Asset Processor would input anything. Under 40.1.1 Import Asset Add is intended to describe the import (inbound interface/spreadsheet upload) process. This does have a few screen shots. The screen shots show that the asset module has 6 tabs (general, maintenance, acquisition, location, license, supplemental). However, the knowledge center only provides a screen shot of two of these tabs and therefore the agency can only guess as to what is one the other tabs.</p> | This issue has been identified during interface development and testing | There is no action plan to resolve this issue. FGCC requests that PALM update the knowledge center or provide the agencies access to additional PALM screen shots until access to UAT is granted | 06/30/26 | This is still an outstanding issue |
| Open | 09/09/25 | | High - Impacts the a | User Acceptance Testing | <p>The Knowledge Center reports sections appears to be out of date or in some case incorrect.</p> <p>There are multiple reports within the General Ledger Module that appear to be incorrect because they include a column for GAAFR which is a FLAIR data element that has been replaced and does not exist in PALM. A few examples are GLR085, GLR112, and GLR115.</p> <p>Additionally, there are numerous reports that only provide a message for "more information will be available soon" (GLR132, GLR133, GLR136, GLR139, GLR140, etc.)</p> <p>As we prepare out testing plan for UAT as well as our training plans we are unable to identify what can be tested and what will be available to users and agency business systems. Currently, it has been explained that if some data is not available in outbound interfaces then it would be available via the reporting modules. We are unable to complete these processes and plans without knowing what information may be available.</p> | This issue has been identified during interface development and testing | There is no plan of action to resolve this. FGCC requests that PALM update the Knowledge Center Reporting information | 06/30/26 | This is still an outstanding issue |
| Open | 05/12/25 | | Low - All impacts no | Interface | <p>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</p> | This was uncovered during the interface approval process | 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. | 06/30/26 | This is still an outstanding issue |

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|--|--|--|--|--|--|--|--|--|
| | | | | | process or convert 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. | | | |
|--|--|--|--|--|--|--|--|--|

| FGCC Assumptions | | | | | |
|-------------------------------|---|--------|------------------------|--|-------------------------------------|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Confirmed for Nov. - Dec. 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 | 05/01/25 | Agency Business Sytems | <input checked="" type="checkbox"/> |
| Technology Data | FGCC will not have a Versa Replacement system in place prior to PALM Go Live | Logged | 05/01/25 | Agency Business Sytems | <input checked="" type="checkbox"/> |
| 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 | 05/01/25 | Agency Business Sytems | <input checked="" type="checkbox"/> |

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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| FGCC Status Report Confirmation | | | |
|---------------------------------|----------------------|--|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Lisa Mustain | lisa.mustain@flgaming.gov | 01/15/26 |
| September - October 2025 | Lisa Mustain | lisa.mustain@flgaming.gov | 11/12/25 |
| July - August 2025 | Lisa Mustain | lisa.mustain@flgaming.gov | 09/09/25 |
| May - June 2025 | Lisa Mustain | lisa.mustain@flgaming.gov | 06/23/25 |
| March - April 2025 | Lisa Mustain | lisa.mustain@flgaming.gov | 05/06/25 |

Helpful Links

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

FLHSMV 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

November - December 2025

Agency Sponsor

Steve Burch

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 98.08%

- Submitted On Time = 45
- Submitted Late = 6
- Pending Submission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 97.88%

- Submitted On Time = 74
- Submitted Late = 8
- Pending Submission = 2

Direct Impact Task Completeness



Direct Task Completeness:

Score = 92.94%

- Submitted Complete = 39
- Submitted Incomplete = 0
- Completed After Submission = 12

Other Task Completeness



Other Task Completeness:

Score = 84.55%

- Submitted Complete = 41
- Submitted Incomplete = 2
- Completed After Submission = 12

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 = 2
- 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 |
|----------------|------------------------------|---------|--|-------------------------|-----------------------|--|------------------------|--|-------------------------------------|----------------------------------|
| | 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. | Task Closed - Submission Incomplete | |
| 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 Agency 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 | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | The agency has compiled agency user stories for unique processes, and all PALM activities published as of 12/19/25 that apply to the agency. The team reviewed and created 100% user stories for the project-recommended activities worksheet released on 7/10/25. The agency is using Option 3 in Task 574, and will submit Excel files containing agency user stories to task 574. | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/18/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/06/25 | Ready to mark complete as of 10/27 meeting | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/22/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/13/26 | | | 01/13/26 |

| | | | | | | | | | | |
|----------|-----------|-----|--|----------|----------|-------------------|--|--|--|--|
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 99/99/99 | | | | | |
| N/A | Processes | 602 | Update Agency Business Process Documentation | 01/12/26 | 06/26/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 12/20/24 | | User Acceptance Testing | Supplier ID | Stable | 9 (High/High) | Final Supplier ID will be provided by PALM before Go Live. Risk to agency is in not receiving finalized Supplier IDs until or just before go live. In order to successfully match supplier IDs provided by PALM, the FEID is critically needed by FLHSMV, confirmed by Data Manager. The agency will re-examine manual processing time required to match Supplier IDs when Mock 4 data is received (approximately January 2026). | 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. Test Supplier IDs were provided in interim to support UAT testing. | The ability to match the Supplier ID (throughout multiple mock conversions) period to agency data would be quite taxing and require multiple, additional hours that are not currently included in the plan budget. | Risk is still high, and the agency will continue to work with the supplier IDs received for Mock Conversion 4 and Final Supplier ID. |
| Open and Monitoring | 12/16/25 | | Interface | Supplier ID - Cycle 3 Interface Testing | Stable | 6 (Medium/High) | Complete supplier ID tables will not be available for test during UAT for API and IUI interfaces. Only select supplier IDs will be available for testing in February. | The agency will select which supplier IDs to test with each interface. The supplier IDs will vary (i.e., counties, agencies, other vendors, etc). | Agency may not be able to test all supplier IDs during interface cycle 3 testing / End to End testing. | The agency is continuing to monitor this risk. |
| Open and Monitoring | 04/14/25 | | Interface | Interface Error File and Summary Logs | Stable | 6 (High/Medium) | Interface Error Log layouts (multiple) have not been provided to HSMV. | HSMV has tested Error Files for API002 from PALM (during interface testing). While PALM did provide additional fields in the error logs for easier identification, HSMV hasnt been able to complete our automation process as we had with FLAIR. This processing is still in development and will be better tested in full UAT. | 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 the errors may be delayed in UAT. | Agency was able to test error logs for spreadsheet uploads during pre-UAT; however, staff will need to test interface error logs during full UAT in February. |
| Open and Mitigating | 12/20/24 | | Staffing/Resource Availa | Resources - Accounting (training / up-skilling for PALM) | Stable | 4 (Medium/Medium) | The agency has identified a need to cross-train accounting staff, and allied teams, to learn new / daily business processes in addition to testing the PALM system and learning adjacent systems. | HSMV is actively working to cross-train existing staff, and to provide Florida PALM training and job aides. | Training challenges could impact successful PALM implementation and go-live experience during a critical period. | The agency is continuing to monitor this risk. |
| Open and Monitoring | 06/18/25 | | Conversion/Configurator | Mock 4 Conversion Errors | Stable | 4 (Medium/Medium) | The agency completed Mock 3 data tasks. Overall, conversion results were improved from Mock 2 to Mock 3. | HSMV will review Mock 4 conversion errors and correct as soon as possible. (January 2026 ETA) | The agency continues to consider staff burnout due to daily job duties, UAT participation, and cleanup of Mock 4 conversion files. | The agency is continuing to monitor this risk. |
| Open and Mitigating | 09/01/23 | | Agency Business System | FAME application | Stable | 2 (Medium/Low) | HSMV processes large volume of data through its FAME application (Revenue Distribution, WEX, Goodyear, PRIDE, etc.). It is imperative that the interfaces and reports work properly when tested. | HSMV is working on developing multiple interfaces and has begun developing reports. Changes to the payment batch jobs are in progress. | The agency could have impacts to readiness for PALM go-live if the FAME application is not remediated. | As of 01/09/2026, HSMV has completed testing for five interfaces, three interfaces are in progress, and one interface (AMI002) is scheduled for a test date of January 20, 2026. |

| FLHSMV Issues | | | | | | | | | | |
|---------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| FLHSMV Assumptions | | | | | | | | | | |
|-------------------------------|--|--|--|--|--------|------------------------|--|--|---|--|
| Critical Operational Elements | Assumption | | | | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | | Reporting Period Comments for Nov. - Dec. 2025 | |
| Data | Florida PALM will provide similar functionality as FLAIR@HSMV | | | | Logged | 08/31/23 | Impacted Stakeholders include all end users. | | Agency is continuing to monitor this assumption | |
| 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 pertain to FAME. Impacted Stakeholders include All End Users and potentially other agencies. | | Agency is continuing to monitor this assumption | |

Agency Sponsor Confirmation

FLHSMV Status Based 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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| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-----------------------|--------------------|
| November - December 2025 | Steve Burch | steveburch@flhsmv.gov | 01/13/26 |
| September - October 2025 | Steve Burch | steveburch@flhsmv.gov | 11/07/25 |
| July - August 2025 | Steve Burch | steveburch@flhsmv.gov | 09/09/25 |
| May - June 2025 | Steve Burch | steveburch@flhsmv.gov | 07/08/25 |
| March - April 2025 | Steve Burch | steveburch@flhsmv.gov | 05/12/25 |
| January - February 2025 | Steve Burch | steveburch@flhsmv.gov | 03/07/25 |

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FSDB Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Tracie Snow

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 = 94.89%

- Submitted On Time = 36
- Submitted Late = 8
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 75.33%

- Submitted Complete = 25
- Submitted Incomplete = 6
- Completed After Submission = 14

Other Task Completeness:

Score = 83.09%

- Submitted Complete = 36
- Submitted Incomplete = 3
- Completed After Submission = 16

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 = 2
- Duplicate Filled Role = 12
- 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 09/12/25 | Stories uploaded | | 12/19/25 |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/19/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/07/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/07/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/16/26 | | | 01/16/26 |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

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.

FSDB Risks

| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
|---------------------|-------------|-------------|-------------------------|-----------------|------------|---------------|---|---|---|---|
| Open and Monitoring | 06/02/25 | | Conversion/Configurator | Local fund loss | Increasing | 9 (High/High) | Local funds hold over \$36.0 million dollars in donations. PALM has proposed eliminating these local funds which will remove them from the CAFR. and Agency GL. | DFS A&A proposes to combine local funds into the GR funds as a solution, separated by a unique speed key. | Commingling of funds for different purposes is not a good idea as proposed. Maintaining a local fund apart from other funds is the real solution. | Commingling of funds is never a good idea, we need to keep major funds separated. |

| | | | | | | | | | |
|---------------------|----------|--|--|------------|-----------------|--|---|---|--|
| Open and Monitoring | 11/12/25 | | Conversion/Configurator Missing Admin Fund | Increasing | 9 (High/High) | Admin Fund 4890-20-2-021007 is missing from dropdown tabs | We will need the Admin Fund to be present in PALM to be able to transfer between State funds. | Loss of the Admin fund will make temporary inter State fund transfers difficult to track. | Day to day operations will be impacted. |
| Open and Monitoring | 01/30/24 | | Conversion/Configurator Loss of EO field | Stable | 6 (Medium/High) | Mitigation seems unlikely since PALM will not have an EO field that is used for grant reporting. | None as of yet | Loss of consistent grant reporting | No solution yet. |
| Open and Monitoring | 01/30/24 | | Conversion/Configurator Loss of on demand payments | Stable | 6 (Medium/High) | It is unknown what can take place of on demand payments | None as of yet | Inability to create on demand payments | It appears some progress has been made in addressing this issue. |

FSDB Issues

| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
|--------|-------------|-------------|-----------------------|-------------------------|--|---|--|-----------------------------------|--|
| Open | 06/02/25 | | High - Impacts the at | Conversion/Configurator | Local fund | PALM proposes to eliminate local fund 20-8-082109, 20-8-84301, and 71-8-084209 which collectively hold over \$33.3 million dollars in Agency managed donations owned by the State. These local funds have been authorized and in use for well over 20 years and are needed to manage received donations. We expect them to be active in PALM. | PALM must convert these funds when converting from FLAIR to avoid the loss of \$33.3 million dollars from State assets not being reported in the CAFR. | During conversion | No solution yet |
| Open | 01/30/24 | | High - Impacts the at | Conversion/Configurator | Loss of OCA/EO fields | Use of FLAIR OCA/EO fields are more effective than speedkeys and help collect data in a more cohesive manner. | None likely | None planned | No change |
| Open | 01/30/24 | | High - Impacts the at | Conversion/Configurator | Loss of on demand payments | It is unknown what can take place of on demand payments | No replacement evident | None planned | No change |
| Open | 11/12/25 | | High - Impacts the at | Conversion/Configurator | Administrative fund is missing in workbooks. | DFS directed us to use the Admin fund to hold the local funds dollars during conversion | Absent the Admin fund, we have no place to co-locate the Endowment funds in during conversion. | None planned | No Admin fund yet available |
| Open | 10/01/25 | | High - Impacts the at | Conversion/Configurator | Grant fields are missing from FACTS extract adn cannot be updated. | Available grant fields in PALM are not current resulting is most missing that are already in FACTS. | RC is pursuing PALM tech staff on uploading the most current data extract from FACTS. | TBD | In progress |

FSDB Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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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FSDB Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|----------------------|-------------------|--------------------|
| November - December 2025 | Tracie C. Snow | snowt@fsdbk12.org | 01/16/26 |
| September - October 2025 | Tracie C. Snow | snowt@fsdbk12.org | 11/10/25 |
| July - August 2025 | Tracie C. Snow | snowt@fsdbk12.org | 09/03/25 |
| May - June 2025 | Tracie C. Snow | snowt@fsdbk12.org | 07/10/25 |
| March - April 2025 | Tracie C. Snow | snowt@fsdbk12.org | 05/28/25 |
| January - February 2025 | Tracie C. Snow | snowt@fsdbk12.org | 03/14/25 |

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FWC Status Report Dashboard

Reporting Period

November - December 2025

Agency Sponsor

Jessica Crawford

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 = 98.4%

Submitted On Time = 43

Submitted Late = 6

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 91.46%

Submitted Complete = 37

Submitted Incomplete = 3

Completed After Submission = 8

Other Task Completeness:

Score = 96.32%

Submitted Complete = 54

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:

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

Unique Filled Role = 6

Duplicate Filled Role = 8

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 10/29/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/19/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/19/25 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/05/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/12/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 11/06/23 | | Staffing/Resource Availability | Limited subject matter expert (SME) availability | Increasing | 6 (Medium/High) | Our agency is short-staffed, therefore, we have limited access to SMEs | 1. Identify any planned schedule issues 2. Obtain and include backup resources in activities | If SMEs aren't available to learn and test the system, we will have issues once we go live. | No new comments |
| Open and Monitoring | 11/06/23 | | Staffing/Resource Availability | Team Attrition | Stable | 6 (Medium/High) | People come and go | 1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards | If team members leave, they take all their knowledge with them, making it that much harder for whoever is left once we go live. | No new comments |
| Open and Monitoring | 11/06/23 | | Training | Resistance to change | Stable | 4 (Medium/Medium) | We have a workforce that is familiar with current processes, any type of change, causes fear amongst the team members. | 1. Include impacted stakeholders early in the process and often 2. Educate the reason for the change and impact | If folks don't get on board with the changes, we will have issues once we go live | No new comments |

| | | | | | | | | | | |
|---------------------|----------|--|-------------------------|--|--------|-------------------|--|--|---|-----------------|
| Open and Monitoring | 08/09/24 | | 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) | Agencies are very dependent upon the enterprise systems, since Florida PALM is not managing a communication plan as part of the process, agencies are left hoping there is communication going to occur. | 1. FWC Analysis, design, and system remediation is being based on calculated assumptions | If we learn of enterprise changes too late in the process, we will be at risk for not being able to perform the needed activities within those applications at go live. | No new comments |
| Open and Monitoring | 11/06/23 | | Interface | Not all PALM interfaces are fully designed/documented, additionally currently defined interfaces are subject to change. | Stable | 1 (Low/Low) | Since Florida PALM is using an agile development approach interfaces aren't fully designed and documented prior to agencies needing to do development/remediation activities | 1. FWC Analysis and design is being based on calculated assumptions | If interfaces change too late in the game, we will be at risk for not being able to process incoming files once we go live. | No new comments |

| FWC Issues | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| | | | | | | | | | |

| FWC Assumptions | | | | | |
|-------------------------------|------------|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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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| FWC Status Report Confirmation | | | |
|--------------------------------|----------------------|----------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Jessica Crawford | jessica.crawford@myfwc.com | 01/12/26 |
| September - October 2025 | Jessica Crawford | jessica.crawford@myfwc.com | 11/07/25 |
| July - August 2025 | Jessica Crawford | jessica.crawford@myfwc.com | 09/08/25 |
| May - June 2025 | Jessica Crawford | jessica.crawford@myfwc.com | 07/07/25 |
| 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

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[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

November - December 2025

Agency Sponsor

Alton L. "Rip" Colvin, Jr.

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 93.8%

- Submitted On Time = 41
- Submitted Late = 8
- Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 80.82%

- Submitted Complete = 29
- Submitted Incomplete = 5
- Completed After Submission = 15

Other Task Completeness:

Score = 83.97%

- Submitted Complete = 34
- Submitted Incomplete = 2
- Completed After Submission = 22

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 | |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Task Closed - Submission Incomplete | | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Task Closed - Submission Incomplete | 11/17/25 | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/24/25 | | Submission Complete | | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | | Submission Complete | | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | Submission Complete | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | 01/12/26 | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | Submission Complete | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Monitoring | 04/30/25 | | Deployment/Cutover | Downtime during transition | Increasing | 3 (Low/High) | In the period between FLAIR sunseting and PALM go-live, JAC risks violation of prompt payment statutes, and anticipates significant transactional volume backlog and increased calls from vendors regarding payment | Monitor schedule and plan accordingly, constant communication with the JROs and vendors on the delay and timelines. | This will cause a significant disruption to the workflow as well as compliance and interest penalties owed to vendors. JAC will work through the backlog as quickly as possible. | Additional information / guidance from Project team prior to go-live is required for JAC to develop a mitigation strategy. |

| | | | | | | | | | | |
|---------------------|----------|--|------------------------|--|------------|--------------|---|--|---|---|
| Open and Monitoring | 05/12/25 | | Post Implementation | Transfer of FLAIR IW data to PALM DW fails. | Stable | 3 (High/Low) | <p>DW REQUIRES.</p> <p>The Florida PALM plan indicates that FLAIR IW data will be extracted and stored in PALM DW. If this process fails, the agency will be without historical data needed for reporting</p> | As of November 2025, we will monitor the risk and updates from the Florida PALM team related to DW. In the future, we may need a more robust plan. At this time, JAC does not have a viable mitigation plan to address the risk. | The agency would be unable to access data to be able to complete reports using historical data. The Risk would elevate to an issue. At this time, JAC does not have a viable response plan if this were to become an issue, however JAC would be required to develop a plan to store and maintain large amounts of revenue and expenditure transaction data, along with a reporting tool to meet future data requests & requirements. | Risk remains pending additional information from the Project. |
| Open and Monitoring | 05/09/25 | | Agency Business System | Business Management Operations System (BOMS) | Decreasing | 3 (High/Low) | JAC, and the Judicial Related Offices (JROs) JAC serves, utilize an external business system (BOMS) for core business functionality. BOMS requires substantial remediation efforts to meet PALM requirements, including system and process-based changes. | 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 of the system and associated processes. | If BOMS remediation is unsuccessful, substantial manual workarounds would need to be developed to continue core business operations across JAC and the JROs it serves. | As of January 2026, remediation of BOMS is progressing as expected. JAC is monitoring the progress on an ongoing basis. |

| JAC Issues | | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|------------------|-------------------------------|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period | Comments for Nov. - Dec. 2025 |
| | | | | | | | | | | |

| JAC Assumptions | | | | | | |
|----------------------------------|---|--------|------------------------|--|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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 | Confirmed for reporting period. | |
| People Processes Technology | JAC will receive requested funding throughout the duration of the PALM project lifecycle. | Logged | 05/09/25 | All JAC staff | Confirmed for reporting period. | |
| 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 | Confirmed for reporting period. | |
| People Processes Technology Data | JAC assumes the PALM schedule will be updated to reflect the delay in UAT and provide sufficient time (as much or more than previously scheduled) for UAT when the new schedule is published to Agencies. | Logged | 09/09/25 | All JAC staff | Confirmed for reporting 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.

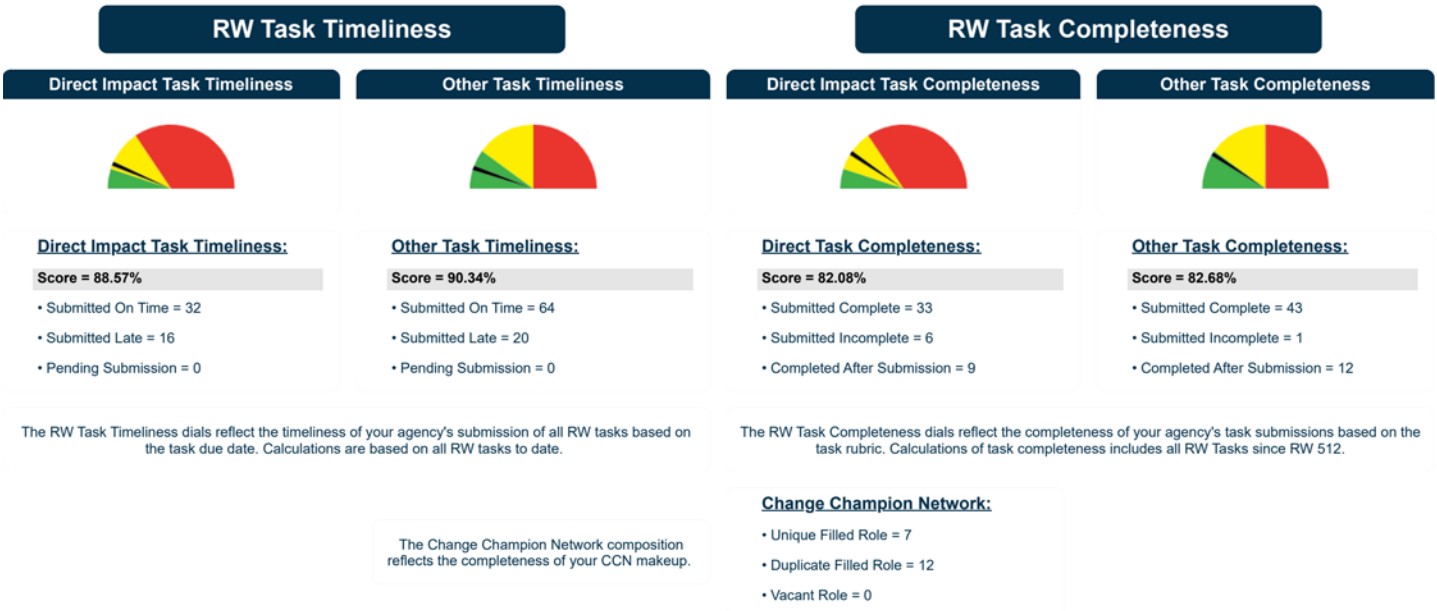
Agency Sponsor Name: *

☐ Confirm *

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| JAC Status Report Confirmation | | | |
|--------------------------------|----------------------|-----------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Alton L. Colvin, Jr. | rip.colvin@justiceadmin.org | 01/14/26 |
| September - October 2025 | Alton L. Colvin, Jr. | rip.colvin@justiceadmin.org | 11/10/25 |
| July - August 2025 | Alton L. Colvin, Jr. | rip.colvin@justiceadmin.org | 09/10/25 |
| May - June 2025 | Alton L. Colvin, Jr. | rip.colvin@justiceadmin.org | 07/10/25 |
| 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 |



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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | Submitted addendum 8/28/2025 | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/03/25 | Updated GL Workbooks: General Ledger Allocation, Organization | Task Closed - Submission Incomplete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/10/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/30/25 | The Monthly Progress Report was submitted 12/30/2025. For Cycle 2 Interface Testing, all interfaces are marked as complete by Florida PALM, however, there is a comment from LEG for PRI002 that there were errors and LEG is waiting for Florida PALM to resolve those errors. PRI005 and PRI006 are marked as Not Started on the LEG side but should be updated to complete to align and PRI007, which is an outbound, was sent to LEG recently and LEG has not completed testing on our side and the Cycle 2 sheet is locked and cannot be updated to include comments or statuses. | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | | | | | |

| LEG Risks | | | | | | | | | | |
|---------------------|-------------|-------------|------------------------|--|--------|---------------|---|--|---------------------------------|---|
| Status | Date Opened | Date Closed | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 10/28/24 | | Interface | EDR and Auditor General Data needs | Stable | 9 (High/High) | PALM must continue to provide EDR and Auditor General the data they need to support the Legislature | Continue to work through issue with partners | High | EDR and AG must have the same data that is used today to complete their daily work. |
| 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 | 3 (Low/High) | Current Legislative travel system vendor will not support PALM. New travel management system must be procured and operational in time for PALM Go-Live on July 1, 2026. | Continue to work through issue with partners | High | Working through the process to procure a new expense management/travel system. |
| 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 | 3 (Low/High) | Current Asset Management system vendor will not support PALM. New system must be procured and operational in time for PALM Go-Live on July 1, 2026. | Continue to work through issue with partners | Medium | Working through the process to procure a new Asset Management system. |

| LEG Issues | | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 | |
| | | | | | | | | | | |

| LEG Assumptions | | | | | | | Reporting Period Comments for Nov. - Dec. 2025 | | | |
|-------------------------------|---|--|--|--------|------------------------|--|---|--|--|--|
| Critical Operational Elements | Assumption | | | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | | | | |
| People | Will not lose project resources to competing priorities, retirements or other turnover. | | | Logged | 07/01/23 | Temporary impact to project | Staff has been hired to fill the vacancies that were a concern as it relates to Florida PALM, however, we will leave this as an assumption. | | | |

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

☐ Confirm *

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| LEG Status Report Confirmation | | | |
|--------------------------------|----------------------|--------------------------------|--------------------|
| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
| November - December 2025 | Heather Cleary | cleary.heather@leg.state.fl.us | 01/14/26 |
| September - October 2025 | Heather Cleary | cleary.heather@leg.state.fl.us | 11/10/25 |
| July - August 2025 | Heather Cleary | cleary.heather@leg.state.fl.us | 09/10/25 |
| May - June 2025 | Lee Boatwright | boatwright.lee@leg.state.fl.us | 07/07/25 |
| March - April 2025 | Lee Boatwright | boatwright.lee@leg.state.fl.us | 05/09/25 |

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PSC Status Report Dashboard

Reporting Period

November - December 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

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 94.88%

- Submitted On Time = 29
- Submitted Late = 11
- Pending Submission = 0

Other Task Timeliness:

Score = 97.09%

- Submitted On Time = 69
- Submitted Late = 13
- Pending 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.

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 84.15%

- Submitted Complete = 29
- Submitted Incomplete = 4
- Completed After Submission = 8

Other Task Completeness:

Score = 90.36%

- Submitted Complete = 42
- Submitted Incomplete = 1
- Completed After Submission = 13

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 = 2
- Duplicate Filled Role = 12
- 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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/08/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/17/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 01/06/26 | Still in progress of cleaning data. | Task Closed - Submission Incomplete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 10/16/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 09/29/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/06/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/25/25 | | Submission Complete | 11/25/25 |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/06/26 | | Submission Complete | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | Submission Complete | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
|---------------------|-------------|-------------|-------------------------|----------------|--------|----------------|------------|------------------------------------|---------------------------------|--|
| Open and Mitigating | 01/09/26 | | Conversion/Configurator | Data cleansing | Stable | 2 (Medium/Low) | - | Continue to cleanse data | Data may not load into FL APLM | No updates or change |

| PSC Issues | | | | | | | | | |
|------------|-------------|-------------|----------|------------------------|-------------|------------|-------------|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| | | | | | | | | | |

| PSC Assumptions | | | | | |
|-------------------------------|------------|--------|------------------------|--|--|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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: |
| November - December 2025 | Apryl Lynn | alynn@psc.state.fl.us | 01/14/26 |
| November - December 2025 | Apryl Lynn | alynn@psc.state.fl.us | 01/14/26 |
| September - October 2025 | Apryl Lynn | alynn@psc.state.fl.us | 11/06/25 |
| July - August 2025 | Apryl Lynn | alynn@psc.state.fl.us | 09/05/25 |
| May - June 2025 | Apryl Lynn | alynn@psc.state.fl.us | 07/10/25 |
| 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 |

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

SCS 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

November - December 2025

Agency Sponsor

Eric Maclure

RW Task Timeliness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Timeliness:

Score = 99.59%

Submitted On Time = 47

Submitted Late = 1

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness

Other Task Completeness

Direct Task Completeness:

Score = 86.81%

Submitted Complete = 31

Submitted Incomplete = 2

Completed After Submission = 14

Other Task Completeness:

Score = 90.36%

Submitted Complete = 43

Submitted Incomplete = 1

Completed After Submission = 12

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 |
| Indirect | Processes | 574 | Prepare Documentation for User Acceptance Testing | 06/02/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Direct | People | 573-B | Complete and Submit End User Role Mapping Worksheet. | 07/14/25 | 12/19/25 | 100% - Submitted | 12/19/25 | | Submission Complete | |
| Direct | Data | 661 | Update Conversion Field Mapping | 08/11/25 | 11/05/25 | 100% - Submitted | 11/04/25 | | Submission Complete | |
| Direct | Data | 662 | Submit Updated Configuration Workbooks | 08/11/25 | 11/05/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| Direct | Data | 587-A | Complete Data Cleansing Based on Mock Conversion 3 | 08/11/25 | 11/07/25 | 100% - Submitted | 11/05/25 | | Submission Complete | |
| N/A | N/A | 627 | Submit Bimonthly Agency Readiness Status Report | 11/03/25 | 11/10/25 | 100% - Submitted | 11/07/25 | | Submission Complete | |
| Indirect | N/A | 667 | Submit Monthly Progress Report - Testing | 11/03/25 | 11/25/25 | 100% - Submitted | 11/23/25 | | Submission Complete | 11/24/25 |
| Indirect | N/A | 668 | Submit Monthly Progress Report - Testing | 12/01/25 | 12/30/25 | 100% - Submitted | 12/22/25 | | Submission Complete | |
| Direct | Technology | 592 | Agency IdP SMEs Add End Users to Agency's Identity Provider | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | People | 688 | Update UAT Plan | 12/08/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| Indirect | N/A | 606 | Update Agency Readiness Certification #2 | 12/15/25 | 01/09/26 | 100% - Submitted | 01/09/26 | | | |
| N/A | N/A | 671 | Submit Bimonthly Agency Readiness Status Report | 12/29/25 | 01/14/26 | 100% - Submitted | 01/14/26 | | | |
| Indirect | N/A | 669 | Submit Monthly Progress Report - Testing | 01/05/26 | 01/30/26 | 50% - In Progress | | | | |
| Direct | Data | 597 | Complete Data Cleansing Based on Mock Conversion 4 | 01/12/26 | 03/13/26 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | People | 670 | Share Florida PALM Updates | 01/12/26 | 01/23/26 | 50% - In Progress | | | | |

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 | Primary Risk Category | Risk Title | Trend | Risk Rating | Background | Monitor/Mitigation Plan/Resolution | Impact if Risk Becomes an Issue | Reporting Period Comments for Nov. - Dec. 2025 |
| Open and Mitigating | 06/11/25 | | User Acceptance Testing | If SCS can not process end-to-end transactions at or above FLAIR transaction times, (i.e., invoice-to-warrant within 48 hours or procure-to-pay within 48 hours), SCS will not certify that the PALM system and Enterprise Partners are ready for SCS to activate | Increasing | 9 (High/High) | SCS has requested PALM to include formal UAT testing scenarios that exercises PALM processing times (singular) and Enterprise Partners (dual processing dependencies) | SCS has requested PALM to include formal "performance based" UAT test scenarios that includes multiple end-to-end transaction types that measure life-cycles timings in PALM and Enterprise Partners against what FLAIR and Enterprise Partners | SCS will not accept the PALM solution for go-live. | SCS has requested PALM to include formal "performance based" UAT test scenarios that includes multiple end-to-end transaction types that measure life-cycles timings in PALM and Enterprise Partners against what FLAIR and Enterprise Partners |

| | | | | | | | | | | |
|---------------------|----------|--|---------------------------|--|------------|-------------------|--|--|--|---|
| | | | | SCS to go live. | | | | achieve today. Service Level Agreement (SLA) targets need to be defined and achieved with UAT testing for SCS to accept the PALM and Enterprise Partner systems for go-live. | | achieve today. Service Level Agreement (SLA) targets need to be defined and achieved with UAT testing for SCS to accept the PALM and Enterprise Partner systems for go-live. |
| Open and Mitigating | 05/02/25 | | User Acceptance Testing | <p>If PALM is not fully operations in UAT, then SCS schedules, timelines, and delivery dates in SCS IMS will need to be delayed with dependencies adjusted.</p> <p>Depending on what PALM UAT functionality is delivered, SCS's will need to reassess which parts of our Financial, HR/Payroll, and Reporting operations PALM will be able to service. To ensure proper alignment is in place to operate in PALM throughout UAT and possibly Training and Production, SCS must perform additional analysis of our business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems to determine our SCS functional and technical operational models.</p> | Increasing | 6 (High/Medium) | Milestones missed, Schedules and Timelines have been extended | <p>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. Following up with PALM POC's and other Agency contact.</p> | SCS schedules, timelines, and delivery dates in SCS IMS will be delayed with increases in time and costs. | SCS is in contact with IV&V to have PALM communicate directly to all agencies their progress against plan on establish "control thresholds information" on a regular basis. Following up with PALM POC's and other Agency contacts |
| Open and Mitigating | 05/02/25 | | User Acceptance Testing | <p>If Enterprise Partner applications are not operational in UAT, then SCS schedules, timelines, and delivery dates in SCS IMS will need to be delayed with dependencies adjusted.</p> <p>Enterprise Partners are critical in processing SCS Financial, HR/Payroll, and Report distribution information.</p> <p>Depending on what functionality is delivered, SCS's will need to reassess which parts of our Financial, HR/Payroll, and Reporting operations PALM and Enterprise Partners will be able to service. To ensure proper alignment is in place to operate in PALM throughout UAT and possibly Training and Production, SCS must perform additional analysis of our business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems to determine our SCS functional and technical operational models..</p> | Increasing | 6 (High/Medium) | <p>PALM has encouraged Agencies to take on more responsibilities by directly engaging Enterprise Partners (EP). This approach can overwhelm EPs.</p> | <p>SCS is focusing on internal ABS testing and defining where Enterprise Partners can be leveraged. Also, communicating with external partners our requirements & expectations for successful integration support</p> <p>Continuing to reach out to Enterprise Partner (EP) POC, PALM POC's, and other Agency contacts. Attending EP workshops and demos as they are made available.</p> | SCS will not be able to process critical transactions end-to-end in PALM resulting in schedules, timelines, and delivery date delays. | <p>SCS has focused on internal ABS testing and defining where Enterprise Partners can be leveraged. Also, communicating with external partners our requirements & expectations for successful integration support</p> <p>Continuing to reach out to Enterprise Partner (EP) POC, PALM POC's, and other Agency contacts. Attending EP workshops and demos as they are made available."</p> |
| Open and Mitigating | 05/02/25 | | Staffing/Resource Availal | <p>If SCS does not receive supplemental funding as requested, then SCS's ability to migrate and transform to PALM Financials, HR/Payroll, and Reporting at go-live will be at risk.</p> <p>Receiving requested funds will allow SCS to properly prepare, migrate, and transition to PALM Financial, HR/Payroll, and Reporting operations within schedules, timelines, target delivery dates, and costs.</p> | Increasing | 6 (High/Medium) | SCS will submit supplemental funding request and justification to support additional SCS resources | Monitoring funding allocations | SCS's ability to migrate and transform to PALM Financials, HR/Payroll, and Reporting at go-live will be at risk. | Continues to monitor funding allocations |
| Open and Mitigating | 06/06/25 | | User Acceptance Testing | <p>If PALM Business Intelligence, Reporting and Data Warehouse is not similar to FLAIR functionality in UAT, then SCS will have to modify our current PALM defined business process models, staffing levels, resource structures, workflows, operating procedures and changes to internal Agency Business</p> | Increasing | 4 (Medium/Medium) | In July 2024, prior to opening a Risk, SCS sent a question to the PALM Project Team regarding Financial Transaction Details and received a response in December. This did not satisfy SCS reporting requirements that are provided in FLAIR today. | <p>Following up with PALM POC's and other Agency contacts.</p> <p>Sent an email to PALM on June 06/06/2025 requesting similar FLAIR Data Warehouse capabilities and for PALM to conduct a session discussing reporting solutions/alternatives with agencies</p> | SCS will not be able to properly provide pre-defined and custom reports for individuals, units, organizations, locally, and remotely (Florida-wide SCS community). | <p>SCS continues to follow up with PALM POC's and other Agency contacts.</p> <p>Sent an email to PALM on June 06/06/2025 requesting similar FLAIR Data Warehouse capabilities and for PALM to conduct a session discussing reporting solutions/alternatives</p> |

| | | | | | | | | | | |
|---------------------|----------|--|--------------------------|---|------------|-------------------|--|---|--|--|
| | | | | Agency Business Systems which will delay SCS schedules, timelines, and delivery dates. | | | | SCS has received responses from PALM around operationalizing PALM delivered Business Intelligence, Reporting and Data Warehouse functionality. SCS is currently set to begin testing internal ABS testing scenarios that will accommodate "end-to-end" functional scenarios between PALM, SCS, & Enterprise Partners. However, based on PALM's responses to SCS questions around PALM delivered Business Intelligence, Reporting and Data Warehouse utilization, SCS is having to modify our current PALM defined business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems. SCS Transaction History will be our heavy lift on how to retrieve transactional data fields from a wide array of PALM tables. | | SCS has received responses from PALM around operationalizing PALM delivered Business Intelligence, Reporting and Data Warehouse functionality. SCS is currently set to begin testing internal ABS testing scenarios that will accommodate "end-to-end" functional scenarios between PALM, SCS, & Enterprise Partners. However, based on PALM's responses to SCS questions around PALM delivered Business Intelligence, Reporting and Data Warehouse utilization, SCS is having to modify our current PALM defined business process models, staffing levels, resource structures, workflows, operating procedures, and changes to internal Agency Business Systems. SCS Transaction History will be our heavy lift on how to retrieve transactional data fields from a wide array of PALM tables." |
| Open and Mitigating | 10/07/25 | | Interface | If PALM Interfaces do not provide Asset information that relates to specific payment transactions through the API031 Outbound Voucher and Payment Extract interface, then SCS will not be able to load that information into our ABS Trans-History application for Agency to utilize | Stable | 4 (Medium/Medium) | SCS requires Asset information that relates to specific payment transactions be available for our ABS Trans-History application for users to utilize | SCS is looking at alternate ways to load Asset information that relates to specific payment transactions. | SCS will not be able to load that information into our ABS Trans-History application for users to utilize. | SCS has worked with PALM to load Asset information that relates to specific payment transactions by adding an additional Asset interface file of AMI003 |
| Open and Mitigating | 10/31/25 | | Agency Business System | If SCS does not receive clear instructions from People First and PALM on how to perform our annual Leave Liability and ARS reconciliation, then SCS time-to-close will be extended to allow for additional manual processing to complete our Leave Liability balance postings to DFS Financials. | Increasing | 4 (Medium/Medium) | This situation exists because SCS does not use People First for employee time entry processing. SCS utilizes two ABS applications instead, ARS for employees to enter their time throughout the fiscal year and Leave Liability to reconcile and post their liability balances to DFS Financials at yearend. | SCS must interpret any People First and PALM HRMS changes within the context of our configuration, then reach out when necessary for clarity. | SCS time-to-close will be extended to allow for additional manual processing to complete our Leave Liability balance postings to DFS Financials. | SCS has interpreted People First and PALM HRMS changes within the context of our configuration, then reach out when necessary for clarity. |
| Open and Mitigating | 05/02/25 | | Identity Provider (IdP) | If SCS domain transition from ".org" to ".gov" is not complete before PALM UAT is available, then SCS users may have trouble accessing the PALM UAT environment resulting in falling behind with migration and transformation activities in UAT. | Stable | 1 (Low/Low) | This change has impacted current SCS Cash Management (CM) users' ability to access the current PALM CM application. If these changes aren't rolled out before PALM UAT begins, it will affect timely submission of upcoming tasks and can also affect SME access to the UAT environment. | SCS is working with PALM IT with case number CS0012635 - to resolve any .gov related access issues. | SCS users may have trouble accessing the PALM UAT environment resulting in falling behind with migration and transformation activities in UAT. | SCS continues working with PALM IT with case number CS0012635 - to resolve any .gov related access issues. |
| Open and Mitigating | 05/02/25 | | Conversion/Configuration | If SCS does not understand how PALM is converting FLAIR Vendor/Sequence Numbers to PALM Supplier Numbers, then SCS will not be able to properly process Contracts and Supplier transactions correctly. FLAIR Vendor/Seq number to PALM Supplier number conversion cross-walk is critical in processing transactions correctly. | Stable | 1 (Low/Low) | SCS is working with PALM and MFMP to determine how FLAIR Vendor/Seq # are converted to PALM Supplier # | SCS is working with PALM and MFMP to determine how FLAIR Vendor/Seq # are converted to PALM Supplier # | SCS will not be able to properly process Contracts and Supplier transactions correctly. | SCS continues to work with PALM and MFMP to determine how FLAIR Vendor/Seq # are converted to PALM Supplier # |

| SCS Issues | | | | | | | | | |
|------------|-------------|-------------|----------------------------|-------------------------|--|--|---|-----------------------------------|--|
| Status | Date Opened | Date Closed | Priority | Primary Issue Category | Issue Title | Background | Action Plan | Planned or Actual Resolution Date | Reporting Period Comments for Nov. - Dec. 2025 |
| Open | 05/07/25 | | High - Impacts the ability | Business Process Change | SCS is adopting new PALM HR/Payroll business processing requirements, designs, & reporting: - This will Impact internal SCS ABS ARS Timekeeping, Leave Liability reconciliation with PALM Financials and SCS HRIS payroll reporting from PALM | Implementing the information collected during the PALM HR/Payroll workshops. SCS is conducting internal design sessions to update agency procedures. | Validating updated processing with SCS HR, F&A, & OIT | 07/31/25 | SCS has adopted new PALM HR/Payroll business processing requirements, designs, & reporting: - This will Impact internal SCS ABS ARS Timekeeping, Leave Liability reconciliation with PALM Financials and SCS HRIS payroll reporting from PALM |

| SCS Assumptions | | | | | |
|---|---|--------|------------------------|--|---|
| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Nov. - Dec. 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. | Logged | 06/06/25 | SCS Business Units: - F&A - Budget - Contracts & Grants - HR/Payroll - OIT - Courts Administration | SCS continues to assume 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 | | | | SCS has created internal ABS testing scenarios that will integrate a complete "end-to-end" testing scenario between SCS, Enterprise Partners, & PALM |
| People Processes Technology Data | PALM related changes to Leave Liability and ARS will not be processed until June 2027, post PALM go-live date targeted for January 2027. There will be a grace period from PALM's go-live date to the date when Leave Liability and ARS will be processed for fiscal end-of-year reconciliation and posting to PALM | Logged | 10/28/25 | SCS Business Units: - F&A - HR/Payroll - OIT | PALM related changes to Leave Liability and ARS will not be processed until June 2027, post PALM go-live date targeted for January 2027. There will be a grace period from PALM's go-live date to the date when Leave Liability and ARS will be processed for fiscal end-of-year reconciliation and posting to PALM |

Agency Sponsor Confirmation

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Agency Sponsor Name: *

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SCS Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|--------------------------|------------------------|------------------------|--------------------|
| November - December 2025 | Eric W. Maclure, State | (macluree@flcourts.org | 01/14/26 |
| September - October 2025 | Eric W. Maclure, State | (macluree@flcourts.org | 11/07/25 |
| July - August 2025 | Eric W. Maclure, State | (macluree@flcourts.org | 09/09/25 |
| May - June 2025 | Eric W. Maclure, State | (macluree@flcourts.org | 07/10/25 |
| 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 |