

Helpful Links

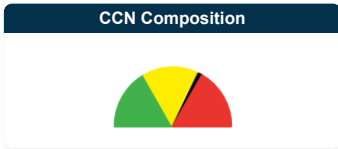
- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for CITRUS
- Readiness Workplan

CITRUS Status Report Dashboard

Reporting Period
January - February 2024

Agency Sponsor
Christine Marion

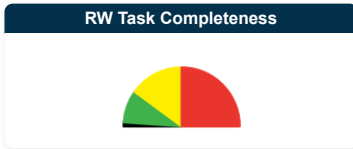
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.



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

Change Champion Network:

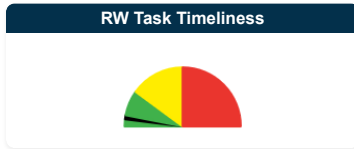
- Unique Filled Role = 2
- Duplicate Filled Role = 12
- Vacant Role = 0



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

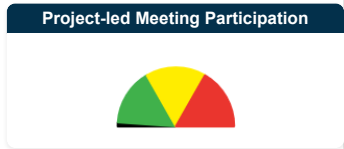
- Score = 100.00%**
- Submitted Complete = 1
 - Submitted Incomplete = 0
 - Completed After Submission = 0



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

RW Task Timeliness:

- Score = 96.09%**
- Submitted On Time = 17
 - Submitted Late = 3
 - Pending Submission = 0



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24	Voucher print program has been replaced, no agency business system interfaces will be needed.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24	No interface needs are identified at this time.		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/23/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/09/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	03/01/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/14/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 11

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 31

- Related Business Systems = 3
- Related Reports = 42

Documentation Status:

- Complete = 31 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

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

Current-State:

Cataloged Business Systems = 4

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

Documentation Status:

- Complete = 4 Partial = 0 Not Started = 0

Cataloged Interfaces = 2

- Inbound Interfaces = 2
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- **Associated Unique Uses = 70**
- Continued Use - Yes = 21
- Continued Use - No = 0

Associated Business Systems = 2

Cataloged Reports = 54

- **Criticality:**
- High = 31 Med = 12 Low = 5 None = 0

Implementation:**Business Systems Planned for Integration = 1****Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 0
Not Started = 0 Not Needed = 0**Segment II - Documentation Updates: TBD****Planned Interfaces = 1**

- Inbound Interfaces = 0

- Outbound Interfaces = 1

Implementation:**Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

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

CITRUS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Due to size of agency and small accounting staff, same person must have multiple roles or back up roles	Open	6 (Medium/High)	WE have requested a Budget Amendment to provide funding for travel, for OPS Subject Matter Expert, and possible hiring of a project manager.	Appropriation for Additional funding was granted in CATF. This trust fund does not have sufficient fund balance to support using these funds. They will be reverted.	11/01/23	C Marion
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings. Update as of Jan 2024: There have been no training or information sessions targeted for technical support. We are unsure of the role our technical support person will play in PALM. He has very little to do with FLAIR,	09/19/23	C Marion

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Citrus does not have a dedicated project manager to ensure all PALM activities are completed, Tasks are updated, and staff is provided direction.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Without additional project funding, staff will complete tasks as time allows.	Funding for PALM for Citrus has been included in Senate and House bills, pending the conference process. This funding would be available 07/01/24. We will be watching the budget process until final approval by Governor.	07/01/24	CCN
Technology Data	Citrus uses a voucher print program that was written in-house and is not documented	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Citrus will research possible voucher print programs other agencies are utilizing, and determine if there is one that meets our needs	Eform application installed on Dec 28th to replace in-house voucher print program	01/01/24	IT

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR funding has not been made available to Citrus. CATF does not have sufficient fund balance to absorb additional costs
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff continues to attend workshops, and will begin attending in person as we are able in January.
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.
People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins
People Processes Data	Vendor maintenance done outside of PALM in AOD	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	This assumption will remain until more information released

CITRUS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Discussion with OPB	01/03/24	Christine, OPB	Discuss options for receiving GR funding for FY2024-25	Discussed amended LBR submittal. OPB suggests sending document stating needs rather than submitting as an amendment, anticipate FY2024-25 to be administered funds
People Processes	PALM Team Meeting	01/04/24	Lucy, Christine, Kay, Angela, Melissa	Update on tasks due in January, plan for office coverage while Kay and Lucy are in Tally at PALM design workshops	Although we were sent a link to register for the design workshops remotely, we decided it would be good to attend in

					person this time. Executive Director Shepp dropped in on the meeting, to encourage staff and let them know she appreciated their efforts and teamwork.
People Processes	Citrus Touchpoint Meeting	01/22/24	Lucy, Kay, Christine, Melissa, George attended	see agenda for details	
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/10/24	Kay, Lucy	In-person workshops in Tally for Process and Manage Payments	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/11/24	Kay, Lucy	In-person workshops in Tally for Asset processes	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/16/24	Kay, Lucy	In-person workshops in Tally for Deposit and apply receipts	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/17/24	Kay, Lucy	In-person workshops in Tally for	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/18/24	Kay, Lucy	In-person workshops in Tally for enter and process journals	Lucy and Kay attended in person
Processes	Meetings to review Payroll Business Process Models	01/23/24	Lana, Christine, Kay, Lucy	review and document our questions regarding the payroll wave models	Several meetings were held with the team as noted. Notes were written up and attached in task tracker

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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CITRUS Status Report Confirmation !

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23