

Helpful Links

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FDC Status Report Dashboard

Reporting Period

January - February 2024

Agency Sponsor

Mark Tallent

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

CCN Composition



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

Change Champion Network:

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

RW Task Completeness



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

RW Task Timeliness



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

RW Task Timeliness:

- Score = 93.91%**
- Submitted On Time = 18
 - Submitted Late = 1
 - Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 9
- Meetings Missed = 0

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		We are waiting for several team members to submit their updates. Once this is complete, we can provide KPMG the necessary documentation to start TASK515. We will update to 50% Once we receive the documentation and updates on TASK 328. Currently Manvith has already corresponded with Leonor , and Catherine, is still generating the updates for that this task. We are anticipating to be Green by March 8th, and 100pct complete. After assessing the progress we had to downgrade to 50pct, due to amount is still required to complete. (3/01)		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/03/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/26/24	Almost 100%. Pending to confirm any other issues or risks need to add from David Eskin. We have closed other risk, as we have new contract hires on board for PALM. We added one more risk with Mr David Eskin regard Data Analysis (He took ownership of that) (2/21)		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/26/24	We are waiting on another week to reconfirm any additional new associates added on. Then we will Mark it as 100% complete by Feb 27th , (2/21). Added the people we needed to add as END Users 2/26	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		We are waiting updates for Leonor for the AR, AM, and GL (2/22). We received the received prepopulated location codes (updated by PALM 2/21), and will require process and require to redistribute the data according. Waiting from Mary for confirmation (Asset Management) (3/1)		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Pending update from certain department reps Diana Swain and Leonor Skogland , that are handling data cleansing process.(2/21). Updated AMC001, ARC001, POC001, Waiting for GMC001. We've updated the current data cleansing process, Assets, Revenues, Grants, General Ledgers. We need to Unlock the first 3 Columns. Approx. 33pct complete (See worksheet) (2/29)		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are meeting with KPMG to discuss further change management requirement. We require TASK 328 to be completed. Manvith already emailed the personal to complete. (2/21). System Access Control , Payroll Management and Disbursement Management business grouping documentation complete. Waiting for Financial Reporting , Revenue , Accounts Receivable and Grants documentation to be Received. (03/11)		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		This ties into TASK 518		

Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress			This is connected to TASK 514, and requirements for Data Cleansing. (Leonora Skoglund is waiting for a response to a question she had about conversion ARC001: Customer Conversion. On 02/16/24). Ms Mary will check up with Ms Leonor about what the real percentage is complete in terms of data cleansing, there might require a lot more than scene 2/26		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission			Meeting with David Eskin regarding these decisions, Meeting completed. Some empty section of dashboard, as there is no interface listed to us. Once we get clarification about the interfaces, we can approach this. We received our updates on that Interfaces from David Eskin (2/21) We are about 100% complete (2/21). Ms.Mary will Ask the question during our Touchpoint Meeting on Tuesday with Vince about the interfaces (2/26)		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24				Pending/More likely not going to meet the deadline based on the amount of remediation efforts, and David Eskin even reconfirmed it during last PALM Monthly Touchpoint meeting with Vince (3/1)		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/07/24				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/07/24		Bimonthly Agency Readiness Status Report Submitted with the Approval of Agency Sponsor.		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24						

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.

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 126 • Business Process Groupings = 13 Role Mapping = TBD Training = TBD	Current-State: Cataloged Business Processes = 266 • Related Business Systems = 13 • Related Reports = 58 • Documentation Status: - Complete = 147 Partial = 88 Not Started = 31 Implementation: Impacted Agency Business Processes = TBD	Current-State: Cataloged Business Systems = 26 • Criticality: - High = 10 Med = 5 Low = 5 None = 6 • Documentation Status: - Complete = 13 Partial = 8 Not Started = 5 Cataloged Interfaces = 33 - Inbound Interfaces = 30 - Outbound Interfaces = 3 Implementation: Business Systems Planned for Integration = 12 • Segment I - Documentation Updates: - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 6 Not Needed = 6 • Segment II - Documentation Updates: TBD Planned Interfaces = 12 - Inbound Interfaces = 1 - Outbound Interfaces = 11	Current-State: Unique FLAIR Data Elements = 73 • Associated Unique Uses = 222 - Continued Use - Yes = 183 - Continued Use - No = 10 • Associated Business Systems = 2 Cataloged Reports = 234 • Criticality: - High = 211 Med = 11 Low = 2 None = 11 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.

FDC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Data Analysis, and the downstream task (will make 1st year difficult) remediation of the data.	Open	9 (High/High)	Impact TASK 519, might not meet deadline (6/28). Need more data info (Data fields) involved with PALM to get a good understanding.	PALM Interfaces are not a useful approach.	02/22/24	David Eskin
People Processes Technology	1077 - Funding for PM staff augmentation	Closed	6 (High/Medium)	Funding request approved by OPB – hiring currently in process. We have already hired 3 BA's and 1 PM and a DA. A BA and a DA is about to be onboarded shortly (Updated) 2/20/24	Funding request approved by OPB – hiring currently in process --- Funding has already occurred, and team has been hired	02/20/24	Greg Prescott, OIT
People Processes Technology Data	BARS (Budget and Account Reporting System)	Open	6 (High/Medium)	Required more information implementation of NEW BARS System	Cost and Time analysis to design and implement a system with the current timeline of PALM	02/16/24	OIT

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

Elements					Comments or updates	Resolution Date	Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Closed	Critical - Impacts the ability of the agency to move forward with work without resolution	To access the available Administered Funds to support the PALM Project and readiness activities	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	OIT
People Processes Technology	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup	The Planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date – January 2026.	06/30/25	David Eskin, Finance and Accounting/Systems Reporting
Technology Data	We may have some basic Functional and Technical Documentation on BARS (Requirements), but not enough info build a new system	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Accessing the Requirement specification from The Development team of BARS, to assist the impact in order to move the implementation of the new BARS System. Awaiting a meeting with PALM Technical Team.	Management is currently discussing this solution plan	08/30/24	Erica Starling, Financial Administrator
People Processes	Lack of Clear Instructions and Frequent Changes in Task Guidance	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance	TBD	01/06/26	Erica Starling, Financial Administrator

FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	FDC's Organizational Change Management (OCM) Lead was onboarded and started working 02/26/2024.
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating, as needed.
People Processes Technology	FDC will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Currently still working on Task 328.
People Processes Technology	FDC Change Champion Network will assess the impact of Identify Change Impacts and Update Agency Current State Business Process.	Logged	02/16/24	All agency business systems and CCN roles	Should start working on TASK 515

FDC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	AMC001 - Asset & Property Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Org Code clean-up complete and being monitored. There are 3 Org codes reported in the Asset Management File not active in the COA. Requested activation of codes to the Financial Reporting Section. Projects: The Financial Reporting Section has begun deactivating all projects capitalized by Hurricanes Michael and Irma. Additionally, those projects capitalized in fiscal years 21-22, 22-23, and 23-24 will be deactivated. Pending identification of the rest of capital projects to be inactivated. The agency has projects since the 1980s that are not inactive. Use fund (GF-SF-FID, BE, and State Program): clean-up have been identified. Building Number: Currently working on identify the missing building numbers. Location: Property currently working to update the missing locations.
Data	ARC001 - Customers Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Account Receivables: There are items from prior years that need to be addressed. All accounts receivables are handled outside the AR module.
Data	GMC001 - Grants Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Grants: It was identified the list of grants that need inactivation.
Data	POC001 - Open Encumbrances Conversion	02/16/24	FLAIR, MFMP Users	Data Cleansing and conversion required for the file.	FDC maintains a clean encumbrance file by fiscal year, so no clean-up needed on old data; with the exception of Fixed Cap Projects, encumbrances are only set up for the current fiscal year.
Data	Criminal Justice OCA Data Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Criminal Justice OCA Data Conversion 02/27/2024 FLAIR Data Cleansing and conversion required for the file. The task is to analyze the OCA data in the last three fiscal years and it indicates that Criminal Justice has 103 OCA's. Of these, 58 were used consistently in fiscal years 21-22, 22-23 and 23-24. The additional 45 OCA codes have not been used since FY20-21 or earlier. Part of this task is to remove those codes that are no longer needed.
People	FL PALM Discussion on the Staff Augmentation positions	01/12/24	Agency Liaisons, Backup Agency Sponsor, and OIT	To get clear direction on the staff aug positions and who will assign work	
People	CCN PALM Monthly Standing Meeting	01/22/24	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Task 511 Review	01/25/24	Agency Liaisons	To discuss the completion of this task	
People	PALM Project Touch Base	01/29/24	Project Manager, Business Analyst, Agency Liaisons and Backup Agency Sponsor	Meet and greet to talk through everything now that we have an assigned Project Manager.	
People	Project Management Tasks	01/31/24	Project Manager & Agency Sponsors	Meeting to discuss the completion of tasks since we had a new Project Manager and Business Analyst	
People	Project Manager Weekly Standup Meeting	02/06/24	Project Manager & Agency Liaisons	Meeting for Project Manager to let us know where we are in the project	
People	KPMG Palm Support Kick-off Meeting	02/06/24	Project Manager, Backup Project Sponsor, Agency Liaisons, Change Management Liaison and Business Analyst	Kick-off meeting with KPMG to start the process of mapping our business processes and doing a GAP analysis to include detailing how FDC/FCOR should address the gaps	
People	PALM Task Meeting	02/07/24	Agency Liaison and the	Meeting to discuss the upcoming tasks and what	

			Business Analyst	each should be working on	
People	PALM Task Meeting	02/08/24	Agency Liaison and the Business Analyst	Daily check in on all tasks	
People	PALM Task Meeting	02/13/24	Agency Liaison, Project Manager and Business Analysts	Daily check in on all tasks	
People	BARS Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts, DMS Contacts and OIT	Met with DMS via Microsoft Teams to discuss our agency business system (BARS) to see if they are going to remediate their ABS or create a new one, which is similar to our BARS	
People	BARS Internal Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts and OIT	Discussion on our possible options for our ABS system (BARS)	
People	PALM Task Meeting	02/14/24	Agency Liaison and Business Analysts	Daily check in on all tasks	
People	KPMG Weekly Meeting	02/15/24	Agency Liaison and Project Manager of KPMG and additional KPMG staff	FDC Files questions	
People	CCN PALM Monthly Standing Meeting	02/16/24	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	PALM Task Meeting	02/16/24	Agency Liaison, Project Manager and Business Analysts	Discuss Task 515	
People	PALM Task Meeting	02/20/24	Agency Liaisons and Financial Reporting SME	Discuss Task 513	
People	KPMG Weekly Meeting	02/21/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	PALM Task Meeting	02/21/24	Agency Liaison, Project Manager, Business Analysts and Systems SME	Discuss Task 518 to start the interface selection for the task.	
People	PALM Task Meeting	02/22/24	Agency Liaisons, Business Analyst and Facilities SMEs	Discuss Task 513 dealing with FDC Location Definition	
People	Inter-Agency Property Forum	02/22/24	Primary Change Management Liaison and Property SMEs	All agencies gathered to discuss upcoming tasks and to exchange ideas	
People	PALM Task Meeting	02/26/24	Agency Liaisons	Discuss Task 513 dealing with FDC Location Definition	
People	PALM Task Meeting	02/26/24	Agency Liaison and Business Analysts	Daily check in on all tasks	
People	PALM Task Meeting	02/27/24	Agency Liaisons and Property SMEs	Discuss Task 513 dealing with FDC Location Definition	
People	Agency Business System Vendor Meeting	02/27/24	Agency Liaisons, Business Analyst and Property SMEs	Meeting with the Asset Management Tracking System vendor to discuss remediation of the bar scanning system	
People	Property Management Forum Review	02/28/24	Back Agency Sponsor, Agency Liaisons, Business Analyst and Property SMEs	Discuss Task 513 and what was learned at the Property Forum meeting held	
People	KPMG Weekly Meeting	02/28/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
Technology	BARS Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts, DMS Contacts and OIT	Met with DMS via Microsoft Teams to discuss our agency business system (BARS) to see if they are going to remediate their ABS or create a new one, which is similar to our BARS	
Technology	BARS Internal Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts and OIT	Discussion on our possible options for our ABS system (BARS)	
Technology	Agency Business System Vendor Meeting	02/27/24	Agency Liaisons, Business Analyst and Property SMEs	Discussion with Agency Business System Vendor with regards to Strategic Asset Tracking System for remediation of the bar scanning system	

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/24
November - December 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	01/03/24
September - October 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	11/08/23
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23