

**Helpful Links**

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- Readiness Workplan

# AHCA Status Report Dashboard

**Reporting Period**

January - February 2025

**Agency Sponsor**

Lynn Smith

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

## RW Task Timeliness

## RW Task Completeness

**Direct Impact Task Timeliness**

**Other Task Timeliness**

**Direct Impact Task Completeness**

**Other Task Completeness**



**Direct Impact Task Timeliness:**

Score = 95.16%

- Submitted On Time = 22
- Submitted Late = 9
- Pending Resubmission = 0

**Other Task Timeliness:**

Score = 66.31%

- Submitted On Time = 29
- Submitted Late = 30
- Pending Resubmission = 5

**Direct Task Completeness:**

Score = 81.67%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 8

**Other Task Completeness:**

Score = 89.38%

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

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

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

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

**CCN Composition**



**Change Champion Network:**

- Unique Filled Role = 14
- Duplicate Filled Role = 4
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

**RW Tasks - Completed or Open Items**

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	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		11/1 - Discussed completion of the tasks and in the process of documentation 8/30 - On-going process for updates. Identifying most important processes to document. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission	03/07/25	3/7/2025 - ABS Remediation Complete 11/1 - Completed remediation for the Chart of Account structure 9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements. 8/30 - Development team is actively involved with the remediation, beginning with the Chart of Accounts.		
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		8/30 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission				
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				
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements.		

N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering			
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25		Submission Complete
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress			
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress			
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25		Submission Complete
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/06/25		Submission Complete 02/13/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete 02/14/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete 02/13/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/03/25		Submission Complete
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/07/25		Submission Complete
Indirect	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		3/7/2025 - All but 3 interfaces are ready for Cycle 2 Testing. 01/27-All files have started 01/17- A third of the interfaces have been remediated.	
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/05/25		Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/25/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/20/25		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 38</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 12/13</li> </ul> <p><b>Identified Subject Matter Experts = 13</b></p>	<p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 67</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 10/13</li> <li>Planned Spreadsheet Uploads = 4</li> </ul>	<p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 23</b></p> <p><b>Planned Interfaces = 17</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 2</li> <li>Outbound Interfaces = 15</li> </ul>	<p><b>Implementation:</b></p> <p><b>Configuration</b></p> <ul style="list-style-type: none"> <li><b>Commitment Control (KK)</b> <ul style="list-style-type: none"> <li>Budget Allotments - Control Option = Option # 2 - Track with Budget</li> <li>Account ChartField Tier Selection = Account Tier #3: Family</li> <li>Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree</li> </ul> </li> <li><b>Org Security Rule = Agencywide</b></li> <li><b>Optional ChartFields</b> <ul style="list-style-type: none"> <li>OA1 = To Be Configured</li> <li>OA2 = Not To Be Configured</li> <li>PC Category = To Be Configured</li> <li>PC Subcategory = To Be Configured</li> <li>PC Source Type = Not To Be Configured</li> </ul> </li> </ul> <p><b>Conversion</b></p> <ul style="list-style-type: none"> <li><b>Optional Conversions</b> <ul style="list-style-type: none"> <li>Accounts Receivable = Not Needed</li> <li>Assets = Needed</li> <li>Contracts = Needed</li> <li>Customers = Not Needed</li> <li>Encumbrances = Needed</li> <li>Grants = Needed</li> </ul> </li> </ul>

- Projects = Not Needed  
 - Projects Balances = Not Needed

## Agency Reported

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

### AHCA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Data	If there is not an accounting system available in June 2026, AHCA will not be able to complete the Weekly Medicaid Run and will not have the ability to pay the providers, costing the State, millions of dollars in fines/penalties.	Open	9 (High/High)	Strategy: 1) Change statutory requirements 2) Meet with CMS to explain the absence of Accounting System to plan for holding federal funds for more than 72 hours. 3) Meet with A&A and Treasury to aid in decision making process on the solution. 4) Multiple Projections for the month of December. Note: Banks are still operational		11/25/24	Smith, Lynn
Technology	If funding for Third Party Vendor maintained ABS applications is not received by 3/31/2025, AHCA will not be ready for Readiness Certification 4	Open	9 (High/High)	1) Review all ACHA System documentation for applications that may use FLAIR data elements (completed) 2) Meet with Leadership/Stakeholders to discuss the need for their teams to relook at possible impacts (completed) 3) 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 4) Review Sponsor/Stakeholders to discuss approach on other ABS identification. 5) Create an amendment for FY25/26 LBR to include additional operating budget for both the Agency Business Systems remediation and business systems remediation by Vendors.		01/31/25	Wander, Phyllis
People	If Florida PALM project scope increases based upon unidentified agency requirements that were missed, the Agency's FY25-26 LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	2/28/2025: The Florida PALM Implementation date has impacted the need to request additional funding for Florida PALM Go-Live.	11/02/23	Wander, Phyllis
People Processes	Given that Budget resources in the Bureau of Financial Services are involved in the FY25/26 Legislative Budget Request Process, if the budget team has not provided a plan for accomplishing Florida PALM YE UAT by 04/04/2025, AHCA will not provide Agency Readiness for Stage Gate 4 for Agency Readiness.	Open	4 (Medium/Medium)	Utilize resources from the IT team (Business Consultants) to perform the testing for the Agency Complete a checklist of all processes to be tested Obtain sign-off from BFS Budget team that results were as expected, given the transactions processed during the Project Led Testing period	2/28/2025: This risk still exists but will need to be re-evaluated due to the changed implementation date. Changed from High to Medium risk. 1/31/2025- IT resources have begun to identify and document BFS YE closing activities. Additional business analysis resource (IT) has been added to address the year end process analysis and what needs to be accomplished by the BFS Team	11/18/24	Hughes, Levis
Technology	If remediation for In-house ABS applications that are impacted with the implementation of Florida PALM have not been planned for by 3/31/2025, AHCA may have the resource constraints that will impact the Readiness 4 Certification requirements.	Open	4 (Medium/Medium)	1) Hire a second PM to manage the ABS applications that are indirectly impacted by Florida PALM where impacts are associated with the Enterprise applications (PeopleFirst, FACTS, etc.)- Completed 2) Identify change requirements for identified applications. 3) Create Plan of ABS remediation and testing		01/31/25	Wander, Phyllis

### AHCA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Funding for Third Party Vendor supported Agency Business Systems currently identified as needing remediation that are indirectly impacted by Florida PALM was not requested in the FY25/26 LBR. Those currently identified are ePAR and CATS, where Vendors are required to make changes.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Planning in progress	2/28/2025: Another PM within Agency has been identified to determine the impacts of other Agency applications where the Enterprise applications have made changes to support Florida PALM.	03/28/25	Wander, Phyllis
Technology	Identification of Agency Business Systems that may need remediation is still under way.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Planning in progress	2/28/2025: Another PM within Agency has been identified to determine the impacts of other Agency applications where the Enterprise applications have made changes to support Florida PALM.	03/28/25	Wander, Phyllis
People	As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Hire additional BFS staff with different skillsets; and do not make it a requirement to possess FLAIR experience. Hire additional staff augmented staff to perform more of the Florida PALM related tasks.	2/15/2025-Two additional resources are to begin within the month 1/31/2025-Vacancy in the Financial and Accounting team is at 30%	03/28/25	Hughes, Levis
People Processes	AHCA Florida PALM team needs at least two additional resources for the remainder of the Florida PALM project.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Obtain budget to hire additional staff	2/28/2025: Resubmitted Amendment to AHCA Budget team on	03/07/25	Smith, Lynn

	The Agency currently has budget to hire one additional resource, but needs budget to hire the second.				2/24/2025: 2/1/31/2025 - Submitted the amendment for additional funding for the current FY 1/8/2025-Completing the documentation for the amendment		
People	Lack of Training Coordinator Resource	Open	High - Impacts the ability of the agency to meet deadlines or milestones	A Training Coordinator Role is needed to aid in the documentation of the Training Plan. Current Staff Aug resources are documenting functional requirements, testing scenarios and other documentation to aid the BFS team and technical team in remediation and Florida PALM Tasks. Action Plan: Staff Aug team will be SME testers to help the short-staffed Bureau of Financial Services team document Agency training materials	2/28/2025: Staff Aug team has begun to formulate a plan for training the staff by role assignment	06/27/25	Wander, Phyllis
People	Florida PALM Tasks and Financial Operations are Competing for the same resources	Open	High - Impacts the ability of the agency to meet deadlines or milestones	With limited resources, production incidents in SunFocus will take precedence over Florida PALM Financial Services Tasks, causing a shift in resources to focus on the incident. Escalate for BFS leadership to set the priority as the incidents are identified	2/28/2025: A high priority item is being worked by the BFS team, but they continue to work Florida PALM tasks as time permits	06/28/25	Hughes, Levis
Technology	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 of task to continue to be low.	Open	Low - All impacts not listed as Critical or High	Update the comments of the remediation tasks as they become complete.	2/28/2025: Interface remediation is on target for all but two of the selected interfaces due to lack of incomplete information in the Knowledge Center. 1/31/2025-Interface remediation is on target for Agency Interface Cycle 2 Testing (6 of the 17 interfaces completely remediated)	05/30/25	Wander, Phyllis

#### AHCA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

#### Agency Sponsor Confirmation

#### AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	03/10/25