

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for APD
- Readiness Workplan

APD Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Rose Salinas

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 = 96.56%

- Submitted On Time = 30
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 99.85%

- Submitted On Time = 63
- Submitted Late = 1
- Pending Resubmission = 0

Direct Task Completeness:

Score = 85.81%

- Submitted Complete = 19
- Submitted Incomplete = 0
- Completed After Submission = 12

Other Task Completeness:

Score = 86.50%

- Submitted Complete = 25
- Submitted Incomplete = 1
- 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.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 13
- 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 | Technology | 561 | Remediate Agency Business Systems based on Segment IV | 10/21/24 | 03/14/25 | Pending Resubmission | 03/11/25 | 11/4 - IT Team is addressing - Business System by Business System 1/13 - review in progress - to be completed b4 due date 1/24 - updates and review scheduled week of 1/27 3/11- Added Developer to our APD Team - for this specific ABS | Submission Incomplete | |
| N/A | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 04/11/25 | 75% - Consolidating/Inputting Information for Submission | | 12/16 - PM and BA working to update the tools - in progress 12/30 - Core team working to update/input data 1/9 - Team is working on it. 1/13 - updating 1/24 - team review in progress - clarification and sheet alignment with PALM completed today | | |
| N/A | People | 568 | Create Training Plan for Agency Managed End User Training | 12/09/24 | 05/30/25 | 75% - Consolidating/Inputting Information for Submission | | 12/16 - reviewing the task in depth with APD PALM Team 12/30 - BA and PM in review of training docs that will be incorporated in the APD plans 1/7 - re-read task - use template 1/13 - reviewed with core team - reviewing the template 1/24 - training survey submitted 1/24 3/3 - actively working plan | | |
| Direct | Data | 658-C | Submit Data Field Mapping | 01/06/25 | 02/14/25 | 100% - Submitted | 02/14/25 | 1/9 - Team is working on it. 1/13 - core team working 1/24 - final review to be completed wed. 1/29 2/3 - working with D & R 3/4 - team updates completed to be submitted 3/5 3/5 - completed for resubmission - chose option of selecting values that do not have a match as "do not configure" until next round of tasks that enable us to add new Grant/OA2 values | Submission Complete | 03/05/25 |
| 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 | | 1/24 - IT team working 3/3 - IT sources working in tandem and updates in progress | | |
| Direct | Data | 567-Q | Share, Review, and Update Configuration Workbooks | 01/27/25 | 02/21/25 | 100% - Submitted | 02/21/25 | 1/30 - reviewing with core team 2/3 - team review today 2/21 - BA closing loop with some answers from core team | Submission Complete | 02/21/25 |
| N/A | People | 582 | Share Florida PALM Updates | 01/27/25 | 02/07/25 | 100% - Submitted | 02/06/25 | 1/30 listing updates 2/3 - working up list with updates 2/6 - updated noting the impact of Hurricane Milton/Weather events and holidays - Thanksgiving and Christmas = all noted | Submission Complete | |
| N/A | People | 584 | Update Authorized Smartsheet Users | 01/27/25 | 02/07/25 | 100% - Submitted | 02/03/25 | 1/30 - updates verifying with teams 2/3 - validate the list - checking with H 2/3 - updates - reviewed - cross checked BM | N/A | |

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|--------|------|-------|--|----------|----------|--|----------|--|---------------------|
| Direct | Data | 588-L | Submit Data Field Mapping | 02/03/25 | 03/14/25 | 73% - Consolidating/Inputting Information for Submission | | 2/10-team is in review and planning 3/3 - mapping meeting completed 3/4 | |
| N/A | N/A | 589 | Submit Bimonthly Agency Readiness Status Report | 02/28/25 | 03/10/25 | 100% - Submitted | 03/07/25 | 3/3 - completed and updates done 3/5 - Rose emailed to sign off reminder 3/7 - All signed off and reviewed by Rose | Submission Complete |
| N/A | N/A | 590 | Manage Agency Specific Implementation Schedule, Risks and Issues | 02/28/25 | 04/30/25 | 50% - In Progress | | 3/3 - ongoing 3/11 - working | |
| Direct | Data | 567-L | Share, Review, and Update Configuration Workbooks | 03/03/25 | 03/28/25 | 75% - Consolidating/Inputting Information for Submission | | 3/3 - team workbooks meetings and deliverables in progress with full efforts to complete | |
| Direct | Data | 567-M | Share, Review, and Update Configuration Workbooks | 03/03/25 | 03/28/25 | 75% - Consolidating/Inputting Information for Submission | | 3/3 - team workbooks meetings and deliverables in progress with full efforts to complete | |
| Direct | Data | 567-N | Share, Review, and Update Configuration Workbooks | 03/03/25 | 03/28/25 | 75% - Consolidating/Inputting Information for Submission | | 3/3 - team workbooks meetings and deliverables in progress with full efforts to complete | |

| 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 = 73 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 42 | Implementation: Impacted Agency Business Processes = 237 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 2 | Implementation: Business Systems Planned for Integration = 8 Planned Interfaces = 26 - Inbound Interfaces = 5 - Outbound Interfaces = 21 | Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Needed - Projects Balances = Needed |

Agency Reported

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

| APD Risks | | | | | | | |
|---|--|--------|---------------|---|--|-----------------------|----------------------------|
| Critical Operational Elements | Risk Description | Status | Risk Rating | Mitigation/Response Strategy | Reporting Period Comments or Updates | Date of Status Change | Owner / Coordinator |
| Technology | Data loss during migration | Open | 9 (High/High) | Implement robust backup and recovery mechanisms, conduct thorough testing | Measurement: Percentage of data migrated successfully noted: Migration Phase 12/13 - being addressed in UAT plan | 12/08/23 | APD Finance Team |
| Processes | Downtime during the transition | Open | 9 (High/High) | Develop a detailed migration plan with scheduled downtime, parallel run for testing | Measurement: Duration of downtime noted: Migration Phase 12/13 - being addressed in UAT plan | 12/08/23 | PALM Team/APD Project Team |
| People Processes Technology Data | COA - Update accounting business system software or system with the new chart of accounts. | Open | 9 (High/High) | - This includes modifying the account structure and assigning codes as needed, within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly | IT Team will align to update and make required changes in the Business System | 12/27/23 | IT Team and APD Teams |

| | | | | | | | |
|----------------------------------|--|------|-----------------|---|---|----------|-------------------------------|
| | | | | the same | arena 12/13 - new coa and field specifications being supported based on PALM parameters | | |
| People Processes Technology Data | COA - Testing old to new and establishing a valid testing exercise | Open | 9 (High/High) | - Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results. | Testing scenarios and plan to be defined 12/13 - UAT Development in process 2/26 - working with mock error files to challenge the new COA structure for APD | 12/27/23 | ALL APD Finance and IT Teams |
| Technology Data | Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build | Open | 9 (High/High) | KB/Tech Analyst is driving the request with the PALM IT team to get schema provided | With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc 12/13 - ongoing 2/26 - APD making great progress | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Compatibility issues between old and new systems | Open | 9 (High/High) | APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - leaving open - documenting any issues | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Integration challenges with existing accounting software on ABS | Open | 9 (High/High) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - all APD ABS are being upgraded to support PALM Specs | 04/24/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Training - Lack of Familiarity with New System Features | Open | 6 (Medium/High) | - Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing. | - noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s) 12/13 - we are all not familiar with the new platform 2/26 - Still open and waiting | 12/27/23 | APD Teams |
| Data | Training - Data Migration Errors | Open | 6 (Medium/High) | - Conduct thorough data validation and testing. - Have backup plans for data recovery. | - Organizing Data Review Teams and timeline 12/13 - track in UAT | 12/27/23 | APD Teams |
| People Processes | Training - Time Constraints with routine business | Open | 6 (Medium/High) | - Plan training schedules to minimize disruption. - Allocate extra time for learning and transition. | - teams will be in review of scheduling and clean up in 2024 12/13 - working to schedule around critical Finance dates | 12/27/23 | APD Teams |
| People Processes Technology Data | Training - Inaccurate Financial Reporting | Open | 6 (Medium/High) | - Verify and validate financial data during and after migration. - Have contingency plans for reporting errors. | - clean preparation prior to and then checking team after - APD is in clean up mode going forward. 12/13 - UAT to be training effort by PALM 2/26 - change analysis exercises for the workbooks with each APD Team | 12/27/23 | APD Financial Accounting Team |
| Processes Technology Data | Data Security Breach | Open | 6 (High/Medium) | - Implement strict access controls and encryption measures. | - Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM 12/13 - PALM Team 2/26 - PALM issue and end user matrix defined with the security requirements for Business Systems | 12/27/23 | APD IT Team |
| People Processes Technology Data | Technology Failures | Open | 6 (High/Medium) | - Implement data backup and recovery procedures | - Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024 12/13 - IT Teams to support as needed - new PALM Helpdesk access 2/26 - APD will be doing a separate Business Systems UAT | 10/24/23 | APD IT Team |
| People | Timing in Financial accounting arena - Loss of | Open | 6 (High/Medium) | - Plan for a gradual transition with overlapping | - Teams will be | 12/27/23 | APD Teams |

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|----------------------------------|---|------|-------------------|--|---|----------|------------------------------|
| Processes | Productivity During Transition | | | systems if possible. | attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule 12/13 - addressing timeframe for 2025 - 12/19 - 1/7 2/26 - scope creep - documented by APD Teams during 2024 for Dec 19-Jan 7 | | |
| People Processes Technology Data | COA - Archive old Data | Open | 6 (High/Medium) | - archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How | Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies 12/13 - APD working on Archive for FAS/FRS archive for all data prior to PALM Migration - internal APD | 12/27/23 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Payroll - Severe Data Loss or Corruption during Migration of data | Open | 6 (High/Medium) | Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance. | Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV 12/13 - s/B non issue- keep open | 01/26/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing. | Open | 6 (High/Medium) | . APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan. | Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - should not effect APD = keep open | 01/26/24 | ALL APD Finance and IT Teams |
| Technology Data | Data Integrity issues during schema migration | Open | 6 (High/Medium) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - APD will be prepared in advance leaving open for now | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Lack of scalability in new API architecture | Open | 6 (High/Medium) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - API - interface questions continue as APD works to build | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Data Breach | Open | 6 (High/Medium) | Implement multi-factor authentication, encrypt sensitive data, and regularly audit access logs | 12/13 - global issue for any could based applications | 10/31/24 | ALL APD Finance and IT Teams |
| Technology Data | Unauthorized Access (Insider Threat) | Open | 6 (High/Medium) | Apply role-based access controls, monitor user activities, and conduct regular training for employees on data security | Conduct periodic internal audits and monitor for suspicious activity 12/13 - checking internal APD users access abilities SSO | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | UAT - Incomplete Test Coverage | Open | 6 (High/Medium) | Define comprehensive test cases based on requirements, prioritize critical features, conduct test case reviews | Ensure requirements traceability to avoid missed scenarios 12/13 - UAT plan updates in progress with CORE Team | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Defects Missed in UAT | Open | 6 (High/Medium) | Implement multiple testing stages (functional, integration, regression), train testers on critical business flows, and conduct defect reviews | Encourage detailed documentation and communication for defect reporting 12/13 - create a capture log for PALM during UAT - incorporating into the UAT plan | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Unclear Exit Criteria for UAT | Open | 6 (High/Medium) | Define clear pass/fail criteria, set quality benchmarks, and ensure all criteria are met before exiting UAT | Review exit criteria with stakeholders before starting UAT 12/13 - open until PALM provides UAT plan for go - no go 2/26 - UAT planning in the works | 10/31/24 | ALL APD Finance and IT Teams |
| Processes Data | Time lag/Plan for AR and conversion accounts | Open | 4 (Medium/Medium) | Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA | Measurement: Reconciliation issue noted: Migration Phase 12/13 - part of updated convergence plan - teams noting now | 02/06/24 | APD Finance Team |
| People Technology Data | Training - Insufficient Training Resources - needing a variety | Open | 4 (Medium/Medium) | - Secure necessary training materials and resources. - Engage vendor-provided training and support. | - looking to PALM for direction and scheduling when it becomes available 12/13 - training for APD = being developed - no PALM training at this time | 12/27/23 | APD and PALM |
| People Processes | Inadequate Post-Training Support | Open | 4 (Medium/Medium) | - Establish a helpdesk or support team. - Provide ongoing access to resources. | - PALM Team to define 12/13 - APD to determine addition Training Headcount 2/26 - proposed team support to be provided | 12/27/23 | PALM and APD IT Team |
| People Processes Technology Data | Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss. | Open | 4 (Medium/Medium) | APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition. | Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - UAT - keep open | 01/26/24 | ALL APD Finance and IT Teams |

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|----------------------------------|---|------|-------------------|---|--|----------|------------------------------|
| | | | | | 2/26 - teams meetings in progress | | |
| Technology Data | Insufficient documentation for new API interfaces | Open | 4 (Medium/Medium) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - IT team working thru each ABS at this time | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Ineffective communication between IT and accounting teams | Open | 4 (Medium/Medium) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building 12/13 - PALM Log for all IT questions ongoing | 04/24/24 | ALL APD Finance and IT Teams |
| Technology Data | Service Downtime/Disruptions | Open | 4 (Medium/Medium) | Implement failover and disaster recovery protocols, choose a provider with SLAs for high availability, monitor system uptime | Inform users in case of downtime and provide transparent communication 12/13 - testing now for impacts = all teams | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | UAT Environment Downtime | Open | 4 (Medium/Medium) | Plan for backup environments, perform load testing on UAT, and have an incident response plan for UAT | Inform stakeholders of potential downtime impacts 12/13 - working with 12/19-1/7 freeze timeframe - exercise by teams within APD at this time 2/26 - uat still to be defined | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | UAT - Incorrect Test Data Use | Open | 4 (Medium/Medium) | Set up accurate and relevant test data, train testers on data setup, and maintain a standardized test data set | Establish guidelines for creating and using test data 12/13 - scenarios review in progress | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Inadequate UAT Documentation | Open | 4 (Medium/Medium) | Maintain detailed test plans, cases, and results, and set documentation standards; conduct reviews to ensure clarity | Ensure all stakeholders have access to up-to-date UAT documentation 12/13 - UAT scenarios/stories being captured at this time for 1st qtr 2025 | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | UAT Poor Test Case Prioritization | Open | 4 (Medium/Medium) | Identify high-risk areas for prioritization, work with stakeholders to prioritize based on business impact | Focus on areas with high impact on the application's functionality 12/13 - Teams are in review of their critical tasks | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Documentation Errors | Open | 3 (High/Low) | - Implement a peer review process for critical documentation. | - Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review 12/13 - UAT to document in plan 2/26 - UAT Plan still in development | 12/27/23 | APD Core Team |
| Technology Data | Security vulnerabilities in new API interfaces | Open | 3 (High/Low) | APT TA to work with PALM IT to gain best updates and data | Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - open data/cloud - IT question-challenge 2/26 - challenge to verify and close this risk | 04/24/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Roll Back Plan to be included in the Conversion Plan | Open | 3 (High/Low) | APT to incorporate the parallel effort with current business processes and also with the strategy process with PALM Data and ABS alignment. | Prepare for unexpected issues that cause risk during migration causing significant problems that will stop progress forward into PALM 12/13 - UAT and PALM to provide a plan for migration time frame | 08/27/24 | ALL APD Finance and IT Teams |
| Technology Data | Data Loss due to Cloud Provider Failure | Open | 3 (High/Low) | Enable regular automated backups, store backups in geographically separate regions, test data restoration | Partner with reputable providers with a history of reliability 12/13 - PALM issue - may impact service | 10/31/24 | ALL APD Finance and IT Teams |
| Technology Data | Inaccurate Financial Data | Open | 3 (High/Low) | Implement input validation checks, automate data reconciliation, perform regular audits on financial data | Include error reporting mechanisms and alerts for users 12/13- APD reconciliation will be part of the UAT to determine that FLAIR Data base was migrated/in sandbox/and mapped correctly | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology Data | Unauthorized Access to UAT Environment | Open | 3 (High/Low) | Use role-based access controls, monitor access logs, and enforce MFA for test environment access | Regularly review UAT environment access rights 12/13 - not certain of the user access and will be tested in UAT | 10/31/24 | ALL APD Finance and IT Teams |
| People Processes Technology | Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction. | Open | 2 (Medium/Low) | Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required. | Ongoing teams meetings to mitigate - IT included | 01/26/24 | ALL APD Finance and IT Teams |

| | | | | | | | | |
|----------------------------------|--|------|----------------|--|---|---|------------------------------|--|
| Data | | | | | | b/z/b - Seg IV 12/13 - APD Teams to determine migration trust 2/26 - teams meetings in progress | | |
| People Technology Data | Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues | Open | 2 (Low/Medium) | - Ensure that the new system is compatible with existing hardware and software. | - IT Team engagement is strong within APD so this will be part of the IT agenda 12/13 - training for APD = being developed - no PALM training at this time | 12/27/23 | IT Team | |
| People Processes Technology Data | Insufficient user training and support | Open | 1 (Low/Low) | Develop comprehensive training materials, provide ongoing user support | Measurement: User feedback and help desk tickets note: Training phase 12/13 - Training still open - will also be a part of UAT 2/26 - still an agency concern | 10/24/23 | PALM Team/APD Project Team | |
| People Processes Technology Data | Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints | Open | 1 (Low/Low) | Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged. | Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - shouldnt be an issue per PALM - but keeping open 2/26 - teams meetings in progress | 01/26/24 | ALL APD Finance and IT Teams | |
| People Processes Technology Data | Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing | Open | 1 (Low/Low) | Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success. | Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - APD IT team working any issues and aligning PAYROLL | 01/26/24 | ALL APD Finance and IT Teams | |

APD Issues

| Critical Operational Elements | Issue Description | Status | Priority | Resolution Plan | Reporting Period Comments or Updates | Planned or Actual Resolution Date | Owner / Coordinator |
|-------------------------------|--------------------|--------|--|--|--|-----------------------------------|---------------------|
| Processes Data | Data Quality issue | Closed | Low - All impacts not listed as Critical or High | Ongoing efforts with all teams to cleanse data in FLAIR 12/10 - data cleansing continues but not to be considered an issue | 8/27 - ongoing issue and ongoing cleanse in progress | 02/28/25 | PM/BA/Finance Teams |

APD 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 Data | The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD. | Logged | 09/06/23 | PALM Project Team/APD Project Team | On-Going with PALM Team Readiness Plan |
| People Processes Technology Data | Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion | Logged | 09/06/23 | PALM Project Team/APD Project Team | Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst |
| People | The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support. | Logged | 09/06/23 | PALM Project Team/APD Project Team | On-going |
| People Processes Technology Data | The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required. | Logged | 09/06/23 | PALM Project Team/APD Project Team | On-going with Amendment 8 approved - move forward with PALM Directives as defined |
| People Processes Technology Data | Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026 | Logged | 09/06/23 | PALM Project Team/APD Project Team | To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD @Feb 2025 - pending updated for Amendment 12 |
| People Processes Technology Data | All agencies will transition together. | Logged | 09/06/23 | PALM Project Team/APD Project Team | To be focused at conversion timeframe at 4th qtr. of project |
| People Processes Technology Data | Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT) | Logged | 09/06/23 | PALM Project Team/APD Project Team | second half and then ongoing as the project readiness plan is outlined by PALM 12/13 - UAT - timeframe is the test |
| People | The Florida PALM production sandbox will continue to be a | Logged | 09/06/23 | PALM Project Team/APD Project Team | second half and then ongoing as the project readiness plan is |

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|---|---|--------|----------|--|--|
| Processes Technology Data | copy of the current production environment and will be updated in January 2026 for this major implementation | | | Team | outlined by PALM Feb. 2025 - adjustment to delays will determine enough time to test and work in the sandbox and team confidence |
| People Processes Technology Data | Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD | Logged | 09/06/23 | PALM Project Team/APD Project Team | Post implementation - At Live |
| People Processes Technology Data | APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR | Logged | 12/27/23 | PALM Project Team/APD Project Team/APD IT Team | Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team. |
| People Processes Technology Data | APD COA will be aligned and designed based on new PALM parameters | Logged | 02/28/24 | APD Project Team/APD IT Team | Accounting Alignment 4/24 - In process with Task 513 - also in data cleanse effort 12/13 - APD Completed to test in UAT |
| People | APD Organizational Structure is fully defined and correlated to the correct org code by personnel alignment - updated by HR | Logged | 02/28/24 | APD Project Team/APD IT Team | Organizational Alignment 4/24 - APD faces a reorganization over the next 9 months - thru Dec. 2024. Approvals remain outstanding. The PALM requirements will be "as is" for the agency and updates will occur when approvals move thru. There will be no wait time or hold to update. Following the Task requirements of 513 toward the May due date. 12/13 - base on current to date ORG code for APD Feb 2025 - Tasks are challenging due to alignment to structure and team is working to make certain all is correctly in place - roll up in tree and updated |
| Data | APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues. | Logged | 02/28/24 | APD Project Team/APD IT Team | 4/24 - this remains a big concern on the handling of this data prior to conversion. The data pull for the conversion must be aligned correctly so that the PALM load places the data into the OA2 field in support of the accounting requirements for APD. Planning within APD is on-going as understanding of the data requirements becomes available. APD has discussed in several Touchpoint meetings and also reviewed with the PALM IT RC Lead Chris. 6/25 - Consideration into the conversion plan and how data will map. Need to review all possibilities 12/13 - considerations completed -Feb. 2025 - the OA2 challenge in tasks continue to challenge for COA alignment with APD use of field - in review |
| Data | APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration. | Logged | 04/24/24 | APD Finance Teams | 4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion. 6/26 - data cleansing continues and will continue thru the next 18 months. Updates will be made in FLAIR as required by the accounting daily/weekly/monthly -Feb 2025 - continued effort |
| People Processes Technology Data | APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer | Logged | 04/24/24 | APD Finance Teams | 4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity. |
| People Processes Technology Data | Data Security Compliance | Logged | 08/27/24 | APD Finance Teams | The cloud-based system will comply with all state and federal regulations regarding data privacy and security, such as CJIS, HIPAA, or IRS 1075, as applicable |
| People Processes Technology Data | No Major Changes to Existing Workflows, | Logged | 08/27/24 | APD Finance Teams | Assumes minimal disruption to existing business processes or workflows, and that the new system can adapt to existing operational requirements. -assuming the agency will continue with current Business Systems operating as they do prior to migration |
| Processes Technology Data | High Availability and Reliability | Logged | 08/27/24 | APD Finance Teams | The cloud-based system will be more reliable than the legacy mainframe, with a guaranteed uptime and robust disaster recovery capabilities. |
| Technology Data | Scalability | Logged | 08/27/24 | APD Finance Teams | The new system can handle future growth in terms of users, transactions, and data volume without requiring significant reconfiguration or additional infrastructure |
| People Processes Technology Data | Realistic Timeline. | Logged | 08/27/24 | APD Finance Teams | The project will follow a realistic timeline with adequate buffers for unforeseen delays, ensuring that all milestones are met without excessive pressure -Amendment proposal - what is the status of FLAIR for scope slide? |
| People Processes Technology Data | Auditability | Logged | 08/27/24 | APD Finance Teams | The new system will provide sufficient audit trails and logs to satisfy internal and external audit requirements. -TBD |
| People Processes Technology Data | UAT Environment Mirrors Production Environment | Logged | 10/31/24 | UAT Team, IT | Confirm that configurations and settings match production before UAT begins |
| People Processes Technology Data | UAT -Test Data Accurately Reflects Real User Data Scenarios | Logged | 10/31/24 | UAT Team, QA | Test data generation in progress; validation with real user scenarios needed @ Feb 25 - teams in review |
| People Processes Technology Data | All Key Stakeholders are Available for UAT Feedback | Logged | 10/31/24 | Business Users, Project Lead | Stakeholders have confirmed availability, but final schedule pending |
| People Processes Technology Data | All Major Functionalities are Developed and Deployed in UAT | Logged | 10/31/24 | UAT Team, Development | 90% of functionalities are ready; remaining features are expected by the end of this week |
| People Processes Technology Data | UAT Test Cases Cover All Critical Business Requirements | Logged | 10/31/24 | UAT Team, Business Analyst | Initial review complete; updates to test cases in progress based on new requirements based on the Business Processes by Module outlined in the Knowledge center |
| People Processes Technology Data | Project Scope creep will not impact compliance and financial reporting | Logged | 02/27/25 | APD Agency Teams, IT Teams | • Delays could impact critical financial reporting deadlines (e.g., quarter-end, year-end, tax filing deadlines). • Regulatory compliance (GAAP, IFRS, SOX, etc.) may be at risk if the transition is incomplete. |
| People Processes Technology Data | Data integrity and validation challenges are checked for outdated and inconsistent data | Logged | 02/27/25 | UAT Team, IT, QA Team | The longer the migration takes, the higher the risk of outdated or inconsistent data. Extended timelines may require additional reconciliation efforts and dual-system maintenance. |
| People Processes Technology Data | Support teams remain in place - contractors and budget overruns are supported | Logged | 02/27/25 | APD Agency Teams | results in increased costs for additional development, testing, training, and consulting services are challenged, along with additional licensing fees may apply if the legacy system must remain operational longer. |

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| People Processes Technology Data | Change management - project fatigue is addressed and mitigated | Logged | 02/27/25 | APD Agency TEams | Extended projects can lead to user fatigue and resistance to change - impact to training may need to be repeated or revised due to staff turnover. |
| People Processes Technology Data | Downstream delays with other agency business systems are not disrupted | Logged | 02/27/25 | APD Agency Teams, IT Teams | Contingency plans may require more attention |

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| January - February 2025 | Rose Salinas | rose.salinas@apdcares.org | 03/06/25 |