

Helpful Links

- Dashboard Snapshots
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- Readiness Workplan

CITRUS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Christine Marion

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 = 88.57%

- Submitted On Time = 17
- Submitted Late = 11
- Pending Resubmission = 0

Other Task Timeliness:

Score = 90.63%

- Submitted On Time = 45
- Submitted Late = 14
- Pending Resubmission = 4

Direct Task Completeness:

Score = 80.00%

- Submitted Complete = 16
- Submitted Incomplete = 2
- Completed After Submission = 9

Other Task Completeness:

Score = 76.67%

- Submitted Complete = 21
- Submitted Incomplete = 5
- Completed After Submission = 7

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

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

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

CCN Composition

CITRUS

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 9
- Vacant Role = 0

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

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	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	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25			Due to budget constraints and the pending changes to Florida PALM's schedule, Citrus is delaying starting remediation efforts until May 2025.		
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25					
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					
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25	IT IS NOT POSSIBLE TO SCROLL THE ENTIRE LIST AND MAKE SELECTIONS, AS IT IS TOO LONG FOR THE SMARTSHEET. IF YOU CORRECT THIS, I CAN GO IN AND MAKE APPROPRIATE SELECTIONS.	Submission Complete	01/15/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	03/11/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/17/25	Completed and resubmitted per instructions provided on 2/17 and 2/25.	Submission Complete	02/25/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/17/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/17/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	01/09/25
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Florida PALM: Agency submitted incomplete. Task required to be close as reporting period has ended.	Task Closed - Submission Incomplete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/17/25	Citrus resubmitted this task following the February Readiness Touchpoint	Submission Complete	02/28/25

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			Citrus anticipates this task to be delayed to match the new timeline.		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	03/11/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	Pending Resubmission	02/17/25	E-mail communication to all PALM users and team involved with ABS Remediation; Weekly PALM user meetings	Submission Incomplete	03/03/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

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 = 9 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 6	Implementation: Impacted Agency Business Processes = 32 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 26 - Inbound Interfaces = 0 - Outbound Interfaces = 26	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - 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 = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Not Needed - Grants = Needed - 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.

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	The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed.	Open	9 (High/High)	Citrus will have to carefully design our implementation schedule to ensure that there is no delay or gaps in services during UAT.	This risk remains active and has been increased with Amendment 12.	02/28/25	Matthew Christovich
Technology Data	Florida PALM designs fail to take into account the reporting and business needs of the agencies, requiring each agency to develop alternative solutions to meet their existing business needs currently met by FLAIR.	Open	9 (High/High)	Citrus will carefully monitor the Design Segments and document, as soon as possible, any apparent deficiencies in the Florida PALM Design.	The realization of this risk has directly created Issue 004 and Issue 005.	02/28/25	Matthew Christovich
Processes	Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank).	Open	6 (Medium/High)	We have made the project manager aware of the issue, and he has informed PALM that we need to determine how foreign currency payments will be handled through PALM.	Citrus has adjusted our UAT planning process to accommodate a cycle of leadership testing prior to full end user testing to determine the specific PALM methods to handle this process.	02/28/25	Matthew Christovich

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	On 11/14/2024, Florida PALM finalized the parameters (scope and schedule) regarding interface selection, interface testing, and data warehouse design in a way that makes it impossible for Citrus to create interfaces with our agency business systems at Go-live, hampering the ability of the agency to conduct business related to revenue collection, contract tracking, and overseas payments.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	On 12/12/24, Citrus elected to select all "outbound" interfaces from Florida PALM and will be requesting funds in an OWP to solicit and contract for a data repositing solution to collect all Florida PALM data and provide more advanced, robust, and specific reporting capabilities than Florida PALM presented on 11/14/24. In addition, as the DW solution for Florida PALM is not planned for full functionality at Go-live, Citrus will also be constructing our own reports from PALM data in this environment.	This item has been moved out to correspond with the new interface design and testing timeline.	08/01/25	Project Manager
Processes Technology Data	On 12/12/24, Citrus discovered that the design of Florida PALM prevents the Organization codes used for budgeting and transacting to be the same. The budget is designed to "roll-up" up groups of Organization codes.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Citrus raised the issue with PALM in our December 2024 Touchpoint Meeting. This issue cannot be resolved by Citrus, as it relates to design decisions made during the budget module during Design Segment I and was not discovered until the configuration files were submitted to PALM.	Citrus has repeatedly requested during our Touchpoint meetings in January and February to meet with the budget design team to address our issues. As of 2/28, no meeting has been scheduled.	05/30/25	Project Manager

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	The DFS Florida PALM project team will provide a PALM UAT environment to all CCN members, SMEs, and End Users prior to go-live. The Department will be given sufficient time to test and practice critical transactions before go-live in this dedicated testing environment.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	It was clarified by Jimmie Cox during the Design Segment meetings that PALM will have two environments: Sandbox, which is a copy of Production, and Test, which is intended to test future functionality.
People Processes Technology	The Legislature will appropriate and timely release General Revenue funding for contracted services for Agency support of the PALM project and those resources are available to perform the work assigned to them as scheduled.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated to reflect the necessity of both appropriation and timely release of General Revenue funds.
Processes Technology Data	The DFS Florida PALM project team will provide a reporting solution at go-live to support the business needs of the Department.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Design Segment IV for Data Warehouse is currently pending. Language updated for standardization.
People Processes Data	The DFS Florida PALM project team will provide information regarding the data fields to support all Chart of Accounts values Citrus currently uses (such as OCA's).	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated for standardization.
Processes Technology Data	The DFS Florida 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	Language updated for standardization.
People Processes Technology	The DFS Florida PALM project team will provide both in-person, on-line, and recorded training for CCN's, SMEs, and all accounting staff.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated for standardization.
People Processes Data	Key tasks, such as user maintenance, vendor maintenance, vendor payment registration, etc. will be done outside of PALM in their respective enterprise systems, e.g. AOD, STMS, VIP, etc.	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	Language updated for standardization.
People Processes Technology Data	The leadership of the Department of Citrus will support the project by providing resources, access to systems and stakeholders, and by supporting the organizational change management strategy created by the project team.	Logged	08/30/24	Citrus Admin Staff, CCN's PALM project team	Assumption added to reflect the need for Department buy-in as a Critical Success Factor.
People Processes Technology Data	The DFS Florida PALM project will provide key information identifying the functionality, business processes, and timeline of the larger project in a timely manner to facilitate planning and execution.	Logged	08/30/24	Citrus Admin Staff, CCN's PALM project team	Assumption added to reflect the dependency of the Department on Florida PALM to provide timely and complete information as a Critical Success Factor.

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 2025	Christine Marion	cmarion@citrus.myflorida.com	03/03/25