

Helpful Links

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

DBPR Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Sally Huggins

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 = 96.33%

- Submitted On Time = 25
- Submitted Late = 5
- Pending Resubmission = 0

Other Task Timeliness:

Score = 93.44%

- Submitted On Time = 52
- Submitted Late = 11
- Pending Resubmission = 0

Direct Task Completeness:

Score = 98.67%

- Submitted Complete = 28
- Submitted Incomplete = 0
- Completed After Submission = 2

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 37
- Submitted Incomplete = 0
- Completed After Submission = 0

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 = 12
- Duplicate Filled Role = 6
- 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	50% - In Progress		Versa will produce upload spreadsheets API041 and IU1001		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25	Added new Technical and User Documentation for Versa for DBPR	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission	01/29/25	The final UAT Testing Plan has been drafted and reviewed internally by DBPR Project Directors.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/07/25		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	01/07/25	DBPR believes only one Distribution Code is needed; however, sub-locations have had recent activity against them.	Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25	All updates applied by Jennifer in Secure File Share	Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/13/25	One PCard Speedkey has Category of 030000, which previously was not allowed, but now it is.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	03/07/25	Reviewing differences between Organizations configured and those being converted.	Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/21/25	Reviewed balances remaining on OCAs and cleaned up where appropriate	Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25	All related updates applied to Smartsheet	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Covers January and February 2025	Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/25/25	No mapping of Grants to occur. Balances on inactive grants liquidated.	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		No ABS interfaces to test at this time		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/20/25	3 FGCC Funds/Organizations were divested/liquidated on 2/17/25. As discussed at meeting on 2/20/25, DBPR submitted with these comments.	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25	No changes required	N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Need to add DMS-owned location(s) under PALM Task 657		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25	Reporting on January and February 2025	Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation	02/28/25	04/30/25	25% - Beginning Initial		For activity during March and April		

		Schedule, Risks and Issues		Internal Meetings and Information Gathering		2025	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission	
Direct	Data	567-N	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>Implementation:</p> <p>Planned Florida PALM End Users = 32</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 23</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 117</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 2</p> <p>Planned Interfaces = 1</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 0 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> 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 <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Not 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.

DBPR 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	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Open	4 (Medium/Medium)	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in April 2025.	No Crosswalk review sessions have been conducted in several weeks.	02/19/25	Gary Townsend
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners Create visual aids, mapping documents, and other PALM educational tools.	PALM Task 568 - DBPR End User Training Plan has been released and is actively being worked. PALM Education continues to be an area of focus.	04/08/24	Gary Townsend
People Processes Technology Data	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete work flows	Open	3 (High/Low)	Mitigation - Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)	PALM Task 560 aides in documenting processes and related details. User Stories are being created out of Future-State review sessions and these User Stories should foster learning the new process flows. In addition to workflows, UAT test scripts could be negatively impacted as well. Reduced Impact from High (3) to Medium (2).	04/18/24	Thomas Richardson
People Processes Technology Data	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete Future-State Business Processes	Open	3 (High/Low)	Mitigation - Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations	Action Item #69 was created to establish a repository for PALM post-production install support items. It is	04/23/24	Thomas Richardson

	once we go live				precipitated by batch cycles that need to run.	believed data queries, direct PALM access, and reports will provide all of the necessary data that is needed by Finance & Accounting and no new tool will be necessary. User Stories are including additional details, particularly on the data and use of FLAIR@BPR. Reduced Impact from 3 to 2.		
People Processes Technology Data	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Engaging DBPR SMEs to assist with User Stories should help. Current-State to Future-State Crosswalk sessions are behind the scheduled dates the OCM lead requested. An Assumption (#44) was added for getting caught up. Current-State to Future-State Crosswalk sessions should resolve.	05/31/24	Thomas Richardson	
People Processes Technology Data	If all various Future-State Business Process scenarios (including anomalies and non-happy path conditions) are not identified and accounted for in test scripts, then testing will not be comprehensive and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Work with DBPR SMEs and identify all possible scenarios. Account for these scenarios in UAT test scripts in advance of scheduled UAT.	User Stories are being created, and this should flesh out all scenarios. Decreasing Probability from 2 to 1. Some anomalies and scenarios are trickling in from F&A staff. A Task for each process crosswalk session has been added to identify any anomalies or scenarios. Changed Probability from High (3) to Medium (2). Some anomalies for test cases associated with Versa upload spreadsheets were added to the Test Scripts folder.	07/03/24	Thomas Richardson	
People Processes Technology Data	If significant time is not spent planning and preparing for UAT as well as business processes not intended to be performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Open	3 (High/Low)	Mitigation - If significant time is not spent planning and preparing for UAT as well as business processes not being performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	UAT Testing Plan draft (PALM Task 536-C) has been drafted and is under internal DBPR review. Significant UAT planning and documentation has been accomplished. Internal definition of defect tiers has been drafted and discussed. Test scripts have been started and there are placeholders for every business process to be tested during UAT. Research for UAT has already been started. Decreasing Impact from High (3) to Medium (2). Test scripts have been started and there are placeholders for every business process to be tested during UAT.	07/17/24	Thomas Richardson	
People Processes Technology Data	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	This has been added as a Task on the Leadership Summary of Tasks. Reduced Impact from High (3) to Medium (2).	08/16/24	Thomas Richardson	
People Processes Technology Data	If all PALM CMS Wave processes already in production that have a current FLAIR component have not been identified how the FLAIR piece will be replaced, then we will have problems executing Business Processes when the PALM Financial Wave is deployed to production considering FLAIR is going away at that time	Open	3 (High/Low)	Identify all PALM Business Processes done by DBPR in production today and identify all that have a FLAIR component, review the FLAIR components in detail and identify a replacement, confirm the approach, and test the approach during Financial Wave UAT. RC indicated possibly 2 weeks of downtime; however, details are not known at this time. Outstanding questions include: How certain is two weeks of downtime? What is the plan for payroll? When will additional information be available about downtime?	RC indicated possibly 2 weeks of downtime; however, details are not known at this time. Outstanding questions include: How certain is two weeks of downtime? What is the plan for payroll? When will additional information be available about downtime?	11/13/24	Thomas Richardson	
People Processes Technology Data	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely and successful completion of UAT	Open	3 (High/Low)	Ensure that crosswalks and flow detail diagrams are covered at a detail level. Details should be addressed when User Stories and Business Process Crosswalk sessions are conducted.	Decision #32 has been documented that articulates the desire to have detailed user stories to support research and test script writing. Details should be addressed when User Stories and Business Process Crosswalk sessions are conducted. Changed Status from Decreasing to Stable. All systems external to FLAIR need to be clearly identified.	01/13/25	Gary Townsend	
People Processes Technology Data	If user stories for all scenarios and anomalies are not created then the required test scripts may not be completed and there could be tests that should have been conducted during UAT that did not get tested. This could lead to problems once PALM is in production when a scenario arises that has not been tested	Open	3 (High/Low)	Ensure that time is spent to cover all possible scenarios and anomalies.	Staff should be encouraged to recall past scenarios and conditions. New Test Scripts were created for scenarios where there are problems/anomalies building Versa upload spreadsheets. User stories should be created for all possible	01/13/25	Gary Townsend	

					created for all possible scenarios. User stories should be created for all possible scenarios.		
People Technology	If significant problems are encountered during UAT when testing spreadsheet uploads, there may not be enough time for DBPR IT to make modifications in time to be retested	Open	3 (High/Low)	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT. This was shared with RCs at the Monthly Touchpoint and they are checking to see if DBPR can volunteer as guinea pig so testing upload spreadsheets can begin prior to UAT in July 2025. This was shared with DBPR IT at the Biweekly meeting.	PALM is ensuring that interfaces produced from ABSS are being tested well in advance of UAT, however, upload spreadsheets must wait until UAT to be tested. While the due dates for some PALM Tasks were extended, Task 561 was not one of them. This needs to be revisited. This was shared with RCs at the Monthly Touchpoint, and they are checking to see if DBPR can volunteer as guinea pig so testing upload spreadsheets can begin prior to UAT in July 2025. This was shared with DBPR IT at the Biweekly meeting.	01/13/25	Thomas Richardson
Processes	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Open	2 (Medium/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	Reduced Impact from High (3) to Medium (2).	04/08/24	Thomas Richardson
People Processes Technology	If PALM Future-State Business Processes are not stable and subject to significant change during or after PALM education presented to DBPR end users, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	2 (Medium/Low)	Mitigation - Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes. Identify any shortcomings in Future-State Business Processes and communicate them to the DFS PALM Project team via the RC as soon as possible	Current-State to Future-State Crosswalk sessions are behind schedule but are taking place. A template for addressing flow changes as well as technical changes is being developed. PALM-led training in the UAT environment in April 2025 should help.	06/19/24	Thomas Richardson
People Processes	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Open	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	Reduced Impact from High (3) to Medium (2).	08/19/24	Jennifer Gaines
People Processes Technology Data	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Open	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	All roles have been defined. Just need to properly assign them to the proper individuals. Updated priority from Low (L) to Medium (M).	08/19/24	Thomas Richardson

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

DBPR Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR end users		
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository.	
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current through February 2025.	
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR end users PALM	Year End and other situations could be exceptions that will need to be managed.	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR end users PALM	The Executive Steering Committee agreed to a 6-month extension.	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR end users PALM	The DBPR staff remain active and engaged	
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR end users PALM		
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	All DBPR end users Thomas Richardson PALM		
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All DBPR end users Versa FLAIR@BPR	Versa Regulation is the only ABS being remediated. FLAIR@BPR will be replaced by Agency Query Writer and reports in PALM.	

People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producing 2 other files to be imported into PALM, but those remain upload spreadsheets.
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All DBPR end users PALM FLAIR	However, a snapshot of FLAIR@BPR that will not be kept current will be available for historical reference.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All DBPR end users PALM FLAIR	There are some business processes that DBPR will perform that have no component in PALM but will still need to be completed. These will be tested as part of UAT.
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Changes to business processes should be minimal.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR end users PALM	The Project Schedule is updated and managed on a daily basis. Snapshots are captured on a weekly basis.
People Processes Technology Data	Testing of remediated business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All DBPR end users PALM	Versa remediation continues. One PALM Spreadsheet Upload has been completed and one more is in the works. I direct interface from Versa to PALM is being developed..
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	UAT test scripts are being assigned to SMEs that will perform the functions in production as part of UAT.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contrace Organizational Change Lead	
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All DBPR end users OCM Lead PALM	PALM training Tasks are under way. In addition, PALM Task 568 addresses a training plan. Training for PALM by the project for SMEs will be conducted at the beginning of UAT.
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR was engaged in the required data cleansing. Additional cleansing is still required.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Tasks associated with configuration and conversion were completed.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	All PALM CMS processes that include a FLAIR component, were revisited to determine if the FLAIR component (because FLAIR is going away) needs to be replaced or accounted for. It was determined that nothing special needs to be done to account for FLAIR going away.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested.	Logged	05/01/24	DFS PALM Development Staff All DBPR end users PALM	Placeholder test scripts have been created.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR end users	Received confirmation we will only have the UAT environment, which will be available in August 2025.
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All DBPR end users	Has been included in the UAT Testing Plan (Task 536)
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All DBPR end users PALM PALM Website	Future-State Business Processes are currently being reviewed with DBPR staff. Only 10 videos are currently available.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	This information is being captured as part of User Story development.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by Florida PALM and are not the responsibility of DBPR	Logged	06/21/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	These will be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios.
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR PALM Readiness Project stakeholders	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that it does not become outdated and obsolete.	Logged	08/07/24	All DBPR PALM Readiness Project stakeholders	The PMP quarterly review was completed as scheduled.
Data	All PALM reports will include all Chart of Accounts fields (including OA2)	Logged	08/16/24	All DBPR PALM Readiness Project stakeholders PALM	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	All DBPR PALM Readiness Project stakeholders PALM	Only one direct interface is being developed for DBPR ABSs at this time (API002). PALM Tasks related to establishing interface network connectivity have been removed off hold for DBPR and are being worked.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR PALM Readiness Project stakeholders PALM	Some data will be provided in the form of reports, but queries can be run whenever needed.
People Processes	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the Business	Logged	10/23/24	All DBPR Revenue staff PALM	PALM upload spreadsheet ARI010 has been finalized and turned over to DBPR IT for remediation

Technology Data	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR Stakeholders Gary Townsend PALM	The Current-State to Future-State Business Processes were rearranged, rescheduled, with revised tasks with the input from the OCM Lead. They are still behind schedule.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	All DBPR Revenue Accounting Stakeholders PALM Versa Regulation	The PALM Technical Team is limiting the Payment Method values that will be stored in PALM. The Remittance Type values included in the QLIK report should be sufficient.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the Project Schedule	Logged	12/04/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks have been rescheduled and are behind in accordance with the Project Schedule.
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks are currently under way. User Stories are being used to capture the necessary details.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT	Logged	12/18/24	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	STMS continues to provide monthly updates that are very helpful.
People Processes Technology Data	All supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	Complete addresses must be available in PALM to support mailing of refunds considering the API041 upload spreadsheet does not have a spot for the address even though ABS Versa has the address and provides it to SMEs currently.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Sally Huggins Jennifer Gaines Derrick Thomas Gary Townsend Thomas Richardson Gary Townsend	Review sessions have been scheduled once a month and are being conducted with the Microsoft Project comprehensive version of the Schedule.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	Task 560 is due by 3/28/25 so the business process details will need to be available 1-2 days prior to that.

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.

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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25