DOE Status Report Dashboard

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

Reporting Period

January - February 2025

Agency Sponsor

Suzanne Pridgeon

RW Task Timeliness

Direct Impact Task Timeliness

Direct Task Completeness:

Score = 95.67%

- Submitted On Time = 28
- Submitted Late = 1
- Pending Resubmission = 1

Other Task Timeliness

Other Task Timeliness:

Score = 89.08%

- Submitted On Time = 53
- Submitted Late = 7
- Pending Resubmission = 4

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.

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 81.07%

- **Submitted Complete = 15**
- Submitted Incomplete = 1
- Completed After Submission = 12

Other Task Completeness

Other Task Completeness:

Score = 83.94%

- Submitted Complete = 23
- Submitted Incomplete = 3
- Completed After Submission = 7

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.

CCN Composition

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

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 5
- 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	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	Documentation is still in progress. To be completed the according to the rubric, the documentation must be completed.	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24	Test cases has not been identified yet.	Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/24	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/16/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/19/25		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		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/12/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and...	02/28/25	04/30/25	50% - In Progress				

			Implementation Schedule, Risks and Issues								
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress					

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.

People

Implementation:

Planned Florida PALM End Users = 124

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 13

Processes

Implementation:

Impacted Agency Business Processes = 132

• Related Business Process Groupings = 10/13

• Planned Spreadsheet Uploads = 8

Technology

Implementation:

Business Systems Planned for Integration = 14

Planned Interfaces = 13

- Inbound Interfaces = 5

- Outbound Interfaces = 7

Data

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 #3: No Tree Assigned

• **Org Security Rule = Agency Defined**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• **Optional Conversions**

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = 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.

DOE Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
Processes Technology Data	Significant delay in receiving the technical requirements	Open	6 (High/Medium)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	Quicker response time has lowered the risk level.	06/25/24	Project Manager
People Processes Technology Data	A potential risk for the TraQ application not being ready for User Acceptance Testing (UAT) is the possibility of incomplete functionality or unresolved bugs. If critical features are not fully implemented or existing issues have not been addressed, it can lead to: 1. Delays in Project Timeline: UAT is a crucial phase, and if the application isn't ready, it can push back the overall project schedule, affecting subsequent phases such as deployment and user training. 2. Increased Costs: Remediation efforts to fix issues identified during UAT can lead to unexpected costs, particularly if extensive changes are needed or if additional resources are required. 3. User Dissatisfaction: If the application does not meet user expectations during UAT, it can result in negative feedback, eroding user confidence and satisfaction, which may impact future adoption. 4. Reputational Damage: Failing to deliver a functional product on time can harm the organization's reputation, especially if stakeholders or customers are relying on the	Open	6 (High/Medium)	Clear Communication: Maintain Transparent Communication with Stakeholders about timelines, potential risk and the importance of maintaining the project schedule. Risk Management Plan: Create a comprehensive risk plan to outline potential risk and the impacts on the application and the timeline of the project.	New Risk	12/13/24	Application Owner

Category	Risk	Status	Rating	Mitigation	Update	Date	Owner
	application for critical business operations. 5. Compliance Risks: If the application is intended to meet specific regulatory or compliance standards, not being ready for UAT could lead to non-compliance issues, resulting in legal or financial repercussions.						
People Processes Technology	Applications (FLAGS, Deposit, Indirect Cost and PARS) Missing Remediation and UAT Due to Resource (Programmers/Developers) Constraint Risk 1: Applications Not Remediated Before Go-Live -Description: Critical applications may not be fully remediated, leading to potential failures, security vulnerabilities, or non-compliance with regulations post-launch. - Impact: High – Could result in operational disruptions, financial losses, and damage to reputation. - Likelihood: Medium – Resource constraints are common, but proactive measures can reduce this risk. Risk 2: Missing User Acceptance Testing (UAT) - Description: Inadequate UAT can lead to undetected defects and user dissatisfaction, resulting in a product that does not meet user needs or expectations. -Impact: High – Can lead to significant rework, increased costs, and user resistance to adopting the solution. - Likelihood: Medium – UAT is often deprioritized under resource constraints. Risk 3: Delay in Project Timeline - Description: Both remediation and UAT delays can extend project timelines, affecting overall delivery and stakeholder satisfaction. - Impact: Medium – Extended timelines can lead to increased costs and resource contention. - Likelihood: High – Delays are likely if remediation and UAT are overlooked. Summary By actively identifying and addressing the risks associated with applications not being remediated and missing UAT due to resource constraints, Agency can take proactive measures to mitigate potential impacts. Implementing prioritization, effective resource allocation, and streamlined processes will enhance the likelihood of successful project outcomes despite challenges.	Open	6 (High/Medium)	Risk 1: 1. Prioritization of Applications: Assess and prioritize applications based on criticality and impact. Focus remediation efforts on the highest-risk applications first. 2. Resource Allocation: Identify and allocate resources from less critical projects or consider temporary hires/contractors to bolster the team. 3. Phased Rollout: Consider a phased rollout approach where non-critical features are delayed to allow for necessary remediation. 4. Regular Progress Reviews: Implement weekly check-ins to monitor remediation progress and adjust resources as needed. Risk 2: 1. Engage Stakeholders Early: Involve key stakeholders early in the process to identify critical functionalities that must be tested. 2. Simplified UAT Processes: Streamline UAT processes by reducing the scope to focus on core functionalities, allowing for quicker testing cycles. 3. Utilize Automated Testing Tools: Implement automated testing tools to supplement manual UAT efforts, increasing efficiency. 4. Schedule UAT in Phases: Conduct UAT in phases aligned with sprint cycles to ensure continual feedback and reduce the backlog of testing. Risk 3 1. Clear Timeline Management Use project management tools to visualize timelines and set clear milestones. 2. Buffer Periods: Incorporate buffer periods in project schedules to accommodate potential delays. 3. Transparent Communication: Maintain open communication with stakeholders about potential risks and delays, managing expectations effectively.		02/07/25	DOE Leadership
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change 10/01/2024 This risk will remain throughout the project	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team {anyone working on PALM}). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	No update - 10/11/2024	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	4 (Medium/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified. 10/01/2024 The quicker response by PALM have lowered the risk level.	05/30/24	Project Manager
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies. 10/01/20.24 This risk remains current	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	No update-10/11/2024	01/12/24	DTI and Aware technical teams
People Processes Technology Data	The project is heavily reliant on one individual (Matt Kirkland) who possesses the primary knowledge of the business applications. If this individual becomes unavailable (due to illness, departure, or other reasons), there is a risk of project delays, errors, and reduced efficiency in resolving technical or operational challenges. Impact: -Delays in project timelines due to the lack of expertise available to address critical issues. -Reduced quality of deliverables due to incomplete understanding of business applications. -Increased operational and knowledge transfer costs if the individual exits or is unavailable. -Potential for project failure in critical phases where the knowledge is essential.	Open	3 (High/Low)	1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members. 2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible. 3.) Cross-Training: Train other team members to create redundancies in expertise. 4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity. 5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise. By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity.	New Risk Assessment	11/22/24	DOE Leadership
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are	07/13/23	DOE PALM Team

						discovered, DOE will revisit the task. 10/01/2024 No new system has been identified.		
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.		No update - 10/11/2024	01/30/24	AWARE Team

DOE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Technology Data	Task 519 remediation phase 1 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	No update as of 10/11/2024	12/02/24	PM/DTI
People Processes Technology Data	Task 531 remediation phase 2 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New issue	12/02/24	PM/DTI

DOE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule update coming

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 ***

Submit

DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	03/12/25

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