FCOR 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

Ryan Schenck

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 99.23%

- Submitted On Time = 24
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 95.08%

- Submitted On Time = 58
- Submitted Late = 6
- Pending Resubmission = 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.

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 99.20%

- Submitted Complete = 23
- Submitted Incomplete = 0
- Completed After Submission = 2

Other Task Completeness

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 40
- Submitted Incomplete = 0
- Completed After Submission = 0

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 = 16
- Duplicate Filled Role = 0
- 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	100% - Submitted	11/17/24	FCOR doesn't have any ABS systems to update documentation or remediation needed.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	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				
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	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/09/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/03/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/06/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25		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	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/03/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/05/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

People

Implementation:

Planned Florida PALM End Users = 6

• Business Process Groupings = 6/13

Identified Subject Matter Experts = 14

Processes

Implementation:

Impacted Agency Business Processes = 18

• Related Business Process Groupings = 4/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #3: Family

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned

• **Org Security Rule = Agencywide**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = Not 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 = 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.

FCOR 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 Technology	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Open	6 (High/Medium)	1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT	11/05/2024 : Solution concept shared with the OIT experts to review and guide FDC PALM team on the next steps for technical solutioning. 11/06/2024 : Initial resourcing plan has been reviewed with OIT leadership and received alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design and Technology platform. 2/10/2025: Hiring of staff-aug Reports Developer and Business Analyst has been initiated, interviews are currently in-progress.	06/30/25	Dipak Roy, OIT PM
People Processes	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Utilize the PALM site to develop and deploy a 3-part preliminary training series to future PALM end users. The training series will be followed by a Process Gap Analysis and Process Gap Remediation activity for each Business process group. Action 2: Identify future PALM superusers, to participate in the preliminary PALM training series and closing activities. Action 3. Once available, leverage the Sandbox and Demo sessions to further familiarize users with system functionality.	12/17/2024: CML-Training Development is underway and is on track to be completed by June 30, 2025. 12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated. 2/19/2025: Training liaison has been engaged to prepare for overall training plan and training materials.	06/30/25	Erica Starling, Financial Administrator
People Processes	The Testing phases in the Florida PALM project	Open	6 (High/Medium)	1. Prepare the UAT testing team thoroughly, regarding	12/05/2024: Florida PALM	06/30/25	Erica Starling, Financial Administrator

Processes Technology Data	plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.		(High/Medium)	Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.	PALM team held across-agency kick-off of the UAT planning activity. There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT. Most of the preparation activities are affected by non-availability of the final system. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.		Administrator
People Processes Technology Data	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Open	6 (High/Medium)	Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation	12/17/2024: CML-Training Development is underway and will precede the initiation of the Closing Process Gap Analysis and Remediation activities. The deployment of the training Series is on track to launch by February 01, 2025. 11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM). 2/19/2025: Identification of specific gaps and remediation plan has been initiated.	09/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Open	6 (High/Medium)	1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.	12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing. To continue working on to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supporting activities to ensure agency readiness for PALM project. Identification of specific remediation plan has been initiated. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.	09/30/25	Erica Starling, Financial Administrator
People Processes Technology	Insufficient information on access security model and planning of changes to current users role/ responsibilities may impact agency user readiness/ adoption.	Open	4 (Medium/Mediu	Action: Utilize the Current State Position Catalogue to map current positions to PALM's future state roles. Action: Develop and Launch Training 4 of Pre-PALM Training series (Orientation to PALM Roles & Workflows). Training will focus specifically on future PALM roles enabling the linkage between current and future state job roles.	11/15/2024: CML-People Readiness Lead completed the development of the Role Mapping Workbook and socialized workbook with the project team. 11/30: Team started exploring the user & security roles definitions in the Florida PALM portal. 12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topic is & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new work book. 12/17/2024: CML-The provision of the RWP 560-"Topicis & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched. 2/19/2025: FDC-FCOR PALM project team is awaiting detailed information from FL PALM team on security roles, privileges, and segregation of duty information for Financials wave. Similar details from CMS wave is being considered as a reference.	06/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/	Open	3 (High/Low)	Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components.	11/06/2024 : Overall requirement was reviewed with OIT	06/30/25	Dipak Roy, OIT PM

Technology Data	generate user reports based on legacy/ historical data.			components	reviewed with OIT leadership and received alignment. Currently in discussion with OIT Systems Management team to identify a solution. Next step is implement and test the solution. 1/10/2025: Technical workshop conducted with FDC OIT experts and finalized the architectural design and technology platform. 2/10/2025: FDC-FCOR PALM project team and OIT technical teams are currently brainstorming, to understand the scope and approach.	

FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that. Therefore, the FDC/ FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces. 2. Solution approach for New Database and CAIRS has been prepared. 3. Architectural design of the solution currently in-progress.	08/29/25	Dipak Roy, OIT PM
People Processes	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Crosstrain staff to ensure adequate backup. 2. Cross training will be completed during the project to ensure operational resiliency.	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	David Eskin, FDC Finance and Accounting/Systems Reporting
People Processes	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets.	1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions. 2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues. 2/19/2025: Highlighted this issue again as part of Thursdays Task Talk topics, and requested FL PALM team to consolidate all updates to the PALM readiness workplan and share at once, with appropriate level of communication.	01/06/26	Erica Starling, Financial Administrator
People Processes Technology Data	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Onboard additional staff aug position with FLAIR data experience.	1. Created RFQ for an additional staff aug position. 2. The resource has been onboarded in early December 2024. 2/10/2025: New resource to be onboarded as a replacement for the person onboarded in December 2024. Additionally one more resource request has been raised with FDC Contract management team.	12/31/24	Erica Starling, Financial Administrator
Processes Technology	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g. UAT Test Plan, UAT Test Scripts, Future State Work Processes	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.	9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work. 10/16/2024: UAT high level plan was shared in PALM advisory council meeting. 11/20/2024: BA	01/13/25	Dipak Roy, OIT PM

| | | | | | 11/20/2024: BA requirement has been reviewed with the OIT leadership and available vendors are being evaluated. 2/7/2025: Discussion in-progress with the OIT Quality Assurance vendor to leverage their expertise in UAT planning and preparation of test cases and test scripts. | |

FCOR 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	FCOR's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FCOR will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	List of agency business systems are documented, i.e. as-is state, systems in the scope of remediation. Remediation approach for 2 systems are finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FCOR UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan.
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop it is understood that the IT development activities for enterprise systems are in-progress.
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g., ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	

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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FCOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	03/05/25