# LEG 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**
Lee Boatwright

## RW Task Timeliness

### Direct Impact Task Timeliness



**Direct Impact Task Timeliness:**

Score = 81.94%

- Submitted On Time = 15
- Submitted Late = 15
- Pending Resubmission = 1

### Other Task Timeliness



**Other Task Timeliness:**

Score = 87.08%

- Submitted On Time = 45
- Submitted Late = 16
- Pending Resubmission = 3

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 = 79.63%

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

### Other Task Completeness



**Other Task Completeness:**

Score = 77.43%

- Submitted Complete = 24
- Submitted Incomplete = 4
- 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.

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

### CCN Composition



**Change Champion Network:**
- Unique Filled Role = 14
- Duplicate Filled Role = 11
- 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 | | System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes. | | |
| N/A | Technology | 531 | Remediate Agency Business Systems based on Segment II | 04/29/24 | 10/04/24 | 50% - In Progress | | System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes. | | |
| Direct | Technology | 546 | Update Florida PALM Interface Inventory for Segment IV | 07/22/24 | 10/18/24 | 75% - Consolidating/Inputting Information for Submission | | Pending meetings for EDR, and for AG's office to confirm what interfaces will be used. | | |
| 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 | | Submission Incomplete | |
| N/A | Technology | 561 | Remediate Agency Business Systems based on Segment IV | 10/21/24 | 03/14/25 | 50% - In Progress | | | | |
| N/A | Technology | 558 | Update Agency Business System Documentation | 11/18/24 | 01/10/25 | Pending Resubmission | 01/10/25 | | Submission Incomplete | 02/06/25 |
| Indirect | People | 564 | Update Future Florida PALM Users | 12/09/24 | 01/10/25 | 100% - Submitted | 01/10/25 | | Submission Incomplete | 03/12/25 |
| Indirect | People | 536-C | Create Agency Specific User Acceptance Testing Plan | 12/09/24 | 04/11/25 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| N/A | Processes | 560 | Submit Change Analysis Tool | 12/09/24 | 04/11/25 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |
| 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 | 02/20/25 | | Submission Complete | |
| Direct | Data | 567-K | Share, Review, and Update Configuration Workbooks | 12/18/24 | 01/17/25 | 100% - Submitted | 02/18/25 | | Submission Complete | |
| Direct | Data | 567-P | Share, Review, and Update Configuration Workbooks | 12/18/24 | 02/14/25 | 100% - Submitted | 02/20/25 | Made updates per Task completion verification form | Submission Complete | 02/25/25 |
| Direct | Data | 658-A | Submit Data Field Mapping | 12/18/24 | 02/14/25 | 100% - Submitted | 03/11/25 | | Not Submitted | |
| Direct | Data | 658-B | Submit Data Field Mapping | 12/18/24 | 02/14/25 | 100% - Submitted | 03/10/25 | | 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 | 03/05/25 | Florida PALM: Agency did not submit. Task required to be close as reporting period has ended. | Submission Complete | |
| Indirect | Technology | 576 | Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface | 01/06/25 | 07/25/25 | 25% - Beginning Initial Internal Meetings and Information Gathering | | | | |

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|---|---|---|---|---|---|---|---|---|---|---|
| | | | Testing | | | | | | | |
| Direct | Data | 567-Q | Share, Review, and Update Configuration Workbooks | 01/27/25 | 02/21/25 | 100% - Submitted | **02/18/25** | | Submission Complete | |
| N/A | People | 582 | Share Florida PALM Updates | 01/27/25 | 02/07/25 | 100% - Submitted | **02/06/25** | | Submission Complete | |
| N/A | People | 584 | Update Authorized Smartsheet Users | 01/27/25 | 02/07/25 | 100% - Submitted | **02/06/25** | | 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 | **03/10/25** | | Submission Complete | |
| N/A | N/A | 590 | Manage Agency Specific Implementation Schedule, Risks and Issues | 02/28/25 | 04/30/25 | 100% - Submitted | **03/11/25** | | | |
| 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 | | | | |

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| 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 = 48**

• Business Process Groupings = 10/13

**Identified Subject Matter Experts = 11**

**Processes**

**Implementation:**

**Impacted Agency Business Processes = 112**

• Related Business Process Groupings = 8/13

• Planned Spreadsheet Uploads = 3

**Technology**

**Implementation:**

**Business Systems Planned for Integration = 11**

**Planned Interfaces = 19**

- Inbound Interfaces = 11

- Outbound Interfaces = 7

**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 = TBD**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

**Conversion**

• **Optional Conversions**

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Not Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

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## 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.

### LEG Risks

| Critical Operational Elements | Risk Description | Status | Risk Rating | Mitigation/Response Strategy | Reporting Period Comments or Updates | Date of Status Change | Owner / Coordinator |
|---|---|---|---|---|---|---|---|
| Technology | Sufficient Reports | Open | 6 (High/Medium) | Maintain consistent and clear communication between the agency and PALM so all reporting needs are met. Document reporting needs and verify they are met prior to go live. | | 01/14/25 | OLS Staff |
| People | Staff turnover - How many and when possible. We have people that will be completing Drop | Open | 4 (Medium/Medium) | Ensure staff is adequately trained and cross-training is taking place. Also ensure internal documentation, use cases, and related information is accurately documented and accessible for new staff. | | 01/14/25 | OLS Staff |

### LEG Issues

| Critical Operational Elements | Issue Description | Status | Priority | Resolution Plan | Reporting Period Comments or Updates | Planned or Actual Resolution Date | Owner / Coordinator |
|---|---|---|---|---|---|---|---|
| Technology | Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time | Open | High - Impacts the ability of the agency to meet deadlines or milestones | We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. | Much about Reporting is still unknown so it is difficult to assess this issue at this time. | 05/31/24 | Mike Mentillo |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not posses, if not mitigated, could have a significant impact on operations either within our external to the F & A office. | | | None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hirer F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS). | | | |
| Technology | Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information. | Open | Low - All impacts not listed as Critical or High | This is a training issue and can be accomplished through end user training and practice in the sand box. | Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much? | 05/31/24 | Mike Mentillo |

## LEG Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments or Updates |
|---|---|---|---|---|---|
| | | | | | |

## 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

## LEG Status Report Confirmation

| Reporting Period | Agency Sponsor Name: | Confirmed By: | Confirmation Date: |
|---|---|---|---|
| January - February 2025 | Lee Boatwright | boatwright.lee@leg.state.fl.us | 03/10/25 |