APD 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
July - August 2023

Agency Sponsor
Rose Salinas

Readiness Workplan Tasks

100%
0%

- ● Completed
- ● Submitted Late
- ● Pending Submission
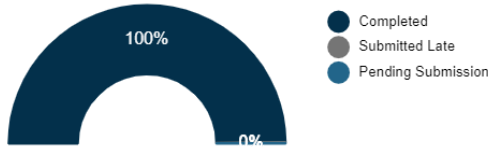
The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 5

• Completed = 5

• Submitted Late = 0

• Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

• Unique Filled Role = 6

• Duplicate Filled Role = 9

• Vacant Role = 0

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

Participation:

• Meetings Attended = 5

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 0

• Related Business Systems = 0

• Related Reports = 0

• **Documentation Status:**

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

• **Criticality:**

- High = 9 Med = 0 Low = 0 None = 0

• **Documentation Status:**

- Complete = 3 Partial = 6 Not Started = 0

Cataloged Interfaces = 78

- Inbound Interfaces = 6

- Outbound Interfaces = 1

Implementation:

• Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 480

• **Associated Unique Uses = 1181**

- Continued Use - Yes = 1094

- Continued Use - No = 57

• **Associated Business Systems = 2**

Cataloged Reports = 112

• **Criticality:**

- High = 150 Med = 18 Low = 1 None = 0

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully		APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime		PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents		PALM Team/APD Project Team
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect	Measurement: Reconciliation issue		APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system	Measurement: Employee feedback and adoption rate		PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems	Measurement: Number of integration issues		PALM Team/APD Project Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results		PALM Team/APD Project Team
People Processes Technology	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets		PALM Team/APD Project Team

Data

APD Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	IT Team question for confirmation - Data Warehouse - PALM to own this and open questions remain - regarding the scripting to be changed and how APD will receive that information along with the understanding of a comprehensive conversion plan at time of migration to the new PALM Platform.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	IT Team is engaged now with the PALM IT team and gaining input and understanding of status - ongoing	This is will be an on-going	07/31/25	APD IT/Project Team/PALM

APD 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 Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	

APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	SME Team updates	8/31	APD CCN and SME Teams	Identify the primary and secondary contacts with each remote location - regions/facilities/DDDP	Updated with new input to the SME team. APD initiative to always provide a primary and secondary to each role within the finance team structure
People	Bi-Weekly Hi-5's - Information message to the APD teams	7/6, 7/24, 8/7, 8/21, 9/5	APD Teams/CCN/SME's	Provide updates and information regarding the progress and motivation for the PALM Project as it moves forward	Bi-weekly information email sent to the teams for review and information sharing
People	APD - OWP for Additional Project Team Support	8/31	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	Target onboarding in October 2023
People Processes Data	PALM Workshop Particiaption	8/14, 8/15	APD Finance teams for Module: Disbursements and Financials/Budget/Cash Control	APD Team members attending to get an understanding of the overview and discussion around design and build elements for the PALM platform and where changes or additions are being added	APD Team members participated - primary and secondary (2 from each Finance area) so that exposure and understanding was provided for the PALM efforts currently in process
People Processes Technology Data	PALM Advisory Council Meeting	8/16	APD participation in PALM Hosted Advisory Counsel meeting	Be a part of the communication dissemination - understand where APD fits in and what is happening by keeping up to date	Attended by either or both Ramon or Becky to represent any significant information understanding and sharing with the PALM roll out objectives and actions
People Processes Technology Data	APD - Readiness - Status update Task 331	9/6 - 9/11	APD Finance Teams/PALM Teams	APD reporting on efforts to manage the project activities and objectives	APD will meet the bi-monthly requirement - but will update as activities/issues/update/completions are done.Sept report submitted 9/11
People Technology	APD Smartsheet Use	8/31	APD Finance and IT Teams	APD has determined that the use of Smartsheet will enhance the productivity within the Finance and IT teams and will add value to the efforts to align with PALM and the project requirements as well as establish good internal communication and collaboration going forward	Currently APD is onboarding and learning the basic use of the application as it is rolled out to the Finance teams. it will be better used as the Business Analyst and Tech Developer come on board to manage multi projects internally
Processes	Business Process exercise Step 1	9/1	APD Finance Teams	APD Step 1 - Finance Team Responsibility defined with job listing and team organization defined - in process	Starting at top down - APD to define Team/Module Purpose/Responsibility/Objective/Requirements
Processes	Legacy Historical Process Manual Review	8/2 - present	APD Finance Team/APD PALM Team	Use and understanding of the existing APD Finance Manual with separation for PALM Alignment into teams and defining for use in Business Process Updates	Using the APD Manual to review and assist Teams with new effort to update/create new/analyze existing practices
Technology	Business System Review - Task 326	9/6 - 9/15	APD IT Team	Final Review on the inventory in Smartsheet	This Task is considered completed and will be submitted after review with IT Primary by 9/15 - 2 open questions remaining for IConnect and Inventory System

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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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23