

**Helpful Links**

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

# AHCA Status Report Dashboard

**Reporting Period**

July - August 2024

**Agency Sponsor**

Lynn Smith

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

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 11
- Duplicate Filled Role = 4
- Vacant Role = 0

**RW Task Completeness**



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

**RW Task Completeness:**

- Score = 83.00%**
- Submitted Complete = 13
- Submitted Incomplete = 1
- Completed After Submission = 6

**RW Task Timeliness**



The Readiness Workplan Tasks Timeliness dial reflects the timeliness of your agency's submission of all RW tasks to date.

**RW Task Timeliness:**

- Score = 65.1%**
- Submitted On Time = 21
- Submitted Late = 21
- Pending Submission = 7

**Project-led Meeting Participation**



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Meeting Participation:**

- Meetings Attended = 8
- Meetings Missed = 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	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	06/28/24	8-30 - Sponsor sent out notice for the different impacted areas for a coordinated effort to clean the outstanding records (MFMP/Contracts/FACTS/Budget/Grants 8/9 - No cleaning activities are required for Assets 7/12 -12K+ records have been identified as needed to be cleansed. Initial review of the records includes encumbrances, contracts, and grants. Many of these records cannot be cleaned up by the Agency and will need to be purged by DFS. Meeting is scheduled to identify specific records that can be correct. 4/30 - Working with A&A on data cleansing 4/12 - Have begun some data review of the files provided to the Bureau for Financial Services team by DFS; Will Review and determine if additional data needs to be addressed and the approach. To be completed by	Submission Incomplete	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		8/30 - On-going process for updates. Identifying most important processes to document. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		8/30 - Development team is actively involved with the remediation, beginning with the Chart of Accounts.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		8/30 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission				
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress		8-30 - Sponsor sent out notice for the different impacted areas for a coordinated effort to clean the outstanding records (MFMP/Contracts/FACTS/Budget/Grants		
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress				

N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	08/23/24	Making small updates	Submission Complete	
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	100% - Submitted	08/16/24		Submission Complete	
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/26/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	75% - Consolidating/Inputting Information for Submission			N/A	
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	08/07/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24		Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/04/24		Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24					
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24					
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24					
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24					
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24					
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24					
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/16/24		Submission Complete	08/16/24
Direct	People	549	Submit Training Survey	08/12/24	09/20/24					
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24					
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24					
Direct	Technology	550-A	Provide Public IP Address and Select Technical Meeting Time	08/26/24	08/30/24	100% - Submitted	08/28/24		Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/10/24			
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24				N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/06/24		N/A	09/09/24

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 30</b></p> <ul style="list-style-type: none"> <li>• Business Process Groupings = 12/13</li> </ul> <p><b>Identified Subject Matter Experts = 10</b></p> <ul style="list-style-type: none"> <li>• SMEs by Business Process Grouping</li> <li>- Account Mgmt. and Financial Reporting = 0</li> <li>- Accounts Receivable = 2</li> <li>- Asset Accounting and Mgmt. = 2</li> <li>- Banking = 0</li> <li>- Budget Mgmt. and Cash Control = 2</li> <li>- Contracts Mgmt. = 1</li> <li>- Disbursements Mgmt. = 1</li> <li>- Grants Mgmt. = 1</li> <li>- Inter/IntraUnit Transactions = 1</li> <li>- Payroll Mgmt. = 1</li> <li>- Projects Mgmt. = 0</li> <li>- Revenue Accounting = 1</li> <li>- System Access and Controls = 1</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p>The sequence of procedures to accomplish a business objective.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 67</b></p> <ul style="list-style-type: none"> <li>• Related Business Systems = 5</li> <li>• Related Reports = 31</li> <li>• Documentation Status:</li> <li>- Complete = 65 Partial = 0 Not Started = 1</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 67</b></p> <ul style="list-style-type: none"> <li>• Related Business Process Groupings = 10</li> <li>- Planned Spreadsheet Uploads = 4</li> <li>• Level of Impact: People Changes</li> <li>- High = 10 Medium = 9 Low = 16 None = 1 Uncertain = 0</li> <li>• Level of Impact: Processes Changes</li> <li>- High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0</li> <li>• Level of Impact: Technology Changes</li> <li>- High = 1 Medium = 30 Low = 4 None = 1 Uncertain = 0</li> <li>• Level of Impact: Data Changes</li> <li>- High = 0 Medium = 31 Low = 4 None = 1 Uncertain = 0</li> <li>• Segments I &amp; II Documentation Update Status</li> <li>- Not Started = 16 In Progress = 21 Complete = 0</li> <li>• Segment III Documentation Update Status</li> <li>- Not Started = 0 In Progress = 0 Complete = 0</li> </ul>	<p>The applications or tools used to process, track, or report on financial operations.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 23</b></p> <ul style="list-style-type: none"> <li>• Criticality:</li> <li>- High = 20 Med = 0 Low = 2 None = 1</li> <li>• Documentation Status:</li> <li>- Complete = 3 Partial = 15 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 18</b></p> <ul style="list-style-type: none"> <li>- Inbound Interfaces = 13</li> <li>- Outbound Interfaces = 5</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 23</b></p> <ul style="list-style-type: none"> <li>• Segment I - Documentation Updates:</li> <li>- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li>• Segment II - Documentation Updates:</li> <li>- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li>• Segment III Documentation Update Status</li> <li>- Not Started = 0 In Progress = 0 Complete = 0</li> </ul> <p><b>Planned Interfaces = 15</b></p> <ul style="list-style-type: none"> <li>- Inbound Interfaces = 0</li> <li>- Outbound Interfaces = 11</li> </ul>	<p>Information used in or produced from an agency's financial business operations.</p> <p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 82</b></p> <ul style="list-style-type: none"> <li>• Associated Unique Uses = 82</li> <li>- Continued Use - Yes = 1</li> <li>- Continued Use - No = 0</li> <li>• Associated Business Systems = 22</li> </ul> <p><b>Cataloged Reports = 62</b></p> <ul style="list-style-type: none"> <li>• Criticality:</li> <li>- High = 59 Med = 0 Low = 0 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 7/9</b></p> <ul style="list-style-type: none"> <li>• Accounts Receivable (AR)</li> <li>- Planned Distribution Codes = 13</li> <li>• Asset Management (AM)</li> <li>- Planned Location Codes = 13</li> <li>- Planned Associated Area ID's = 50</li> <li>• Commitment Control (KK)</li> <li>- Planned Option = Option # 1 - Track with Budget</li> <li>• General Ledger (GL)</li> <li>- Planned Budgetary Value Combo Edits = 694</li> <li>- Planned Local Funds = None</li> <li>- Planned Organization ID's = 192</li> <li>- Planned OA1's = 632</li> <li>- Planned OA2's = None</li> </ul>

**Segment IV Planned Configurations**

- Started = 2 Not Started = 0

**Conversions & Data Readiness**

• Conversions Needed = 10

• Agency Data Outside of Primary Source System(s) = 0

**Data Readiness/Cleansing Status:**

- Complete = 2 In Progress = 0 Not Started = 1 Not Applicable 3

**Reports = 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.

**AHCA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander

**AHCA Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Hire additional staff augmented staff to perform more of the Florida PALM related tasks.		11/04/24	Wander, Phyllis
People Processes	AHCA Florida PALM team needs at least two additional resources for the remainder of the Florida PALM project. The Agency currently has budget to hire one additional resource, but needs budget to hire the second.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Obtain budget to hire additional staff		10/07/24	Smith, Lynn
People	Matriculation of knowledgeable business process and the SunFocus Application resources' will hinder the progress of the project.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Short term is to ensure documentation is current for jobs roles		11/01/24	
Technology	Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness of task to continue to be low.	Open	Low - All impacts not listed as Critical or High	Update the comments of the remediation tasks as they become complete.		05/30/25	Wander, Phyllis

**AHCA Assumptions**

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

**AHCA 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	Florida PALM-Financial Services Ecosystem Management Status	07/01/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	07/02/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Weekly Project Team Meeting	07/03/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Florida PALM-Financial Services Ecosystem Management Status	07/08/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	07/09/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	07/09/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Weekly Project Team Meeting	07/10/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
Processes	Grants Management	07/11/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
People	Florida PALM-Financial Services Ecosystem Management Status	07/15/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	07/16/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Weekly Project Team Meeting	07/17/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	

Processes	STMS/Revolving Fund/P-Card Processes	07/18/24	Bureau of Financial Services Disbursements	Identify any missing processes while delivering the To-Be process documentation	
People	Florida PALM-Financial Services Ecosystem Management Status	07/22/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Florida PALM-Financial Services Ecosystem Management Status	07/29/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	07/30/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Weekly Project Team Meeting	07/31/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
Processes	STMS / P-Card Processes	08/01/24	Bureau of Financial Services Disbursements	Identify any missing processes while delivering the To-Be process documentation	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	08/06/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Florida PALM-Financial Services Ecosystem Management Status	08/12/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Florida PALM-Financial Services Ecosystem Management Status	08/19/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Technology	Florida PALM Technical Meeting	08/19/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People	Weekly Project Team Meeting	08/21/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Florida PALM-Financial Services Ecosystem Management Status	08/26/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Technology	Florida PALM Technical Meeting	08/26/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People Technology	Florida PALM Technical Meeting	08/26/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	

### 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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### AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	09/10/24
May - June 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	07/03/24
March - April 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/24
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24