

Helpful Links

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

APD Status Report Dashboard

Reporting Period

July - August 2024

Agency Sponsor

Rose Salinas

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 = 12
- 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 = 83.60%**
- Submitted Complete = 16
 - Submitted Incomplete = 1
 - Completed After Submission = 8

RW Task Timeliness



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

RW Task Timeliness:

- Score = 98.08%**
- Submitted On Time = 48
 - Submitted Late = 2
 - Pending Submission = 0

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 = 10
- 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	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission		6/17 - IT Team is moving forward in review and updates to task requirements - Primary to APD is the FRS database and from that all other ABS's are considered - PP in development for all timeline milestones		
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/25/24	7/15 - sharing PALM updates and links to help teams is a primary priority within APD - IN Progress always 7/25 - completed and submitted - all documented with attachments - some shareable 8/1 - re-submitted with correct audience - Other-to end users - updated and also filled blank date in row requiring date	Submission Complete	08/01/24
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/05/24	7/25 - meetings to review and outlines being initiated for the APD Teams 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables 8/30 - Tuesday meeting to finalize - Project activities 9/5 - cleared by team review - "NO" for all - Proj. Costing		
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24	7/25 - meetings to review and outlines being initiated for the APD Teams 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables 8/30 - SharePoint issue with this one - getting all onboard and working thru CMS - Tuesday 9/3 = BA led 9/4 - email to PALM for clarification - to get this closed - questions needing answer for APD logic 9/6 - Need PALM to input values due to data validation issue in workbook, but values provided to RC via email		09/06/24
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		7/25 - planning IT Team review 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables		
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables		
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables		
Direct	Technology	545-B	Update and Finalize Florida PALM Conversion Inventory for Segment IV - Projects (PCC001)	07/22/24	08/23/24	100% - Submitted	08/23/24	7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/8 - updates being worked and review with AM Team 8/13 - physical inventory review and final updates 8/19 - BA updating with teams 8/22 - file located on SharePoint was a major challenge for the agency and	Submission Complete	

								major challenge for the agency - and needing to make certain both designated approved access choices are updated with PALM per Rose's submissions - PALM asking for additional submission for S.J. 8/23 - File sent via email for PALM upload to Secure File Share portal		
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		7/25 - planning IT Team review 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		7/25 - planning IT Team review 8/19 - IT Team in Review and working Data Warehouse - ABS attention		
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/13/24	8/7 - completed - Dee/Shaquan - submitted to PALM team and updates on CCN - reviewing for outstanding requirement 8/12 - Email to Dora to clarify - will submit on time - completed - but need to know we chose the correct STF type 8/13 - moving to 100% completed	Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	75% - Consolidating/Inputting Information for Submission		8/19 - Training was part of original survey - determining if additional survey focused on Trng will be needed or the information provided will give enough good stats. 8/27 - query is out to find those APD that will be committed to the intense requirements for participation in the TT effort. 9/10 - APD Core team to discuss with the review suggesting that we will not participate in TTT		
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	50% - In Progress		9/10 - check the team status - on our internal tracker 541-C: Provide the agency-specific configurations needed for SpeedKey and Payroll (PR). PR Configuration Workbook - Position Funding Worksheet Video PR Configuration Workbook - CJIP Funding Worksheet Video PR Configuration Workbook - FFIP Funding Worksheet Video PR Configuration Workbook - Default Funding Worksheet Video		
Direct	Technology	550-A	Provide Public IP Address and Select Technical Meeting Time	08/26/24	08/30/24	100% - Submitted	08/27/24	8/27 - IT Team is meeting to provide the information requested 8/26 - regarding the IP address(es) that are needed for PALM Access/UAT connectivity - SS APD MFT Planning 8/27 - 550-A - is completed as Lee and Rohan for APD are the designated Testing Support contacts identified by APD. - SS APD Testing Support 8/27 - provided by IT team - 160.131.122.0/24 IP address and Port 8/27 - Meeting time - Selected on on the schedule worksheet - APD - 1-1:30 Thursday 8/5	Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/09/24	9/4 - email to Rose for review and sign off with submission by Friday 9/6 9/10 - Rose email confirming status submission completed.		
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	09/05/24	9/4 - meeting scheduled for 1:30 pm est Thursday Sept 5	N/A	

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.
Implementation: Planned Florida PALM End Users = 74 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 40 • SMEs by Business Process Grouping - Account Mgmt. and Financial Reporting = 3 - Accounts Receivable = 2 - Asset Accounting and Mgmt. = 3 - Banking = 2 - Budget Mgmt. and Cash Control = 2 - Contracts Mgmt. = 3 - Disbursements Mgmt. = 3 - Grants Mgmt. = 2 - Inter/IntraUnit Transactions = 20 - Payroll Mgmt. = 6 - Projects Mgmt. = 5 - Revenue Accounting = 2	Current-State: Cataloged Business Processes = 237 • Related Business Systems = 6 • Related Reports = 34 Documentation Status: - Complete = 237 Partial = 0 Not Started = 0 Implementation: Impacted Agency Business Processes = 237 • Related Business Process Groupings = 10 • Planned Spreadsheet Uploads = 0 Level of Impact: People Changes - High = 14 Medium = 6 Low = 47 None = 81 Uncertain = 0 Level of Impact: Processes Changes - High = 12 Medium = 12 Low = 31 None = 93 Uncertain = 0 - Level of Impact: Technology Changes	Current-State: Cataloged Business Systems = 9 • Criticality: - High = 9 Med = 0 Low = 0 None = 0 Documentation Status: - Complete = 8 Partial = 1 Not Started = 0 Cataloged Interfaces = 78 - Inbound Interfaces = 6 - Outbound Interfaces = 1 Implementation: Business Systems Planned for Integration = 8 Segment I - Documentation Updates: - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7 Segment II - Documentation Updates: - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7	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: Segments I & II Planned Configurations = 7 • Accounts Receivable (AR) - Planned Distribution Codes = 3 • Asset Management (AM) - Planned Location Codes = 368 - Planned Associated Area ID's = None

- System Access and Controls = 2

Role Mapping = TBD

Training = TBD

- Level of Impact: Technology Changes

- High = 15 Medium = 5 Low = 22 None = 106
Uncertain = 0

• Level of Impact: Data Changes

- High = 17 Medium = 13 Low = 11 None = 107
Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 138

• Segment III Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 138

• Segment III - Documentation Updates:

- Complete = 0 Updating = 0 Evaluating = 0
Not Started = 0 Not Needed = 7

Planned Interfaces = 16

- Inbound Interfaces = 3

- Outbound Interfaces = 13

• Commitment Control (KK)

- Planned Option = Option # 1 - Track with Budget

• General Ledger (GL)

- Planned Budgetary Value Combo Edits = 382

- Planned Local Funds = None

- Planned Organization ID's = 359

- Planned OA1's = 230

- Planned OA2's = 65

Segment IV Planned Configurations

- Started = 2 Not Started = 0

Conversions & Data Readiness

• Conversions Needed = 8

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

• Data Readiness/Cleansing Status:

- Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0

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.

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 noted: Migration Phase	12/08/23	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 noted: Migration Phase	12/08/23	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 - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	- Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	- APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed, within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams

Data	Training - Data migration errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/21/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	- Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
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 - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	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 - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building	04/24/24	ALL APD Finance and IT Teams
People	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and	- Provide updates on	10/24/23	APD Core Team

Processes Technology Data				update documentation accordingly.	regulatory changes in real-time and include them in monthly compliance reports. - ongoing		
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to be initiated with COA review	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Roll Back Plan to be included in the Conversion Plan	Open	3 (High/Low)	APT to incorporate the parallel effort with current business processes and also with the strategy process with PALM Data and ABS alignment.	Prepare for unexpected issues that cause risk during migration causing significant problems that will stop progress forward into PALM	08/27/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT 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 - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams

APD 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	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2 8/27 - still reviewin g- as this is a unique field to APD - we will incorporate the conversion with a plan to make certain this is mapped correctly	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD IT TEAM Collaboration with the PALM IT Team	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD will continue with the Excel Spreadsheet listing of IT questions that will be shared to the Readiness Coordinator for APD and filter to the relevant PALM team members for answers and acknowledgement - this is a solution that was proposed by the PALM Team - APD would like to work more collaboratively in the IT effort - as we have begun work to establish efforts for business as usual and develop PALM spec initiatives that are currently known.	This is going to be an ongoing challenge as timing is of the essence and with a delay in responses - the pace is slowed and falls back to last minute activities for completion	09/26/25	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted 4/22 - new organization chart has been drafted and will initiate a change in organizational structure - G/L will be updated as approvals are completed 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval 8/27 - changes have not really impacted as expected.	07/31/24	APD Sponsor and Finance Team

					employee SE alignment is updated to employee records		
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team 4/22 - the inventory clean up and alignment with G/L cleanse is in progress - not yet closed 8/27 - still open and will review by 9/30	07/01/24	APD AM Team - BA - PM - Core Team
People Processes Technology Data	APD Inventories - Asset and Encumbrances - Process Improvement	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Working with teams to establish and document processes while cleaning data - giving an internal due date and review	4/22 - still in process - unable to finish based on the Task requirements and due date of 4/12 4/24 - Asset Team has issued the Inventory requirements for fiscal yr end - and with that the effort to close is targeted for full cleanse of ALL inventory by June 30, 2024 4/24 - Encumbrances - part of the YE Close. 6/26 - Encumbrances completed with YE Close out and Certify forward - leaving Locations and Physical Inventories to be validated and completed - target - Aug 30th for all - but for Task 513 - July 5th 8/27 - cleanse completed 8/1 - and processes being updated but not related to PALM	07/01/24	Asset Mgmt and Encumbrances by the Disbursement team
People	APD Organizational changes will change the alignment of the personnel within the agency - but no approvals are final and there remain accounting adjustments to support until the accounting structure can be corrected	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get DMS approvals thru based on the Director's changes to organizational structure and chart - currently a draft	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval	07/31/24	APD Agency as a whole
People Processes Technology Data	APD Asset Inventories - Locations physical address alignment across systems to include Solaris	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get FLAIR and Solaris Data corrected/updated/changed/added/deleted for all Physical locations associated with APD either HQ/Regions/Facilities/Regions	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval - re-write of procedures and documentation to correct processes - aligning with the asset module workflow within PALM 8/27 - still in process with IT team - PALM specs being used and PALM CORE Team working with IT teams to support the changes expected	12/20/24	APD Agency as a whole
People Processes Technology Data	Custom development and Thorough Testing	Open	High - Impacts the ability of the agency to meet deadlines or milestones	work in a sprint IP effort to write - test - move forward with the data base effort being built for PALM -	8/27 - creating the testing effort to make certain the APD strategy for PAL database within APD to support the data from PALM will be fully tested and a test plan will be vetted by the teams	09/26/25	APD IT Teams/APD PALM Team and Core Team
Processes Data	Data Quality issue	Open	Low - All impacts not listed as Critical or High	Ongoing efforts with all teams to cleanse data in FLAIR	8/27 - ongoing issue and ongoing cleanse in progress	02/28/25	PM/BA/Finance Teams

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	On-Going with PALM Team Readiness Plan
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	Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst
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	On-going
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	On-going with Amendment 8 approved - move forward with PALM Directives as defined
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	To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
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	second half and then ongoing as the project readiness plan is outlined by PALM
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	second half and then ongoing as the project readiness plan is outlined by PALM
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	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters	Logged	02/28/24	APD Project Team/APD IT Team	Accounting Alignment 4/24 - In process with Task 513 - also in data cleanse effort
People	APD Organizational Structure is fully defined and corelated to the correct org code by personnel alignment - updated by HR	Logged	02/28/24	APD Project Team/APD IT Team	Organizational Alignment 4/24 - APD faces a reorganization over the next 9 months - thru Dec. 2024. Approvals remain outstanding. The PALM requirements will be "as is" for the agency and updates will occur when approvals move thru. There will be no wait time or hold to update. Following the Task requirements of 513 toward the May due date.
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.	Logged	02/28/24	APD Project Team/APD IT Team	4/24 - this remains a big concern on the handling of this data prior to conversion. The data pull for the conversion must be aligned correctly so that the PALM load places the data into the OA2 field in support of the accounting requirements for APD. Planning within APD is on-going as understanding of the data requirements becomes available. APD has discussed in several Touchpoint meetings and also reviewed with the PALM IT RC Lead Chris. 6/25 - Consideration into the conversion plan and how data will map. Need to review all possibilities
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.	Logged	04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion. 6/26 - data cleansing continues and will continue thru the next 18 months. Updates will be made in FLAIR as required by the accounting daily/weekly/monthly
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer	Logged	04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.
People Processes Technology Data	Data Security Compliance	Logged	08/27/24	APD Finance Teams	The cloud-based system will comply with all state and federal regulations regarding data privacy and security, such as CJIS, HIPAA, or IRS 1075, as applicable
People Processes Technology Data	No Major Changes to Existing Workflows,	Logged	08/27/24	APD Finance Teams	Assumes minimal disruption to existing business processes or workflows, and that the new system can adapt to existing operational requirements.
Processes Technology Data	High Availability and Reliability	Logged	08/27/24		The cloud-based system will be more reliable than the legacy mainframe, with a guaranteed uptime and robust disaster recovery capabilities.
Technology Data	Scalability	Logged	08/27/24		The new system can handle future growth in terms of users, transactions, and data volume without requiring significant reconfiguration or additional infrastructure
People Processes Technology Data	Realistic Timeline.	Logged	08/27/24		The project will follow a realistic timeline with adequate buffers for unforeseen delays, ensuring that all milestones are met without excessive pressure
People Processes Technology Data	Auditability	Logged	08/27/24		The new system will provide sufficient audit trails and logs to satisfy internal and external audit requirements.

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 Processes Technology Data	Asset Management Team	07/01/24	APD Asset Management Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July and Aug Completed 7/1 - 7/26 - 8/22
People Processes Technology Data	Weekly APD PALM Internal Team Meeting	07/01/24	PM/BA/TA - APD Internal PALM	Primary PALM Team Status Call - PM/BA/TA - weekly	Review all - talk to status - align APD 7/1-7/8-7/15-7/22-7/29-8/5-8/12-8/19-8/26
People Processes Technology Data	Accounts IT Team	07/09/24	APD IT Team -PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July and Aug Completed 7/9-7/29-8/6-8/8-8/20
People Processes Technology Data	APD CCN Meeting Specific	07/10/24	APD CORE Team - Tacachale Facility	New monthly Meeting	meetings on going: 7/10 - 8/21
People Processes Technology Data	Weekly Core Team Status Report	07/11/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Email updates (Past/present week/future) Weekly	Awareness/Task Review/Updates regarding Teams/PALM Participation Weekly Meeting - Review status/updates 7/11-7/18-7/25-8/1-8/8-8/15 -8/22-8/29
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Meeting	07/11/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley/Business Analyst - Kristopher/Technical Analyst	Awareness/Task Review/Updates regarding Teams/PALM Participation	Awareness/Task Review/Updates regarding Teams/PALM Participation Weekly Meeting - Review status/updates 7/11-7/18-8/1-8/8-8/22
People Processes Technology Data	APD IT Conversion PLAN Meetings - APD PALM Team	07/11/24	PM/BA/TA - APD Internal PALM	IT Requirements/APD conversion planning and outline for timelines and activity requirements	Focus on APD timeline for Data/IT Team(s) -7/11-7/18-8/1-8/8-8/22
People Processes Technology Data	APD All Hands meeting	07/17/24	APD Accounting Teams - All	Monthly ALL Teams meeting in person	one off - teams meeting to update after ye
People Processes Technology Data	Accounts Receivable Team	07/17/24	APD Accounts Receivable - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July and Aug Completed 7/17 - 8/21
People Processes Technology Data	Budget Team	07/24/24	APD Budget Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July 7/26 - makeup for Aug - one off
People Processes Technology Data	Disbursements Team	07/25/24	APD Disbursements Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July Completed 7/25 - makeup for aug - due to schedule
People Processes Technology Data	APD Calendar updates to Teams	07/25/24	APD PM	Timeline Snapshot for the month of May and June - upcoming events and scheduled activities	Agency Updates - BA and PM Review 7/25
People Processes Technology Data	Contract Team	07/29/24	APD Contract Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly Jul and Aug completed 7/29 - 8/30
People Processes Technology Data	Monthly Inter/Intra - Facilities Team Meeting	07/29/24	APD Facilities Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July and Aug Completed 7/29 - 8/22
People Processes Technology Data	Payroll Team	07/30/24	APD Payroll Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly Jul and aug - Completed 7/30 & 8/26
People Processes Technology Data	Account Management and Financial Reporting Team	07/30/24	APD Financial Reporting Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly July and Aug Completed 7/30 - 8/30
People Processes Technology Data	Monthly Inter/Intra - Regions Team Meeting	07/31/24	CCN and SMEs - PM/BA/TA	State/HQ-SE-SW-NE-NW-Suncoast-Southern-Central Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Team meeting - monthly July and Aug Completed 7/31 - 8/30
People Processes Technology Data	APD Physical Inventory Meeting- Asset Team	08/22/24	APD CORE Team - Tacachale Facility	Special Meeting	Focus for Task 513/514 meetings on going: 8/22-8/26
People Processes Technology Data	APD - High Fives - Email	08/30/24	APD Finance Teams as a whole	APD Communication Plan	July/Aug overviews

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

APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Rose Salinas	rose.salinas@apdcares.org	09/09/24
May - June 2024	Rose Salinas	rose.salinas@apdcares.org	07/01/24
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24