

Helpful Links

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

DBPR Status Report Dashboard

Reporting Period

July - August 2024

Agency Sponsor

Sally Huggins

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 = 10
- Duplicate Filled Role = 8
- 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 = 96.88%**
- Submitted Complete = 31
- Submitted Incomplete = 1
- Completed After Submission = 0

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 = 90.96%**
- Submitted On Time = 37
- Submitted Late = 13
- 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	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/11/24		Submission Complete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/19/24	Resubmitted on 6/27/24	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	06/19/24	Ready	Submission Complete	
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	05/23/24	Conplete	Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	05/24/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	08/20/24	Versa Regulation (ABS) remediation is being tracked under Task 547	Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	08/01/24		Submission Complete	
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	100% - Submitted	08/06/24	UAT Testing Plan has been drafted and reviewed internally by DBPR Project Directors. Note: Sections of the UAT Testing Plan associated with PALM Tasks 536B and 536C have not been completed in the document; however, notes and other thoughts are there for future use.	Submission Complete	
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	06/27/24	All updates have been applied. Erin Moreno and Lynn Smith were removed.	Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	100% - Submitted	08/29/24	Smartsheet(s) have been updated and are ready for Bimonthly Status reporting	N/A	
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/16/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/02/24		Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/26/24	Have 2 rows with multiple organizations.	Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	08/20/24	Cleansing plans for 4 remaining required conversions were confirmed.	Submission Complete	
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		Current-State Business Process 7.01 will be handled by DFS going forward. Smartsheet is complete - just awaiting any potential changes as a result of Design Workshops for Segment 4 Business Processes		
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	08/22/24	No updates identified and required at this time and have confirmed with Versa even though there will be remediation.	Submission Complete	
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/20/24	Confirmed 4 conversions identified as needed (Conversion Inventory & Data Readiness Smartsheet).	Submission Complete	
Direct	Technology	545-B	Update and Finalize Florida PALM Conversion Inventory for Segment IV - Projects (PCC001)	07/22/24	08/23/24	100% - Submitted	08/22/24	No entered for PCC001	Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	Pending Resubmission	08/29/24	No interfaces being developed at this time. Awaiting meeting with new Accounting Systems Analyst to review all ABSs and confirm information provided (No "Uncertains")	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		FLAIR Object Codes to be configured in PALM OA2 and Versa will be remediated to do the same. Specifications to produce ARI010 out of Versa Regulation have been drafted,		

								reviewed, and turned over to DBPR IT. Specifications for spreadsheet uploads IUI001 and API041 still be developed		
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/20/24	Server details identified. Primary File Manager (John Mounts replacement) is still being interviewed for. Lyndell Francis is interim primary contact and Jennifer Gaines is the backup contact for now.	Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/30/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission		Need access to ticketing system so can incorporate ServiceNow in the document		
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24	75% - Consolidating/Inputting Information for Submission		UAT testing Plan has been drafted and is under internal DBPR review		
Direct	Technology	550-A	Provide Public IP Address and Select Technical Meeting Time	08/26/24	08/30/24	100% - Submitted	08/29/24	No interfaces are being developed within DBPR ABBs at PALM Go Live. No meeting with File Managers and Florida PALM Technical Team to go over server details is needed at this time.		
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/09/24			
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	25% - Beginning Initial Internal Meetings and Information Gathering			N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	75% - Consolidating/Inputting Information for Submission			N/A	

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 32</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 22</p> <ul style="list-style-type: none"> SMEs by Business Process Grouping Account Mgmt. and Financial Reporting = 7 Accounts Receivable = 7 Asset Accounting and Mgmt. = 8 Banking = 7 Budget Mgmt. and Cash Control = 7 Contracts Mgmt. = 2 Disbursements Mgmt. = 7 Grants Mgmt. = 1 Inter/IntraUnit Transactions = 5 Payroll Mgmt. = 1 Projects Mgmt. = 1 Revenue Accounting = 9 System Access and Controls = 3 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Current-State:</p> <p>Cataloged Business Processes = 97</p> <ul style="list-style-type: none"> Related Business Systems = 11 Related Reports = 25 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 84 Partial = 13 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 97</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9 Planned Spreadsheet Uploads = 0 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 0 None = 97 Uncertain = 0 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 79 Medium = 0 Low = 0 None = 18 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 79 Medium = 0 Low = 0 None = 18 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 79 Low = 0 None = 18 Uncertain = 0 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 52 <p>Segment III Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 30 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Current-State:</p> <p>Cataloged Business Systems = 11</p> <ul style="list-style-type: none"> Criticality: High = 6 Med = 2 Low = 1 None = 2 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 9 Partial = 0 Not Started = 1 <p>Cataloged Interfaces = 1</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 0 <p>Implementation:</p> <p>Business Systems Planned for Integration = 2</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment II - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1 Segment III - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 1 <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Current-State:</p> <p>Unique FLAIR Data Elements = 84</p> <ul style="list-style-type: none"> Associated Unique Uses = 85 Continued Use - Yes = 48 Continued Use - No = 32 <p>Associated Business Systems = 37</p> <p>Cataloged Reports = 55</p> <ul style="list-style-type: none"> Criticality: High = 20 Med = 19 Low = 15 None = 0 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 6/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = 52 Asset Management (AM) Planned Location Codes = 9 Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 1 - Track with Budget General Ledger (GL) Planned Budgetary Value Combo Edits = 661 Planned Local Funds = None Planned Organization ID's = 368 Planned OA1's = 31 Planned OA2's = None <p>Segment IV Planned Configurations</p> <ul style="list-style-type: none"> Started = 2 Not Started = 0 <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 8 Agency Data Outside of Primary Source System(s) = 0 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 4 In Progress = 0 Not Started = 0 Not Applicable = 0 <p>Reports = TBD</p>

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.

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	If the required testing is not defined and scheduled, F&A staff may not be ready and available and that could negatively impact DBPR PALM readiness	Closed	6 (High/Medium)	Mitigation - Discuss and understand all the PALM scheduled testing with the Readiness Coordinator and Technical Readiness Coordinator and ensure the Project Schedule reflects realistic durations and timelines.	Awaiting feedback from Technical Readiness Coordinator per his research.	07/03/24	Thomas Richardson
People Processes Technology Data	If all various Future-State Business Process scenarios (including anomalies and non-happy path conditions) are not identified and accounted for in test scripts, then testing will not be comprehensive and could negatively impact DBPR PALM readiness	Open	6 (High/Medium)	Mitigation - Work with DBPR SMEs and identify all possible scenarios. Account for these scenarios in UAT test scripts in advance of scheduled UAT.	DBPR staff were asked to be thinking about and start identifying the various scenarios that need to be accounted for so they can be documented. OCM lead created folders for storing all BP scenarios that will be used for creating test scripts.	07/03/24	Thomas Richardson
People Processes	If DBPR Finance & Accounting process owner resources are not available as needed, then the process flows may not be validated/developed, and this will negatively impact DBPR PALM readiness	Closed	3 (High/Low)	Mitigation - Complete Stakeholder Register after identifying process owners and work with them to ensure availability	Year End Processing is getting ramped up and could impact staff's availability. F&A resources have been available as needed so far. All Segment 1-3 Current-State Business Processes have been reviewed. Staff have multiple daily responsibilities that will need to be coordinated.	07/10/24	Gary Townsend
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners Create visual aids, mapping documents, and other PALM educational tools.	PALM education, UAT training, and Florida PALM training is being planned. Anomalies and various scenarios are being identified so they can be tested.	04/08/24	Gary Townsend
Processes	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	No DBPR-specific requirements have been identified at this time	04/08/24	Thomas Richardson
People Processes Technology Data	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete work flows	Open	3 (High/Low)	Mitigation - Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)	Sessions to review Future-State process flows are resuming mid-August.	04/18/24	Thomas Richardson
People Processes Technology Data	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete Future-State Business Processes once we go live	Open	3 (High/Low)	Mitigation - Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	DBPR has requested batch cycle days/times and data query constraints. Dropped Probability from 2 to 1.	04/23/24	Thomas Richardson
People Processes Technology Data	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Sessions to review Future-State process flows are resuming next week. Dropped Probability from 2 to 1.	05/31/24	Thomas Richardson
People Processes Technology Data	If significant time is not spent planning and preparing for UAT as well as business processes not intended to be performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Open	3 (High/Low)	Mitigation - If significant time is not spent planning and preparing for UAT as well as business processes not being performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Several questions have been added to the DBPR UAT Question Log Smartsheet. The PM has drafted several UAT testing artifacts that could be used and these have been shared. Most BPs executed outside of FLAIR/PALM utilize FLAIR@BPR, which will go away so the importance of scripting and testing BPs to be performed outside of PALM increases as a result	07/17/24	Thomas Richardson
People Processes Technology Data	If DBPR does not test all send/receive transactions for Inter/Intra Unit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	This is related to Action Item #40	08/16/24	Thomas Richardson
People Processes Technology Data	If DBPR staff are not familiar with all Chart of Account changes, then it will be difficult to make the necessary changes required for a smooth transition, which negatively impact the PALM readiness	Open	3 (High/Low)	Make details of Chart of Accounts and related changes an area of focus as part of the PALM Education activities that are under way	Will impact non-PALM document sources (e.g. Excel from Suncom, etc.).	08/29/24	Thomas Richardson
People Processes Technology	If PALM Future-State Business Processes are not stable and subject to significant change during or after PALM education presented to DBPR end users, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	2 (Medium/Low)	Mitigation - Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes. Identify any shortcomings in Future-State Business Processes and communicate them to the DFS PALM Project team via the RC as soon as possible	Segment IV Design Workshops have identified some changes to Business Processes. Dropped Impact from 3 to 2.	06/19/24	Thomas Richardson
People Processes	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Open	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	Role Mapping is currently being determined	08/19/24	Jennifer Gaines
People Processes Technology Data	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Open	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	Discussed at Inter/Intra Unit Design Workshops	08/19/24	Thomas Richardson

DBPR 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	If Timing of Segment IV review & design workshops interferes with end of year Finance & Accounting activities, then F&A Business operations could be adversely impacted	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Try to get out in front as much as possible before EOY activities pick up. Catch up on PALM Tasks after EOY activities complete. Note: Scheduling of Workshops determined as good timing.	This issue can be closed now that Year End processing is nearing the end combined with we know the Segment IV Design Workshop dates. Review of To Be Business Process has been put on hold until Year End Processing is complete.	08/01/24	Sally Huggins

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR end users	
Processes	The Agency Project schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Project Schedule was completed and baselined
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR end users PALM	Resources have been available to review/define Current-State Business Processes
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than January 2026.	Logged	04/01/24	All DBPR end users PALM	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR end users PALM	The DBPR staff have been engaged
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR end users PALM	Regular meetings were conducted with the Readiness Coordinators
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership.	Logged	04/01/24	All DBPR end users Thomas Richardson PALM	Great support has been received to date
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All DBPR end users Versa FLAIR@BPR	Some progress has been made; Data warehouse design not yet completed will impact this
People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All DBPR end users PALM FLAIR	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All DBPR end users PALM FLAIR	Some Finance and Accounting Business Processes have been determined not available in PALM
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	All Current-State Business Processes were reviewed/updated
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project schedule.	Logged	04/01/24	All DBPR end users PALM	All Current-State Business Processes were reviewed/updated
People Processes Technology Data	Testing of remediating business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All DBPR end users PALM	Detailed Testing Tasks were added to the Project Schedule
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Detailed Testing Tasks were added to the Project Schedule
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contrace Organizational Change Lead	Contract Staff have been onboarded
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All DBPR end users OCM Lead PALM	
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Data cleansing Tasks were completed
People Processes Technology Data	The Florida PALM Project will perform data cleansing and conversion.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Data cleansing and conversion Tasks were completed
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology	Language in the To Be Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	

Data					
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding To Be Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy.	Logged	05/01/24	DFS PALM Development Staff All DBPR end users PALM	These Current-State Business Processes are being assigned to arbitrary Segment 5 for scheduling/priority purposes.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR end users	Readiness coordinator is checking for available options
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All DBPR end users	To be included in the Test Plan (Task 536)
People Processes	All PALM To Be Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All DBPR end users PALM PALM Website	Project Manager Discussed with Readiness Coordinator
People Processes	Data elements included in FLAIR standard reports will be provided by DFS PALM and DBPR will identify data elements included in DBPR custom reports	Logged	06/17/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	FLAIR Reports Smartsheet does not include applicable data elements. FL PALM has indicated they are not providing (see AI #30)
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by Florida PALM and are not the responsibility of DBPR	Logged	06/21/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	These will be remediated by the time scheduled testing begins
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR PALM Readiness Project stakeholders	Related to question added to Question Log Smartsheet about who populates the RTM for global PALM Business Processes that apply to all Agencies
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that it does not become outdated and obsolete.	Logged	08/07/24	All DBPR PALM Readiness Project stakeholders	Names on the DBPR Org Chart is one area that will need to be closely monitored.
Data	All PALM reports will include all Chart of Accounts fields (including OA2)	Logged	08/16/24	All DBPR PALM Readiness Project stakeholders PALM	DBPR is considering using the OA2 field in PALM to house the Object Codes
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	All DBPR PALM Readiness Project stakeholders PALM	No direct interfaces are being developed for DBPR ABSs at this time

DBPR 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	Prepared for and conducted meeting with the Project Directors	07/02/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	07/03/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	07/03/24	DBPR Supervisors/Managers Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Identified and documented new assumptions	07/03/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	07/03/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	
People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	07/03/24	Sally Huggins Jennifer Gaines Thomas Richardson	To provide a thorough and accurate account of the DBPR Readiness activities conducted throughout the reporting period	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	07/09/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	07/09/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Worked on and submitted draft of Rule 60GG Project Management Plan (PMP - using approved template) for review	07/09/24	Thomas Richardson	Complete required Rule 60GG deliverable	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	07/11/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Participated in Weekly Task Talk session	07/11/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed Task 538 - Submit Bimonthly Agency Readiness Status Report; obtained approval from Readiness Coordinator (on schedule)	07/11/24	Sally Huggins	To complete the required PALM Task and to inform DFS and DBPR management of the state of the Project	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	07/11/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	

People Processes Technology Data	Completed Task 538 - Submit Bimonthly Agency Readiness Status Report; obtained approval from Readiness Coordinator (ahead of schedule)	07/11/24	All DBPR Stakeholders PALM Leadership	To ensure DBPR status is communicated and the project is being managed effectively	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	07/12/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	07/12/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed draft of UAT Testing Plan (Task 536A) - and submitted for interenal DBPR review	07/15/24	DBPR Supervisors and Managers Thomas Richardson PALM	To stay on schedule for required PALM Tasks	
People Processes Technology Data	Submitted draft Update Workforce Readiness Plan (Task 535) for internal DBPR review	07/15/24	DBPR Supervisors/Managers Gary Townsend	To follow up on the survey results per Task 524 and incorporate them into a Readiness Work Plan and to complete the required PALM Task	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	07/16/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed Task 540 and submitted for review; updated RW Tracker	07/16/24	All DBPR Gary Townsend	To ensure all Current-State Business Processes are correctly identified and documented	
People Processes Technology Data	Prepared UAT Test Script and other UAT templates	07/16/24	Thomas Richardson	Preparations for UAT	
People Processes Technology Data	Completed Task 540 -Share Florida PALM Updates; obtained approval from Readiness Coordinator (ahead of schedule)	07/16/24	All DBPR Stakeholders	To ensure DBPR stakeholders are kept in the loop regarding PALM Readiness activities and progress	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	07/18/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Participated in Weekly Task Talk session	07/18/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Reviewed Requirements and aligned with Future-State Business Processes	07/18/24	Thomas Richardson	To get ready Future-State able to show requirements traceability throughout testing (UAT)	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	07/18/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	
People Processes Technology Data	Conducted biweekly RAID Review.	07/18/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure Project Directors are on board and understand all logged and managed Risks, Action Items, Issues, and Decisions. Assumptions as well.	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	07/19/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	07/19/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	07/19/24	DBPR Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	
Technology Data	Identify FLAIR Reports data elements	07/23/24	All DBPR Gary Townsend Thomas Richardson	To ensure the equivalent data elements are available in PALM	Started with the reports labelled as critical
People Processes Technology Data	Attended Design Workshop - 90.1 Create and Maintain Projects - Project Costing	07/23/24	Thomas Richardson Gary Townsend	To keep up with design details and to ask pertinent questions	Segment IV
People Processes Technology Data	Attended Design Workshop - 90.1 Create and Maintain Projects - Project Costing	07/24/24	Thomas Richardson Gary Townsend	To keep up with design details and to ask pertinent questions	Segment IV
People Processes Technology Data	Attended Design Workshop - Manage Accounts Payable and Purchase Orders	07/25/24	Jennifer Gaines Kris Burnside Gary Townsend Thomas Richardson Ashley Strickland Alexandria James	To keep up with design details and to ask pertinent questions	Segment IV
People Processes Technology Data	Identified and documented new assumptions	07/26/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	Posted to Smartsheet
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	07/26/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	07/26/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	07/26/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Reviewed and updated all Smartsheet(s).	07/26/24	Sally Huggins Jennifer Gaines Thomas Richardson Garv Townsend	To keep all project information and details current and up to date.	

			Nicole Jacobik PALM		
People Processes Data	Identified additional ways to enhance PALM Education for DBPR staff	07/29/24	All DBPR DBPR FLAIR PALM	Ensure PALM interfaces, reports, and sources of data are understood	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	07/30/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	07/31/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Reviewed and updated all Smartsheet(s).	07/31/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM	To keep all project information and details current and up to date.	
Technology Data	Identify FLAIR Reports data elements	07/31/24	All DBPR Gary Townsend Thomas Richardson FLAIR	To ensure the equivalent data elements are available in PALM	Started with the reports labelled as critical
People Processes Technology Data	Research PALM upload spreadsheets for Versa (ABS) remediation	07/31/24	DBPR Finance & Accounting Staff DBPR IT Versa PALM	To make uploads to PALM from Versa as efficient as possible	This could impact ABS remediation design for Versa
People Processes Data	Work on Task 541A - update PC Configuration Smartsheet(s)	07/31/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM FLAIR	To complete the required and released PALM Task	
People Processes Technology Data	Review edits and apply changes to the UAT Testing Plan for Task 536A	07/31/24	All DBPR Gary Townsend Thomas Richardson PALM	To complete the required and released PALM Task	
People Processes Technology Data	Review edits and apply changes to the Project Management Plan (PMP) - a Rule 60GG deliverable	07/31/24	All DBPR Gary Townsend Thomas Richardson PALM	To complete the required Rule 60GG deliverable and create a plan that defines how the project should be managed	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	08/01/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	08/01/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Technology Data	Participated in Weekly Task Talk session	08/01/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	08/02/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	08/02/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Completed Task 541A -Confirm agency-specific configurations for Segment IV. A=Project Costing (PC); obtained approval from Readiness Coordinator (ahead of schedule)	08/02/24	All DBPR Stakeholders PALM Stakeholders	To ensure DBPR has configured Project Costing details so available in PALM when needed	
People Processes Data	Researched Current-State reports and related data elements within each; also, reviewed similar Future-State reports	08/02/24	All DBPR end users FLAIR PALM	To make sure all data elements used in Current-State Business Processes are identified and Future-Statein understanding where these data elements reside in PALM	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	08/06/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed Task 536A UAT Testing Plan (Goals, objectives, activities, and roles and responsibilities and submitted	08/06/24	All DBPR end users FLAIR PALM	To ensure UAT is thoroughly planned out	
People Processes Technology Data	Revised PMP v2.0 and submitted for final approval	08/06/24	All DBPR end users	Complete required Rule 60GG deliverable and to have structure and guidance to manage the project with	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	08/07/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	08/07/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	08/08/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Participated in Weekly Task Talk session	08/08/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	08/08/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes	Saved a weekly snapshot of the Project Schedule in PDF and Excel	08/08/24	Sally Huggins Jennifer Gaines	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up

Data	formats and posted in the Project Central Repository		Thomas Richardson		
People Processes Technology Data	Completed Task 545B - Update Florida PALM Conversion Inventory for Segment IV; obtained approval from Readiness Coordinator (ahead of schedule)	08/08/24	All DBPR Thomas Richardson	To ensure data conversion is addressed and to complete PALM Tasks timely and with accuracy	
People Processes	Completed Task 535 - Update Workforce Readiness Plan; obtained approval from Readiness Coordinator (ahead of schedule)	08/08/24	All DBPR Stakeholders	To ensure DBPR has an understanding of the staff's readiness for PALM	
People Processes Technology Data	Completed Task 543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV; obtained approval from Readiness Coordinator (ahead of schedule)	08/09/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To document and understand the change impacts to People, Processes, Technology, and Data and to complete a required PALM Task	
People Processes Technology Data	Participate in Segment 4 Design Workshop (inter/Intra Unit)	08/13/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Conducted by the PALM Project at the Car Museum
People Processes Technology Data	Participate in Segment 4 Design Workshop (inter/Intra Unit)	08/14/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Conducted by the PALM Project at the Car Museum
People Processes Technology Data	Conducted a meeting with DBPR Bureau Chief to address Configuration Workbooks for Segment 4 (Task 541)	08/14/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	08/14/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Participate in Segment 4 Design Workshop (Asset Management)	08/15/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Conducted by the PALM Project at the Car Museum
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	08/16/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	08/16/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	08/16/24	DBPR Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	Prepared in advance
People Processes Technology Data	Completed Task 544 - Update Agency Business System Documentation for Segment IV; obtained approval from Readiness Coordinator	08/16/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure ABS documentation is thorough and accurate and to complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Identified and documented new assumptions	08/19/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	Posted to Smartsheet
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	08/20/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed Task 545A - Update Florida PALM Conversion Inventory for Segment IV; obtained approval from Readiness Coordinator (ahead of schedule)	08/20/24	All DBPR Thomas Richardson	To ensure data conversion is addressed and to complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Completed Task 531 - Remediate Agency Business Systems based on Segment II; obtained approval from Readiness Coordinator (ahead of schedule)	08/20/24	All DBPR Thomas Richardson	To ensure DBPR ABS remediation is addressed and to complete PALM Tasks timely and with accuracy	
People Processes Data	Completed Task 542 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV; obtained approval from Readiness Coordinator (ahead of schedule)	08/20/24	All DBPR Thomas Richardson	To ensure DBPR ABS remediation is addressed and to complete PALM Tasks timely and with accuracy	
People Processes Technology	Completed Task 543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV; submitted for approval from Readiness Coordinator (ahead of schedule)	08/20/24	All DBPR stakeholders	To ensure Current-State and Future-State DBPR Business Processes are documented and understood; also, to complete the required PALM Task (ahead of schedule)	
People Processes Technology Data	Met with Readiness Coordinators to discuss UAT and PALM Task details	08/20/24	Nicole Jacobik Nikki Klein Thomas Richardson	To receive information necessary to complete PALM Tasks with quality and on time	
People Processes Technology Data	Completed Task 541B -Confirm agency-specific configurations for Segment IV. B=Cash Management (CM); obtained approval from Readiness Coordinator (ahead of schedule)	08/20/24	All DBPR Revenue Team Thomas Richardson Jennifer Gaines Sally Huggins Gary Townsend	To ensure DBPR has configured Cash Management details so available in PALM when needed	
People Data	Update all Contacts Smartsheet(s)	08/21/24	All DBPR stakeholders Nicole Jacobik All Readiness Coordinators	To keep the information current and accurate	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	08/21/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	08/22/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology	Participated in Weekly Task Talk session	08/22/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	

Data					
People Processes Technology Data	Prepared for an participated in meeting PALM Technical team to go over the ARI010 spreadsheet upload	08/22/24	PALM Project Technology team Sally Huggins Jennifer Gaines Lyndell Francis Jessie Rideout Alice Ibarra Michelle Stauffer Thomas Richardson DBPR IT	To arrive at detail specifications so the ABS Versa Regulation can be remediated to provide data in the required PALM format	Several internal meetings go over this format with the proper stakeholders
People Processes Technology Data	Reviewed Risks and Issues with Project Sponsor every other week	08/22/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure the DBPR leadership has an opportunity to review all RAID items on a regular basis and to provide her feedback/input	Posted to Smartsheet
People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	08/22/24	Sally Huggins Jennifer Gaines Thomas Richardson	To report all DBPR PALM Readiness project activities conducted	
People Processes Technology Data	Completed Task 545-B Update and Finalize Florida PALM Conversion Inventory for Segment IV - Projects (PCC001)	08/22/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure all projects that need to be converted to PALM have been identified; no projects are being converted for DBPR; also, to complete the required PALM Task (ahead of schedule)	Secure File Share
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	08/23/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	08/23/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Technology Data	Reviewed and updated all Smartsheet(s).	08/23/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM	To keep all project information and details current and up to date.	
People Processes Technology Data	Completed Task 548 - Update File Manager contact information and MFT server information	08/23/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure ABS documentation is thorough and accurate and to complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Schedule, prepare for, and conduct a meeting with DBPR Revenue Team to go over ABS Versa Regulation design specifications	08/23/24	Jennifer Gaines Lyndell Francis Michelle Stauffer Thomas Richardson	To ensure DBPR Revenue will receive revenue data in PALM correctly	This is for spreadsheet upload ARI010 and other Versa remediation.
People Processes Technology Data	Schedule, prepare for, and conduct a meeting with DBPR IT to go over ABS Versa Regulation design specifications	08/26/24	Sally Huggins Jennifer Gaines Lyndell Francis Jessie Rideout Alice Ibarra Michelle Stauffer Thomas Richardson DBPR IT	To ensure DBPR IT has the necessary detail specifications so the ABS Versa Regulation can be remediated to provide data in the required PALM format	This is for spreadsheet upload ARI010 and other Versa remediation.
People Processes Technology Data	Participate in Segment 4 Design Workshop (Payroll Management)	08/27/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Conducted by the PALM Project at the Tallahassee State College
People Processes Technology Data	Participate in Segment 4 Design Workshop (Payroll Management)	08/28/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Conducted by the PALM Project at the Tallahassee State College
People Processes Technology Data	Identified and managed Risks (Risk Register), Action Items (Action Item Log), Issues (issue Log), and Decisions (Decision Log) (RAID items) every week	08/28/24	Sally Huggins Jennifer Gaines Thomas Richardson	To manage and mitigate risks and issues that could negatively impact PALM Readiness (and the project)	Posted to Smartsheet
People Processes Technology Data	Prepared for and conducted Daily Checkpoint meetings with Project Sponsor, DBPR Bureau Chief, Project Manager, and Organizational Change Management Lead	08/28/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To have regular interaction/communication and to get required direction to complete PALM Readiness activities	
People Processes Technology Data	Completed Task 546 - Update Florida PALM Interface Inventory for Segment IV	08/29/24	Sally Huggins Jennifer Gaines Thomas Richardson All DBPR stakeholders PALM	To identify all interfaces between DBPR Agency Business Systems (ABSs) and PALM.; also, to complete the required PALM Task	
People Processes Data	Completed Task 539 - Update CCN and Contacts, Risks and Issues; obtained approval from Readiness Coordinator (ahead of schedule)	08/29/24	Sally Huggins Jennifer Gaines Thomas Richardson	To keep all DBPR contact details updated and to complete the required PALM Task	
People Processes Technology Data	Completed Task 550-A Provide Public IP Address and Select Technical Meeting Time	08/29/24	Jennifer Gaines Lyndell Francis DBPR IT PALM Technical Team	To provide the MFT server details and schedule a meeting with the technical parties to test the server connections; DBPR is not participating since no interfaces are being exchanged	Task was submitted for RC approval
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	08/30/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Technology Data	Managed Tasks and assignments from the Project Schedule daily; updated the working copy of the Project Schedule	08/30/24	DBPR Supervisors/Managers Thomas Richardson	To ensure all project tasks are being completed on time	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	08/30/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Continued discussions, planning, and execution of PALM Education of the DBPR end users	08/30/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure DBPR DBPR staff are getting acclimated with PALM details	
People Processes	Completed Task 549 (Submit Training Survey)	08/30/24	Sally Huggins Gary Townsend Jennifer Gaines All DBPR Stakeholders	To complete the training survey to identify Train the Trainer participants within your agency, if any.	DBPR is not selecting the Train the Trainer option.

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

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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Sally Huggins	sally.huggins@myfloridalicense.com	09/09/24
May - June 2024	Sally Huggins	sally.huggins@myfloridalicense.com	07/11/24
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24