DFS Status Report Dashboard

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

Reporting Period

July - August 2024

Agency Sponsor

Scott Fennell

CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation
The Change Champion Network dial reflects the completeness of your CCN makeup.	The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.	The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.	The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

• Unique Filled Role = 14

• Duplicate Filled Role = 6

• Vacant Role = 0

RW Task Completeness:

Score = 99.62%

• Submitted Complete = 25

• Submitted Incomplete = 0

• Completed After Submission = 1

RW Task Timeliness:

Score = 91.54%

• Submitted On Time = 43

• Submitted Late = 6

• Pending Submission = 1

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	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Build will not start until design is complete. Build scheduled from August - December 2024.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	08/02/24	DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/03/24		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	07/11/24		Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress		Build will not start until design is complete. Build scheduled from August - December 2024.		
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	07/31/24		Submission Complete	
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	100% - Submitted	08/16/24		Submission Complete	
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/03/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/10/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	100% - Submitted	08/26/24		N/A	
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/26/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/19/24	DFS will not be using the optional PC costing fields.	Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24			
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress				
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	50% - In Progress				
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/12/24		Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/29/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	25% - Beginning Initial Internal Meetings and Information Gathering				

Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	550-A	Provide Public IP Address and Select Technical Meeting Time	08/26/24	08/30/24	100% - Submitted	08/28/24		Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/10/24			09/10/24
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	100% - Submitted	09/05/24		N/A	

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 349

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 49

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 16
- Accounts Receivable = 13
- Asset Accounting and Mgmt. = 4
- Banking = 7
- Budget Mgmt. and Cash Control = 29
- Contracts Mgmt. = 12
- Disbursements Mgmt. = 35
- Grants Mgmt. = 4
- Inter/IntraUnit Transactions = 9
- Payroll Mgmt. = 5
- Projects Mgmt. = 2
- Revenue Accounting = 10
- System Access and Controls = 2

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 441

• Related Business Systems = 12

• Related Reports = 43

• Documentation Status:

- Complete = 441 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 441

• Related Business Process Groupings = 12

- Planned Spreadsheet Uploads = 1

• **Level of Impact: People Changes**

- High = 14 Medium = 48 Low = 125 None = 76 Uncertain = 14

• **Level of Impact: Processes Changes**

- High = 15 Medium = 67 Low = 115 None = 51 Uncertain = 29

• **Level of Impact: Technology Changes**

- High = 18 Medium = 45 Low = 68 None = 102 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 55 Medium = 94 Low = 54 None = 58 Uncertain = 16

• **Segments I & II Documentation Update Status**

- Not Started = 2 In Progress = 3 Complete = 212

• **Segment III Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete = 62

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 68

• **Criticality:**

- High = 16 Med = 5 Low = 0 None = 47

• **Documentation Status:**

- Complete = 31 Partial = 0 Not Started = 0

Cataloged Interfaces = 121

- Inbound Interfaces = 100
- Outbound Interfaces = 21

Implementation:

Business Systems Planned for Integration = 20

• **Segment I - Documentation Updates:**

- Complete = 9 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 8

• **Segment II - Documentation Updates:**

- Complete = 3 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 14

• **Segment III - Documentation Updates:**

- Complete = 4 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 13

Planned Interfaces = 20

- Inbound Interfaces = 6
- Outbound Interfaces = 13

Data

Information used in or produced from an agency's financial business operations.

Current-State:

Unique FLAIR Data Elements = 419

• **Associated Unique Uses = 1301**

- Continued Use - Yes = 1064
- Continued Use - No = 47

• **Associated Business Systems = 19**

Cataloged Reports = 385

• **Criticality:**

- High = 252 Med = 76 Low = 38 None = 45

Implementation:

Segments I & II Planned Configurations = 7/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 20

• **Asset Management (AM)**

- Planned Location Codes = 47
- Planned Associated Area ID's = 241

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 1086
- Planned Local Funds = None
- Planned Organization ID's = 276
- Planned OA1's = 45
- Planned OA2's = None

Segment IV Planned Configurations

- Started = 2 Not Started = 0

Conversions & Data Readiness

• Conversions Needed = 10

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

• **Data Readiness/Cleansing Status:**

- Complete = 5 In Progress = 0 Not Started = 1 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.

DFS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	The loss of CCN resources would constrain current CCN staff capacity and could result in the loss of critical functional and institutional knowledge, which is imperative to the success of the Florida PALM Project.	Open	9 (High/High)	• Create a knowledge base of CCN operational processes and procedures; develop training methods to facilitate knowledge transfer; and provide cross-training among CCN members where feasible. • Use of dedicated back-up CCN Liaisons will aid in the short-term continuity.	Monitoring	02/19/24	Alexandra Weimorts
People	ENTERPRISE A&A: The Project timeline is very conservative regarding flexibility, and A&A's involvement is critical for project success. Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&A change management and internal preparation for A&A preparedness activities have already started, but having adequate resources will be key to successful implementation.	Open	9 (High/High)	• Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations. • Retain our critical staff that are involved in Florida PALM activities and those who are picking up added job responsibilities so that subject matter experts can dedicate time to Florida PALM activities. • Provide expectations that staff will cross-train and provide knowledge transfer to increase the depth need to continue operating with a high level of	Monitoring	10/11/23	Renee Hermeling

Category	Risk Description	Status	Score	Mitigation	Phase	Date	Owner
				service and accuracy. • A&A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY.			
People	ENTERPRISE A&A: Resource impacts due to A&A operational staff spending a significant amount of time performing Project related tasks. This pulls resources from operations, increases workloads, and causes stress and an increased chance of employee burnout. • Project tasks may require additional time outside employees designated working hours to attend meetings, review time sensitive documents, or contribute to critical tasks. Some positions are not granted flexibility to flex time throughout the month, but they must flex it within the week. This policy limitation causes a strain on availability of resources. Allowing current staff more flexibility to flex their time beyond the work week would help with resource allocation. • As we get closer to implementation, the number of items that will require attention will continue to increase. This will include, assisting agencies with data management, preparing enterprise data for conversion, developing cut-over and FLAIR close out plans, participating in all levels of integration and UAT testing, validating testing results, participation and validation of mock and production conversions, developing policy around new processes.	Open	9 (High/High)	• Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities. • Hire additional staff (FTE or OPS) to learn current operations so that our experienced staff can continue to participate with the Florida PALM Project in design, testing, and implementation activities. • Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team. • Work with Human Resources to properly document team members who should be classified as SES staff. • Establish plans for reduction of current operational activities and prioritize responsibilities based on risk and probability. This could include posting all payments and suspending pre-audit activities, suspending Article V and Contract Management audits, suspending processing of EFT applications, as examples.	Monitoring	10/11/23	Renee Hermeling
Technology	Florida PALM design release dates for Segments III, IV, and Data Warehouse will decrease the build time for impacted agency business systems. This may impact the ability for applicable agency business systems to be ready for interface testing by January 2025.	Open	6 (Medium/High)	• Develop initial agency business system future-state designs as much as possible based on Segment I and II design information made available by the Florida PALM Project. Update ABS designs as soon as Segment III, IV, and Data Warehouse design information becomes available from the Florida PALM Project. • Work with Division/Office management to allow dedicated technical and functional resources to be available for agency business systems remediation efforts when design information is released.	Monitoring	10/20/23	Stacey Pollock
Processes	ENTERPRISE TREASURY: Discussions relating to the status of outstanding warrants at the cutover from December 2025 to January 2026 has not been finalized and could, potentially, have impacts to warrant recipients and reconciliation processes.	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants. • Potential solutions being discussed between PALM and Treasury including the possibility that warrants would be maintained in FLAIR and concurrently canceled and reissued in PALM while maintaining warrant number. Note that solution is pending approval from Treasury.	Monitoring	01/25/24	Sarah Pons
Processes	ENTERPRISE TREASURY: The current Concentration Account contract ends in March of 2026. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM. The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, BAI codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. They will also need to receive and distribute new depository supplies to their locations.	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	Monitoring	12/13/23	Sarah Pons
Technology	Reduced duration for agency business system end-to-end testing with Florida PALM during UAT could impact Tier 1 agency business systems with significant changes, as well as those systems that will require downstream Tier 2 interface testing. As a result, DFS may not have enough time to successfully complete all of the testing needed for agency business systems, which in turn could impact agency readiness for go-live with Florida PALM.	Open	6 (High/Medium)	• Develop remediation timelines and resources to prepare the agency business systems to be ready for the start of ABS end-to-end testing with Florida PALM. • Work with Division/Office management to allow technical and functional resources to be available during the ABS end-to-end testing period with Florida PALM.	Monitoring	10/20/23	Stacey Pollock
Processes	ENTERPRISE A&A: Planning for some critical activities has not been done. Until these plans have been developed, A&A cannot adequately determine needed resources, time and effort. • Cutover planning • FLAIR retirement planning • Stabilization period planning • Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll • Financial Reporting mappings and data rollup	Open	6 (High/Medium)	• Continue to collaborate with the Florida PALM Project and seek resources through staff aug. additional FTE or contracts as needs are discovered.	Monitoring	10/11/23	Renee Hermeling
People Processes Technology Data	ENTERPRISE TREASURY/Deferred Compensation: Background: As a step 1, Bureau of Deferred Compensation recently launched the Roth deferral type that allows participants to make (Post- Tax) Roth contributions and/ or Pre-Tax contributions to the Deferred Compensation Plan. Since Roth was rolled out without restriction to Catch- up contributions, participants may contribute to both deferral types in any proportion they choose. Current Challenge: As a step 2, beginning in January 2026, the Deferred Compensation Plan will have to implement a new federal regulation that limits 50+ Catch up contributions made to the 457b Pre-Tax deferral type for participants whose prior year FICA wages exceed $145,000. The federal government has been slow to clarify a few key points, especially applicable for multi- employer plans like ours. The Bureau	Open	4 (Medium/Medium)	• The Bureau of Deferred Compensation will make expeditious efforts to get clarity from FEDs. • BOSP, OIT, and PALM management will be made aware of all known details and will be updated on further details as soon as they are available. • BOSP, OIT, and PALM management will evaluate the information (when made available by Bureau of Deferred Compensation) and will make a conscious effort to assign resources to implement the required changes. • Contingency plan will be prepared by Bureau of Deferred Compensation for a scenario in which PALM is unable to implement the changes within the required timeline.	New Risk Assessment	07/09/24	Sarah Pons (BOSP/OIT/PALM/DC)

	for Multi- employer plans like ours. The Bureau of Deferred Compensation is committed to determine and communicate exactly what is needed for implementation as soon as possible. Once specified, BOSP, OIT, and PALM will need to be able to implement requested changes to meet this federal regulation deadline, which coincides with the timing of the release of PALM. BOSP, OIT and PALM resources will be needed to implement whatever changes are necessary. Risk Highlight: The risk is that the appropriate resources may not be available to meet the timing of this Federal mandate. Implication: If we do not implement on time we would be required to suspend or terminate the 50+ catchup for ALL participants in our plan.						
Technology	Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation activities. This could impact the Department's ability to meet the scheduled finish dates for Florida PALM Readiness Workplan tasks related to design, build, and testing activities.	Open	4 (Medium/Medium	• Communicate the Florida PALM timelines with third-party vendors. • Provide information and advisory support to the functional area(s) related to remediation activities and timelines. • Provide advisory support if needed related to interfaces, interface field mapping, and possible functional changes.	Monitoring	02/27/24	Stacey Pollock
Processes	ENTERPRISE TREASURY: Relating to CMIA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMIA reporting.	Open	4 (Medium/Medium	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	Monitoring	12/13/23	Sarah Pons
Technology	Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities could cause delays in the ABS Remediation timeline.	Open	4 (Medium/Medium	• Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline. • Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration.	Monitoring	10/20/23	Stacey Pollock
People	ENTERPRISE A&A: • All bureaus within the division will have significant process changes. • Insufficient preparation or reluctance to adopt and adapt to changes could result in delays; operational deficiencies; and critical operations, tools, technologies, and resources not being available. • Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output. • Due to the unique activities that A&A performs at an enterprise level, reduced performance could have a negative impact on agencies.	Open	4 (Medium/Medium	• Prepare staff through regular change management engagements. • Perform knowledge transfer on why things are done so we can ensure better understanding of future processes. •Complete thorough process analysis and mapping of each process, along with the technology, tools, and resources to future functionality can ensure that we have identified where operational changes will occur and to what extent it will be affected. • Monitor staffs' engagement. • Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps. • Review organizational charts and identify succession planning or knowledge transfers for known gaps. • A&A has contracted with two People Soft experienced resources to help with implementation activities, including identifying staffing model changes and process changes.	Monitoring	10/11/23	Renee Hermeling
People Processes Technology Data	ENTERPRISE A&A: A&A serves all other agencies, therefore our processes are at risk from external impacts: • Agencies – All A&A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for implementation, this will cause significant issues for A&A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&A staff around go live. • Project – There may be changes in Project directions or decisions that negative affect A&A that would cause an increase of time and resources or provide confusion and lack of clarity among A&A's expectations. • Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&A's operations.	Open	4 (Medium/Medium	• Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff. • A&A OFFE team make outreach with agencies to determine training needs for skills that will be needed in Florida PALM users. • Participate with all FFMIS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon. • Assist agencies with readiness tasks such as data analysis and cleansing. • Develop contingency plans for agencies that are not prepared for Florida PALM implementation. • Monitor activities, changes in rules and regulations, and agencies competencies. • Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible. • A&A is seeking funding through the LBR process to contract for financial expertise that State Agencies can use to identify knowledge gaps and areas needing improvement and address those issues.	Monitoring	10/11/23	Renee Hermeling

DFS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DFS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	Based on the Florida PALM implementation timeline established through the execution of Amendment #8, the Go-Live date for the Florida PALM solution is expected to occur on January 6, 2026.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.
Technology	The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces and business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.
Technology	Agency business system owners will understand Florida PALM impacts to be able to provide requirements for system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.

DFS 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	CCN Developed and launched "Stakeholder Florida PALM SharePoint site"	07/01/24	DFS, OFR, OIR	The site can be a helpful resource for understanding Florida PALM and you, CCN communications, Games, Calendar of Activities, and direct users to the Florida PALM website for additional resources!	Entered as new Readiness Activity
People	July Sponsor Snapshot	07/02/24	Agency Leadership	Inform audiences of division shout-outs, accomplishments, what to expect and where we are in the Florida PALM journey	Entered as new Readiness Activity
People	DWC/ PSDA Sharing Awareness	07/08/24	SMEs	Share Florida PALM Sponsor Snapshot for July 2024	Entered as new Readiness Activity
People Processes Data	Determining Property tracking in PALM related to IT hardware	07/10/24	DFS Property, DFS Desktop, OIT Administration	On 7/8 at 9:30 am OIT met with DFS Property (Bobby Francis), DFS receiving (Heather Blocker), and DFS Desktop (Arty Gallegos). We discussed our current business processes and how they will change with PALM UAT and ultimately implementation of PALM. This included a review of business process' 40.1, 40.2.1, 40.2.4, and 40.2.3. Later on, in the day on 7/8, I again reached out to DFS Property (Carolyn Poppell and Bobby Francis) to discuss rules on property transfers and statutes surrounding how they perform they job.	This was a teams meeting. I have written notes from the meeting and can transcribe them if needed.
People	Conduct weekly Treasury PALM update	07/10/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People Processes	Awareness: 5 Florida PALM Updates	07/18/24	POCs, SMEs & Endusers	Provide bite-sized content to stakeholders about PALM Functions	Entered as new Readiness Activity
People Processes	Conduct weekly Treasury PALM update	07/18/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
Technology Data	DRM Contacts Conversion to FLAIR VS	07/18/24	DRM SMEs, TFMS	Meeting to review notes from the comparison of Origami contacts identified for conversion to the EFT Authorization File Name.	Entered as new Readiness Activity
People	DWC/ PSDA Sharing Awareness	07/18/24	POCs, SMEs, Division Management	Share FL PALM Updates July 2024 with stakeholders	Entered as new Readiness Activity
People	Conduct weekly Treasury PALM update	07/18/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People	Florida PALM Training Highlights - Navigation Training AVAILABLE	07/29/24	POCs SMEs	Provide Navigation Training to SME and endusers	Entered as new Readiness Activity
People Processes	Conduct weekly Treasury PALM update	07/31/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People Processes	DRM Management Update Meetings	07/31/24	DRM Leadership	Share topics that included FL PALM tasks, Risks and Issues Team, Origami Contacts Conversion, Origami Project Team, PALM POC monthly meeting, and Segment IV Design Workshop	Entered as new Readiness Activity
People	Conduct weekly Treasury PALM update	07/31/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People	A&A Awareness: August Sponsor Snapshot	08/01/24	Endusers	Inform audiences of division shout-outs, accomplishments, what to expect and where we are in the Florida PALM journey	Entered as new Readiness Activity
People	August Sponsor Snapshot	08/01/24	Agency Leadership	Inform audiences of division shout-outs, accomplishments, what to expect and where we are in the Florida PALM journey	Entered as new Readiness Activity
People	A&A shared Sponsor Snapshot with entire Division	08/01/24	End-users	Share information with all end users	Entered as new Readiness Activity
People Processes Technology Data	Treasury Implementation Plan meeting with CCN Project Manager	08/02/24	Treasury leadership	Discuss implementation plan and associated treasury tasks for the PALM implementation	Entered as new Readiness Activity
People Processes	OFB Disbursements Staff Meeting	08/07/24	OFB-BFS-Disbursements	Shared knowledge center, glossary and the Stakeholder Site. Encouraged staff to review and use the games on the stakeholder site	Entered as new Readiness Activity
People Processes	Conduct weekly Treasury PALM update	08/07/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People Processes Technology Data	DRM Invoice Received Date Requirement Meeting	08/07/24	Bureau chiefs of Bureau of Workers' Compensation/State Liabilities & Property Claims/Risk Financing & Loss Prevention, Data Management Section, Contract Monitoring Section, WC training coordinator, DRM Director & Assistant Director, and FL PALM POCs.	Meeting to discuss three-date stamp requirement in ABS.	Entered as new Readiness Activity
People	Conduct weekly Treasury PALM update	08/07/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity

People Processes Technology Data	OFB Florida PALM Prep - Trivia Questions	08/09/24	OFB Staff	Trivia questions pulled from the knowledge center. Required staff to navigate the knowledge center to locate the answers.	Entered as new Readiness Activity
People Processes Technology Data	OFB RRU Review IU Business processes	08/09/24	OFB-BFR-RRU	Reviewed the IU business process models and flows as a team and discussed.	Entered as new Readiness Activity
People	DWC/ PSDA Sharing Awareness	08/13/24	POCs, SMEs, Division Management	Share Florida PALM Sponsor Snapshot for August 2024	Entered as new Readiness Activity
People Processes	Awareness: 4 Florida PALM Updates	08/14/24	POCs, SMEs & Endusers	Provide bite-sized content to stakeholders about PALM Functions	Entered as new Readiness Activity
People	DRM FL PALM Sponsor Snapshot for July 2024	08/14/24	End Users	Distribution by DRM Director of the FL PALM Sponsor Snapshot for July 2024 and link to the Stakeholder SharePoint Site.	Entered as new Readiness Activity
People	DWC/ PSDA Sharing Awareness	08/14/24	DWC SMEs and Leadership	Share 4 Florida PALM Updates - August 2024 (Infographic)	Entered as new Readiness Activity
People	Conduct weekly Treasury PALM update	08/14/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People Processes Technology Data	DRM Project Tracking Meeting	08/21/24	DRM SMEs	08/20 & 08/21 meetings to update the FL PALM project tracking log.	Entered as a new Readiness Activity
People	Conduct weekly Treasury PALM update	08/21/24	Treasury leadership	Share project task statuses, project communication wrap-ups and allow SMEs an opportunity to ask questions, make suggestions and provide feedback.	Entered as new Readiness Activity
People Data	Awareness: Division Specific Organization Chartfield Structure	08/26/24	POC, OFB SMEs	Provided Flyer for each division to visually see the organization structure on a tree; 20 in total and provided 4 copies per division to display. Some folks did not know their org and the structure purpose. By personalizing the stakeholder can make it relatable.	Entered as new Readiness Activity
People Processes Technology Data	A&A: All Leadership Meeting - Florida PALM Updates	08/26/24	A&A leadership	The A&A Florida PALM Transition Team presented updates on Florida PALM activities that included information on: Where is the Project is now? Results of the CCN Roadshow, Where is A&A now?, Transformation Bureau Planning, Conversion and Data Validation Teams, UAT Planning, and What should we expect next?	Entered as new Readiness Activity
People	CID & BPAF: Criminal Investigations Division Debrief	08/26/24	PAF/CID Leadership	To keep leadership aware of current activities: Specifically, after Monthly POC PALM meeting provided a debrief to bureau leadership (Chief Bosco and Chief O'Neil) to discuss and provide new timeline, visuals for each CID group. Allowed leadership to ask any questions or follow-up items to the CCN.	Entered as a new Readiness Activity
People	Treasury Implementation Plan meeting with CCN Project Manager	08/26/24	Treasury Leadership	Discuss implementation plan and associated treasury tasks for the PALM implementation	Entered as a new Readiness Activity
People Technology	OFB, PCARD section - Florida PALM Training Highlights - Navigation	08/28/24	OFB PCard Staff	PCARD team attended the Florida PALM Training Highlights - Navigation training to gain knowledge of PALM navigation	Entered as new Readiness Activity
People Technology	OFB, Disbursements section - Florida PALM Training Highlights - Navigation	08/28/24	OFB Disbursements Staff	Disbursements staff (50%) team attended the Florida PALM Training Highlights - Navigation training to gain knowledge of PALM navigation	Entered as new Readiness Activity
People Processes Data	DWC/ PSDA Handout Distribution	08/29/24	All DWC end-users	PSDA updated the DWC PALM Bulletin Board by posting the handouts provided by the CCN Liaison at the POC Monthly Meeting. (Organization Tree Flyer and Florida PALM Gaming Flyer)	Entered as new Readiness Activity
People Processes Technology	DWC/ PSDA Attended LMS PALM Training	08/29/24	POCs	DWC POCs attended the LMS People First Florida PALM Training Highlights - Navigation.	Entered as new Readiness Activity
Processes Technology	DRM FL PALM Training Highlights - Navigation	08/29/24	DRM SME	DFS training on navigating in FL PALM including FL PALM general information, signing into FL PALM, homepage navigation, adding tiles, and subprocess navigation.	Entered as a new Readiness Activity
People Processes	DRM Management Update Meetings	08/30/24	DRM Leadership	Share topics that included FL PALM tasks, Risks and Issues Team, Origami Contacts Conversion, Origami Project Team, PALM POC monthly meeting, and Segment IV Design Workshop	Entered as new Readiness Activity
People Processes Technology Data	DRM Origami FL PALM Integration Meetings	08/30/24	DRM Leadership & ABS Staff	Meetings held on: 08/01, 08/16, 08/23, and 08/30 PALM Origami Project Progress meetings. Topics included creating a staging environment, setting up chart of accounts, setting up required date and ID fields, and handling warrant cancellations.	Entered as new Readiness Activity
Processes Technology Data	DRM Supplier Meetings	08/30/24	DRM SMEs, ABS, DRM Management, A&A, CCN	08/16 Purpose of meeting: Discuss DRM Florida PALM Implementation risks and DRM concerns identified in the April 17th meeting held with A&A, CCN and DRM. 08/27 & 08/28 meetings to create an MCM & MBR Data Flowchart for process outlined in the DRM Florida PALM Implementation Risks document to distribute to A&A/CCN. 08/29 DRM prep meeting for 08/30 meeting. 08/30 Purpose of meeting: Circle back with A&A on the DRM direction for PALM Implementation	Entered as new Readiness Activity
People Processes Technology Data	DRM- CCN Risks and Issues Management Team - Engagement and Learning Session	08/30/24	Division Stakeholders	First meeting and learning session for the CCN Risks and Issues Management Team	Entered as new Readiness Activity
People	FCCS-Bulletin Board post	08/30/24	FCCS End-users	Inform end-users Awareness: Small bite site did you know topics	Entered as a new Readiness Activity
People Processes	DRM FL PALM Implementation Plan	08/30/24	DRM Leadership and SME	Created DRM Implementation plan	Entered as a new Readiness Activity

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: *

DFS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Scott Fennell	scott.fennell@myfloridacfo.com	09/10/24
May - June 2024	Scott Fennell	scott.fennell@myfloridacfo.com	07/10/24
March - April 2024	Scott Fennell	scott.fennell@myfloridacfo.com	05/13/24
January - February 2024	Scott Fennell	scott.fennell@myfloridacfo.com	03/05/24