

Helpful Links

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

DOE Status Report Dashboard

Reporting Period

July - August 2024

Agency Sponsor

Suzanne Pridgeon

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

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 5
- 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 = 84.44%

- Submitted Complete = 19
- Submitted Incomplete = 1
- Completed After Submission = 7

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 = 92.26%

- Submitted On Time = 42
- Submitted Late = 7
- Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 10
- Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	08/15/24
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/11/24		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	08/12/24	Procurement department is completing their cleanse of Contracts, and the task will be completed.	Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	100% - Submitted	08/02/24		Submission Complete	08/15/24
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	07/11/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	100% - Submitted	08/30/24		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	09/06/24		Submission Complete	
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	25% - Beginning Initial Internal Meetings and Information Gathering				
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	08/20/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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				
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/07/24		Submission Complete	08/07/24
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	50% - In Progress				
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	Pending Resubmission	09/11/24		Submission Incomplete
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	09/04/24		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 = 88</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 13</p> <p>SMEs by Business Process Grouping</p> <ul style="list-style-type: none"> Account Mgmt. and Financial Reporting = 1 Accounts Receivable = 1 Asset Accounting and Mgmt. = 1 Banking = 1 Budget Mgmt. and Cash Control = 2 Contracts Mgmt. = 2 Disbursements Mgmt. = 1 Grants Mgmt. = 1 Inter/IntraUnit Transactions = 1 Payroll Mgmt. = 2 Projects Mgmt. = 1 Revenue Accounting = 2 System Access and Controls = 1 <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 = 35</p> <ul style="list-style-type: none"> Related Business Systems = 5 Related Reports = 1 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 34 Partial = 1 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 35</p> <ul style="list-style-type: none"> Related Business Process Groupings = 6 Planned Spreadsheet Uploads = 1 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 23 Medium = 3 Low = 4 None = 0 Uncertain = 0 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 22 Medium = 3 Low = 4 None = 0 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 22 Medium = 3 Low = 3 None = 0 Uncertain = 0 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 30 <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 = 26</p> <ul style="list-style-type: none"> Criticality: High = 23 Med = 0 Low = 0 None = 1 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 7 Partial = 1 Not Started = 9 <p>Cataloged Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 <p>Implementation:</p> <p>Business Systems Planned for Integration = 9</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 0 Updating = 6 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment II - Documentation Updates: Complete = 0 Updating = 5 Evaluating = 0 Not Started = 0 Not Needed = 1 Segment III - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 <p>Planned Interfaces = 6</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 4 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Current-State:</p> <p>Unique FLAIR Data Elements = 443</p> <ul style="list-style-type: none"> Associated Unique Uses = 574 Continued Use - Yes = 124 Continued Use - No = 3 <p>Associated Business Systems = 6</p> <p>Cataloged Reports = 87</p> <ul style="list-style-type: none"> Criticality: High = 87 Med = 13 Low = 1 None = 0 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 5/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = 8 Asset Management (AM) Planned Location Codes = None Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 1 - Track with Budget General Ledger (GL) Planned Budgetary Value Combo Edits = 882 Planned Local Funds = None Planned Organization ID's = 725 Planned OA1's = 576 Planned OA2's = None <p>Segment IV Planned Configurations</p> <ul style="list-style-type: none"> Started = 1 Not Started = 1 <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 9 Agency Data Outside of Primary Source System(s) = 4 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 1 <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.

DOE Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology Data	Significant delay in receiving the technical requirements	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
Processes Technology Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.		06/25/24	Project Manager
People Technology Data	Not meet due date for Task 521 Segment 1 remediation	Closed	6 (Medium/High)	PM and DTI are working with PALM to develop a strategy to speed up the process of starting remediation.		07/12/24	Project Manager

People Processes Technology Data	Task 531 remediation phase 2 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	6 (Medium/High)	PM is working for DTI to develop a strategy to speed up the process of starting remediation.		08/30/24	Project Manager
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	6 (High/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified.	05/30/24	Project Manager
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team (anyone working on PALM)). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	New Risk	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	New risk	01/12/24	DIT and Aware technical teams
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	New risk	01/30/24	AWARE Team
People Processes	Task 541-C the statewide standard project activity codes will be needed to complete the speed keys setup assignment.	Open	1 (Low/Low)	Working with PALM to acquire the activity codes		08/30/24	Project Manager

DOE Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Technology Data	Not meet due date for Task 519 Segment 1 remediation	Open	Low - All impacts not listed as Critical or High	All remediation will be done once information is received.		10/01/24	PM

DOE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023

DOE 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	Status Report	07/01/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Processes Technology Data	DOE PALM Project Plan	07/01/24	DTI Team, Deputy Comptroller and PM.	Go over and update PALM Project	
People Processes	DOE PALM Training Plan	07/02/24	Comptroller, Deputy Comptroller, SME's and PM	Develop the training outline for PALM.	
People	Status Report	07/12/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology	DTI Weekly Status report	07/12/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People	Status Report	07/19/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People	Status Report	07/26/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology	DTI Weekly Status report	07/26/24	Project Manager, Comptroller, Deputy	Provided weekly status on PALM file status and Database build.	

			Comptroller, Business Analyst, Business Analyst Manager	
People Technology	VR and DBS File location	07/30/24	VR, DBS and DTI	To determine the file pickup location.
People Technology Data	PALM Updates and file revision	07/30/24	technical and departmental staff	To discuss the changes of the PALM files.
People Technology	TRAQ System meeting	08/01/24	DTI, TRAQ vendor, Assets Management, and Project Manager.	To determine file(s) needed for TRAQ System
People	Status Report	08/02/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE
People Technology	DTI Weekly Status report	08/02/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.
People Technology	DTI Weekly Status report	08/08/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.
People	Status Report	08/09/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE
People Technology	DTI Weekly Status report	08/16/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.
People	Status Report	08/16/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE
People Processes	Revenue Process Meeting	08/21/24	Revenue, BA and PM	To find any missing process and document.
People Processes	Cash Management Process Meeting	08/22/24	Cash Management, BA and PM	To find any missing process and document.
People Technology	DTI Weekly Status report	08/22/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.
People	Status Report	08/23/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE
People Technology	VR and DBS File location	08/28/24	VR, DBS and DTI	To determine the file pickup location and file naming.
People Processes	Cash Management Process Meeting	08/30/24	Cash Management, BA and PM	To find any missing process and document.
People	Status Report	08/30/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE
People Technology	DTI Weekly Status report	08/30/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

Confirm *

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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Matt Kirkland	matt.kirkland@fldoe.org	09/11/24
May - June 2024	Matt Kirkland	matt.kirkland@fldoe.org	07/12/24
March - April 2024	Matt Kirkland	matt.kirkland@fldoe.org	05/13/24
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24