

Helpful Links

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

DOEA Status Report Dashboard

Reporting Period

July - August 2024

Agency Sponsor

Randy Pupo

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 = 6
- Duplicate Filled Role = 10
- 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 = 88.46%**
- Submitted Complete = 23
- Submitted Incomplete = 0
- Completed After Submission = 3

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 = 61.8%**
- Submitted On Time = 20
- Submitted Late = 15
- Pending Submission = 14

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Still working to document processes across division. RFQ in process to hire temporary staff to assist in compiling procedures and cross walking to PALM.	N/A	
	N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks	N/A	
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			Implementation schedule baseline still being constructed. PM processes in the works.	N/A	
	N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks	N/A	
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks	N/A	
	N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			Implementation schedule baseline still being constructed. Temporary staff to be hired FY 24/25 to manage PM related tasks.	N/A	
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24			Implementation schedule baseline still being constructed. Temporary staff to be hired FY 24/25 to manage PM related tasks.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Temporary staff began with agency to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24			Implementation schedule baseline still being constructed.	N/A	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Temporary staff began with agency to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	04/29/24	No business systems interacting with FLAIR.	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	04/29/24	No interface needs.	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	Spoke with sections within finance to understand maintenance of accurate data. Document created for overall data clean up management shared and will update as necessary.	Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/11/24	Verified needs with department heads.	Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	05/24/24	Business system related, no anticipated remediation.	Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24			Implementation schedule baseline still being constructed.	N/A	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	25% - Beginning Initial Internal Meetings and Information Gathering		Project manager task when they begin. Still working to document processes and crosswalk to PALM processes to determine scripts. Currently plan to have a list of the processes and go through them during user testing.		
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/11/24	Will be adding two more users once an	Submission	

								email is established with agency. Two new employees.	Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/10/24	Submitted by Randy Pupo.	Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	25% - Beginning Initial Internal Meetings and Information Gathering		Implementation schedule baseline still being constructed. Temporary staff to be hired FY 24/25 to manage PM related tasks.	N/A	
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24	100% - Submitted	07/25/24	Shared updates with majority of users. In PALM design workshops this week and will share updates with SME post meetings.	Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/10/24	Reviewing Projects.	Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	50% - In Progress				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Temporary staff began with agency to compile and organize procedures in order to crosswalk to PALM processes. Plan for this and all previous tasks associated complete by 10/31		
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	08/01/24	Business system related, no anticipated remediation.	Submission Complete	08/01/24
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	08/23/24	Submitted to RC. Cannot check out/in to Secure Library	Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/01/24	No interface needs.	Submission Complete	08/01/24
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	08/01/24	Business system related, no anticipated remediation.	Submission Complete	08/01/24
Direct	Technology	548	Identify and Confirm File Managers	08/06/24	08/16/24	100% - Submitted	08/16/24	No interface needs.	Submission Complete	
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/23/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24					
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering		Working to update current codes before confirming configuration codes.		
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/12/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24			Implementation schedule baseline still being constructed. PM hired and should begin September 2024 to manage PM related tasks.	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 = 27</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 9</p> <ul style="list-style-type: none"> SMEs by Business Process Grouping - Account Mgmt. and Financial Reporting = 1 - Accounts Receivable = 1 - Asset Accounting and Mgmt. = 1 - Banking = 1 - Budget Mgmt. and Cash Control = 1 - Contracts Mgmt. = 1 - Disbursements Mgmt. = 2 - Grants Mgmt. = 1 - Inter/IntraUnit Transactions = 1 - Payroll Mgmt. = 3 - Projects Mgmt. = 0 - Revenue Accounting = 1 - 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 = 0</p> <ul style="list-style-type: none"> Related Business Systems = 0 Related Reports = 0 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 0 Partial = 0 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 0</p> <ul style="list-style-type: none"> Related Business Process Groupings = 0 Planned Spreadsheet Uploads = 0 <ul style="list-style-type: none"> Level of Impact: People Changes - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0 Level of Impact: Processes Changes - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0 Level of Impact: Technology Changes - High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0 Level of Impact: Data Changes - High = 0 Medium = 0 Low = 0 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 = 0 <p>Segment III Documentation Update Status</p> <ul style="list-style-type: none"> - Not Started = 0 In Progress = 0 Complete = 0 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Current-State:</p> <p>Cataloged Business Systems = 5</p> <ul style="list-style-type: none"> Criticality: - High = 0 Med = 0 Low = 0 None = 2 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 0 Partial = 1 Not Started = 0 <p>Cataloged Interfaces = 7</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 <p>Implementation:</p> <p>Business Systems Planned for Integration = 0</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 = 0 Segment III - Documentation Updates: - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 <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 = 70</p> <ul style="list-style-type: none"> Associated Unique Uses = 75 - Continued Use - Yes = 49 - Continued Use - No = 0 Associated Business Systems = 6 Cataloged Reports = 37 Criticality: - High = 9 Med = 3 Low = 8 None = 17 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 6/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) - Planned Distribution Codes = 1 Asset Management (AM) - Planned Location Codes = 20 - Planned Associated Area ID's = None Commitment Control (KK) - Planned Option = Option # 2 - Control General Ledger (GL) - Planned Budgetary Value Combo Edits = 268 - Planned Local Funds = None - Planned Organization ID's = 81 - Planned OA1's = 665 - Planned OA2's = None

Segment IV Planned Configurations

- Started = 1 Not Started = 1

Conversions & Data Readiness

• Conversions Needed = 9

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

Data Readiness/Cleansing Status:

- Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOEA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Ongoing staff aug to address Task 328.	Processes should be fully documented by 10/1/24 and crosswalking will begin	05/24/24	Randy Pupo
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Medium)	As vacancies occur, targeting candidates with increased technological skills.	ongoing	05/24/24	Ryan White
Data	While cleaning up, making sure staff maintains the clean data	Open	1 (Low/Low)	Reviewing conversion inventory carefully and understanding the impact of having to clean up post go-live	Will continue to monitor	09/05/24	Nancy Frye

DOEA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Liaison time limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.	PM should be starting soon to monitor and complete readiness activities	09/16/24	Randy Pupo
People	Staff limitations still exist, turnover creates knowledge gaps	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working on retention and building processes and procedures so when turnover occurs, knowledge is not completely lost	Issue remains	07/01/25	Ryan White
Processes	Current processes may be outdated or not fully known creating issues in determining how they will be done in PALM	Open	Low - All impacts not listed as Critical or High	Working to build processes and utilize resources for when staff is learning they are understanding the why and when possible looking in the knowledge center to understand how it will change	In progress of cross walking processes so that staff can review while learning	04/01/25	Nancy Frye

DOEA Assumptions

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

DOEA 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	Communicated with multiple department heads regarding Data Clean Up and reminders to document specific processes especially as we continue year end clean up and reconciling	07/11/24		Keep the idea of cross walking current processes to how we will do the same thing in PALM	
Data	Reviewing current payroll issues and how we can make changes to convert to PALM	08/22/24		Change the PeopleFirst coding in some way to limit cash issues so that when PALM goes live, these will pass the budget and cash checks with ease	

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

[Privacy Notice](#) | [Report Abuse](#)

DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2024	Randy Pupo	pupor@elderaffairs.org	09/12/24
May - June 2024	Randy Pupo	pupor@elderaffairs.org	07/10/24
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit	elmere@elderaffairs.org	03/13/24