

### Helpful Links

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- Readiness Workplan

# SCS 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

Eric Maclure

### CCN Composition



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

#### Change Champion Network:

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- 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 = 93.08%**
- Submitted Complete = 19
  - Submitted Incomplete = 0
  - 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 = 95.88%**
- Submitted On Time = 43
  - Submitted Late = 7
  - 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  | 07/12/24               |                            | Submission Complete                | 07/15/24                         |
| N/A            | Technology                   | 528     | Update Agency Business System Documentation for Segment III                              | 04/15/24                | 07/12/24              | 100% - Submitted  | 07/12/24               |                            | Submission Complete                | 07/15/24                         |
| Indirect       | Technology                   | 530     | Update Florida PALM Interface Inventory for Segment III                                  | 04/15/24                | 07/12/24              | 100% - Submitted  | 07/08/24               |                            | 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  | 07/10/24               |                            | Submission Complete                |                                  |
| Indirect       | Technology                   | 529     | Update Florida PALM Conversion Inventory for Segment III                                 | 04/29/24                | 07/12/24              | 100% - Submitted  | 07/10/24               | AR is on a spreadsheet whi | Submission Complete                | 07/12/24                         |
| N/A            | Technology                   | 531     | Remediate Agency Business Systems based on Segment II                                    | 04/29/24                | 09/27/24              | 75% - Consolidating/Inputting Information for Submission            |                        |                            |                                    |                                  |
| N/A            | People                       | 535     | Update Workforce Readiness Plan  | 06/17/24                | 08/02/24              | 100% - Submitted  | 08/02/24               |                            | 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  | 07/10/24               |                            | 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  | 08/22/24               |                            | N/A                                |                                  |
| N/A            | People                       | 540     | Share Florida PALM Updates   | 07/15/24                | 07/26/24              | 100% - Submitted  | 07/25/24               |                            | 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  | 08/22/24               |                            | 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              |   |                        |                            |                                    |                                  |
| Direct         | Technology                   | 548     | Identify and Confirm File Managers   | 08/06/24                | 08/16/24              | 100% - Submitted  | 08/16/24               |                            | Submission Complete                |                                  |
| Direct         | People                       | 549     | Submit Training Survey   | 08/12/24                | 09/20/24              | 50% - In Progress   |                        |                            |                                    |                                  |
| 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              | 50% - In Progress   |                        |                            |                                    |                                  |
| Direct         | Technology                   | 550-A   | Provide Public IP Address and Select Technical Meeting Time                              | 08/26/24                | 08/30/24              | 100% - Submitted  | 08/30/24               |                            | Submission Complete                |                                  |
| N/A            | N/A                          | 551     | Submit Bimonthly Agency Readiness Status Report  | 08/30/24                | 09/11/24              | 100% - Submitted  | 09/09/24               |                            |                                    | 09/10/24                         |

|        |            | Status Report |  |          |          |  |  |  |     |
|--------|------------|---------------|--|----------|----------|--|--|--|-----|
| N/A    | N/A        | 552           | Manage Agency Specific Implementation Schedule, Risks and Issues   | 08/30/24 | 10/31/24 | 75% - Consolidating/Inputting Information for Submission |  |  | N/A |
| Direct | Technology | 550-B         | Participate in Technical Meeting to Receive Credentials and Access | 09/03/24 | 09/13/24 |  |  |  | N/A |

| People  | Processes   | Technology  | Data   |
|---|---|---|--|
| The staff and stakeholders affected by your agency's transition to Florida PALM.  | The sequence of procedures to accomplish a business objective.  | The applications or tools used to process, track, or report on financial operations.  | Information used in or produced from an agency's financial business operations.  |
| <p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 119</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Identified Subject Matter Experts = 9</b></p> <ul style="list-style-type: none"> <li><b>SMEs by Business Process Grouping</b></li> <li>Account Mgmt. and Financial Reporting = 2</li> <li>Accounts Receivable = 3</li> <li>Asset Accounting and Mgmt. = 2</li> <li>Banking = 1</li> <li>Budget Mgmt. and Cash Control = 1</li> <li>Contracts Mgmt. = 0</li> <li>Disbursements Mgmt. = 2</li> <li>Grants Mgmt. = 0</li> <li>Inter/IntraUnit Transactions = 4</li> <li>Payroll Mgmt. = 3</li> <li>Projects Mgmt. = 0</li> <li>Revenue Accounting = 3</li> <li>System Access and Controls = 3</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p> | <p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 32</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 5</li> <li>Related Reports = 32</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 32 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 32</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 11</li> <li>Planned Spreadsheet Uploads = 4</li> </ul> <ul style="list-style-type: none"> <li><b>Level of Impact: People Changes</b></li> <li>High = 0 Medium = 4 Low = 26 None = 2 Uncertain = 0</li> <li><b>Level of Impact: Processes Changes</b></li> <li>High = 0 Medium = 8 Low = 24 None = 0 Uncertain = 0</li> <li><b>Level of Impact: Technology Changes</b></li> <li>High = 0 Medium = 8 Low = 24 None = 0 Uncertain = 0</li> <li><b>Level of Impact: Data Changes</b></li> <li>High = 0 Medium = 0 Low = 32 None = 0 Uncertain = 0</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 8 Complete = 24</li> </ul> <p><b>Segment III Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 11 Complete = 21</li> </ul> | <p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 5</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 3 Med = 2 Low = 0 None = 0</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 5 Partial = 0 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 4</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment III - Documentation Updates:</b></li> <li>Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> </ul> <p><b>Planned Interfaces = 9</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = -2</li> <li>Outbound Interfaces = 7</li> </ul> | <p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 72</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 72</b></li> <li>Continued Use - Yes = 48</li> <li>Continued Use - No = 0</li> <li><b>Associated Business Systems = 6</b></li> </ul> <p><b>Cataloged Reports = 48</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 3 Med = 27 Low = 6 None = 9</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 6/9</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>Planned Distribution Codes = 7</li> <li><b>Asset Management (AM)</b></li> <li>Planned Location Codes = 89</li> <li>Planned Associated Area ID's = None</li> <li><b>Commitment Control (KK)</b></li> <li>Planned Option = Option # 1 - Track with Budget</li> <li><b>General Ledger (GL)</b></li> <li>Planned Budgetary Value Combo Edits = 285</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 1046</li> <li>Planned OA1's = 70</li> <li>Planned OA2's = None</li> </ul> <p><b>Segment IV Planned Configurations</b></p> <ul style="list-style-type: none"> <li>Started = 1 Not Started = 1</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 9</li> <li>Agency Data Outside of Primary Source System(s) = 1</li> <li><b>Data Readiness/Cleansing Status:</b></li> <li>Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 0</li> </ul> <p><b>Reports = TBD</b></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.

| SCS Risks                     |   |        |                   |   |   |                       |                     |
|-------------------------------|---|--------|-------------------|---|---|-----------------------|---------------------|
| Critical Operational Elements | Risk Description  | Status | Risk Rating       | Mitigation/Response Strategy  | Reporting Period Comments or Updates  | Date of Status Change | Owner / Coordinator |
| Processes                     | Allocation to Object Code. State Courts does not allocate to the Object Code level. This would be a severe impact to the Judicial Branch. Not only our process would be hugely impacted but also our need for additional FTE. | Open   | 9 (High/High)     | We have verbalized to FL PALM the impact of this proposed change to the Judicial Branch. We are waiting for updates on the proposed design. | Allocation to the object code may not be necessary - check with PALM to validate this approach.<br>- example: place "7" (expenses) value in the Account Code to satisfy the Object Code requirement |                       | Budget              |
| Processes                     | Warrant cancellation, On Demand and Salary refunds.   | Open   | 9 (High/High)     | We do not use. Setup a discussion with SCS HR to further identify any actions.  | HR impact to be further flushed out<br>Additional BPC resources have been added to assist with developing salary refunds, etc. as needed, continuing to monitor progress                            |                       | Human Resources     |
| Technology Data               | FLAIR data conversion integrity & validation  | Open   | 4 (Medium/Medium) | Working with PALM to see what resources & processes will be provided to SCSs to validate converted FLAIR data into PALM.                    | This was discussed during our 12/12/23 Touch Point meeting that we need assistance to assist  | 12/13/23              | F&A, OIT and HR     |

|                 |   |      |                   |  |   |          |   |
|-----------------|---|------|-------------------|--|---|----------|---|
|                 |   |      |                   |  | assistance to convert our ORG Code listings. 7/19: Requested a joint SCS, PALM session  |          |   |
| People          | Training for all stakeholders at deployment.              | Open | 4 (Medium/Medium) | We will take advantage of all available training provided by PALM. Update our process and procedures.<br>- Recruit staff augmentation resources to assist  | Staff augmentation is in process<br>Additional BPC resources have been added to assist with developing training materials as needed, continuing to monitor progress   |          | Finance & Accounting                        |
| Processes       | Statutory Compliance - Prompt Payments                    | Open | 4 (Medium/Medium) | PALM to provide adequate training to process Statutory Compliance - Prompt Payments<br>- Reduce time involved to process batch approval processes for Statutory Compliance - Prompt Payments<br>- Remediate process flow in PALM vs the current process flow | Further details will be flushed out as the SCS PALM solution design is further defined.   |          | Finance & Accounting                        |
| Processes       | Proper documentation of current processes and procedures. | Open | 2 (Medium/Low)    | In the process of recruiting & onboarding the appropriate number of resources necessary to further define SCS business processes details.  | Processes were updated to complete FL PALM TASK 328<br>- 2 additional resources added (PM, 1 BPC)<br>- recruiting in progress for additional BPCs- requesting to have an additional BPC resource onboarded by 07/2024, and Fall 2024  | 11/30/23 | SCS   |
| People          | Additional/adequate human resources for accounting roles  | Open | 1 (Low/Low)       | Prepare LBR to request additional funding or FTE. Cross train employees to assume different work responsibilities.   | This was discussed during our last touchpoint meeting 12/12/23<br>Cross Training is being evaluated along with current resource levels. Final action is to be determined  | 12/12/23 | Finance & Accounting Chief and Budget Chief |
| People          | Ongoing Communication about project                       | Open | 1 (Low/Low)       | Working Task 523 to document SCS communications.<br>- Continue to meet with our SCS communication team to further define PALM communication campaign strategies, project messaging, delivery channels and schedules to PALM stakeholders                     | Planned bi-monthly SCS communication beginning 2024.<br>Intranet updates. As PALM implementation comes closer, we will create a mass communication SCS campaign.<br>- Met with our SCS communication team to define PALM communication campaign strategies, project messaging, delivery channels and schedules to PALM stakeholders |          | Finance & Accounting                        |
| Technology Data | Business system development and integration               | Open | 1 (Low/Low)       | We develop as best as possible   | Follow up with OIT (Brian)  |          | Finance & Accounting, OIT                   |

| SCS Issues                       |   |        |   |  |  |                                   |                                |
|----------------------------------|---|--------|---|--|--|-----------------------------------|--------------------------------|
| Critical Operational Elements    | Issue Description   | Status | Priority  | Resolution Plan  | Reporting Period Comments or Updates   | Planned or Actual Resolution Date | Owner / Coordinator            |
| Processes Data                   | SCS does not utilize HRIS for timesheet reporting, this apart of the payroll life cycle in PALM   | Open   | Critical - Impacts the ability of the agency to move forward with work without resolution | Request our attendance and reporting software (ARS) to interface with PALM for reporting time and attendance     | Identify which PALM Interface SCS will leverage and the frequency  |                                   | Human Resources                |
| Technology                       | SCS needs the HRIS requirements, reporting, integration and design specifications   | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | Unknown until SCS HR, OIT & F&A have discussed requirements  | Conduct discussions with HR, OIT & F&A   |                                   | Human Resources                |
| Processes Data                   | HRIS payroll reports not utilized to send data to PALM  | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | Request payroll reports for SCS to be generated - LWOP, missing timesheet reports, over and under payment report |  |                                   | Human Resources                |
| Processes                        | Entering OPS paper timesheets, Shift and On-call payments into People First manually in the Alternate Time Entry screen   | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | Request approval for OPS employees be allowed to use the HRIS system to submit timesheets.                       |  |                                   | Human Resources                |
| Processes                        | LWOP entered as Unpaid hours in Alternate Time Entry screen when notified timely  | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | We are still trying to figure out how this change will affect us. We are anticipating updates from FL PALM.      |  |                                   | OIT                            |
| People Processes Technology Data | We have built our Business (Invoice Management System) to interface with FLAIR with a batch upload file. We have not tested this output extract due to a MOU yet to be provided by DFS. | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | We will follow up with DFS to get an MOU signed so we can move forward with testing.                             | This could turn into a priority & resource availability issue whenever a decision is made by DFS & the MOU |                                   | OIT and Finance and Accounting |
| Processes Data                   | SCS COA Bureau, Section & Unit combination is incomplete  | Open   | High - Impacts the ability of the agency to meet deadlines or milestones                  | SCS is waiting to validate the conversion process from FLAIR Accounts to COA                                     | When COA SMEs open the Smartsheet, SCS F&A will update the Bureau, Section & Unit combination values       |                                   | Finance and Accounting         |

| SCS Assumptions               |  |        |                        |   |                                      |
|-------------------------------|--|--------|------------------------|---|--------------------------------------|
| Critical Operational Elements | Assumption   | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s)              | Reporting Period Comments or Updates |
| Processes                     | Additional One-Time Payment function in HRIS will function the same                          | Logged | 08/09/24               | Separating, retiring, DROP entry, Overtime recipients |                                      |
| Data                          | Payroll data will be transferred the way it is now, except the funding codes will be updated | Logged | 08/09/24               | Human Resources                                       |                                      |
| Processes                     | Alternate Time Entry screen will function the same   | Logged | 08/09/24               | LWOP and OPS employees                                |                                      |

### SCS 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                        | Additional staff     | 07/01/24 | OSCA                                     | Potential need for additional staff. Request of funds from FL PALM 2024 |                                      |

### 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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### SCS Status Report Confirmation

| Reporting Period        | Agency Sponsor Name:     | Confirmed By:         | Confirmation Date: |
|-------------------------|--------------------------|-----------------------|--------------------|
| July - August 2024      | Eric W. Maclure, State   | macluree@flcourts.org | 09/09/24           |
| May - June 2024         | Eric W. Maclure, State   | macluree@flcourts.org | 07/10/24           |
| March - April 2024      | Eric W. Maclure, State   | macluree@flcourts.org | 05/10/24           |
| January - February 2024 | Eric W. Maclure, Interim | macluree@flcourts.org | 03/06/24           |



