

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for AHCA
- Readiness Workplan

AHCA 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

March - April 2024

Agency Sponsor

Lynn Smith

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 6
- 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 = 72.50%

- Submitted Complete = 2
- Submitted Incomplete = 1
- Completed After Submission = 1

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflects the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 66.56%

- Submitted On Time = 12
- Submitted Late = 14
- Pending Submission = 4

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 = 7
- 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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		4/30 - Some updates were provided, but it appears to be incomplete. 4/19 Awaiting updates from AHCA Technical Team on next steps after the reissuance of initial documentation (Task 326). 4/12 - AHCA Technical Team was unable to schedule meeting (due to conflicts) with the Florida PALM team for outstanding questions. Also - See Issue 0001		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/03/24	4/30 - All are completed, but will not submit until we review it once more as a team		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		4/30 - Working with A&A on data cleansing 4/12 - Have begun some data review of the files provided to the Bureau for Financial Services team by DFS; Will Review and determine if additional data needs to be addressed and the approach. To be completed by		
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		4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		4/30 - Some updates were provided, but it appears to be incomplete. 4/19 Awaiting updates from AHCA Technical Team on next steps after the reissuance of initial documentation (Task 326) 4/12 - AHCA Technical Team was unable to schedule meeting (due to conflicts) with the Florida PALM team for outstanding questions.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/25/24		Submission Complete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/13/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	05/01/24			
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	75% - Consolidating/Inputting Information for Submission	04/19/24	Awaiting documentation from the team for end user engagement	Submission Incomplete	05/01/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24					
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24					
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24					
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24					
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24					

Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/13/24	Signed on Thursday 5/9	05/13/24
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24				

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>Implementation:</p> <p>Planned Florida PALM End Users = 30</p> <ul style="list-style-type: none"> Business Process Groupings = 12/13 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>Current-State:</p> <p>Cataloged Business Processes = 67</p> <ul style="list-style-type: none"> Related Business Systems = 5 Related Reports = 31 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 65 Partial = 1 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 67</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10 Planned Spreadsheet Uploads = 4 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 15 None = 1 Uncertain = 20 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 1 Medium = 30 Low = 4 None = 1 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 25 In Progress = 0 Complete = 0 	<p>Current-State:</p> <p>Cataloged Business Systems = 23</p> <ul style="list-style-type: none"> Criticality: High = 20 Med = 0 Low = 2 None = 1 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 3 Partial = 15 Not Started = 0 <p>Cataloged Interfaces = 18</p> <ul style="list-style-type: none"> Inbound Interfaces = 13 Outbound Interfaces = 5 <p>Implementation:</p> <p>Business Systems Planned for Integration = 23</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 0 Updating = 1 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment II - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 0 <p>Planned Interfaces = 11</p> <ul style="list-style-type: none"> Inbound Interfaces = -2 Outbound Interfaces = 9 	<p>Current-State:</p> <p>Unique FLAIR Data Elements = 82</p> <ul style="list-style-type: none"> Associated Unique Uses = 82 Continued Use - Yes = 1 Continued Use - No = 0 Associated Business Systems = 22 <p>Cataloged Reports = 62</p> <ul style="list-style-type: none"> Criticality: High = 59 Med = 0 Low = 0 None = 0 <p>Implementation:</p> <p>Configuration Workbooks</p> <ul style="list-style-type: none"> Segments I & II Started = 8 Not Started = 1 <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 3 Agency Data Outside of Primary Source System(s) = 0 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 0 In Progress = 0 Not Started = 3 Not Applicable 0 <p>Reports = TBD</p>

Agency Reported

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

AHCA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	When SunFocus and other urgent operational events occur, resources will be shifted to focus on the operational events thereby impacting the completion of Florida PALM tasks (schedule).	Open	9 (High/High)	Production incidents and time sensitive activities will continue to interfere with the resource-light bureau. Assume the risk and work with the PALM Project staff to identify when a deliverable will be late. Document each occurrence and continue working on Florida PALM tasks and activities.	On-going	11/02/23	Phyllis Wander
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander
People Processes	Loss of Institutional Knowledge - Matriculation of knowledgeable business process and the SunFocus Application resources will hinder the progress of the project thereby impacting the timely completion of Florida PALM tasks (schedule).	Open	6 (High/Medium)	Continue to document desk procedures and manual processes and systems as well as encourage cross-training of operational functions.	On-going	11/09/23	Phyllis Wander

AHCA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Technology	After requesting system documentation, the Vendor team has not provided any functional/system documentation for SunFocus to attach to Florida PALM Task 326. The task did not meet the scheduled due date of 10/27/2023.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	2/28/2024: Monitor the completion of Segment I and II updates to the documentation. Escalate	4/30/2024: Vendor team provided updates to documentation (Tasks 504 and 516) but it was incomplete. 4/19/2024: Vendor team provided documentation in the proposed format but has not provided in updates. Meeting Coordination between the Florida PALM technical team needs to be held to answer outstanding questions Vendor team has. Coordination of that meeting will begin again after the first attempt.	01/15/24	Scott Ward

					after the first attempts failed. Will update the resolution date when meeting is scheduled. 2/28/2024: Segment I updates were not included with the initial documentation. 2/23/2024: Met with the Vendor team and reviewed the documentation (in-progress). Initial documentation (Completion of Task 326) is expected before the end of the reporting period (February 29th). 2/9/2024: AHCA Management has reached out to the Vendor to address the need for system documentation.		
People Processes Technology	If the resources are not identified and on-boarded by the end of March 2024, 1) the Agency will not complete the tasks in a timely manner and 2) the Agency will not transition to Florida PALM in January 2026.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Immediate plan is to add an additional BA or Business Process Consultant to document the HR/Payroll processes and complete the tasks that were done for the Financials Wave.	4/19: BPC 1 has been onboarded with the second one to begin on 4/29 4/10/2024: BPCs with extensive FLAIR background confirmed for the 4/29. 3/22/2024: Business Process Consultant (BPC) accepted position to begin in the next few weeks. 3/11/2024: Initial round of interviews completed. 2/28/2024: Currently holding interviews. 2/9/2024: Resumes have been received and reviewed by the AHCA team. In the process of setting up interviews. 01/11/2024: Re-evaluated the advertisement and revised the eQuote documentation. Plan to post at the end of the week. 11/09/2023: Reviewed current resumes, but they did not have the specific skills we were seeking. Need to re-evaluate and resubmit a posting for the Staff Aug.	01/15/24	Phyllis Wander

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

AHCA 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	Weekly Governance Meetings	03/04/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	03/06/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	03/04/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	03/11/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	03/11/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Project Team Meeting	03/18/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	03/18/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	03/20/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	04/01/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/01/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	04/08/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Change Champions Workgroup Meeting	04/10/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Governance Meetings	04/15/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	04/15/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Change Champions Workgroup Meeting	04/17/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	

People	Quarterly Financial Ecosystem Governance	04/19/24	Executive Leadership and BFS Leadership	Managing for the transition of Florida PALM for Agency-wide visibility	
People	Weekly Project Team Meeting	04/22/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/22/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	04/24/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
People	Weekly Project Team Meeting	04/29/24	Bureau of Financial Services	To review specific issues; processes; questions	
People	Weekly Governance Meetings	04/29/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
Processes	Weekly Disbursement To-Be Processes	04/24/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Weekly Disbursement To-Be Processes	04/30/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

Submit

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AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/24
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24
November - December 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	01/13/24
September - October 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	11/09/23
July - August 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	09/11/23