APD 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
Rose Salinas

CCN Composition

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

Change Champion Network:

• Unique Filled Role = 6

• Duplicate Filled Role = 11

• 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 = 65.71%

• Submitted Complete = 3

• Submitted Incomplete = 2

• Completed After Submission = 2

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 = 99.38%

• Submitted On Time = 29

• Submitted Late = 1

• 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 = 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
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission		2/28 - PALM User Excel Spreadsheet received with updates for teams - finishing placing into Smartsheet by COB 2/29. 3/14-APD Teams breakdown on internal tracker - Reports documentation updated (3/12)/Business Process Review Seg I & II 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - 90% completed- working to close final open items from internal tracker - Finance Team leading - multiple sheets broken out for team input 4/18 - internal APD tracker updated with specific breakdown of all rubrics and teams follow thru defined. ongoing meetings and effort 5/7 - final review on all spreadsheets for completion - no blanks - all identified and sheets completed correctly - will submit on time - goal is 5/9 ***5/10 - 5/10 TLH office closures - per conversation with RC, leaving task open, all workbooks completed pending Location Definition Workbook - RC meeting slated for 5/13 - pending internal APD follow up as well 5/13*** 5/13 - RC comments: APD's config workbook is complete with exception of location id. RC discussed with PM-Business Analyst on 5/10 during TLH storm office closure. Organization tree structure process cleared up. Sheet complete. Matching FLAIR location codes to addresses is a challenge. PM will follow up with APD F&A on 5/13 about Flair location id's, make appropriate selections in sheet, and assign Florida Palm location ids in sheet. (Note: APD is assigning FP location codes based on current day FLAIR location codes.) Task tracker comment to be added noting 5/10 phone call with RC. Due to 5/10 TLH storm office closures, PM will follow up with APD team on 5/13 to resolve Location ID.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	04/11/24	2/5 - Start of review for TASK completion 2/14 - Reviewing and updating based on Finance Team recommendations 2/21 - in progress 3/14 - Teams review/IT and Teams assignment break out - APD Internal Tracker 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - Round 1 Plan has been executed - working to close final open items from internal tracker 4/10 - All Inventories are planned - but not executed yet with May Encumbrance clean up completion target and June completion plans for asset data. - leaving at 75% due to	Submission Incomplete	05/06/24

								actual inventory effort is in progress at this time and will NOT be completed until end of JUNE. 4/11 - finalizing input to sheets - review 4/12 for completion of all rubrics with inventory actions remaining outstanding 4/18 - ongoing effort with BA leading the documentation updates for inventories - asset and encumbrances 5/2 - teams review - Encumbrances target completion for cleanse - May 30 5/2 - Asset Managment - target completion for the physical location cleanse - May 30 - physical inventory of all assets - June 30 5/6 Selected "Not Applicable" for all columns for Customers and Grants rows: Data Readiness Evaluation through Current-State Data Readiness Status	

N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT initiating the activities with new TD onboarding 2/27-APD IT Team is onboarding a new Technical support person to assist with focused IT support to include re-writes to scripting for interface of all APD ABS's 2/28 - new meeting review scheduled for 3/7 3/14 - IT Team onboard and focused - noted in internal tracker - working thru assignments/actions 3/31 - new APD position for Tech Support - moving thru all sheets after team updates for data impacts and updates from IT 4/8 - final reviews - 90% completed-working to close final open items from internal tracker - define the plan and establish IT team objectives for segments thru 1/2/3 4/18 - IT team review scheduled for 4/23 4/30 - IT team is completed with the Smartsheet - but the IT Team is 5/3 - TA working this task for completion - update on next IT call 5/13		
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/18/24	4/8 - Core Team meetings - /Hi 5's and All hands - information is shared thru out APD (Thursday Task Talk - 4/11) 4/18 - completed with documentation - comments column includes dates from all listings of meetings as discussed with RC - noted those documentations that can be shared 4/18 - dates completed in column - updated - with new add and notes- resubmitted - email to RC	Submission Complete	04/18/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	75% - Consolidating/Inputting Information for Submission		4/18 - review of internal APD defined survey deliverable with team calls next 2 weeks - reviewing with CORE team at APD 4/29 - being answered by teams - reviewing with teams on team calls - latest due date within APD 5/10 - Smartsheet form. 5/3 - All Teams provided Survey by EOD 5/3 - IT team separately to be provided by EOD 5/6 5/7 - reminder for teams completion - sent today		
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
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		5/3 - initiated review		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		5/3 - initiated review		
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
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	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/09/24	5/7 - Rose/Sponsor in review and signoff pending 5/9 - Rose signed off and sumitted		
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				

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.
Implementation:	**Current-State:**	**Current-State:**	**Current-State:**
Planned Florida PALM End Users = 75	**Cataloged Business Processes = 238**	**Cataloged Business Systems = 9**	**Unique FLAIR Data Elements = 480**
• Business Process Groupings = 13/13	• Related Business Systems = 6	• **Criticality:**	• **Associated Unique Uses = 1181**
Role Mapping = TBD	• Related Reports = 34	- High = 9 Med = 0 Low = 0 None = 0	- Continued Use - Yes = 1094
Training = TBD	• **Documentation Status:**	• **Documentation Status:**	- Continued Use - No = 57
	- Complete = 238 Partial = 0 Not Started = 0	- Complete = 8 Partial = 1 Not Started = 0	• **Associated Business Systems = 2**

Implementation:

Impacted Agency Business Processes = 238

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 0

• Level of Impact: People Changes

- High = 21 Medium = 6 Low = 62 None = 17 Uncertain = 22

• Level of Impact: Processes Changes

- High = 19 Medium = 10 Low = 24 None = 13 Uncertain = 62

• Level of Impact: Technology Changes

- High = 15 Medium = 4 Low = 8 None = 27 Uncertain = 74

• Level of Impact: Data Changes

- High = 17 Medium = 7 Low = 3 None = 22 Uncertain = 78

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 94

Cataloged Interfaces = 78

- Inbound Interfaces = 6

- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 8

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates:

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

Planned Interfaces = 14

- Inbound Interfaces = 3

- Outbound Interfaces = 11

Cataloged Reports = 112

• Criticality:

- High = 150 Med = 18 Low = 1 None = 0

Implementation:

Configuration Workbooks

• Segments I & II

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 2

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

• Data Readiness/Cleansing Status:

- Complete = 0 In Progress = 2 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.

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	-Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams

Category	Risk	Status	Rating	Mitigation	Monitoring / Notes	Date	Team
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Closed	6 (High/Medium)	- Implement standardized documentation procedures - 2/6 - Teams working with new Business Analyst to update and fully document to the PALM Process Documentation and narratives - 1st and 2nd qtr 2024	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024 4/24 - noted that the Business Process documentation has been updated and documented as aligned with Task requirements. This is an ongoing internal project effort in parallel with PALM asks.	04/24/24	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People	Resistance to change among employees	Open	4	Conduct change management training	Measurement:	02/06/24	PALM Team/APD Project

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan / Strategy	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b intiatied with COA review	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises is in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Data	APD Finance G/L Team - questioning when there will be a final approved full PALM Chart of Accounts listing provided	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024	This is will be an on-going -December 2023 - new chart fields finalized and the APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team	03/29/24	APD Finance Team
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found -2/6 - BA start Date =	04/01/24	APD Sponsor and Finance Team

Critical Operational Elements	Description	Status	Impact	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	Date	Responsible
	fulfillment of tasks at this time - with the resources we will be able to catch up and move forward.				2/6 - BA Start Date 2/20 -2/6 - Tech Support pending 4/22 - update March hire of BA and April Hire of TA		
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted 4/22 - new organization chart has been drafted and will initiate a change in organizational structure - G/L will be updated as approvals are completed	06/28/24	APD Sponsor and Finance Team
People Processes Data	APD Finance G/L Team - final PALM Chart of Accounts listing provided for workbook	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024 - 2/6 - new task 513 - to accomplish Workbook initiatives for PALM - in progress 4/22 - The Task 513 Workbook has aided in the closure of COA structure and mapping efforts - closed to completed Task 513	This is will be an on-going APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team 2/29 - asset mgmt team is engaged for location inventory	03/29/24	APD Finance Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team 4/22 - the inventory clean up and alignment with G/L cleanse is in progress - not yet closed	07/01/24	APD AM Team - BA - PM - Core Team
People Processes Technology Data	PALM Business Process Modules DO NOT align with the naming convention on the new PALM Modules - this is a new learning issue after adjusting for team purposes	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Re-mapping - and will re-educate the teams to their PALM Module Name - REALLY causes "change management issues"	4/22 - new change - business process models vs PALM Modules names - they don't align and APD has renamed their teams based on the Business Process Models/Modules originally introduced.	06/28/24	APD Teams/CCN and SME's
People Processes Technology Data	APD Inventories - Asset and Encumbrances - Process Improvement	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working with teams to establish and document pro	4/22 - still in process - unable to finish based on the Task requirements and due date of 4/12 4/24 - Asset Team has issued the Inventory requirements for fiscal yr end - and with that the effort to close is targeted for full cleanse of ALL inventory by June 30, 2024 4/24 - Encumbrances - part of the YE Close.	07/01/24	Asset Mgmt and Encumbrances by the Disbursement team
People Processes Technology Data	APD is in the process of a Business System re-write to the ABC system and this will require a 2 x re-write for support as PALM is onboarded	Open	High - Impacts the ability of the agency to meet deadlines or milestones	ABC project is pending a hold to address current a	4/24 - the Business System requirements at APD are unique due to the clients services provided. Need to update is critical but the affect to do this 2xs is being measured. TBD on the outcome and IT decisions	12/30/24	APD IT Team
People	APD Organizational changes will change the alignment of the personnel within the agency - but no approvals are final and there remain accounting adjustments to support until the accounting structure can be corrected	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get DMS approvals thru	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity.	06/28/24	APD Agency as a whole

APD Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined

Technology Data	regulations with APD looking to gain information and support from the PALM teams as needed or required.				
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.		04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion.
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer		04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.

APD 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 Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	03/07/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/04/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/05/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/06/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD BA and PM - Review Weekly Status	03/07/24	APD BA/PM	Review weekly information and updates/TASKS deep dive/details	Agency Review
People Processes Technology Data	APD Calendar updates to Teams	03/05/24	APD PM	Timeline Snapshot for the month of March and April - upcoming events and scheduled activities	Agency Updates - BA and PM Review
People Processes Technology Data	Weekly Core Team Status Report	04/18/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Email updates (Past/present week/future) Weekly	weekly: Jan - 4,11,18,25 Feb - 1,8,15,22,29 Mar - 7,14,21,28
People Processes Technology Data	Weekly Core Team Teams Call	04/18/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Teams Virtual Call review of updates (Past/present week/future) Weekly	Weekly: Jan - 4,25 Feb - 1,8,22,29 Mar - 7, 14, 21 Apr - 11, 18
People Processes Technology Data	Monthly Budget Team Meeting	04/02/24	CCN and SMEs	Budget Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: Budget and Possible Future Project - Monthly	Monthly: Mar 20
People Processes Technology Data	Monthly Accounts Receivable Team Meeting	03/25/24	CCN and SMEs	Accounts Receivable Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: A/R-Revenue Accting-Cash Control-Grants. Monthly	Monthly: Feb 21
People Processes Technology Data	Monthly Disbursements Team Meeting	04/10/24	CCN and SMEs	Disbursements Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum - Team represents Modules: Disbursements Management Monthly	Monthly: 3/21
People Processes Technology Data	Monthly Asset Management Team Meeting	04/08/24	CCN and SMEs	Asset Mgt. Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Asset Accounting & Management - Monthly	Monthly: Mar13/Mar 21/Mar 26
People Processes Technology Data	Monthly Contract Team Meeting	03/26/24	CCN and SMEs	Contract Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Contracts and Possibly Projects - Monthly	Monthly: Feb 28
People Processes Technology Data	Monthly Payroll Team Meeting	04/02/24	CCN and SMEs	Payroll HR and Finance Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Payroll Management and System Access and Controls - Monthly	Monthly: Mar 20/Feb 28
People Processes Technology Data	Monthly Accounting and Financial Reporting Team Meeting	03/25/24	CCN and SMEs	Accounting Management and Financial Reporting Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum	Monthly: Mar 11

Data					Team represents Modules: Accounting Management and Financial Reporting- Monthly	
People Processes Technology Data	Monthly IT Team Meeting	04/09/24	CCN and SMEs	IT Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents APD IT Effort	Monthly: Mar 5, Mar 25, Apr 2, extra meeting s due to onboarding new TA
People Processes Technology Data	Monthly Inter/Intra - Facilities Team Meeting	04/11/24	CCN and SMEs	Tacachale/Sunland/DDDP Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Monthly: Apr 2,
People Processes Technology Data	Monthly Inter/Intra - Regions Team Meeting	03/19/24	CCN and SMEs	State/HQ-SE-SW-NE-NW-Suncoast-Southern-Central Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Monthly: Feb 29, Mar incorporated into facilities meeting
People Processes Technology Data	Weekly APD PALM Internal Team Meeting	04/15/24	Other	Primary PALM Team Status Call - PM/BA/TA - weekly	Review all - talk to status - align APD
People Processes Technology Data	Monthly / Bi-Monthly APD High Fives Email	04/08/24	Other	Distribution email to all CCN and SME's and Teams - choosing high five points of interest/information/updates/clarifications for teams to review - Monthly - if needed Bi-Monthly	Internal APD focused - top 5 things to notes/express/propose/inform agency CCN and SME's and sent at least 1 x month or if needed 2 x's
People Processes Technology Data	PALM Communications forward/share	04/17/24	Other	All CCN and SME's are subscribed to PALM Communication - Add on clarifications and separation of priority emails redistributed to teams as needed - random	Sharing and adding APD focus to PALM communications
People Processes Technology Data	DFS Communications forward/share	04/04/24	Other	Manage teams with DFS required information/surveys/inquiries - random	Taking the Lead on DFS PALM Focused inquiries for accountability arbitrary dates
People Processes Technology Data	APD Internal Team Process Manual Documents - Goals-Charter	04/05/24	End Users	ALL Teams - Internal Intiative to update and align Goals and Charter for PALM Team Module structure	APD is working with each team as a whole to update their internal process manual and this is created to establish the team efforts and goals. - arbitrary monthly team meetings - all dates from March 21 - April 5

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: *

[   ]

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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24
November - December 2023	Rose Salinas	rose.salinas@apdcares.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23