

Helpful Links

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

CITRUS Status Report Dashboard

Reporting Period

March - April 2024

Agency Sponsor

Christine Marion

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

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 2
- Duplicate Filled Role = 12
- 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 = 73.75%**
- Submitted Complete = 5
 - Submitted Incomplete = 1
 - 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 = 97.19%**
- Submitted On Time = 25
 - Submitted Late = 5
 - 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	100% - Submitted	05/09/24			
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	100% - Submitted	03/25/24		Submission Complete	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	100% - Submitted	03/25/24		Submission Complete	03/25/24
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/10/24		Submission Complete	04/21/24
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/25/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/10/24		Submission Complete	
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	04/29/24			04/29/24
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/19/24	Everything that is available has been attached.	Submission Incomplete	05/13/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	50% - In Progress				
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				
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	05/02/24		Submission Complete	
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

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 11/13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 32

- Related Business Systems = 4
- Related Reports = 42

Documentation Status:

- Complete = 31 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 4

Criticality:

- High = 4 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 4 Partial = 0 Not Started = 0

Data

Information used in or produced from an agency's financial business operations.

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70

- Continued Use - Yes = 21

- Continued Use - No = 3

• Associated Business Systems = 0

Implementation:

Impacted Agency Business Processes = 32

- Related Business Process Groupings = 8
- Planned Spreadsheet Uploads = 0
- **Level of Impact: People Changes**
- High = 0 Medium = 11 Low = 21 None = 0 Uncertain = 0
- **Level of Impact: Processes Changes**
- High = 31 Medium = 0 Low = 1 None = 0 Uncertain = 0
- **Level of Impact: Technology Changes**
- High = 2 Medium = 9 Low = 16 None = 5 Uncertain = 0
- **Level of Impact: Data Changes**
- High = 1 Medium = 2 Low = 28 None = 1 Uncertain = 0
- **Segments I & II Documentation Update Status**
- Not Started = 0 In Progress = 0 Complete = 32

Cataloged Interfaces = 2

- Inbound Interfaces = 2
- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 1

- **Segment I - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- **Segment II - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 0

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Cataloged Reports = 54

- **Criticality:**
- High = 31 Med = 12 Low = 5 None = 0

Implementation:

Configuration Workbooks

- **Segments I & II**
- Started = 3 Not Started = 6

Conversions & Data Readiness

- Conversions Needed = 2
- Agency Data Outside of Primary Source System(s) = 1

Data Readiness/Cleansing Status:

- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

CITRUS 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	The quality of audio on webinars and recordings is low. Our team does not feel it is receiving much needed information presented during these workshops	Open	9 (High/High)	Please see what you can do to upgrade the quality of webinars	Data Day was a disaster for us, and a loss of productivity as we had 4 team members relying on the webinar.	04/30/24	PALM Team
Processes	Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank).	Open	6 (Medium/High)	We will discuss with our new project manager, to determine how foreign currency payments will be handled through PALM	New Risk entered this period	04/29/24	C Marion
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings. Update as of Jan 2024: There have been no training or information sessions targeted for technical support. We are unsure of the role our technical support person will play in PALM. He has very little to do with FLAIR,	09/19/23	C Marion

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	The PALM team presents some workshops as webinars, but the technology is not very good. Audio is either choppy with echoes, or completely nonexistent.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	It is not possible for us to travel to Tallahassee for every meeting. The quality of the webinars is so low that it is not productive for our team to participate	Data Day was a huge disappointment, as our team will be responsible for a lot of these activities. Resolution must come from PALM Team. We hope that our new project manager can assist with this task, since the PALM project cannot provide a quality remote solution.	07/31/24	PALM

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR Funding for FY2024-25 included in Legislative budget, pending Governor approval. BAPS request for current year funding was approved and project manager has been contracted through staff augmentation, to start April 30, 2024.
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff is currently completing Task 513, which defines data fields for configuration in PALM
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.

People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins
People Processes Data	Vendor maintenance done outside of PALM in AOD	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	This assumption will remain until more information released

CITRUS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	DFS Data Webinar	03/19/24	Christine, Lucy, Dianne, Kay	DFS explains Data Cleansing process	
Data	Data Cleansing, Round 1	03/21/24	Dianne	Data cleansing begins with first DFS spreadsheet	This will be a continuing process, due April 12
Data	Data Cleansing Activities	04/09/24	Dianne, Lucy, DFS Staff	Clarify Data Cleansing process for file #1	Dianne has been working on the first data cleansing file. Met with DFS staff (Julia Collins-Okane) to clarify what should be included in the file
Data	Data CLeansing Activities	04/10/24	Dianne, Lucy	First data file sent to DFS for data clean up	Confirmed with Julia on 4/29/24 that data items in this file can be deleted.
People Processes Technology Data	PALM Touchpoint Meeting	03/21/24	All PALM CCN members	Review upcoming tasks, ask questions regarding Task 513, see agenda for details	Awaiting answers from Project team in order to complete Task 513
People	Senior Staff Meeting	03/22/24	Christine	Update senior staff on status of project, FLAIR Replacement project administered funds	
People	Meet with new PM, to discuss outstanding Tasks, including those that need to be re-submitted	04/30/24	CCN Team, Matt C. (New PM)	Review project status, discuss tasks which need to be resubmitted	Matt will be on site for this introductory meeting
People Processes	Production Support Webinar	04/23/24	George, Christine, CCN	Webinar regarding IDP and SAM roles	
People Processes	Review Task 328, determine how to move tasks to proper format	04/30/24	Lucy, Matt, Christine	Matt to look at current business process documents	Matt to assist in formatting current business process documents before due date of May 10

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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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Christine Marion	cmarion@citrus.myflorida.com	05/02/24
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23