

**Helpful Links**

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

# COM Status Report Dashboard

**Reporting Period**

March - April 2024

**Agency Sponsor**

Tisha Womack

*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 = 8
- Duplicate Filled Role = 5
- Vacant Role = 1

**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 = 96.67%**

- Submitted Complete = 5
- Submitted Incomplete = 0
- Completed After Submission = 1

**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 = 95.31%**

- Submitted On Time = 26
- Submitted Late = 3
- Pending Submission = 1

**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	05/11/24	Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication. UPDATE AS OF 4/2/2024: Team meeting scheduled for 4/9/2024. Update as of 5/11/2024: Task Tracker update late due to internet and utilities outage as result of storm. Update as of 5/13/2024: task due date extended to 5/13/2024 due to severe weather on 5/10/24; Lisa / Tulani reviewed Smartsheet entries for completeness. Updates made to the Distribution Code smartsheet. Task submitted.		05/13/24
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		Dean Modling has created a cleansing plan and reviewed with Tisha Womack (Sponsor), Lemuel Toro (Agency Liaison) and myself (Project Manager) to formulate an internal plan. Clean up work has started with our Grants Management team. UPDATE AS OF 4/2/2024: Dean (Lead SME) and Tulani (PML) will review task instructions to determine if task completion requirements can be / will be done by task due date of 4/12/2024.		
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	04/12/24	Lisa Simpson reviewed data entered into Smartsheet as of 3/14/2024. Feedback was given to areas whose information was available during meeting. Team asked clarifying questions and advised to make updates as needed. UPDATE AS OF 3/25/24: Internal deadline extended to April 5th due to task team members in PALM Data Day and Design Meetings. However, team members are expected to have 8/11 Smartsheet items with value for their respective assignments. Project updates have been communicated to team via Microsoft Teams.	Submission Complete	04/30/24
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.	Submission Complete	
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication. UPDATE AS OF 3/25/2024: Team meeting schedules on Friday, 3/29/2024 to review task requirements and determine best plan of action for completion. UPDATE AS OF 3/29/2024: Task tentatively complete; waiting to confirm Encumbrances selections. Confirmation due on or before Tuesday, April 2, 2024 5 pm.	Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/12/24	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.	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		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	04/30/24			04/30/24
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/18/24			Submission Complete
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					
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.

**Implementation:**

**Planned Florida PALM End Users = 44**

• Business Process Groupings = 12/13

**Role Mapping = TBD**

**Training = TBD**

**Current-State:**

**Cataloged Business Processes = 61**

• Related Business Systems = 8

• Related Reports = 31

• **Documentation Status:**

- Complete = 22 Partial = 36 Not Started = 3

**Implementation:**

**Impacted Agency Business Processes = 61**

• Related Business Process Groupings = 8

- Planned Spreadsheet Uploads = 7

• **Level of Impact: People Changes**

- High = 3 Medium = 20 Low = 25 None = 7 Uncertain = 6

• **Level of Impact: Processes Changes**

- High = 5 Medium = 29 Low = 13 None = 2 Uncertain = 12

• **Level of Impact: Technology Changes**

- High = 15 Medium = 20 Low = 5 None = 7 Uncertain = 14

• **Level of Impact: Data Changes**

- High = 7 Medium = 31 Low = 3 None = 8 Uncertain = 12

• **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 0 Complete = 61

**Current-State:**

**Cataloged Business Systems = 26**

• **Criticality:**

- High = 7 Med = 18 Low = 0 None = 1

• **Documentation Status:**

- Complete = 4 Partial = 22 Not Started = 0

**Cataloged Interfaces = 15**

- Inbound Interfaces = 15

- Outbound Interfaces = 0

**Implementation:**

**Business Systems Planned for Integration = 23**

• **Segment I - Documentation Updates:**

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• **Segment II - Documentation Updates:**

- Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

**Planned Interfaces = 10**

- Inbound Interfaces = -4

- Outbound Interfaces = 7

**Current-State:**

**Unique FLAIR Data Elements = 71**

• **Associated Unique Uses = 84**

- Continued Use - Yes = 2

- Continued Use - No = 12

• **Associated Business Systems = 2**

**Cataloged Reports = 373**

• **Criticality:**

- High = 2 Med = 0 Low = 0 None = 0

**Implementation:**

**Configuration Workbooks**

• **Segments I & II**

- Started = 3 Not Started = 6

**Conversions & Data Readiness**

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 2

• **Data Readiness/Cleansing Status:**

- Complete = 3 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.

### COM 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	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	Delegated some day-to-day activities to staff members not directly involved with PALM. This change allows CCN team members some time to work on PALM each week. UPDATE as of 4/29/2024: Lead SMEs currently training new resources to be independent.	04/29/24	Caroline (Tisha) Womack / Lemuel Toro
People	Lack of support for Life-to-Date Accounting and	Open	9 (High/High)	Create internal life-to-date reporting system	Commerce needs LTD	04/29/24	Lemuel Toro / Caroline

Processes Technology Data	Reporting					balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module that has some type of LTD capability but details are not known to agencies at this time. Contingency plans have been identified and Commerce is currently working to determine best response if Project Costing module will not provide needed support.	(Tisha) Womack / Dean Modling / Ken Heim
Processes	The current schedule for review of Payroll Wave Business Models allows insufficient time for comprehensive agency review.	Closed	6 (Medium/High)	At present all we can do is await the publication of the meeting materials.	Risk closed.	03/08/24	Lisa Simpson
People	SMEs who will provide vital support to PALM project during Segment IV workshops/meetings may also be needed to complete Financial Statement and Legislative Budget Request (LBR) tasks during the May 2024 - September 2024 window.	Open	6 (Medium/High)	Identify SMEs and SME backup team members.	SMEs with new staff/resources are currently training staff on day-to-day activities, as well as PALM related support. Backup SMEs will be identified as soon as possible.	04/29/24	Lemuel Toro / Lisa Simpson
People	Staff turnover and retention rates negatively impact Commerce's ability to gain and retain talent beneficial to PALM project and agency	Closed	4 (Medium/Medium)	Leadership efforts to recruit agency resources to support Commerce business goals and PALM initiatives as needed.	Commerce has onboarded agency resources to teams impacted by PALM to help support day-to-day activities.	04/29/24	Caroline (Tisha) Womack / Human Resources

#### COM 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	Insufficient work hours available to fully support Commerce specific PALM initiatives because existing staff are at capacity with regular hours	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Currently awaiting legislative budget amendment approval	Legislative budget amendment approved	03/14/24	Caroline (Tisha) Womack (Sponsor)/ Lemuel Toro

#### COM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team

#### COM 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	FACTS Contract Clean Up	03/05/24	Contracts Management	Meeting Cancelled	
Data	FACTS Contract Clean Up	03/12/24	Contracts Management	Review data to clean up and talked about status on all programs. Talked about changing up the reporting and James and David will run reports on FACTS Master Log vs. FACTS.	
Data	FACTS Contract Clean Up	03/19/24	Contracts Management	1. Reviewed new excel X lookup formula for FACTS Master Log vs. FACTS Recon. David and James will implement this X lookup and run the report every Friday for Junior to use for FACTS vs. SERA Recon. 2. Junior is working on SERA Closed vs. FACTS Open Recon. Junior will email all FACTS contract that need to be closed to James and David. 3. James and David are only have HCD program recon to process. 4. Michelle is contacting C&G Romona Turner regarding access for David, James, and Michelle to the C&G smartsheet of the Contracts routing log. 5. David will make a list of issues they encounter when processing the FACTS uploads. 6. Issue David has with FACTS process is not having current contract manger on file. Michelle will get with Lisa to see if there is an active employee with current supervisor list we can reconcile with FACTS Master Log.	
Data	FACTS Contract Clean Up	03/26/24	Contracts Management	1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts. 2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce. 3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field. 4. Junior will have fresh data on April 1st with 2 separate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working. 5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.	

Data	FACTS Contract Clean Up	04/02/24	Contracts Management	Review / Update contracts clean up.	<ol style="list-style-type: none"> <li>1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts.</li> <li>2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce.</li> <li>3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field.</li> <li>4. Junior will have fresh data on April 1st with 2 seperate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working.</li> <li>5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.</li> </ol>
Data	FACTS Contract Clean Up	04/16/24	Contracts Management	Review / Update contracts clean up.	<ol style="list-style-type: none"> <li>1. David and James will do a comparison with FACTS, MasterLog, CGA Smartsheet and purge all unexecuted contracts.</li> <li>2. Michelle will get with Lisa regarding an active personnel list. This report will help to clean up Contract Manager no longer with the Commerce.</li> <li>3. Michelle will work with Tammy Davis regarding MFMP reports to capture PO#'s with Contract # field.</li> <li>4. Junior will have fresh data on April 1st with 2 seperate spreadsheets: 1 with active contracts Junior and David will still be working and 1 with non active contracts James will be working.</li> <li>5. Michelle will contact Ramona Turner regarding the definitions on the status in the CGA smartsheet.</li> </ol>
Data	FACTS Contract Clean Up	04/23/24	Contracts Management	Review / Update contracts clean up.	<ol style="list-style-type: none"> <li>1. Junior and David is working on fresh data with SERA, Master Log, and FACTS.</li> <li>2. Master Log is update with status codes with FACTS. Assigned and active in FACTS.</li> <li>3. R contracts: are Home Owners Agreements. Talked with Ginger and Taylor. R contracts are not in FACTS they were created in Master Log for Tracking purposes. Michelle will ask Lemuel if we can change Master Log status to Tracking.</li> </ol>
Processes Data	Task 517 Team Meeting	03/29/24	Assets, Customers, Grants, Encumbrances	Met to review Segment II resources, as well as identify and document conversion needs for Florida PALM implementation.	Team completed Conversion Inventory & Data Readiness Smartsheet columns.
People Processes	Task 515 Progress Monitoring Meeting	03/21/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Identify impacts and update agency business process documentation for Segments I & II	Reviewed task instructions and requirements; reviewed Smartsheet navigation
People Processes	Task 515 - 518 Status Review Meeting	03/25/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Review task instructions and requirements.	High level review of task instructions and requirements.
People Processes	Task 515 Work Session (PAWS)	03/28/24	Disbursements Management, Account Management & Financial Reporting, Budget Management, Payroll Management	Work space to allow team members to work on or update Smartsheet information based on feedback.	Team members used time as a work session to work on implementation task.
People Processes Technology	General Services Team Meeting	03/07/24	General Services Team	Task 513 requirements	Team met to discuss task 513 requirements and necessary resources. Lisa gave team FLAIR Location Codes to assist in the completion of Asset Management (AR) portion of the Configuration Workbooks for Segments I and II.
Technology	Task 517 Team Meeting	03/29/24	Assets and Property, Customers, Grants, Open Encumbrances	Review task instructions and requirements	Team reviewed task instructions and requirements.

### Agency Sponsor Confirmation

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

Agency Sponsor Name: \*

Confirm \*

Submit

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

### COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Tisha Womack	caroline.womack@commerce.fl.gov	05/11/24
January - February 2024	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	03/08/24
November - December 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	01/11/24
September - October 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23