DOH Status Report Dashboard

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

CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation
The Change Champion Network dial reflects the completeness of your CCN makeup.	The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.	The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.	The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

• Unique Filled Role = 15

• Duplicate Filled Role = 0

• Vacant Role = 0

RW Task Completeness:

Score = 84.29%

• Submitted Complete = 5

• Submitted Incomplete = 0

• Completed After Submission = 2

RW Task Timeliness:

Score = 99.69%

• Submitted On Time = 29

• Submitted Late = 1

• Pending Submission = 0

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	05/08/24	DOH will not be configuring anything for Area ID and OA2		
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	03/26/24		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	04/07/24		Submission Complete	
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/04/24		Submission Complete	
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/04/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/04/24		Submission Complete	04/04/24
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24	Submitted on 03/07		03/11/24
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	04/30/24	Updated Risks with Segment IV dates. Reviewed Issues and made updates to Project Schedule.		
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	100% - Submitted	04/15/24		Submission Complete	04/18/24
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	05/08/24			
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 = 457

• Business Process Groupings = 12/13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 62

• Related Business Systems = 10

• Related Reports = 27

• Documentation Status:

- Complete = 62 Partial = 0 Not Started = 0

Current-State:

Cataloged Business Systems = 58

• Criticality:

- High = 58 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 58 Partial = 0 Not Started = 0

Current-State:

Unique FLAIR Data Elements = 629

• Associated Unique Uses = 646

- Continued Use - Yes = 0

- Continued Use - No = 0

• Associated Business Systems = 1

Implementation:

Impacted Agency Business Processes = 62

• Related Business Process Groupings = 13

- Planned Spreadsheet Uploads = 3

• **Level of Impact: People Changes**

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

• **Level of Impact: Technology Changes**

- High = 47 Medium = 0 Low = 0 None = 15 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 62 Medium = 0 Low = 0 None = 0 Uncertain = 0

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

- Not Started = 0 In Progress = 0 Complete = 62

Cataloged Interfaces = 39

- Inbound Interfaces = 21

- Outbound Interfaces = 15

Implementation:

Business Systems Planned for Integration = 50

• **Segment I - Documentation Updates:**

- Complete = 50 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• **Segment II - Documentation Updates:**

- Complete = 46 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 4

Planned Interfaces = 15

- Inbound Interfaces = 3

- Outbound Interfaces = 8

Cataloged Reports = 653

• **Criticality:**

- High = 947 Med = 0 Low = 0 None = 0

Implementation:

Configuration Workbooks

• **Segments I & II**

- Started = 4 Not Started = 5

Conversions & Data Readiness

• Conversions Needed = 2

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

• **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.

DOH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.	N/A	02/14/22	PALM & DOH
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.	N/A	02/14/22	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.	N/A	04/30/24	PALM & DOH
Processes	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information. Meeting set up with DFS the week of 4/29 and 05/06	N/A	04/30/24	PALM & DOH
Processes	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	N/A	08/16/23	PALM & DOH
Technology	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	N/A	08/21/23	PALM & DOH
Processes	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	N/A	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	N/A	02/14/22	PALM & DOH
People Processes Technology	The training timeframe given will not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	N/A	09/25/23	PALM & DOH
Technology	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	N/A	02/14/22	PALM & DOH
Processes	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	N/A	10/18/23	PALM & DOH
People Processes	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we want live with the Statewide Travel	Open	6 (High/Medium)	DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH	2/21/2024	02/21/24	PALM & DOH

	when we went live with the Statewide Travel Management System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and a struggle to learn a new system and deal with the influx in sampled trips being returned.							
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 2026? • If only the balances are rolling over to PALM, then what about the voucher details? This is specific for Payroll Reallocation, but this will be true for all Vouchers.	Open	4 (Medium/Mediu	DOH needs to know how this will work in PALM	N/A	10/18/23	PALM & DOH

DOH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH 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	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	06/28/23	All DOH systems	PALM Project has identified all impacted enterprise applications.
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	06/28/23	All DOH systems	DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule.
People Processes	Enterprise entities like AG/IG's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period	Logged	02/14/24	DOH staff	DOH PALM team has addressed this with the RC in our Readiness Meeting

DOH 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 Data	Creation of Encumbrance, Payable, and Receivable Session	03/13/24	PM, TL, BA, EAS, Devs, SME	Discussion to clarify business processes surrounding encumbrances, payables, and receivables.	
People Processes Technology Data	CPBVS and EAS Application Review	03/04/24	PM, TL, BA, EAS	Clarify responsibilities regarding PALM remediation	
People Processes Technology Data	Technical Solution FDD Session: DDD	03/04/24	DDD Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the DCPS application was discussed
People Processes Technology Data	Technical Solution FDD Session: LEIDS	03/06/24	MQA Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the LEIDS application was discussed
People Processes Technology Data	DOH PALM_FIRS Budget Meeting	03/07/24	FIRS Team, BA, PM, TL, EAS	Create understanding between ABS team and DOH PALM team regarding Technical Solution for Remediation	Technical solution for the FIRS Budget module was discussed
People Processes Technology Data	DOH PALM_AFAM Meeting	03/19/24	AFAM Team, PM, TL, BA, Devs	Held discussion regarding AFAM processes and what to expect going forward with PALM remediation.	
People Processes Technology Data	DOH PALM_DDD Meeting	04/08/24	PM, TL, BA, EAS, DDD Team	Discussion of DDD Roadmap application and conversions.	
People Processes Technology Data	DOH PALM_CORTNE Meeting	04/23/24	CORTNE Team, BA, PM, TL	Discuss PALM impacted ABSs and finalize remediation responsibilities.	
People Processes Technology Data	Asset Management System - PALM Working Session	04/24/24	PM, TL, EAS, Asset Management SME	Create understanding between ABS team and DOH PALM team regarding Remediation	
People Processes Technology Data	DOH PALM_CONMAN Meeting	04/24/24	CONMAN Team, BA, PM, TL	Create understanding between ABS team and DOH PALM team regarding Remediation	
People Processes Technology Data	DOH PALM_CORTNE Meeting	04/30/24	CORTNE Team, BA, PM, TL	Create understanding between ABS team and DOH PALM team regarding Remediation	
Processes Data	Data Mapping Session (Input Files)	03/08/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks
Processes Technology Data	Qlik-DOH PALM: Cadence Meeting	04/22/24	Qlik Team, TL, PM	Create understanding between ABS team and DOH PALM team regarding Remediation	
Technology Data	Data Mapping Session (Input Files)	03/01/24	PM, TL, BA, EAS	Complete data mapping for PALM Interface API002	Similar meetings to occur over several weeks
Technology Data	Data Mapping Session (FDW)	03/06/24	PM, TL, BA, EAS	Accomplish data mapping for FDW application	Meetings to occur over several weeks.

Technology Data	Data Mapping Session (Input Files)	03/15/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks
Technology Data	AFAM Meeting	03/21/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	03/28/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	04/04/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	Data Mapping Session (Input Files)	04/05/24	PM, TL, BA, EAS	Complete data mapping for PALM Interfaces	Similar meetings to occur over several weeks. Went over all of the PALM impacted ABSs to finalize remediation responsibilities.
Technology Data	AFAM Meeting	04/11/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	AFAM Meeting	04/18/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
Technology Data	Data Mapping Session (FDW)	04/24/24	PM, TL, BA, EAS	Accomplish data mapping for FDW application	Meetings to occur over several weeks
Technology Data	AFAM Meeting	04/25/24	AFAM Team, TL, Devs	Working session with AFAM Team to understand processes.	Weekly Meeting
People	County Health Department Conference	04/10/24	PM, Bureau Chief, End Users	Annual CHD Conference	PM & Bureau Chief gave presentation regarding changes to PALM impacted applications.
People	FIRS WBS	04/11/24	PM, Bureau Chief, Jennie Bishop	Review WBS based on PALM schedule	PM revised the FIRS WBS and reviewed it with Jennie Bishop, David Loe and Curtis Barker
People Processes	DOH Core Meeting	03/06/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH Core Meeting	03/13/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH PALM Executive Steering Committee	03/25/24	Key Stakeholders and PM	•Set expectation for the DOH PALM ESC meeting •Provide PALM Project Updates •Provide DOH PALM Updates	
People Processes	DOH Core Meeting	04/17/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH Core Meeting	04/24/24	Key Stakeholders and PM	• Monitor progress against project plan • Review and approves changes to project plans (resources, scope, goals, cost estimates) • Advise on project planning and implementation strategies • Make strategic decisions related to project deliverables prioritization and approvals • Review and suggest solutions for issues critical to project success • Assist in resolving project conflicts Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for coming weeks.
People Processes	DOH PALM Executive Steering Committee	04/26/24	Key Stakeholders and PM	•Set expectation for the DOH PALM ESC meeting •Provide PALM Project Updates •Provide DOH PALM Updates	Reviewed and Updated Curtis Barker and ESC

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

DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Robert Herron	robert.herron@flhealth.gov	05/08/24
January - February 2024	Robert Herron	robert.herron@flhealth.gov	03/07/24
November - December 2023	Robert Herron	robert.herron@flhealth.gov	01/08/24
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23