LEG 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

Lisa Swindle

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:	**RW Task Completeness:**	**RW Task Timeliness:**	**Meeting Participation:**
• Unique Filled Role = 13	**Score = 80.00%**	**Score = 90.63%**	• Meetings Attended = 11
• Duplicate Filled Role = 10	• Submitted Complete = 4	• Submitted On Time = 22	• Meetings Missed = 1
• Vacant Role = 0	• Submitted Incomplete = 1	• Submitted Late = 7	
	• Completed After Submission = 0	• Pending Submission = 1	

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				
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	Ongoing. Leg team will continue its efforts in ensuring the requirements of this task is complete prior to conversion. We hope to provide an anticipated completion date ASAP		05/13/24
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Ongoing. Leg team is currently reviewing and updating our business processes and related impacts. Updates will be reported accordingly		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	04/11/24		Submission Complete	
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/10/24	Ongoing. Leg team continues to monitor and evaluate data cleaning activities and will continue to update our progress throughout this process	Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	04/11/24		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	03/04/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	100% - Submitted	04/22/24	Internal meeting held on 4/22/2024 - updates made to Risks & Issues and Workforce Readiness Plan.		
N/A	People	523	Share Florida PALM Updates	04/08/24	04/19/24	Pending Resubmission	04/18/24	Regular meetings are being held in accordance with the Workforce Readiness Plan to keep all Leg Stakeholders updated on project progress.	Submission Incomplete	
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	04/29/24	09/27/24					

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:	**Current-State:**	**Current-State:**	**Current-State:**
Planned Florida PALM End Users = 54	**Cataloged Business Processes = 119**	**Cataloged Business Systems = 17**	**Unique FLAIR Data Elements = 136**
• Business Process Groupings = 10/13	• Related Business Systems = 13	• **Criticality:**	• **Associated Unique Uses = 143**
Role Mapping = TBD	• Related Reports = 24	- High = 10 Med = 1 Low = 1 None = 1	- Continued Use - Yes = 14
Training = TBD	• **Documentation Status:**	• **Documentation Status:**	- Continued Use - No = 0

- Complete = 119 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 119

• Related Business Process Groupings = 7

- Planned Spreadsheet Uploads = 2

• **Level of Impact: People Changes**

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

• **Level of Impact: Processes Changes**

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

• **Level of Impact: Technology Changes**

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

• **Level of Impact: Data Changes**

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

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

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

- Complete = 12 Partial = 1 Not Started = 0

Cataloged Interfaces = 9

- Inbound Interfaces = 3

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 7

• **Segment I - Documentation Updates:**

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

• **Segment II - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7

Planned Interfaces = 2

- Inbound Interfaces = -2

- Outbound Interfaces = 2

• **Associated Business Systems = 14**

Cataloged Reports = 77

• **Criticality:**

- High = 42 Med = 23 Low = 6 None = 0

Implementation:

Configuration Workbooks

• **Segments I & II**

- Started = 2 Not Started = 7

Conversions & Data Readiness

• Conversions Needed = 1

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

• **Data Readiness/Cleansing Status:**

- Complete = 0 In Progress = 1 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.

LEG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not posses, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hirer F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

LEG Assumptions

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

LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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]

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2024	Brendan Jones	jones.brendan@leg.state.fl.us	05/15/24
January - February 2024	Lisa Swindle	mentillo.mike@leg.state.fl.us	03/04/24
November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	01/12/24
September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	11/09/23
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23