DBPR 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 2025

Agency Sponsor

Sally Huggins

RW Task Timeliness

Direct Impact Task Timeliness

Direct Impact Task Timeliness:

Score = 96.86%

• Submitted On Time = 29

• Submitted Late = 5

• Pending Resubmission = 0

Other Task Timeliness

Other Task Timeliness:

Score = 93.33%

• Submitted On Time = 54

• Submitted Late = 12

• Pending Resubmission = 0

RW Task Completeness

Direct Impact Task Completeness

Direct Task Completeness:

Score = 98.86%

• Submitted Complete = 33

• Submitted Incomplete = 0

• Completed After Submission = 2

Other Task Completeness

Other Task Completeness:

Score = 100.00%

• Submitted Complete = 42

• Submitted Incomplete = 0

• Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

• Unique Filled Role = 10

• Duplicate Filled Role = 6

• Vacant Role = 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
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/09/25	Versa will produce direct interface API002. Testing will be managed under PALM Task 576.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	05/02/25	100% - Submitted	01/29/25	The final UAT Testing Plan has been drafted and reviewed internally by DBPR Project Directors.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	05/02/25	100% - Submitted	04/30/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		DBPR will be testing 1 interface - API002 out of Versa Regulation		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Need to add DMS-owned location(s) under PALM Task 657	Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25	Reporting on January and February 2025	Submission Complete	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/25/25	Required SpeedKey changes added to comments and highlighted in blue for subsequent configurations.	Submission Complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25	Reviewed with Director	Submission Complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/20/25	Reviewed with Director. SpeedKey PYDREI0001 was requested to be DEACTIVATED. Resubmitted on 3/28/25.	Submission Complete	
Direct	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		Submission Complete	
N/A	People	598	Share Florida PALM Updates	04/14/25	04/25/25	100% - Submitted	04/18/25		Submission Complete	
N/A	N/A	599	Submit Bimonthly Agency Readiness Status Report	05/01/25	05/12/25	100% - Submitted	05/12/25	Reporting on March and April 2025 New Risk, Issue, and Assumption Smartsheet(s)	Submission Complete	
Direct	Technology	578	Confirm Identity Provider for Florida PALM	05/05/25	05/23/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	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.

People

Implementation:

Planned Florida PALM End Users = 32

• Business Process Groupings = 11/13

Identified Subject Matter Experts = 16

Processes

Implementation:

Impacted Agency Business Processes = 117

• Related Business Process Groupings = 9/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 2

Planned Interfaces = 1

- Inbound Interfaces = 1

- Outbound Interfaces = 0

Data

Implementation:

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 2 - Track with Budget

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

DBPR Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Monitor/Mitigation Plan/Resolution	Reporting Period Comments for March - April 2025
Open and Mitigating	03/27/25		Deployment/Cutover	If the deployment PALM occurs on 7/1/2026 as is now planned, working on bugs and other remedies as well as transition activities could interfere with Year End activities.	Increasing	6 (High/Medium)	Discuss with readiness coordinators and arrive at logistics that least impact Year End efforts	The original proposed implementation date of January 2026 was much better in terms of impact to Year End.
Open and Mitigating	02/19/25		Business Process Change	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Increasing	4 (Medium/Medium)	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	20250402 Crosswalk sessions are slated to begin in May 2025. 20250402 Crosswalk sessions are slated to begin in May 2025. 20250326 Crosswalk session dates have been pushed out in the draft of the re-baseline Project Schedule.
Open and Mitigating	04/23/25		Business Process Change	If PALM (The Project) does not take into account Statutory requirements surrounding Financial Statement preparation and completion into their decision making (particularly Year end activities in 2026 around deployment time), then violations of statutes from a timing perspective may result	Stable	4 (Medium/Medium)	Share Risk with RC Team and ensure this is presented to the PALM Project decision-makers so Statutes can be incorporated into planning and subsequent Decisions that impact the Agencies.	Newly opened Risk.
Open and Mitigating	04/09/24		Training	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Decreasing	3 (High/Low)	Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners. Create visual aids, mapping documents, and other PALM educational tools.	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250319 Progress on the Change tool (PALM Task 560) and training plan (PALM Task 568)

Status	Date			Category	Risk/Assumption	Trend	Priority	Mitigation	Updates
									has been made.
Open and Mitigating	05/31/24			Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Stable	3 (High/Low)	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250319 Changed Status from Decreasing to Stable.
Open and Mitigating	11/15/24			Deployment/Cutover	If DBPR does not have a cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.	Stable	3 (High/Low)	Create a Cutover Plan that Identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	20250326 This is logged as a question for related FLAIR availability details on the DBPR Question Log maintained by the RC. 20250326 This is logged as a question for related FLAIR availability details on the DBPR Question Log maintained by the RC. 20250312 Changed Status from Increasing to Stable.
Open and Mitigating	01/13/25			User Acceptance Testing	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely, efficient, and successful completion of UAT	Stable	3 (High/Low)	Ensure that crosswalks, user stories, and flow detail diagrams are covered at a detail level. Ensure sources of data required to complete business processes (e.g. FLAIR@BPR, Reports, queries, etc are identified for current processes so equivalents (when applicable can be identified before test scripts are created.	Looking at Current-State processes to identify prerequisite items that will likely carry over to Future=State processes so that we can begin to identify certain details. Changed Status from Stable to Decreasing.
Open and Mitigating	01/13/25			Staffing/Resource Availability	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Increasing	3 (High/Low)	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	20250409 Per Decision #38, Versa Regulation testing will be managed under PALM Task 576 and PALM Task 561 can be closed. Desk-Checking Versa output files should help. 20250409 Per Decision #38, Versa Regulation testing will be managed under PALM Task 576 and PALM Task 561 can be closed. Desk-Checking Versa output files should help. 20250312 Escalated to Bureau Chief. We are lacking updates and information regarding Versa Regulation remediation. Despite the project extension, no additional time was granted for PALM Task 561.
Open and Mitigating	03/04/25			Staffing/Resource Availability	If DBPR IT has too many competing initiatives that prevents them from remediating Versa Regulation for PALM in time for UAT, then the required testing may not be completed in time for Go-Live	Increasing	3 (High/Low)	Provide DBPT IT with detailed and accurate specifications. Periodically check in with them for a status update and to see if they have any questions.	20250409 Per the revised Testing Timeline, desk checking of direct interface output from ABS Versa Regulation should be completed by July 2025 and interface testing with PALM begins in August 2025. 20250326 A meeting with DBPR IT has been requested by the Director. 20250312 Changed the Status from New to Increasing.
Open and Mitigating	04/09/24			Business Process Change	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Decreasing	2 (Medium/Low)	Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250319 Changed Priority from High (H) to Medium (M).
Open and Mitigating	04/18/24			Business Process Change	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows	Decreasing	2 (Medium/Low)	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, flow diagrams, screen mockups from Design Workshops, FLAIR Transactions to PALM	20250402 See Assumption #52 that addresses that detailed training Risks/Assumptions will be addressed within the Training Plan. 20250402 See Assumption #52 that addresses that detailed

Status	Date		Risk Category	Risk Description	Trend	Risk Rating	Mitigation/Response	Reporting Period Comments
				and that could lead to incomplete workflows			Equivalents Crosswalk, etc.)	training Risks/Assumptions will be addressed within the Training Plan. 20250305 Changed Priority from High (H) to Medium (M).
Open and Mitigating	04/23/24		Agency Business System	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live	Decreasing	2 (Medium/Low)	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	20250416 Changed Priority from Medium (M) to Low (L). 20250416 Changed Priority from Medium (M) to Low (L). 20250305 Changed Priority from High (H) to Medium (M).
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Decreasing	2 (Medium/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	Changed Tolerance from Low (L) to Medium (M).
Open and Mitigating	08/19/24		User Acceptance Testing	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Decreasing	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	20250409 All Current-State processes that equate to PALM Future State processes that include email notifications have been identified and the test cases are being updated.
Open and Mitigating	08/19/24		Role Mapping	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Decreasing	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	20250402 The Business Process Tracking spreadsheet has a column for required roles that should be populated.

DBPR Issues

Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for March - April 2025

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR stakeholders	None
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	All DBPR stakeholders	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository. Currently in the process of re-baselining the Project Schedule per the 6-month extension.
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan (Smartsheet).	Logged	04/01/24	Project Manager Organizational Change Manager DBPR Sponsor	Updates are current through April 2025.
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR division/office staff	Year End and other situations could be exceptions that will need to be managed.
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR stakeholders	The Executive Steering Committee agreed to a 6-month extension.
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR division/office staff	The DBPR staff remain active and engaged
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR division/office staff	Guidance and direction will be provided by the Project Manager.
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	DBPR Executive Leadership Project Manager	None
People Processes Technology Data	The Department will remediate all agency business systems (ABS) impacted by Florida PALM that cannot be retired.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Versa Regulation is the only ABS being remediated. FLAIR@BPR will be replaced by Agency Query Writer and reports in PALM.
People Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producting 2 other files to be imported into PALM, but those remain upload spreadsheets (ARI010 and IUI001).
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM. Note: A snapshot of FLAIR@BPR data query tool will be retained and available for subsequent use of historical data only.	Logged	04/01/24	All DBPR stakeholders	However, a snapshot of FLAIR@BPR that will not be kept current will be available for historical reference. Also, there will be a period of time where neither FLAIR nor PALM will be available. Details are not know at this time.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Logged	04/01/24	All DBPR stakeholders	There are some business processes that DBPR will perform that have no component in PALM but will still need to be completed. These will be tested as part of UAT. All identified current-state business processes serve as the starting point for what will be tested during UAT.
Processes	The Florida PALM Project will be able to provide timely and	Logged	04/01/24	All DBPR stakeholders	Changes to business processes should be minimal. Organizational

Category	Description	Status	Date	Stakeholders	Comments
Technology Data	complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.				Change Manager leading sessions with Agency staff to become familiar with PALM business processes.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	The Project Schedule is updated and managed on a daily basis. Snapshots are captured on a weekly basis. Organizational Change Manager leading sessions with Agency staff to become familiar with PALM business processes and to identify any required changes.
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Versa Regulation (DBPR licensing ABS) remediation continues. One PALM Spreadsheet Upload has been completed and one more is in the works. One (1) direct interface from Versa to PALM (API002) is being developed.
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	UAT test scripts are being assigned to agency SMEs that will perform the functions in production as part of UAT. Details can be found in the UAT Testing Plan per PALM Task 536.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	DBPR Sponsor Project Manager Organizational Change Manager	Consultant resources are currently under contract through June of 2025.
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	PALM training Tasks are under way. In addition, PALM Task 568 addresses a training plan. Training for PALM by the project for SMEs will be conducted at the beginning of UAT in August of 2025.
People Processes Technology Data	The Department will support data cleansing. PALM configuration and conversion tasks will facilitate this cleansing.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	DBPR was engaged n the required data cleansing. Additional cleansing is still required for SpeedKeys, Organizations, and a couple of other data elements.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Scheduled PALM Tasks associated with configuration and conversion were completed. Additional opportunities to modify configured data and data to be converted will be provided by the Project.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	These are available on the PALM website.
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	11/06/24	DBPR Revenue staff Project Manager Finance & Accounting Bureau Chief DBPR Sponsor	All PALM CMS processes that include a FLAIR component, were revisited to determine if the FLAIR component (because FLAIR is going away) needs to be replaced or accounted for. It was determined that nothing special needs to be done to account for FLAIR going away.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Logged	05/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Placeholder test scripts have been created and those that do not need to be tested because they are obsolete have been flagged as such.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	Received confirmation we will only have the UAT environment, which will be available starting in August 2025.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Logged	06/14/24	Project Manager Business Analyst	Has been included in the UAT Testing Plan (Task 536)
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Logged	06/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	Future-State Business Processes are currently being reviewed with DBPR staff. Only 10 videos are currently available and availability of the remainder of the Business Processes has been presented to the RC.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	This information is being captured as part of User Story development.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	These will be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios and assistance with related test scripts.

				Finance & Accounting Bureau Chief Project Sponsor	
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	The PMP quarterly review was completed as scheduled. The second quarterly review/update is currently under way.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Logged	08/16/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Reports are being reviewed and validated as they become available for analysis.
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	Only one direct interface is being developed for DBPR ABSs at this time (API002). PALM Tasks related to establishing interface network connectivity have been addressed.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Some data will be provided in the form of reports, but queries can be run whenever needed. Timing of batch cycles will need to be known and considered.
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	PALM spreadsheet upload ARI010 has been finalized and turned over to DBPR IT for remediation. FGCC is responsible for working with DBPR IT for any FGCC specific details that need to applied to Versa Regulation remediation outputs.
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Current-State to Future-State Business Processes were rearranged, rescheduled, with revised tasks with the input from the OCM Lead. They are still behind schedule.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	The PALM Technical Team is limiting the Payment Method values that will be stored in PALM. The Remittance Type values included in the QLIK report should be sufficient to obtain the necessary detal when needed considering the values are limited in the ARI010 output from Versa.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Logged	12/04/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Future-State crosswalks have been rescheduled and are no longer behind in accordance with the Project Schedule. They are slated to begin May 2025.
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create/enhance all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR division/office staff Project Manager Organizational Change Manager	The Future-State crosswalks are currently on pause. User Stories are being used to capture a significant portion of the necessary details.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Logged	12/18/24	Project Manager Business Analyst	STMS continues to provide monthly updates that are very helpful. MFMP has held sessions as well. Requested information from RC at monthly Touchpoint regarding Works and People First.
People Processes Technology Data	All appropriate supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR division/office staff	Complete addresses must be available in PALM to support mailing of refunds.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Review sessions have been scheduled once a month and are being conducted with the Microsoft Project comprehensive version of the Schedule.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Task 560 is due by 5/2/25 so the business process details will need to available 1-2 days prior to that.
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	Periodic updates are being requested from DBPR IT as to where they stand with remediation progress.
People	The new Business Analyst will be onboarded and available to attend PALM Training during the initial leg of UAT in August 2025.	Logged	03/19/25	Project Manager Business Analyst	Being in on the PALM portion of UAT will put the BA in a better position to write accurate test scripts
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	This is related to PALM Task 568 and Risk Management pertaining to training. In the How to Create a Traing Plan training provided FL Digital Services and Tidal Basin on 4/2/25, including training Risks in Training Plan was one suggestion. The Risk Register already contains high-level PALM education and training Risks.

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]

DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25