

**Helpful Links**

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- Readiness Workplan

# DBPR Status Report Dashboard

**Reporting Period**

March - April 2026

**Agency Sponsor**

Sally Huggins

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

## RW Task Timeliness

## RW Task Completeness

**Direct Impact Task Timeliness**

**Other Task Timeliness**

**Direct Impact Task Completeness**

**Other Task Completeness**



**Direct Impact Task Timeliness:**

Score = 93.73%

- Submitted On Time = 43
- Submitted Late = 8
- Pending Submission = 0

**Other Task Timeliness:**

Score = 94.74%

- Submitted On Time = 80
- Submitted Late = 15
- Pending Submission = 0

**Direct Task Completeness:**

Score = 91.37%

- Submitted Complete = 45
- Submitted Incomplete = 4
- Completed After Submission = 2

**Other Task Completeness:**

Score = 98.51%

- Submitted Complete = 66
- Submitted Incomplete = 1
- 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.

**Change Champion Network:**

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

- Unique Filled Role = 9
- Duplicate Filled Role = 4
- Vacant Role = 3

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	597	Complete Data Cleansing Based on Mock Conversion 4	01/12/26	03/13/26	100% - Submitted	03/13/26	A Service Now ticket was entered to ask PALM to take a closer look at the query pulling the duplicate data.	Submission Complete	
N/A	N/A	673	Submit Bimonthly Agency Readiness Status Report	03/02/26	03/10/26	100% - Submitted	03/10/26		Submission Complete	
Indirect	N/A	674	Submit Monthly Progress Report - Testing	03/02/26	03/31/26	100% - Submitted	03/31/26		Submission Complete	
Indirect	People	696	Maintain Role Mapping Worksheet	03/23/26	04/30/26	100% - Submitted	04/30/26	Role mapping sheet is being updated due to staff changes.	Submission Complete	
Indirect	N/A	675	Submit Monthly Progress Report - Testing	04/01/26	04/30/26	100% - Submitted	04/30/26	Complete	Submission Complete	
Indirect	Data	697	Maintain Configuration and Conversion Workbooks	04/01/26	04/30/26	100% - Submitted	04/30/26	Updates are completed.	Submission Complete	
N/A	People	607	Update Training Plan	04/06/26	06/05/26	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	676	Share Florida PALM Updates	04/13/26	04/24/26	100% - Submitted	04/24/26		Submission Complete	
Direct	Data	713	Confirm Supplier Records	04/20/26	05/22/26	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	698	Complete Data Cleansing in Preparation for Dry Run 2	04/20/26	06/17/26	50% - In Progress				
N/A	N/A	677	Submit Bimonthly Agency Readiness Status Report	05/01/26	05/11/26	100% - Submitted	05/11/26			
Indirect	N/A	678	Submit Monthly Progress Report - Testing, Training	05/01/26	05/29/26	50% - In Progress				
Indirect	Data	699	Maintain Configuration and Conversion Workbooks	05/01/26	05/29/26	50% - In Progress				
Indirect	People	700	Maintain Role Mapping Worksheet	05/01/26	05/29/26	50% - In Progress				
N/A	Processes	602	Update Agency Business Process Documentation	05/04/26	10/30/26					
N/A	People	604	Create Agency-Specific Learning Materials to Support End Users	05/04/26	10/30/26					

## 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	Primary Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for Mar. - Apr. 2026
Open and Mitigating	01/13/25		Agency Business System	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet	Decreasing	9 (High/High)	DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed.	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	There may not be enough time for DBPR IT to make modifications in time to be retested	20260331: The Upload file has been corrected. We will arrange for testing with PALM tomorrow.

				uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested						
Open and Monitoring	03/06/26		Deployment/Cutover	If a querying tool similar in ease of use as the FLAIR@DBPR application is not provided by PALM, DBPR may need to create their own version of PALM@DBPR. This may require development assistance instead of macros as was done in the past.	Increasing	9 (High/High)	DBPR staff are extensive users of the FLAIR@DBPR application. If this system is not replaced, it may negatively impact productivity.	A gap analysis is needed to show available data in the data warehouse that DBPR can query from, and the query abilities of FLAIR@DBPR. If the data warehouse is limited to report data, and if DBPR must have access to real time PALM data, this could become an issue.  The complexity of PALM may be too high for existing F & A staff to develop a query tool on their own.	The solution for this cannot negatively impact productivity.	03/30/2026-The assignments have been made for the DWBI classes. After attendees complete this training, this issue will be revisited to determine next steps.
Closed	03/06/26	03/30/26	Deployment/Cutover	The OCM has left the agency the end of February. This may cause delays in updating procedures during PALM UAT	Stable	6 (Medium/High)	OCM left unexpectedly at the end of February. His task was to update procedure documentation since test cases have been completed.	Much of the procedure update documentation needs are captured in the Test Cases. This information can be used to populate draft procedures to start.  There may be a need for the addition of policies to ensure quality, for example, PALM file upload naming standards, etc. to ensure uniformity and cleanliness at DBPR high standards.  Discussions with Sally and supervisors will determine if this should be elevated to an issue, or if the PM and existing staff can complete the work.	Pending discussions with supervisors and F & A Chief.	20260330: The new OCM has arrived and is working with DBPR business units to gain more traction on completion of test cases and LMS Training, including the new Knowledge Center course added last week.
Open and Mitigating	02/19/25		User Acceptance Testing	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Decreasing	4 (Medium/Medium)	Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities.	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	DBPR SMEs will have minimal time to catch up review of business processes	20260330-Asset Management is the last remaining group to review test cases and processes before attending UAT in mid April. Once their review is complete this risk will be closed.
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)	Down time and other conditions need to be planned for to ensure a smooth transition.	Create a Cutover Plan that identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	Key business processes may not be able to be completely timely and could have negative consequences	20260330-DBPR needs more information from PALM on what their responsibilities are, and what they expect from the agencies.
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	Decreasing	2 (Medium/Low)	Documentation on Future-State business processes is being provided by The Project on the PALM website.	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.	Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	20260330-The new OCM is making arrangements with business units to gain better traction regarding test case execution and LMS training completion. In-person UAT has greatly diminished anxiety with using PALM and users have seen that their processes are represented.

DBPR Issues									
Status	Date Opened	Date Closed	Priority	Primary Issue Category	Issue Title	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for Mar. - Apr. 2026
Open	06/04/25		Critical - Impacts the ability	Interface	ABS Versa Regulation remediation is behind schedule	DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule.	Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT.	10/31/25	04/09/2026: DBPR has placed the corrected file on 04/06/2026
Open	04/20/26		High - Impacts the ability	User Acceptance Testing	UAT Test Case Completion has been	Staff losses in DBPR have impacted the	Work with Budget to make sure	05/29/26	DBPR has been working on spreadsheet uploads and running into

				very slow to complete. This is impacting other testers regarding the availability of test data for downstream processes.	ability for business units to test since there is a lack of test data for them to test with. This may also be impacting enterprise applications	appropriations for all divisions have been completed. Continue to acquire and train new staff to ramp up into PALM as soon as possible. Schedule in person UAT sessions with staff to gauge test data issues and work with team to identify solutions.	issues with required and conditional fields. Layouts don't always match the templates.
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### DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for Mar. - Apr. 2026
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	20260331-All errors have been corrected. Scheduling with PALM will happen soon.
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	All DBPR stakeholders	20260330-Florida PALM has provided requirements for the agency, somewhat timely. Leaving this assumption open until Asset Management in person UAT, and DWBI training is complete.
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	20260330-Business processes have not changed much, but the number of steps to achieve them has increased.
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	20260309: Enterprise business systems testing schedules have been released and arrangements are being made. API002 is nearing the next upload test with PALM, possibly by the end of this week.
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	20260309: DBPR is currently running test cases and updating the number of times user stories have been tested
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	20260309: PALM is enforcing the RTM through Agencies populating the User Story Inventory  PALM Smartsheets are tracking some traceability, and DBPR is tracking agency specific user stories to test cases to cover any DBPR specific requirements.
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 Finance & Accounting Bureau Chief Project Sponsor	20260330-All enterprise business systems have scheduled or are in the process of scheduling UAT.
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 the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	20260330-PALM is going to add more tasks related to maintaining updates to Configurations, conversions, and to the Role Mapping worksheet. The schedule will be updated accordingly.
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	20260309: API010 is scheduled for testing Bank Deposit files from Versa after API002 testing is complete.
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	20260309: This will be tested once the Versa interface is complete.
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	20260331-Final corrections have been made. Arrangements will be made to test with PALM by 04/03/2026
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	20260330-The new OCM will be writing/updating training materials soon.
People Processes Data	DBPR as well as the Project will follow PMI best practices and Rule 60GG statute.	Logged	05/28/25	IV&V endorses this.	20260309: The project is being tracked as required.
People Technology Data	PALM will provide a tool with the same capabilities as FLAIR@DBPR so that staff can query PALM data	Logged	03/06/26	Finance and Accounting Bureau Chief Project Manager Finance and Accounting Supervisors	20260330-This will be revisited after DWBI training is complete. A gap analysis will be made at that time to justify the need for a PALM@DBPR application interface.
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	Removed	03/30/26	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20260330: There have not been any requirements unique to DBPR and at this point, none are expected. Removing this assumption.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Removed	03/09/26	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Language has not been an issue. Removing this assumption
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	Removed	03/09/26	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	PALM has provided data elements in reports but DBPR is responsible for those created by DBPR such as OA1 and OA2. Removing this assumption.
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Removed	03/09/26	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	Removing this as a duplicate of #23

People Technology	Processes Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Removed	03/09/26	DBPR IT DBPR stakeholders	PALM Interfaces are being used in In-Person UAT and will be used when PALM goes to Production. Removing this assumption.
People Data	Processes	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	Removed	03/09/26	All DBPR division/office staff Project Manager Organizational Change Manager	Use stories have been completed. Test cases contain scenarios needed by DBPR.

### Agency Sponsor Confirmation

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

Agency Sponsor Name:

Confirm \*

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### DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
March - April 2026	Sally Huggins	sally.huggins@myfloridalicense.com	05/11/26
January - February 2026	Sally Huggins	sally.huggins@myfloridalicense.com	03/10/26