

**Helpful Links**

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# FSDB Status Report Dashboard

**Reporting Period**

March - April 2026

**Agency Sponsor**

Tracie Snow

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**



**Direct Impact Task Timeliness:**

Score = 95%

- Submitted On Time = 38
- Submitted Late = 8
- Pending Submission = 0

**Other Task Timeliness**



**Other Task Timeliness:**

Score = 96.11%

- Submitted On Time = 71
- Submitted Late = 24
- Pending Submission = 0

**Direct Impact Task Completeness**



**Direct Task Completeness:**

Score = 76.60%

- Submitted Complete = 28
- Submitted Incomplete = 7
- Completed After Submission = 12

**Other Task Completeness**



**Other Task Completeness:**

Score = 83.13%

- Submitted Complete = 46
- Submitted Incomplete = 7
- Completed After Submission = 14

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 = 5
- Duplicate Filled Role = 10
- 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 |
|----------------|------------------------------|---------|--|-------------------------|-----------------------|-------------------------------|------------------------|--|-------------------------------------|----------------------------------|
| Indirect       | Processes                    | 574     | Prepare Documentation for User Acceptance Testing              | 06/02/25                | 01/09/26              | Pending Resubmission          | 09/12/25               | Stories uploaded   | Task Closed - Submission Incomplete | 12/19/25                         |
| Indirect       | People                       | 688     | Update UAT Plan  | 12/08/25                | 01/09/26              | Pending Resubmission          | 01/07/26               |  | Task Closed - Submission Incomplete |                                  |
| Direct         | Data                         | 597     | Complete Data Cleansing Based on Mock Conversion 4             | 01/12/26                | 03/13/26              | 100% - Submitted              | 03/13/26               | Errors in the asset module load have not been resolved yet | Task Closed - Submission Incomplete |                                  |
| 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              | 03/30/26               |  | Submission Complete                 |                                  |
| Indirect       | People                       | 696     | Maintain Role Mapping Worksheet                                | 03/23/26                | 04/30/26              | 100% - Submitted              | 04/22/26               |  | Task Closed - Submission Incomplete |                                  |
| Indirect       | N/A                          | 675     | Submit Monthly Progress Report - Testing                       | 04/01/26                | 04/30/26              | 100% - Submitted              | 04/30/26               |  | Task Closed - Submission Incomplete |                                  |
| Indirect       | Data                         | 697     | Maintain Configuration and Conversion Workbooks                | 04/01/26                | 04/30/26              | 100% - Submitted              | 04/22/26               |  | Submission Complete                 |                                  |
| N/A            | People                       | 607     | Update Training Plan   | 04/06/26                | 06/05/26              | 50% - In Progress             |                        |  |                                     |                                  |
| N/A            | People                       | 676     | Share Florida PALM Updates                                     | 04/13/26                | 04/24/26              | 100% - Submitted              | 04/22/26               |  | Submission Complete                 |                                  |
| Direct         | Data                         | 713     | Confirm Supplier Records                                       | 04/20/26                | 05/22/26              | 100% - Submitted              | 04/23/26               | Confirmed  | Submission Complete                 | 05/05/26                         |
| 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              | 05/15/26               |  |                                     |                                  |
| Indirect       | N/A                          | 678     | Submit Monthly Progress Report - Testing, Training             | 05/01/26                | 05/29/26              |                               |                        |  |                                     |                                  |
| 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.

### FSDB 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 Monitoring | 06/02/25    |             | Conversion/Configurator | Local fund loss | Increasing | 9 (High/High) | Local funds hold over \$36.0 million dollars in | DFS A&A proposes to combine local funds into | Commingling of funds for different purposes | Same   |

|                     |          |  |                         |   |            |                   |   |  |  |  |
|---------------------|----------|--|-------------------------|---|------------|-------------------|---|--|--|--|
|                     |          |  |                         |   |            |                   | donations. PALM has proposed eliminating these local funds which will remove them from the CAFR. and Agency GL. | the GR funds as a solution, separated by a unique speed key.   | is not a good idea as proposed. Maintaining a local fund apart from other funds is the real solution.                                |  |
| Open and Monitoring | 11/12/25 |  | Conversion/Configurator | Missing Admin Fund  | Increasing | 9 (High/High)     | Admin Fund 4890-20-2-021007 is missing from dropdown tabs   | We will need the Admin Fund to be present in PALM to be able to transfer between State funds.  | Loss of the Admin fund will make temporary inter State fund transfers difficult to track.  | Same   |
| Open and Monitoring | 01/30/24 |  | Conversion/Configurator | Loss of EO field  | Stable     | 6 (Medium/High)   | Mitigation seems unlikely since PALM will not have an EO field that is used for grant reporting.                | None as of yet   | Loss of consistent grant reporting   | Same   |
| Open and Monitoring | 01/30/24 |  | Conversion/Configurator | Loss of on demand payments  | Stable     | 6 (Medium/High)   | It is unknown what can take place of on demand payments   | None as of yet   | Inability to create on demand payments   | Same   |
| Open and Monitoring | 03/13/26 |  | Conversion/Configurator | Review of the error file for assets in Mock 4 identified missing room numbers needed to conduct annual inventory.             | Increasing | 6 (Medium/High)   | Mock 4 testing revealed that tangible asset locations are not transferring                                      | PALM has the capability to data parse asset data to import room locations into PALM  | Annual tangible asset inventory will be hampered by not knowing which room the tangible items were in last time as a starting point. | The SNOW ticket response was that the field is freeform and that the agency may enter the needed data there. The answer does not resolve the obvious issue of existing data not being transferred to PALM and instead places the burden onto the agency to add room location data for over four thousand tangible assets. The RC team also did not provide a better solution. I have provided the RC team a copy of our entire asset listing that needs to be present in PALM. |
| Open and Monitoring | 03/13/26 |  | Conversion/Configurator | Review of the error file for assets in Mock 4 identified that some older buildings did not transfer to PALM that should have. | Increasing | 6 (Medium/High)   | Mock 4 testing revealed that some buildings and associated asset dollars are not transferring to PALM           | PALM needs to transfer all assets and associated dollars to ensure a paper loss to the state does not occur on go live day for PALM. | Some assets of the State of Florida will go missing if not transferred correctly.  | Buildings and their improvements need to be accurately transferred from FLAIR to PALM or a paper loss will occur.  |
| Open and Monitoring | 04/22/26 |  | Conversion/Configurator | Trial Balance Reports   | Increasing | 4 (Medium/Medium) | The Standard Trial Balance reports in PALM do not track with those in FLAIR.                                    | Within PALM reports are unreliable at this stage. PALM must resolve and provide useful reports.                                      | We need accurate trial balance reports to be able to produce accurate financial statements.  | Presumably PALM will provide standard reports that reconcile to FLAIR.   |

| FSDB 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        | 06/02/25    |             | High - Impacts the at | Conversion/Configurator | Local fund   | PALM proposes to eliminate local fund 20-8-082109, 20-8-84301, and 71-8-084209 which collectively hold over \$33.3 million dollars in Agency managed donations owned by the State. These local funds have been authorized and in use for well over 20 years and are needed to manage received donations. We expect them to be active in PALM. | PALM must convert these funds when converting from FLAIR to avoid the loss of \$33.3 million dollars from State assets not being reported in the CAFR. | During conversion                 |                  | Same  |
| Open        | 01/30/24    |             | High - Impacts the at | Conversion/Configurator | Loss of OCA/EO fields  | Use of FLAIR OCA/EO fields are more effective than speedkeys and help collect data in a more cohesive manner.   | None likely  | None planned                      |                  | Same  |
| Open        | 01/30/24    |             | High - Impacts the at | Conversion/Configurator | Loss of on demand payments   | It is unknown what can take place of on demand payments   | No replacement evident   | None planned                      |                  | Same  |
| Open        | 11/12/25    |             | High - Impacts the at | Conversion/Configurator | Administrative fund is missing in workbooks.                         | DFS directed us to use the Admin fund to hold the local funds dollars during conversion   | Absent the Admin fund, we have no place to collocate the Endowment funds in during conversion.   | None planned                      |                  | Same  |
| Open        | 10/01/25    |             | High - Impacts the at | Conversion/Configurator | Grant fields are missing from FACTS extract and cannot be updated.   | Available grant fields in PALM are not current resulting is most missing that are already in FACTS.   | RC is pursuing PALM tech staff on uploading the most current data extract from FACTS.  | TBD                               |                  | Same  |
| Open        | 04/22/26    |             | High - Impacts the at | Conversion/Configurator | PALM standard Trial Balance reports do not track with FLAIR reports. | Review of the within PALM trial balance reports indicates it is not yet tracking with FLAIR.  | PALM IT is reviewing   | TBD                               |                  | Reports within PALM need to track with FLAIR to be useful.  |
| Open        | 03/13/26    |             | Low - All impacts not | Conversion/Configurator | Assets are not loading with room numbers in PALM                     | Review of the error file for assets in Mock 4 identified missing room numbers needed to conduct annual inventory.   | PALM IT is reviewing   | TBD                               |                  | The SNOW ticket response was that the field is freeform and that the agency may enter the needed data there. The answer does not resolve the obvious issue of existing data not being transferred to PALM and instead places the burden onto the agency to add room location data for over four thousand tangible assets. |
| Open        | 03/13/26    |             | Low - All impacts not | Conversion/Configurator | Some older buildings are not loading into PALM                       | Review of the error file for assets in Mock 4 identified that some older buildings did not transfer to PALM that should have.   | PALM IT is reviewing   | TBD                               |                  | Buildings and their improvements need to be accurately transferred from FLAIR to PALM or a paper loss will occur.   |

### FSDB Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Mar. - Apr. 2026 |
|-------------------------------|------------|--------|------------------------|--|--|
|                               |            |        |                        |  |  |

### 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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### FSDB Status Report Confirmation

| Reporting Period        | Agency Sponsor Name: | Confirmed By:     | Confirmation Date: |
|-------------------------|----------------------|-------------------|--------------------|
| March - April 2026      | Tracie C. Snow       | snowt@fsdbk12.org | 05/15/26           |
| January - February 2026 | Tracie C. Snow       | snowt@fsdbk12.org | 03/10/26           |