


RW Task Timeliness

Direct Impact Task Timeliness




Direct Impact Task Timeliness:

Score = 97.32%

Submitted On Time = 36
Submitted Late = 5
Pending Submission = 0

Other Task Timeliness




Other Task Timeliness:

Score = 93.43%

Submitted On Time = 58
Submitted Late = 12
Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness




Direct Task Completeness:

Score = 94.00%

Submitted Complete = 36
Submitted Incomplete = 2
Completed After Submission = 2

Other Task Completeness



Other Task Completeness:

Score = 100.00%

Submitted Complete = 43
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.

Change Champion Network:

Unique Filled Role = 10
Duplicate Filled Role = 6
Vacant Role = 0

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

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	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	100% - Submitted	05/30/25		Submission Complete	
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	People	579	Confirm UAT SMEs	04/14/25	05/02/25	100% - Submitted	05/02/25		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	100% - Submitted	05/20/25	No new domains or changes to IdPs	Submission Complete	
Direct	Data	571	Complete Data Cleansing Based on Mock Conversion 2	05/12/25	06/20/25	100% - Submitted	06/20/25	Outstanding questions to resolve POC001	Submission Complete	
Direct	Data	657	Submit Updated Configuration Workbooks	05/19/25	06/20/25	100% - Submitted	06/20/25	One new SpeedKey add that was not configured (PYREGR0041) and it needs to be applied to Position Funding for Pos # 7912001.	Submission Complete	
Direct	Data	659	Update Conversion Field Mapping	05/19/25	06/20/25	100% - Submitted	06/20/25		Task Closed - Submission Incomplete	
Direct	People	573-A	Complete and Submit End User Role Mapping Worksheet for UAT.	05/19/25	06/20/25	100% - Submitted	06/20/25		Task Closed - Submission Incomplete	
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	08/08/25	50% - In Progress				
Direct	Data	657-A	Submit Updated Configuration Workbooks - Agency Supplier Record	06/09/25	06/27/25	100% - Submitted	06/27/25	DBPR has 1 TIN	Task Closed - Submission Incomplete	
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	75% - Consolidating/Inputting Information for Submission		One (1) new addition required	N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/08/25			

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	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for May - June 2025
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	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	20250604 Specifications have not been handed off to DBPR IT for API002 and IUI001 outputs. 20250521 Changed Probability from Medium (2) to High (3). 20250507 Increased Probability from Low (1) to Medium (2) to align with an increasing Risk.
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)	Year End is a very hectic time of the year for DBPR Finance & Accounting.	Discuss with readiness coordinators and arrive at logistics that least impact Year End efforts	Working on bugs and other remedies as well as transition activities could interfere with Year End activities	20250521 At Monthly Touchpoint RC explained many Agencies have raised this risk and have this same concern. 20250507 This is planned to be discussed at the next Monthly Touchpoint with the Readiness Coordinators.
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	Increasing	6 (High/Medium)	This was discussed with IV&V at our monthly IV&V meeting	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.	The PALM Project could be out of compliance with state statute(s).	20250516 This was discussed with RCs at Monthly Touchpoint.
Open and Monitoring	06/11/25		Conversion/Configuration	If Mock 3 conversion data is not full cleansed and converted from FLAIR to PALM, then DBPR could have incomplete and/or inaccurate data in the UAT environment and that could negatively impact UAT testing	Decreasing	6 (High/Medium)	This Risk relates to PALM Tasks 571, 657, and 659 that are very substantial and impactful. The due dates are aggressive.	Work closely with SMEs and data experts and closely monitor and manage PALM Tasks 571, 657/657-A, and 659.	Incomplete or inaccurate data for the UAT Online sessions.	6/19/25 The timeline for completion of these PALM Tasks is compressed and a lot of data needs to be closely reviewed for accuracy.
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)	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	20250604 Future-State Crosswalk sessions have not started yet. 20250514 In the recently re-baselined Project schedule, Future-State Crosswalk sessions are slated to begin at the beginning of June (6/2). This pushes the completion of these sessions out to the end of August, which overlaps with Online UAT (training). 20250507 If Review Sessions do not start soon, there will not be enough time to complete them, and this Risk will need to be escalated. Tolerance was changed from Low (L) to Medium (M).
Open and Mitigating	04/09/24		Training	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional),	Decreasing	3 (High/Low)	Requires Organizational Change Management	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.	PALM readiness for DBPR could be negatively impacted	20250526 Training is a huge area of emphasis. 20250526 Training is a huge area of emphasis. 20250516 SMEs and process owners were redefined by the Project Sponsor and the SME Smartsheet has been updated.

				then PALM readiness could be negatively impacted						
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	Increasing	3 (High/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	20250611 Changed Status from Decreasing to Increasing as a result of not resuming planned Future-State process Crosswalk sessions. 20250528 Updates have been applied to the End Users Smartsheet. Reduced Priority from High (H) to Medium (M).
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	20250528 Discussed with IV&V at the last Monthly meeting. 20250521 Cutover plan is on hold until PALM shares the necessary planned details. 20250507 Changed Priority from Medium (M) to Low (L) until we get closer to GoLive.
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	Increasing	3 (High/Low)	It is important to have detailed and comprehensive test scripts in order to conduct thorough testing and reduce the possibility of errors in production.	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.	Negative impact to the timely, efficient, and successful completion of UAT	202500619 Changed Status from Stable to Increasing. 20250521 Future-State Crosswalk sessions are scheduled to resume 6/2/25. 20250507 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	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 and that could lead to incomplete workflows	Increasing	2 (Medium/Low)	KPMG assesses all of DBPR's current business processes and that documentation is be used to transition to PALM business processes. Flow diagrams are being used.	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 Equivalents Crosswalk, etc.)	DBPR end users will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete workflows	20250611 Changed Status from Decreasing to Increasing as Future-State Crosswalk sessions have not been resumed. 20250521 Newly hired end users are in the process of being onboarded
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	Stable	2 (Medium/Low)	FLAIR@BPR has been a tool that DBPR staff have relied to run real-time custom queries to get current data necessary to complete business functions.	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.	DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live with PALM	20250604 Changed Status from Decreasing to Stable. 20250521 PALM batch processing times are not yet known and could have an impact. 20250507 The timing and availability of related data must be considered as well. Changed Priority from Medium (M) to Low (L).
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test email send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Stable	2 (Medium/Low)	It would be better to have real transfers occur involving the actual real-life players to get more real testing and to reduce the likelihood of unanticipated errors.	Identify an Agency that we can partner up with and coordinate send/receive testing with them	UAT testing could be inadequate and could negatively impact DBPR PALM readiness	20250604 Changes Status from Decreasing to Stable. 20250528 Changed Priority from Medium (M) to Low (L). 20250507 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).	Stable	2 (Medium/Low)	We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world.	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	DBPR may not have the desired email notification flexibility once we go to production with PALM	20250604 Changes Status from Decreasing to Stable. 20250521 Question #0995 still not answered.

				then DBPR may not have the desired flexibility once we go to production with PALM					
--	--	--	--	---	--	--	--	--	--

DBPR Issues									
Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for May - June 2025
Open	06/04/25		Agency Business System	ABS Versa Regulation remediation is behind schedule	Critical - Impacts the abil	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.	07/01/25	20250604 PALM Task 576 to test all ABS direct interfaces must be completed by 7/25/25. It is higher priority to develop Spreadsheet Upload ARI010 first. Risk #37 came to fruition and has been escalated to this issue.

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	No update for this period	
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. The Project Schedule has been re-baselined and includes all new Tasks and dates 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 June 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 high-demand 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 Project Schedule has been amended to include the 6-month extension as well as all other pertinent details and updates.	
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	Project guidance and direction will continue to be provided by the DBPR Project Manager in a timely manner.	
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	DBPR leadership continues to be engaged.	
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 producing 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 still 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 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	Changes to business processes should be minimal. Organizational 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. Enterprise Business Systems will be tested during Full UAT.	
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. A new PO for Ffiscal year 2025-26 is being created.	
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 in the required data cleansing in preparation for Mock 3. Additional cleansing may be required.
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	Mock 2 conversion has been completed and preparations for Mock 3 are under way.
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 under the Chart of Accounts tab.
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	Navigation detailed steps will be addressed at UAT online and the DBPR Business Analyst will attend so that the proper navigation can be addressed in the Test scripts.
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. RC reports remaining videos are dependent upon build and test activities.
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 data 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 Finance & Accounting Bureau Chief Project Sponsor	Enterprise Business Systems should be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios and assistance with related test scripts.
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 the 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 approved PMP v4 has been posted.
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. DBPR resources that will be transmitting files to PALM once in production are prepared to conduct testing of the connection as well.
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	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.

				Chief Project Sponsor	
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 DBPR remediation. FGCC is responsible for working with DBPR IT for any FGCC specific details that need to be 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 review of 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, even in the updated, re-baselined 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 detail 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, but are slipping behind again per the revised Project Schedule. They are slated to begin in early June 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 planned to be resumed. 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, FACTS, 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. The API002 direct interface format accounts for this.
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	Project Schedule 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	Completed as scheduled
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 Training 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.
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.	IV&V endorses this.

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

[Privacy Policy](#) | [Report Abuse](#)

DBPR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2025	Sally Huggins	sally.huggins@myfloridalicense.com	07/08/25
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25