Helpful Links

- ⊘ Dashboard Snapshots
- ⊘ Knowledge Center
- Plorida PALM Workbook for AHCA
- ⊘ Readiness Workplan

AHCA Status Report Dashboard

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

May - June 2024

Agency Sponsor

Lynn Smith

CCN Composition

The Change Champion Network dial reflects the

completeness of your CCN makeup.

RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflects the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 4
- Vacant Role = 0

RW Task Completeness:

Score = 72.50%

- Submitted Complete = 6
- Submitted Incomplete = 2
- Completed After Submission = 4

RW Task Timeliness:

Score = 69.53%

- Submitted On Time = 16
- Submitted Late = 18
- Pending Submission = 2

Meeting Participation:

- Meetings Attended = 1
- Meetings Missed = 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											
roject npact	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	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24		Pending Resubmission	06/28/24	7/12 -12K+ records have been identified as needed to be cleansed. Initial review of the records includes encumbrances, contracts, and grants. Many of these records cannot be cleaned up by the Agency and will need to be purged by DFS. Meeting is scheduled to identify specific records that can be correct. 4/30 - Working with A&A on data cleansing 4/12 - Have begun some data review of the files provided to the Bureau for Financial Services team by DFS; Will Review and determine if additional data needs to be addressed and the approach. To be completed by	Submission Incomplete		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Consolidating Information for Submission		7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints			
I/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24							
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/03/24	4/30 - All are completed, but will not submit until we review it once more as a team	Submission Complete	05/17/24	
I/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/14/24		Submission Complete		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team			
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24		Submission Complete		
ndirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission					
I/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress					
ndirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress					
I/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24						
I/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/13/24	Signed on Thursday 5/9	Submission Complete		
I/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	07/02/24				
I/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/14/24		Submission Complete	06/14/24	
I/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24						

			Acceptance resting Flair						
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	75% - Consolidating/Inputting Information for Submission			
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/03/24	Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24				
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24				

People

The staff and stakeholders affected by your agency's transition to Florida PALM.

Implementation:

Planned Florida PALM End Users = 30

• Business Process Groupings = 12/13

Identified Subject Matter Experts = 11

- SMEs by Business Process Grouping
- Account Mgmt. and Financial Reporting = 0
- Accounts Receivable = 2
- Asset Accounting and Mgmt. = 2
- Banking = 0
- Budget Mgmt. and Cash Control = 2
- Contracts Momt = 1
- Disbursements Mamt. = 2
- Grants Momt. =
- Inter/IntraUnit Transactions = 1
- Pavroll Mgmt. = 1
- Projects Mgmt. = 0
- Revenue Accounting = 1
- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 67

- Related Business Systems = 5
- Related Reports = 31
- Documentation Status:
- Complete = 65 Partial = 1 Not Started = 0

Implementation:

Impacted Agency Business Processes = 67

- Related Business Process Groupings = 10
- Planned Spreadsheet Uploads = 4
- · Level of Impact: People Changes
- High = 0 Medium = 0 Low = 15 None = 1 Uncertain = 20
- Level of Impact: Processes Changes
- High = 0 Medium = 20 Low = 15 None = 1
- Level of Impact: Technology Changes
- High = 1 Medium = 30 Low = 4 None = 1 Uncertain = 0
- Level of Impact: Data Changes
- High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0
- Segments I & II Documentation Update Status
- Not Started = 16 In Progress = 10 Complete = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 23

- · Criticality:
- High = 20 Med = 0 Low = 2 None = 1
- Documentation Status:
- Complete = 3 Partial = 15 Not Started = 0

Cataloged Interfaces = 18

- Inbound Interfaces = 13
- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 23

- Segment I Documentation Updates:
- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- Segment II Documentation Updates:
- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

Planned Interfaces = 15

- Inbound Interfaces = 0
- Outbound Interfaces = 11

Data

Information used in or produced from an agency's financial business operations.

Current-State:

Unique FLAIR Data Elements = 82

- Associated Unique Uses = 82
- Continued Use Yes = 1
- Continued Use No = 0
- Associated Business Systems = 22

Cataloged Reports = 62

- · Criticality:
- High = 59 Med = 0 Low = 0 None = 0

Implementation:

Segments I & II Planned Configurations = 7/9

- Accounts Receivable (AR)
- Planned Distribution Codes = 13
- Asset Management (AM)
- Planned Location Codes = 13
- Planned Associated Area ID's = 50
- Commitment Control (KK)
- Planned Option = Option # 1 Track with Budget
- General Ledger (GL)
- Planned Budgetary Value Combo Edits = 694- Planned Local Funds = None
- Planned Organization ID's = 192
- Planned OA1's = 632 - Planned OA2's = None

Conversions & Data Readiness

- Conversions Needed = 6
- Agency Data Outside of Primary Source
- Data Readiness/Cleansing Status:
- Complete = 0 In Progress = 3 Not Started =
- 0 Not Applicable 3

Reports = TBD

Agency Reported

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

AHCA Risks									
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator		
People Processes Technology	When SunFocus and other urgent operational events occur, resources will be shifted to focus on the operational events thereby impacting the completion of Florida PALM tasks (schedule).	Open	9 (High/High)	Production incidents and time sensitive activities will continue to interfere with the resource-tight bureau. Assume the risk and work with the PALM Project staff to identify when a deliverable will be late. Document each occurrence and continue working on Florida PALM tasks and activities.		11/02/23	Phyllis Wander		
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander		
People Processes	Loss of Institutional Knowledge - Matriculation of knowledgeable business process and the SunFocus Application resources will hinder the progress of the project thereby impacting the timely completion of Florida PALM tasks (schedule).	Open	6 (High/Medium)	Continue to document desk procedures and manual processes and systems as well as encourage crosstraining of operational functions.	On-going	11/09/23	Phyllis Wander		

AHCA Issues									
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator		

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

Critical			Impacted Stakeholder(s)		
Operational Elements	Activity Description	Date(s)	and/or System(s)	Objective	Reporting Period Comments or Updates
People	Weekly Change Champions Workgroup Meeting		Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Weekly Disbursement To-Be Processes		Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Project Team Meeting	05/06/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Weekly Status Meetings	05/06/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	05/08/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Weekly Disbursement To-Be Processes	05/09/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Project Team Meeting	05/13/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Weekly Status Meetings	05/13/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	05/14/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Weekly Change Champions Workgroup Meeting	05/15/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Weekly Disbursement To-Be Processes	05/16/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Project Team Meeting	05/20/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Weekly Status Meetings	05/20/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Change Champions Workgroup Meeting	05/22/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Weekly Disbursement To-Be Processes	05/23/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Medicaid Projection Run As-Is Processes	05/24/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Status Meetings	05/27/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	05/28/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	05/28/24	Executive Sponsor	To review specific issues; processes; questions,budget	
Processes	As-Is Processes Budget	05/29/24	Bureau of Financial Services Budget	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Change Champions Workgroup Meeting	05/29/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Weekly Disbursement To-Be Processes	05/30/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Assets (As-Is and To-Be) Processes	05/30/24	Bureau of Financial Services Assets	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Status Meetings	06/03/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
People	Weekly Project Team Meeting	06/03/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	06/04/24	Executive Sponsor	To review specific issues; processes; questions, budget, OCM	
Processes	Weekly Disbursement To-Be Processes	06/06/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
Processes	FLAIR file uploads As-Is and To-Be Processes	06/06/24	BFS (Policy and Systemts)	Identify any missing processes while delivering the To-Be process documentation	
Processes	Assets (As-Is and To-Be) Processes	06/06/24	BFS and General Services Assets	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Status Meetings	06/10/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
Processes	Medicaid Run (Grants) As-Is Processes	06/10/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Project Team Meeting	06/10/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	06/11/24	Executive Sponsor	To review specific issues; processes; questions, budget, OCM	
People	Weekly Change Champions Workgroup Meeting	06/12/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Contract As-Is and To-Be Processes	06/13/24	Procurement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Contract As-Is and To-Be Processes	06/13/24	Procurement	Identify any missing processes while delivering the To-Be process documentation	
Processes	Grants Management	06/13/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
Processes	Trust Fund and Cash Analysis As-Is and To-Be Processes	06/13/24	BFS (Policy and Systemts)	Identify any missing processes while delivering the To-Be process documentation	
Processes	Weekly Disbursement To-Be Processes	06/14/24	Bureau of Financial Services Disbursement	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Change Champions Workgroup	06/19/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Meeting Assets (As-Is and To-Be) Processes	06/19/24	BFS and General Services	Identify any missing processes while delivering the To-Be process	

People Processes Technology Data	Quarterly Florida PALM-Financial Services Ecosystem Governance	06/19/24	Executive Sponsor, BFS Leadership and CIO	To review resolve and escalate issues and budget	
Processes	As Is and To-Be Processes	06/20/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
Processes	Grants Management	06/20/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Status Meetings	06/24/24	Bureau of Financial Services / Agency Business System - Leadership	To review highlights of weekly activities and bring risks and issues for resolution	
Processes	Medicaid Run (Revenue) As-Is Processes	06/24/24	Bureau of Financial Services Grants	Identify any missing processes while delivering the To-Be process documentation	
People	Weekly Project Team Meeting	06/24/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	06/25/24	Executive Sponsor	To review specific issues; processes; questions, budget, OCM	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	06/25/24	Executive Sponsor	To review specific issues; processes; questions, budget, OCM	
People	Weekly Change Champions Workgroup Meeting	06/26/24	Change Champions and SMEs	Planning for the transition of Florida PALM working through tasks	
Processes	Assets (As-Is and To-Be) Processes	06/26/24	BFS and General Services Assets	Identify any missing processes while delivering the To-Be process documentation	
Processes	Assets (As-Is and To-Be) Processes	06/26/24	BFS and General Services Assets	Identify any missing processes while delivering the To-Be process documentation	

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							

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AHCA Status Report Confirmation									
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:						
May - June 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	07/03/24						
March - April 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/24						
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24						