

- Helpful Links**
- Dashboard Snapshots
 - Knowledge Center
 - Florida PALM Workbook for APD
 - Readiness Workplan

APD Status Report Dashboard

Reporting Period
May - June 2024

Agency Sponsor
Rose Salinas

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

CCN Composition



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

Change Champion Network:

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

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 Completeness:

- Score = 77.27%**
- Submitted Complete = 6
 - Submitted Incomplete = 2
 - Completed After Submission = 3

RW Task Timeliness



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

RW Task Timeliness:

- Score = 97.5%**
- Submitted On Time = 34
 - Submitted Late = 1
 - Pending Submission = 1

Project-led Meeting Participation



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

Meeting Participation:

- Meetings Attended = 2
- 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

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	04/11/24	2/5 - Start of review for TASK completion 2/14 - Reviewing and updating based on Finance Team recommendations 2/21 - In progress 3/14 - Teams review/IT and Teams assignment break out - APD Internal Tracker 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - Round 1 Plan has been executed - working to close final open items from internal tracker 4/10 - All Inventories are planned - but not executed yet with May Encumbrance clean up completion target and June completion plans for asset data. - leaving at 75% due to actual inventory effort is in progress at this time and will NOT be completed until end of JUNE. 4/11 - finalizing input to sheets - review 4/12 for completion of all rubrics with inventory actions remaining outstanding 4/18 - ongoing effort with BA leading the documentation updates for inventories - asset and encumbrances 5/2 - teams review - Encumbrances target completion for cleanse - May 30 5/2 - Asset Management - target completion for the physical location cleanse - May 30 - physical inventory of all assets - June 30 5/6 Selected "Not Applicable" for all columns for Customers and Grants rows: Data Readiness Evaluation through Current-State Data Readiness Status 5/23 - noted attachment notes and resubmission requirement - team in review 5/28 - no change - effort remains with the target of month end closing 6/3 - APD Inventories all in review - continuing with end of June due dates on all 6/17 - Teams moving forward in review and updates to task requirements - cleansing plans still in progress for Asset Team - Encumbrances completed 7/1 - aware of the need to finish up - hand in hand with the task 513 and 515 - Hayley is managing to have team close.	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	Pending Resubmission	04/12/24	2/5 - Start of review for TASK completion 2/14 - Teams individual review underway 2/21 - IT Team working 2/28 - new meeting review scheduled for 3/7 3/14 - Teams review/IT and Teams assignment break out - APD Internal Tracker 3/31 - teams are on track for documentation and process structures with validation to PALM 4/3 - reports/reviewed all - completed with Asset Mgmt outstanding - notified	Submission Incomplete	05/06/24

							<p>for due date of 4/5 to mark completed. 4/3 - blue columns on biz process to be completed by 4/5 - spreadsheet - to be updated in sheets 4/8 4/8 - final reviews - 90% completed- working to close final open items from internal tracker 4/16 - In review - all areas completed - working with the worksheet to update so that all updates are reflected correctly for PALM team review 5/3 - review and resubmit by EOD 5/3 5/6 - completed - HB/BM checked and updated as noted 5/23 - noted attachment notes and resubmission requirement - team in review 5/28 - cleaning up and resubmission this week - by May 30th 6/3 - will review with @Dora - as the rubrics doesn't seem to pick up the updates we previously submitted - so not certain where there is outstanding info needed from APD - to be continued. 6/17 - cleaning up to resubmit @ 6/17 7/1 - comments descriptions are being updated with Monday - 7/8 ready to resubmit the comments provided were to generic for the PALM team and so we are tasked with providing better description for the uncertain label.</p>	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	75% - Consolidating/Inputting Information for Submission	<p>2/28 - PALM User Excel Spreadsheet received with updates for teams - finishing placing into Smartsheet by COB 2/29. 3/14-APD Teams breakdown on internal tracker - Reports documentation updated (3/12)Business Process Review Seg I & II 3/31 - working thru with strategy - teams engaged 4/8 - final reviews - 90% completed- working to close final open items from internal tracker - Finance Team leading - multiple sheets broken out for team input 4/18 - internal APD tracker updated with specific breakdown of all rubrics and teams follow thru defined. ongoing meetings and effort 5/7 - final review on all spreadsheets for completion - no blanks - all identified and sheets completed correctly - will submit on time - goal is 5/9 ***5/10 - 5/10 TLH office closures - per conversation with RC, leaving task open, all workbooks completed pending Location Definition Workbook - RC meeting slated for 5/13 - pending internal APD follow up as well 5/13*** 5/13 - RC comments: APD's config workbook is complete with exception of location id. RC discussed with PM- Business Analyst on 5/10 during TLH storm office closure. Organization tree structure process cleared up. Sheet complete. Matching FLAIR location codes to addresses is a challenge. PM will follow up with APD F&A on 5/13 about Flair location id's, make appropriate selections in sheet, and assign Florida Palm location ids in sheet. (Note: APD is assigning FP location codes based on current day FLAIR location codes.) Task tracker comment to be added noting 5/10 phone call with RC. Due to 5/10 TLH storm office closures, PM will follow up with APD team on 5/13 to resolve Location 5/20 - HB/BM - adding Title File data - PALM provided data will be "NO" for conversion - completion for Wed 22nd 5/21-5/22 - received the Solaris Report from AM Team and reconciliation work is being continued on the Smartsheet for Loc Definitions - inventory 5/28 - Team meeting with Regions to review the validity of the information - aligning Solaris Report with FLAIR Title file and clean will continue with completion upon AM team sign off. 6/3 - Solaris vs FLAIR - very different data - cleansing in progress - working on the updates with locations and within APD for valid data and updates on Active and Inactive locations - will be completed by June 30 - discovery of conflicting data means we are unable to determine the conversion status for each and are working thru this with the Asset Mgmt Team at APD 6/17 - Teams are in review - and mgmt meeting to be held on 6/24 to update processes and validate/sign off 7/1 - Final run on effort - Worksheet reconciliation is set up and the teams for Facilities and Regions are working hand in hand to create/determine the activity status for all loc codes - align the Smartsheet with correct location description - (all info) and provide the status to close. deadline for APD 7/12 - Sponsor Rose is fully aware and we are working with the Asset mgmt team to close this asap.</p>	
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	<p>5/3 - initiated review 5/15 - Planning activities to engage and iterate 6/17 - Teams moving forward in review and updates to task requirements</p>	

N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		5/3 - initiated review 5/15 - Planning activities to engage and iterate 6/17 - Teams moving forward in review and updates to task requirements		
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		5/15 - Planning activities to engage and iterate 6/17 - Teams moving forward in review and updates to task requirements - IT review completed		
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	75% - Consolidating/Inputting Information for Submission		5/3 - initiated review 5/15 - Planning activities to engage and iterate 6/17 - Teams moving forward in review and updates to task requirements		
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	75% - Consolidating/Inputting Information for Submission		5/3 - initiated review 5/15 - Planning activities to engage and iterate 6/17 - Teams moving forward in review and updates to task requirements - all teams in process of cleanse and evaluation of the balances/accounts/data they work with from a team perspective		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission		6/17 - IT Team is moving forward in review and updates to task requirements - Primary to APD is the FRS database and from that all other ABS's are considered - PP in development for all timeline milestones		
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/11/24	6/11 - Re-aligned CCN and updated as required 6-19 - Updates made per Task Verification Form	Submission Complete	06/19/24
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	75% - Consolidating/Inputting Information for Submission				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	50% - In Progress				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/08/24	7/1 - all updated - reviewing for the full team view process - and then completion by 7/3 7/8- Smartsheet fully added all for viewer privilege's - internal APD and PALM Team access/viewing.		
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/01/24	7/1 - Rose to complete by July 3 7/1 - completed!	Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24					

People	Processes	Technology	Data
--------	-----------	------------	------

The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
--	--	--	---

<p>Implementation:</p> <p>Planned Florida PALM End Users = 74</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 40</p> <p>SMEs by Business Process Grouping</p> <ul style="list-style-type: none"> Account Mgmt. and Financial Reporting = 3 Accounts Receivable = 2 Asset Accounting and Mgmt. = 3 Banking = 2 Budget Mgmt. and Cash Control = 2 Contracts Mgmt. = 3 Disbursements Mgmt. = 3 Grants Mgmt. = 2 Inter/IntraUnit Transactions = 20 Payroll Mgmt. = 6 Projects Mgmt. = 5 Revenue Accounting = 2 System Access and Controls = 2 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>Current-State:</p> <p>Cataloged Business Processes = 238</p> <ul style="list-style-type: none"> Related Business Systems = 6 Related Reports = 34 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 238 Partial = 0 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 238</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10 Planned Spreadsheet Uploads = 0 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 21 Medium = 6 Low = 62 None = 17 Uncertain = 22 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 19 Medium = 10 Low = 24 None = 13 Uncertain = 62 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 15 Medium = 4 Low = 8 None = 27 Uncertain = 74 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 17 Medium = 7 Low = 3 None = 22 Uncertain = 78 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 94 	<p>Current-State:</p> <p>Cataloged Business Systems = 9</p> <ul style="list-style-type: none"> Criticality: High = 9 Med = 0 Low = 0 None = 0 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 8 Partial = 1 Not Started = 0 <p>Cataloged Interfaces = 78</p> <ul style="list-style-type: none"> Inbound Interfaces = 6 Outbound Interfaces = 1 <p>Implementation:</p> <p>Business Systems Planned for Integration = 8</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7 Segment II - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7 <p>Planned Interfaces = 15</p> <ul style="list-style-type: none"> Inbound Interfaces = 3 Outbound Interfaces = 12 	<p>Current-State:</p> <p>Unique FLAIR Data Elements = 480</p> <ul style="list-style-type: none"> Associated Unique Uses = 1181 Continued Use - Yes = 1094 Continued Use - No = 57 Associated Business Systems = 2 Cataloged Reports = 112 Criticality: High = 150 Med = 18 Low = 1 None = 0 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 0</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = Not Submitted Asset Management (AM) Planned Location Codes = Not Submitted Planned Associated Area ID's = Not Submitted Commitment Control (KK) Planned Option = Not Submitted General Ledger (GL) Planned Budgetary Value Combo Edits = Not Submitted Planned Local Funds = Not Submitted Planned Organization ID's = Not Submitted Planned OA1's = Not Submitted Planned OA2's = Not Submitted <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 2 Agency Data Outside of Primary Source System(s) = 0 Data Readiness/Cleansing Status:
--	---	---	--

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.

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	- Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	- APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 baseline success	10/24/23	PALM TEAM and APD Teams

						Bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing		
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team	
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD Teams	
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams	
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams	
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	-Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams	
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team	
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team	
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team	
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM	
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team	
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building	04/24/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team	
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly	10/24/23	APD Core Team	

						compliance reports. - ongoing		
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to be initiated with COA review	12/27/23	APD Core Team	
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team	
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team	
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team	
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted 4/22 - new organization chart has been drafted and will initiate a change in organizational structure - G/L will be updated as approvals are completed 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval	07/31/24	APD Sponsor and Finance Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team 4/22 - the inventory clean up and alignment with G/L cleanse is in progress - not yet closed	07/01/24	APD AM Team - BA - PM - Core Team
People Processes Technology Data	PALM Business Process Modules DO NOT align with the naming convention on the new PALM Modules - this is a new learning issue after adjusting for team purposes	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Re-mapping - and will re-educate the teams to their PALM Module Name - REALLY causes "change management issues"	4/22 - new change - business process models vs PALM Modules names - they don't align and APD has renamed their teams based on the Business Process Models/Modules originally introduced. 6/26 - Not an issue but noted by teams in naming conventions and alignment with the PALM Modules	06/28/24	APD Teams/CCN and SME's
People Processes Technology Data	APD Inventories - Asset and Encumbrances - Process Improvement	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working with teams to establish and document processes while cleaning data - giving an internal due date and review	4/22 - still in process - unable to finish based on the Task requirements and due date of 4/12 4/24 - Asset Team has issued the Inventory requirements for fiscal	07/01/24	Asset Mgmt and Encumbrances by the Disbursement team

					yr end - and with that the effort to close is targeted for full cleanse of ALL inventory by June 30, 2024 4/24 - Encumbrances - part of the YE Close. 6/26 - Encumbrances completed with YE Close out and Certify forward - leaving Locations and Physical Inventories to be validated and completed - target - Aug 30th for all - but for Task 513 - July 5th		
People	APD Organizational changes will change the alignment of the personnel within the agency - but no approvals are final and there remain accounting adjustments to support until the accounting structure can be corrected	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get DMS approvals thru based on the Director's changes to organizational structure and chart - currently a draft	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval	07/31/24	APD Agency as a whole
	APD Asset Inventories - Locations physical address alignment across systems to include Solaris	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get FLAIR and Solaris Data corrected/updated/changed/added/deleted for all Physical locations associated with APD either HQ/Regions/Facilities/Regions	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval - re-write of procedures and documentation to correct processes - aligning with the asset module workflow within PALM	08/30/24	APD Agency as a whole

APD Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.

APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology	APD All Hands meeting	06/26/24	APD Accounting Teams - All	Monthly ALL Teams meeting in person	Great overview - including all regions and facilities 5/1 - 6/26

People Processes Technology Data	APD - High Fives - Email	06/18/24	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight 6/18
People Processes Technology Data	Payroll Team	06/27/24	APD Payroll Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 5/21 & 6/25
People Processes Technology Data	Contract Team	06/24/24	APD Contract Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 6/24
People Processes Technology Data	Budget Team	06/26/24	APD Budget Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 6/26
People Processes Technology Data	Disbursements Team	06/05/24	APD Disbursements Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 5/1 & 6/5
People Processes Technology Data	Asset Management Team	06/25/24	APD Asset Management Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 5/21 & 6/25
People Processes Technology Data	Accounts Receivable Team	06/19/24	APD Accounts Receivable - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 5/16 & 6/19
People Processes Technology Data	Accounts IT Team	06/11/24	APD IT Team -PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 5/21 & 6/11
People Processes Technology Data	Account Management and Financial Reporting Team	06/26/24	APD Financial Reporting Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 6/26
People Processes Technology Data	Monthly Inter/Intra - Facilities Team Meeting	06/27/24	APD Facilities Team - PM/BA/TA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting - monthly May and June Completed 6/27
People Processes Technology Data	Monthly Inter/Intra - Regions Team Meeting	06/25/24	CCN and SMEs - PM/BA/TA	State/HQ-SE-SW-NE-NW-Suncoast-Southern-Central Team: CCN and SME's-Teams call to review actions/participation/introduce PALM initiatives/open forum Team represents Modules: Inter/Intra Unit Transactions - Monthly	Team meeting - monthly May and June Completed 5/21 & 6/25
People Processes Technology Data	Weekly APD PALM Internal Team Meeting	06/24/24	PM/BA/TA - APD Internal PALM	Primary PALM Team Status Call - PM/BA/TA - weekly	Review all - talk to status - align APD 5/6-5/13-5/20-6/3-6/10-6/17-6/24
People Processes Technology Data	APD Calendar updates to Teams	05/15/24	APD PM	Timeline Snapshot for the month of May and June - upcoming events and scheduled activities	Agency Updates - BA and PM Review 5/15 - 6/19
People Processes Technology Data	Weekly Core Team Status Report	06/27/24	Agency Leadership	Sponsor/Project Manager/Business Liaison/Technical Liaison/Business Analyst/Senior Tech Analyst Team - Focused on PALM: Email updates (Past/present week/future) Weekly	Awareness/Task Review/Updates regarding Teams/PALM Participation Weekly Meeting - Review status/updates 5/2-5/9-5/16-5/23-5/30-6/6-6/13-6/20
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Meeting	06/27/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley/Business Analyst - Kristopher/Technical Analyst	Awareness/Task Review/Updates regarding Teams/PALM Participation	Awareness/Task Review/Updates regarding Teams/PALM Participation Weekly Meeting - Review status/updates 5/2-5/9-5/16-5/23-5/30-6/6-6/13-6/20
People Processes Technology Data	APD SIMS/Inventory Meeting/LOC	05/06/24	APD CORE Team - Tacachale Facility	Special Meeting	Focus for Task 513/514 meetings on going: 5/15 - 5/21 - 6/4 - 6/17 - 6/25
People Processes Technology Data	APD IT Conversion PLAN Meetings - APD PALM Team	06/24/24	PM/BA/TA - APD Internal PALM	IT Requirements/APD conversion planning and outline for timelines and activity requirements	Focus on APD timeline for Data/IT Team(s) - 5/6 - 5/20 - 6/10 - 6/24

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 Notice](#) | [Report Abuse](#)

APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Rose Salinas	rose.salinas@apdcares.org	07/01/24
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24