

**Helpful Links**

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for CITRUS
- Readiness Workplan

# CITRUS Status Report Dashboard

**Reporting Period**

May - June 2024

**Agency Sponsor**

Christine Marion

*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 = 4
- Duplicate Filled Role = 12
- 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 = 78.33%**

- Submitted Complete = 7
- Submitted Incomplete = 0
- Completed After Submission = 5

**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 = 31
- Submitted Late = 5
- Pending Submission = 0

**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	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	06/04/24	After a review and comparison of Segment I requirements and our ABS, it was determined that no remediations will be necessary for this segment. As such, Citrus has closed this task as "Complete".	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/09/24	Corrections have been made	Submission Complete	05/30/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/04/24		Submission Complete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress				
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	50% - In Progress				
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	50% - In Progress				
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	07/10/24			
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/10/24			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/02/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/28/24			
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/06/24		Submission Complete	06/06/24
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/09/24			
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/09/24			
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	50% - In Progress				

**People**

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

**Implementation:**

**Planned Florida PALM End Users = 8**

- Business Process Groupings = 11/13

**Identified Subject Matter Experts = 6**

**SMEs by Business Process Grouping**

- Account Mgmt. and Financial Reporting = 5
- Accounts Receivable = 5
- Asset Accounting and Mgmt. = 2
- Banking = 5

**Processes**

The sequence of procedures to accomplish a business objective.

**Current-State:**

**Cataloged Business Processes = 37**

- Related Business Systems = 4

- Related Reports = 42

**Documentation Status:**

- Complete = 0 Partial = 1 Not Started = 35

**Implementation:**

**Impacted Agency Business Processes = 37**

**Technology**

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

**Current-State:**

**Cataloged Business Systems = 4**

**Criticality:**

- High = 4 Med = 0 Low = 0 None = 0

**Documentation Status:**

- Complete = 4 Partial = 0 Not Started = 0

**Cataloged Interfaces = 2**

- Inbound Interfaces = 2

- Outbound Interfaces = 0

**Data**

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

**Current-State:**

**Unique FLAIR Data Elements = 70**

**Associated Unique Uses = 70**

- Continued Use - Yes = 21

- Continued Use - No = 3

**Associated Business Systems = 0**

**Cataloged Reports = 62**

**Criticality:**

- High = 32 Med = 12 Low = 5 None = 0

- Budget Mgmt. and Cash Control = 5
- Contracts Mgmt. = 2
- Disbursements Mgmt. = 4
- Grants Mgmt. = 3
- Inter/IntraUnit Transactions = 4
- Payroll Mgmt. = 2
- Projects Mgmt. = 0
- Revenue Accounting = 3
- System Access and Controls = 1

**Role Mapping = TBD**

**Training = TBD**

- Related Business Process Groupings = 9
- Planned Spreadsheet Uploads = 0
- **Level of Impact: People Changes**
- High = 0 Medium = 11 Low = 21 None = 0 Uncertain = 0
- **Level of Impact: Processes Changes**
- High = 31 Medium = 0 Low = 1 None = 0 Uncertain = 0
- **Level of Impact: Technology Changes**
- High = 2 Medium = 9 Low = 16 None = 5 Uncertain = 0
- **Level of Impact: Data Changes**
- High = 1 Medium = 2 Low = 28 None = 1 Uncertain = 0
- **Segments I & II Documentation Update Status**
- Not Started = 0 In Progress = 0 Complete = 32

**Implementation:**

**Business Systems Planned for Integration = 2**

- **Segment I - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 1 Not Started = 0 Not Needed = 0
- **Segment II - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 2 Not Started = 0 Not Needed = 0
- Planned Interfaces = 3**
- Inbound Interfaces = 2
- Outbound Interfaces = 1

**Implementation:**

**Segments I & II Planned Configurations = 7/9**

- **Accounts Receivable (AR)**
- Planned Distribution Codes = 1
- **Asset Management (AM)**
- Planned Location Codes = 7
- Planned Associated Area ID's = 2
- **Commitment Control (KK)**
- Planned Option = Option # 1 - Track with Budget
- **General Ledger (GL)**
- Planned Budgetary Value Combo Edits = 84
- Planned Local Funds = None
- Planned Organization ID's = 40
- Planned OA1's = 101
- Planned OA2's = None
- Conversions & Data Readiness**
- **Conversions Needed = 2**
- **Agency Data Outside of Primary Source System(s) = 1**
- **Data Readiness/Cleansing Status:**
- Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 0

**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.

**CITRUS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank).	Open	6 (Medium/High)	We have made the project manager aware of the issue, and he has informed PALM that we need to determine how foreign currency payments will be handled through PALM.		04/29/24	Matthew Christovich
Technology Data	The quality of audio on webinars and recordings is low. Our team does not feel it is receiving much needed information presented during these workshops	Open	6 (High/Medium)	Please see what you can do to upgrade the quality of webinars.	The quality of the audio recording has improved but remains inconsistent.	04/30/24	Matthew Christovich
People	The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed.	Open	6 (High/Medium)	We will have to carefully adjust our implementation schedule to ensure that there is no delay or gaps in services during UAT.	Risk opened per our June PALM touchpoint.	06/06/24	Matthew Christovich
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	We remain unsure of the role our technical support person will play in PALM. Currently, the technical staff has very little to do with FLAIR, but we're awaiting the final roles.	09/19/23	Matthew Christovich

**CITRUS 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	Citrus does not have a dedicated project manager to ensure all PALM activities are completed, Tasks are updated, and staff is provided direction.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Without additional project funding, staff will complete tasks as time allows.	Funding for PALM for Citrus has been included in Senate and House bills, pending the conference process. This funding would be available 07/01/24. We will be watching the budget process until final approval by Governor.	05/01/24	CCN
Technology Data	The PALM team presents some workshops as webinars, but the technology is not very good. Audio is either choppy with echoes, or completely nonexistent.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	It is not possible for us to travel to Tallahassee for every meeting. The quality of the webinars is so low that it is not productive for our team to participate	PALM has improved the quality of some recordings, but not all. We are moving the resolution date out to the end of July to see how the Design meetings go.	07/31/24	PALM

**CITRUS Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.

People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR Funding for FY2024-25 included in Legislative budget, pending Governor approval. BAPS request for current year funding was approved and project manager has been contracted through staff augmentation, to start April 30, 2024.
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff is currently completing Task 513, which defines data fields for configuration in PALM
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.
People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins
People Processes Data	Vendor maintenance done outside of PALM in AOD	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	This assumption will remain until more information released

### CITRUS 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	Review Revenue System and 4R reporting	05/01/24	Matt, Chuck, Christine, Garrett	Overview of Revenue system requirements	To determine remediation requirements for Revenue System
People Processes Technology Data	Citrus Readiness Touchpoint	05/09/24	CCN Team, PALM Project Team	Review upcoming Tasks	Agenda to follow

### Agency Sponsor Confirmation

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

Agency Sponsor Name: \*

Confirm \*

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### CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Christine Marion	cmarion@citrus.myflorida.com	07/09/24
March - April 2024	Christine Marion	cmarion@citrus.myflorida.com	05/02/24
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24