

**Helpful Links**

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

# COM Status Report Dashboard

**Reporting Period**

May - June 2024

**Agency Sponsor**

Tisha Womack

*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 = 16
- Duplicate Filled Role = 0
- 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 = 89.23%**
- Submitted Complete = 9
  - Submitted Incomplete = 0
  - Completed After Submission = 4

**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 = 94.72%**
- Submitted On Time = 32
  - Submitted Late = 4
  - 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 = 6
- 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	06/28/24	Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/11/24	Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication. UPDATE AS OF 4/2/2024: Team meeting scheduled for 4/9/2024. Update as of 5/11/2024: Task Tracker update late due to internet and utilities outage as result of storm. Update as of 5/13/2024: task due date extended to 5/13/2024 due to severe weather on 5/10/24; Lisa / Tulani reviewed Smartsheet entries for completeness. Updates made to the Distribution Code smartsheet. Task submitted.	Submission Complete	05/16/24
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/05/24		Submission Complete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	50% - In Progress				
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/11/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/13/24			
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/13/24	Onboarding process is in progress for Change Management Liaison. Agency Sponsor, Tisha Womack, is in constant contact with vendor. UPDATE as of 6/26/2024: CML currently getting fingerprints and other administrative tasks done. PML and CML met on 6/26/2024; PML emailed Florida PALM link and most current status update presentation.	Submission Complete	06/26/24
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	06/28/24		Submission Complete	06/28/24
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/08/24			
N/A	N/A	539	Managa Agency Specific	07/01/24	08/29/24					

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 43</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 12/13</li> </ul> <p><b>Identified Subject Matter Experts = 43</b></p> <p><b>SMEs by Business Process Grouping</b></p> <ul style="list-style-type: none"> <li>Account Mgmt. and Financial Reporting = 4</li> <li>Accounts Receivable = 5</li> <li>Asset Accounting and Mgmt. = 3</li> <li>Banking = 2</li> <li>Budget Mgmt. and Cash Control = 3</li> <li>Contracts Mgmt. = 13</li> <li>Disbursements Mgmt. = 11</li> <li>Grants Mgmt. = 15</li> <li>Inter/IntraUnit Transactions = 1</li> <li>Payroll Mgmt. = 3</li> <li>Projects Mgmt. = 2</li> <li>Revenue Accounting = 2</li> <li>System Access and Controls = 5</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p>The sequence of procedures to accomplish a business objective.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 61</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 8</li> <li>Related Reports = 31</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 22 Partial = 36 Not Started = 3</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 61</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 8</li> <li>Planned Spreadsheet Uploads = 7</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 3 Medium = 20 Low = 25 None = 7 Uncertain = 6</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 5 Medium = 29 Low = 13 None = 2 Uncertain = 12</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 15 Medium = 20 Low = 5 None = 7 Uncertain = 14</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 7 Medium = 31 Low = 3 None = 8 Uncertain = 12</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 61</li> </ul>	<p>The applications or tools used to process, track, or report on financial operations.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 26</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 7 Med = 18 Low = 0 None = 1</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 4 Partial = 22 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 15</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 15</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 23</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> </ul> <p><b>Planned Interfaces = 10</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = -4</li> <li>Outbound Interfaces = 7</li> </ul>	<p>Information used in or produced from an agency's financial business operations.</p> <p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 71</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 84</b></li> <li>Continued Use - Yes = 2</li> <li>Continued Use - No = 12</li> <li><b>Associated Business Systems = 2</b></li> </ul> <p><b>Cataloged Reports = 373</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 2 Med = 0 Low = 0 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 6/9</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>Planned Distribution Codes = 6</li> <li><b>Asset Management (AM)</b></li> <li>Planned Location Codes = 21</li> <li>Planned Associated Area ID's = None</li> <li><b>Commitment Control (KK)</b></li> <li>Planned Option = Option # 1 - Track with Budget</li> <li><b>General Ledger (GL)</b></li> <li>Planned Budgetary Value Combo Edits = 693</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 163</li> <li>Planned OA1's = 49</li> <li>Planned OA2's = None</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 3</li> <li>Agency Data Outside of Primary Source System(s) = 2</li> <li><b>Data Readiness/Cleansing Status:</b></li> <li>Complete = 3 In Progress = 0 Not Started = 0 Not Applicable 0</li> </ul>

### 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.

COM 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	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	Delegated some day-to-day activities to staff members not directly involved with PALM. This change allows CCN team members some time to work on PALM each week. UPDATE as of 4/29/2024: Lead SMEs currently training new resources to be independent. UPDATE as of 6/5/2024: Agency Sponsor and Agency Liaison have procured a project manager and are currently finalizing procurement of business analyst/change manager for technical support.	06/05/24	Caroline (Tisha) Womack / Lemuel Toro
People Processes Technology Data	Lack of support for Life-to-Date Accounting and Reporting	Open	9 (High/High)	Create internal life-to-date reporting system	Commerce needs LTD balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module that has some type of LTD capability but details are not known to agencies at this time. Contingency plans have been identified and	06/05/24	Lemuel Toro / Caroline (Tisha) Womack / Dean Modling / Ken Heim

					Commerce is currently working to determine best response if Project Costing module will not provide needed support. UPDATE as of 6/5/2024: Risk reviewed by CCN. Risk remains in place until Commerce has more information on how PALM will handle or is able to assist in LTD reporting.		
People	SMEs who will provide vital support to PALM project during Segment IV workshops/meetings may also be needed to complete Financial Statement and Legislative Budget Request (LBR) tasks during the May 2024 - September 2024 window.	Open	6 (Medium/High)	Identify SMEs and SME backup team members.	SMEs with new staff/resources are currently training staff on day-to-day activities, as well as PALM related support. Backup SMEs will be identified as soon as possible. UPDATE as of 6/5/2024: risk reviewed by CCN. No updates at this time.	06/05/24	Lemuel Toro / Lisa Simpson

### COM Issues

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

### COM Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team

### COM 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	Commerce PALM Town Hall	05/10/24	Finance and Accounting, Human Resources, General Services	Inform staff and PALM end users about potential project impact on financial processes and way of working.	Agency Sponsor, T Womack, welcomed staff and gave brief historical view of PALM project Agency Liaison - L Toro introduced project team and explained importance of participation, direct and indirect. L Simpson discussed where we are currently in project, as well as agency end user expectations. T Honable reviewed PALM website, highlighting End User Support (Solution Center), Knowledge Center, and Training links. T Honable also informed staff of upcoming End User Survey. D Modling presented code crosswalks and K Heim discussed reporting and how this process will be impacted at Commerce; currently reporting is under construction.

### 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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### COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Tisha Womack	caroline.womack@commerce.fl.gov	07/08/24
March - April 2024	Tisha Womack	caroline.womack@commerce.fl.gov	05/11/24
January - February 2024	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	03/08/24