

Helpful Links

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

DBPR Status Report Dashboard

Reporting Period

May - June 2024

Agency Sponsor

Sally Huggins

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 = 10
- Duplicate Filled Role = 8
- 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 = 100.00%
- Submitted Complete = 18
- Submitted Incomplete = 0
- Completed After Submission = 0

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 = 87.22%
- Submitted On Time = 24
- Submitted Late = 12
- 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	06/03/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	06/07/24		Submission Complete	
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/03/24		Submission Complete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/11/24		Submission Complete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	06/19/24	Resubmitted on 6/27/24	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	06/19/24	Ready	Submission Complete	
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	100% - Submitted	05/23/24	Complete	Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	05/24/24		Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	75% - Consolidating/Inputting Information for Submission		Versa mapping exercise being tracked in Project Schedule under this Task.		
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24	Bimonthly report submitted by due date 5/13/24; forgot to update tracker	Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/27/24	All Risks and Issues have been updated. Project Schedule updated daily with weekly snapshots captured in the project Central Repository.		
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/05/24		Submission Complete	
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	50% - In Progress				
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	06/27/24	All updates have been applied. Erin Moreno and Lynn Smith were removed.	Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/11/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 32

- Business Process Groupings = 13/13

Identified Subject Matter Experts = 23

SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 7
- Accounts Receivable = 7
- Asset Accounting and Mgmt. = 8
- Banking = 7

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 97

- Related Business Systems = 11
- Related Reports = 25
- Documentation Status:
 - Complete = 82 Partial = 15 Not Started = 0

Implementation:

Impacted Agency Business Processes = 97

Technology

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

Current-State:

Cataloged Business Systems = 11

- Criticality:
 - High = 5 Med = 2 Low = 1 None = 3
- Documentation Status:
 - Complete = 10 Partial = 0 Not Started = 1

Cataloged Interfaces = 1

- Inbound Interfaces = 1
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 84

- Associated Unique Uses = 85
- Continued Use - Yes = 48
- Continued Use - No = 32
- Associated Business Systems = 37

Cataloged Reports = 55

- Criticality:
 - High = 20 Med = 19 Low = 15 None = 0

- Budget Mgmt. and Cash Control = 6
- Contracts Mgmt. = 2
- Disbursements Mgmt. = 9
- Grants Mgmt. = 1
- Inter/IntraUnit Transactions = 5
- Payroll Mgmt. = 1
- Projects Mgmt. = 1
- Revenue Accounting = 9
- System Access and Controls = 3

Role Mapping = TBD

Training = TBD

• Related Business Process Groupings = 9

- Planned Spreadsheet Uploads = 0

• **Level of Impact: People Changes**

- High = 0 Medium = 0 Low = 0 None = 62
Uncertain = 19

• **Level of Impact: Processes Changes**

- High = 62 Medium = 0 Low = 0 None = 0
Uncertain = 19

• **Level of Impact: Technology Changes**

- High = 62 Medium = 0 Low = 0 None = 0
Uncertain = 19

• **Level of Impact: Data Changes**

- High = 0 Medium = 62 Low = 0 None = 0
Uncertain = 19

• **Segments I & II Documentation Update Status**

- Not Started = 0 In Progress = 1 Complete = 49

Implementation:

Business Systems Planned for Integration = 1

• **Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0
Not Started = 0 Not Needed = 1

• **Segment II - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0
Not Started = 0 Not Needed = 1

Planned Interfaces = 29

- Inbound Interfaces = 14

- Outbound Interfaces = 14

Implementation:

Segments I & II Planned Configurations = 6/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 52

• **Asset Management (AM)**

- Planned Location Codes = 9

- Planned Associated Area ID's = None

• **Commitment Control (KK)**

- Planned Option = Option # 1 - Track with Budget

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 661

- Planned Local Funds = None

- Planned Organization ID's = 368

- Planned OA1's = 31

- Planned OA2's = None

Conversions & Data Readiness

• **Conversions Needed = 4**

• **Agency Data Outside of Primary Source System(s) = 0**

• **Data Readiness/Cleansing Status:**

- Complete = 4 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.

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Data	If we are not able to bridge the gap of institutional knowledge caused by the retirement of Accounting Systems Analyst, then details could be missed that impact DBPR's readiness	Closed	9 (High/High)	Mitigation - Advertise position as soon as possible; hire new employee in time to overlap with retiring employee.	All Technical support has been transitioned to Kris Burnside. If technical solutions fail, F&A will resort back to manual processing. Closing Risk.	05/08/24	Sally Huggins
People Processes Technology Data	Revisiting previously completed tasks could take time away from current scheduled tasks. If too much time is spent on old PALM Tasks, DBPR may never get caught up and in line with the Project Schedule.	Closed	9 (High/High)	Mitigation - Focus on accuracy and completeness on previous Tasks being readressed, then find away to fast track current tasks.	All Redo Tasks have been reviewed by the Readiness Coordinator and have been approved.	06/06/24	Thomas Richardson
People Processes Technology Data	If the DBPR Technical (IT) team does not receive the PALM Revenue Source Codes from DFS PALM by September 2024, there will not be enough time to complete the crosswalk from FLAIR codes to PALM codes in time to complete Versa development needed to conduct the scheduled testing.	Closed	9 (High/High)	Work with PALM Readiness Coordinators to obtain the PALM Revenue Source Codes as soon as possible.	Testing scheduled to start in January 2025; working DBPR IT to plan out Versa design Crosswalk from PALM to FLAIR needs to be completed and provided to DBPR IT	06/06/24	Thomas Richardson
People Processes Technology	If PALM To Be Business Processes are not stable and subject to significant change during or after PALM education presented to Finance & Accounting staff, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	9 (High/High)	Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes.	No known changes at this time.	06/19/24	Thomas Richardson
People Processes Technology Data	If all tasks and related details are not recorded in the Project Schedule, then some tasks may slip through the cracks, and DBPR Finance & Accounting may not be ready for PALM deployment as scheduled	Closed	6 (High/Medium)	Mitigation - Ensure that all tasks are identified and added to the schedule and that the Project Schedule is routinely used as a tool to manage all activities	The Project Schedule has been approved, baselined, and posted in Microsoft Project, pdf, and Excel formats.	06/06/24	Thomas Richardson
People Processes Technology Data	If PALM does not provide efficient Data Warehouse tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete To Be Business Processes once we go live	Open	6 (High/Medium)	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps	Required data elements and their sources in PALM are being researched. Data Warehouse design details to be shared at workshops in October 2024. An approach for replace/remediate can be determined at that time. DBPR needs to understand what Data Warehouse has before an approach to replace/remediate FLAIR@BPR can be addressed.	04/23/24	Thomas Richardson
People Processes Technology Data	If the required testing is not defined and scheduled, F&A staff may not be ready and available and that could negatively impact DBPR readiness	Open	6 (High/Medium)	Discuss and understand all the PALM scheduled testing with the Readiness Coordinator and Technical Readiness Coordinator and ensure the Project Schedule reflects realistic durations and timelines.	Awaiting feedback from Technical Readiness Coordinator per his research.	06/06/24	Thomas Richardson
People Processes	If Decisions made by DBPR Leadership are not monitored and logged, then timely Decisions needed to stay on track may not be achieved	Closed	4 (Medium/Medium)	Mitigation - Ensure all pending and completed Decisions are documented, tracked/managed, and recorded. Review as needed.	All Pending Decisions are being logged and addressed as they arise. Closing Risk.	05/01/24	Thomas Richardson
People Processes Technology	If the Finance & Accounting staff's understanding of what project considers Agency Business System affects completion of	Closed	4 (Medium/Medium)	Mitigation - Review Agency Business System information to ensure all relevant systems are included in the ARS Inventory (see Task 326 504)	Discussed with PALM RC at meeting on 5/9. ARS remediation Tasks	06/26/24	Sally Huggins

Data	tasks changes, assigned project Tasks may not be completed properly, which could impact DBPR's readiness					hinge on Data Warehouse design. Workshops to be conducted in early October 2024.		
People Processes Technology Data	If Timing of Segment IV review & design workshops interferes with end of year Finance & Accounting activities, then F&A Business operations could be adversely impacted	Open	4 (Medium/Medium)	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)	Sessions are being scheduled by the OCM to identify what is not clear to them with To Be processes. When clarity is needed, we are reaching out to the Readiness Coordinators.	04/18/24	Thomas Richardson	
People Processes Technology Data	If DBPR Finance & Accounting does not have someone that understands FEMA and the steps necessary to recoup expenditures, then DBPR may not be reimbursed for expenditures incurred for large DEM projects (or will receive a possible audit)	Closed	4 (Medium/Medium)	Mitigation - Focus on accuracy and completeness on previous Tasks being readdressed, then find away to fast track current tasks.	All Redo Tasks have been reviewed by the Readiness Coordinator and have been approved.	06/06/24	Thomas Richardson	
People Processes	If a DBPR Finance & Accounting current state Process Flow is not mapped to its corresponding future state Process Flow, then the process owner will not be prepared for day 1 processing in PALM	Closed	3 (High/Low)	Mitigation - Validate all current DBPR Process Flows	All Current-State Business Processes that can be mapped to PALM To Be Business Processes have been completed. Closing Risk.	05/01/24	Gary Townsend	
People Processes	If DBPR Finance & Accounting process owner resources are not available as needed, then the process flows may not be validated/developed, and this will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Complete Stakeholder Register after identifying process owners and work with them to ensure availability	Year End Processing is getting ramped up and could impact staff's availability. F&A resources have been available as needed so far. All Segment 1-3 Current-State Business Processes have been reviewed. Staff have multiple daily responsibilities that will need to be coordinated.	04/08/24	Gary Townsend	
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners	OCM Manger is working with the Project Manager to ensure all required tasks and deadlines are entered into the Project Schedule and managed accordingly. PALM Education continues to be an area of focus.	04/08/24	Gary Townsend	
Processes	If all new To Be Business Requirements are not captured, communicated, and reviewed by the DFS technical team for feasibility, then DBPR future state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	To Be Processes will be reviewed after Current-State Business Processes are confirmed/updated (starting in late June 2024). PALM Education continues to be an area of focus.	04/08/24	Thomas Richardson	
Processes	If approved DMS Rule 60GG templates and processes are not utilized/followed, then this project will be out of compliance with State regulations and is subject to a failed audit	Closed	3 (High/Low)	Mitigation - Ensure all currently approved Rule 60GG templates and processes are used for this project	All Rule 60GG Deliverables are being created with approved templates. Closing Risk.	05/01/24	Thomas Richardson	
People Processes Technology Data	If F&A staff are not familiar with and understand PALM To Be Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR readiness	Open	3 (High/Low)	Establish and conduct PALM Education and related planning. Add Tasks to the Project Schedule and manage their completion.	Required data elements and their sources in PALM are being researched and added to PALM education. Requests have been made for F&A to see PALM as early as possible. PALM Education Planning is under way.	05/31/24	Thomas Richardson	
Processes	If we do not validate current DBPR Finance & Accounting processes as accurate and complete, then the future state (To Be) may not be accurate and efficient	Closed	2 (Medium/Low)	Mitigation - Validate all current DBPR Process Flows	Current-State Business Process Review Sessions were completed in June 2024.	06/06/24	Gary Townsend	
People Processes Technology Data	If DBPR Finance & Accounting staff cannot understand To Be Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the To Be Process Flows and that could lead to incomplete work flows	Open	2 (Medium/Low)	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)	Sessions are being scheduled by the OCM to identify what is not clear to them with To Be processes. When clarity is needed, we are reaching out to the Readiness Coordinators.	04/18/24	Thomas Richardson	

DBPR 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	If Timing of Segment IV review & design workshops interferes with end of year Finance & Accounting activities, then F&A Business operations could be adversely impacted	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Try to get out in front as much as possible before EOY activities pick up. Catch up on PALM Tasks after EOY activities complete. Note: Scheduling of Workshops determined as good timing.	Design Workshop dates have been identified. Some current PALM Tasks are being worked ahead of schedule to account slow down period during Year End processing.	09/30/24	Open

DBPR Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All Finance and Accounting Staff		
Processes	The Agency Project schedule will be used to establish and	Logged	04/01/24	Sally Huggins	Project Schedule was completed and baselined	

	monitor scope and progress of tasks supporting the implementation of Florida PALM.			Jennifer Gaines Thomas Richardson PALM	
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All Finance and Accounting Staff PALM	Resources have been available to review/define Current-State Business Processes
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than January 2026.	Logged	04/01/24	All Finance and Accounting Staff PALM	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All Finance and Accounting Staff PALM	The DBPR staff have been engaged
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All Finance and Accounting Staff PALM	Regular meetings were conducted with the Readiness Coordinators
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership.	Logged	04/01/24	All Finance and Accounting Staff Thomas Richardson PALM	Great support has been received to date
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All Finance and Accounting Staff Versa FLAIR@BPR	Some progress has been made; Data warehouse design not yet completed will impact this
People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All Finance and Accounting Staff PALM FLAIR	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All Finance and Accounting Staff PALM FLAIR	Some Finance and Accounting Business Processes have been determined not available in PALM
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	All Current-State Business Processes were reviewed/updated
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project schedule.	Logged	04/01/24	All Finance and Accounting Staff PALM	All Current-State Business Processes were reviewed/updated
People Processes Technology Data	Testing of remediating business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All Finance and Accounting Staff PALM	Detailed Testing Tasks were added to the Project Schedule
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	Detailed Testing Tasks were added to the Project Schedule
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contract Organizational Change Lead	Contract Staff have been onboarded
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All Finance and Accounting Staff OCM Lead PALM	
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	Scheduled PALM Data cleansing Tasks were completed
People Processes Technology Data	The Florida PALM Project will perform data cleansing and conversion.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	Scheduled PALM Data cleansing and conversion Tasks were completed
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	
People Processes Technology Data	Language in the To Be Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding To Be Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy.	Logged	05/01/24	DFS PALM Development Staff All Finance and Accounting Staff PALM	These Current-State Business Processes are being assigned to arbitrary Segment 5 for scheduling/priority purposes.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All Finance and Accounting staff PALM	Readiness coordinator is checking for available options
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All Finance and Accounting staff PALM	To be included in the Test Plan (Task 536)
People Processes	All PALM To Be Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All Finance and Accounting staff PALM PALM Website	Project Manager Discussed with Readiness Coordinator
People Processes	Data elements included in FLAIR standard reports will be provided by DFS PALM and DBPR will identify data elements	Logged	06/17/24	All Finance and Accounting staff	FLAIR Reports Smartsheet does not include applicable data elements

included in DBPR custom reports

DFS PALM Technical Team
 DFS PALM Training Team
 Gary Townsend
 PALM
 PALM Website

DBPR 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	Closed out Initiation Phase of DBPR PALM Readiness Project	05/01/24	Thomas Richardson	Manage all project phases	Closed project phase (milestone)
People Processes Technology Data	Worked on Rule 60GG Project Management Plan (PMP - using approved template)	05/01/24	Thomas Richardson	Complete required Rule 60GG deliverable	
People Processes Technology Data	Participated in Weekly Task Talk session	05/02/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	05/03/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	05/03/24	Finance and Accounting Supervisors/Managers Thomas Richardson	Provide a format of the Project Schedule that everyone can review	In Project Central Repository
People Processes Technology Data	Identified and documented new assumptions	05/06/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	
Processes Technology Data	Prepared for and conducted a special meeting with the Readiness Coordinators to discuss Tasks, RAID, and DBPR Project Schedule	05/09/24	Sally Huggins Jennifer Gaines Thomas Richardson	To communicate and receive required direction to effectively complete tasks and manage the project	
People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	05/09/24	Sally Huggins Jennifer Gaines Thomas Richardson	To provide a thorough and accurate account of the DBPR Readiness activities conducted throughout the reporting period	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	05/09/24	Finance and Accounting Supervisors/Managers Thomas Richardson	To keep all Finance and Accounting Supervisors and Managers in the loop on all project activities and status	
People Processes Technology Data	Participated in Weekly Task Talk session	05/09/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	05/10/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	05/10/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed revisions to Task 328 and finalized updates to Current-State Business Process Smartsheet	05/14/24	All Finance and Accounting Thomas Richardson Gary Townsend	To ensure all Current-State Business Processes are correctly identified and documented	
People Processes Technology Data	Completed Task 532 - Submit Bimonthly Agency Readiness Status Report; obtained approval from Readiness Coordinator (on schedule)	05/15/24	Sally Huggins	To complete the required PALM Task and to inform DFS and DBPR management of the state of the Project	Complete PALM Task
People Processes Technology Data	Refined a tool to facilitate navigation of the shared Project Repository	05/16/24	All Finance and Accounting Thomas Richardson	To help Finance and Accounting staff be able to navigate and find project artifacts	
People Processes Technology Data	Participated in Weekly Task Talk session	05/16/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	05/17/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	05/17/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Created a DBPR PALM Readiness Project Communications Management Plan	05/17/24	All Finance and Accounting Gary Townsend Thomas Richardson	To provide communication standards and details related to how we intend to communicate throughout the Readiness project	
People Processes Technology Data	Conducted onboarding session with Finance and Accounting Bureau Chief and introduced her to the Project Repository and DBPR PALM Readiness Project artifacts	05/20/24	Jennifer Gaines Thomas Richardson	To introduce the new Bureau Chief to the project Central Repository, folder structure, and Readiness project artifacts and work products	
People Processes Technology Data	Identified and documented new assumptions	05/20/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	05/21/24	Finance and Accounting Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	05/22/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Completed Task 526 - Complete Data Readiness Analysis and Data Cleansing Activities for Segment III; obtained approval from Readiness Coordinator (ahead of schedule)	05/23/24	Sally Huggins Thomas Richardson PALM	To ensure data cleanliness is addressed and to complete PALM Tasks timely and with accuracy	Complete PALM Task
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or	05/23/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	

Data	needing rework				
People Processes Technology Data	Completed Task 529 - Update Florida PALM Conversion Inventory for Segment III; obtained approval from Readiness Coordinator (ahead of schedule)	05/24/24	All Finance and Accounting Thomas Richardson	To ensure data conversion is addressed and to complete PALM Tasks timely and with accuracy	Complete PALM Task
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	05/24/24	Finance and Accounting Supervisors/Managers Thomas Richardson	To keep all Finance and Accounting Supervisors and Managers in the loop on all project activities and status	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	05/24/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	05/24/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Initiated discussions and planning for PALM Education of the Finance and Accounting staff; create a tracking document for all PALM education activities	05/28/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure DBPR Finance and Accounting staff are getting acclimated with PALM details	
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	05/28/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
Data	Identified PALM Revenue Codes and added Tasks to ensure design for changes to Versa (ABS) is conducted	05/28/24	All Finance and Accounting Thomas Richardson Versa	To make progress on the design for ABS remediation (Versa)	
People Processes Data	Drafted, reviewed, received approval, and posted RACI Chart	05/29/24	Sally Huggins Thomas Richardson	Complete required Rule 60GG deliverable	
People Processes Technology Data	Drafted, reviewed, received approval, and posted baselined Project Schedule	05/29/24	Sally Huggins Thomas Richardson	Complete required Rule 60GG deliverable and key Project Management tool	
People Processes Technology Data	Completed redo of Task 516 - Update Agency Business System Documentation for Segment II; obtained approval from Readiness Coordinator	05/30/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure ABS documentation is thorough and accurate and to complete PALM Tasks timely and with accuracy	Complete PALM Task
People Processes Data	Completed redo of Task 514 - Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II; obtained approval from Readiness Coordinator	05/30/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure data cleanliness is addressed and to complete PALM Tasks timely and with accuracy	Complete PALM Task
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	05/30/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Participated in Weekly Task Talk session	05/30/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	05/31/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	05/31/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	05/31/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed redo of Task 519 - Remediate Agency Business Systems based on Segment I; obtained approval from Readiness Coordinator	06/03/24	Sally Huggins Thomas Richardson FLAIR@BPR and Versa	To ensure required remediation of DBPR Agency Business Systems (AMSS) is addressed	Complete PALM Task
People Processes Technology Data	Completed redo of Task 518 - Update Florida PALM Interface Inventory for Segment II; obtained approval from Readiness Coordinator	06/03/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure required interfaces are addressed and to complete PALM Tasks timely and with accuracy	Complete PALM Task
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	06/03/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	06/04/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Data	Participated in several DBPR Working Sessions with the PALM Readiness Coordinator; collaborated as needed	06/04/24	Thomas Richardson	To ensure effective communication is achieved and to ensure the proper direction is received necessary to complete PALM Tasks	
People Processes Technology Data	Completed redo of Task 515 - Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II; obtained approval from Readiness Coordinator	06/05/24	Sally Huggins Jennifer Gaines Thomas Richardson	To document and understand the change impacts to People, Processes, Technology, and Data and to complete a required PALM Task	Complete PALM Task
People Processes Data	Completed Task 534 - Update CCN and Contacts, Risks and Issues; obtained approval from Readiness Coordinator (ahead of schedule)	06/05/24	Sally Huggins Jennifer Gaines Thomas Richardson	To keep all DBPR contact details updated and to complete the required PALM Task	Complete PALM Task
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	06/05/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Conducted a meeting with Finance and Accounting Bureau Chief to address PALM Tasks that were late or needing rework	06/06/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	06/06/24	Finance and Accounting Supervisors/Managers Thomas Richardson	To keep all Finance and Accounting Supervisors and Managers in the loop on all project activities and status	
People Processes Technology Data	Participated in Weekly Task Talk session	06/06/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	

Data					
People Processes Technology Data	Completed Task 524 - Complete and Submit End User Readiness Survey Analysis; obtained approval from Readiness Coordinator (ahead of schedule)	06/07/24	Sally Huggins Gary Townsend	To assess end user PALM readiness and to complete the required PALM Task	Complete PALM Task
People Processes Data	Completed late Task 513 - Complete Configuration Workbooks for Segments I and II; obtained approval from Readiness Coordinator	06/07/24	All Finance and Accounting Thomas Richardson	To document and understand the configuration requirements for DBPR and to complete a required PALM Task	Complete PALM Task
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	06/07/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	06/07/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Data	Revised (v2.0), reviewed, received approval, and posted RACI Chart	06/11/24	Sally Huggins Jennifer Gaines Thomas Richardson	Revise and keep current a Rule 60GG deliverable	
People Processes Technology Data	Participated in Weekly Task Talk session	06/13/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Data	Researched FLAIR Reports per completed Task 327 and identified Data Elements not populated	06/13/24	All DBPR Finance and Accounting FLAIR PALM	Identify sources of data for To Be Business Processes	
People Processes Data	Identified additional ways to enhance PALM Education for Finance and Accounting staff	06/13/24	All DBPR Finance and Accounting FLAIR PALM	Ensure PALM interfaces, reports, and sources of data are understood	
Data	Research Organization Code in FLAIR to determine if it exists or needs to be added	06/13/24	All DBPR Finance and Accounting PALM	To facilitate tree structure in GL Organization Smartsheet	New Org Code 080000000 was added to PALM only to facilitate future rollups
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	06/14/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	06/14/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
Technology Data	Identify and organize DBPR ABS documentation in Central Repository	06/14/24	Thomas Richardson	To Facilitate future ABS remediation and to have documentation in a place that can be located	
People Processes Technology Data	Start work on Task 536 - Create Agency Specific User Acceptance Testing Plan	06/17/24	Finance and Accounting Supervisors and Managers Thomas Richardson PALM	To stay on schedule for required PALM Tasks	
People Processes Technology Data	Start work on Task 535 - Update Workforce Readiness Plan	06/17/24	Finance and Accounting Supervisors/Managers Gary Townsend	To follow up on the survey results per Task 524 and incorporate them into a Readiness Work Plan and to complete the required PALM Task	
People Processes Technology Data	Completed Task 527 - Identify Change Impacts and Update Agency Business Process Documentation for Segment III; obtained approval from Readiness Coordinator (ahead of schedule)	06/17/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To document and understand the change impacts to People, Processes, Technology, and Data and to complete a required PALM Task	Complete PALM Task
People Processes Data	Researched Current-State reports and related data elements within each; also, reviewed similar To Be reports	06/18/24	All Finance & Accounting Staff FLAIR PALM	To make sure all data elements used in Current-State Business Processes are identified and to begin understanding where these data elements reside in PALM	
People Processes Technology Data	Prepared for and conducted a special meeting with the technical liaison and Readiness Coordinators to discuss Testing Tasks in the Project Schedule	06/19/24	Technical Liaison Readiness Coordinators Jennifer Gaines Thomas Richardson Gary Townsend	To ensure the Project Schedule accurately reflects all the testing and related details	
Processes Technology Data	Submitted Task 530 - Update Florida PALM Interface Inventory for Segment III	06/19/24	All Finance & Accounting Staff PALM	To identify required interfaces for Segment 3 Business Processes	Submitted early; awaiting approval
Processes Technology	Completed Task 528 - Update Agency Business System Documentation for Segment III	06/19/24	All Finance & Accounting Staff PALM FLAIR@BPR Versa	Ensure Agency Business Systems are remediated for Segment 3 Business Processes	Submitted early; awaiting approval
People Processes Technology Data	Reviewed Risks and Issues with Project Sponsor every other week	06/20/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure the DBPR leadership has an opportunity to review all RAID items on a regular basis and to provide her feedback/input	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	06/20/24	Finance and Accounting Supervisors/Managers Thomas Richardson	To keep all Finance and Accounting Supervisors and Managers in the loop on all project activities and status	
People Processes Technology Data	Identified and documented new assumptions	06/20/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	
People Processes Technology Data	Participated in Weekly Task Talk session	06/20/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Added Tasks to the Project Schedule for PALM Tasks 535 and 536 and started work on those tasks	06/20/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To prepare for UAT and to keep the Workforce Readiness Plan current.	
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	06/21/24	Finance and Accounting Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	06/21/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	06/21/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	

People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	06/25/24	Sally Huggins Jennifer Gaines Thomas Richardson	To report all DBPR PALM Readiness project activities conducted	
People Processes Technology Data	Participated in Weekly Task Talk session	06/27/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Identified and managed Risks (Risk Register), Action Items (Action Item Log), Issues (issue Log), and Decisions (Decision Log) (RAID items) every week	06/27/24	Sally Huggins Jennifer Gaines Thomas Richardson	To manage and mitigate risks and issues that could negatively impact PALM Readiness (and the project)	
People Processes Technology Data	Prepared for and conducted Daily Checkpoint meetings with Project Sponsor, Finance and Accounting Bureau Chief, Project Manager, and Organizational Change Management Lead	06/27/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To have regular interaction/communication and to get required direction to complete PALM Readiness activities	
People Processes	Research ESC monthly meeting notes and determine the various testing tasks to be included in the Project Schedule	06/27/24	All DBPR PALM Readiness Project team staff	Ensure proper tasks, durations, and dates are reflected in the Project Schedule so resource needs can be planned	
People Processes	Completed Task 537 - Update Authorized Smartsheet Users	06/27/24	All DBPR Smartsheet users	To keep Smartsheet user details current and up-to-date	
People Processes Technology Data	Completed Task 533 - Manage Agency Specific Implementation Schedule, Risks and Issues; obtained approval from Readiness Coordinator (on schedule)	06/28/24	Sally Huggins Jennifer Gaines Thomas Richardson	To manage the Project Schedule so it can be effectively managed and to mitigate risks and issues that could negatively impact PALM Readiness (and the project); also, to complete the required PALM Task	Complete PALM Task
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	06/28/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Technology Data	Managed Tasks and assignments from the Project Schedule daily; updated the working copy of the Project Schedule	06/28/24	Finance and Accounting Supervisors/Managers Thomas Richardson	To ensure all project tasks are being completed on time	
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	06/28/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology	Continued DBPR Current State Process flow validations for Accounts Payable & Voucher, Asset & Inventory Management, Budget, Cost Allocation, Data Repository, Financial Reporting and General Ledger, Treasury & Cash Management and Accounts Receivable, Payroll Integration to include Human Resources Payroll Operations.	06/28/24	All DBPR PALM Readiness Project team staff FLAIR	Validate all Current-State Process flows	
People Processes Technology	Created DBPR PALM Readiness Project Communication Management Plan and continued development of DBPR PALM Project Organizational Change Management Plan document which will include Workforce Readiness Plan, Training Management Plan, and new Role Mapping Strategy	06/28/24	All DBPR PALM Readiness Project team staff	To establish Planning documents that will provide guidance, direction, and consistency for the DBPR PALM Readiness Project	
People Processes Technology Data	Continued deep dive into Florida Palm project website to identify logical training material related to ADKAR methodology to identify logical training presentation materials both from the Florida Palm website and will reach out to CCN network to leverage training materials already developed	06/28/24	All DBPR PALM Readiness Project team staff	To prepare for training	
People Processes Technology Data	Update DBPR Current-State Business Process Smartsheet with progress updates	06/28/24	All DBPR PALM Readiness Project team staff	To keep Current-State Business Process details accurate and up-to-date	

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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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Sally Huggins	sally.huggins@myfloridalicense.com	07/11/24
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24