

Helpful Links

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

DMS Status Report Dashboard

Reporting Period

May - June 2024

Agency Sponsor

Lance Dyal

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 = 9
- Duplicate Filled Role = 7
- 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 = 90.00%**
- Submitted Complete = 9
 - Submitted Incomplete = 0
 - Completed After Submission = 2

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 = 98.89%**
- Submitted On Time = 33
 - Submitted Late = 2
 - 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
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	05/13/24	All Duplicates have been identified and marked as No for Configuration Value.	Submission Complete	05/23/24
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		API031 is part of the IRIS Segment I interface. Within that interface, multiple transactions are being added in ongoing meetings with the PALM team. Remediation remains at 25% to date and there is no anticipation of that percentage increasing on or before the June 28 deadline for Task 519. Remediation is marked complete for SATS, Daily Cash and Budget Report, and MIP.		
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/14/24	Files containing survey questions, results, and the Executive Summary Presentation Dashboard are all attached to this row. Leadership approved submission to PALM. The majority of DMS End Users are aware and ready for PALM. Internal Communications are effective. Overall survey results were positive. Gaps are being addressed.	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	07/10/24			
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	07/10/24		Submission Incomplete	
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		July 11: API006, API031, and API007 are all part of IRIS Segment II interfaces. Within these interfaces, transactions are being worked on and adjusted with the PALM team. Remediation remains at 25% and there is no anticipation of that percentage increasing before the task deadline. Documentation will be completed alongside the remediation of IRIS. FRS has reached out to their Readiness Coordinator to see if it would be more appropriate to move IRIS to the FRS Implementation Interfaces & Documentation worksheet since this is more concerning the enterprise side of FRS than the agency side. FRS has not received word if that is allowable at this time. SATS, Daily Cash and Budget Report, and MIP are marked complete.		
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/10/24			
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		July 11: API006, API031, and API007 are all part of IRIS Segment II interfaces. Within these interfaces, transactions are being worked on and adjusted with the PALM team. Remediation remains at 25% and there is no anticipation of that percentage increasing before the task deadline. Documentation will be completed alongside the remediation of IRIS. FRS has reached out to their Readiness Coordinator to see if it would be more appropriate to move IRIS to the FRS Implementation Interfaces & Documentation worksheet since this is		

								more concerning the enterprise side of FRS than the agency side. FRS has not received word if that is allowable at this time.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress		SATS, Daily Cash and Budget Report, and MIP are marked complete.		
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/13/24	Katie Parrish, Agency Sponsor, reviewed and approved submission of the dashboard on her behalf by Evelyn Harrison, Agency Liaison.	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	Risks, Issues, and Assumptions SmartSheets reviewed and updated with the CCN and Enterprise Partners. Enterprise Partners are using their own SmartSheets for this reporting task.		
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/14/24		Submission Complete	06/14/24
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	07/10/24	This task is addressed monthly by the CCN and Enterprise Partners to match staff changes.	Submission Complete	07/10/24
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/12/24	Report Dashboard review meeting held with leadership July 10. Enterprise Partner Report Dashboard briefs and approvals complete.	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	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 84</p> <ul style="list-style-type: none"> Business Process Groupings = 11/13 <p>Identified Subject Matter Experts = 54</p> <p>SMEs by Business Process Grouping</p> <ul style="list-style-type: none"> Account Mgmt. and Financial Reporting = 18 Accounts Receivable = 21 Asset Accounting and Mgmt. = 8 Banking = 10 Budget Mgmt. and Cash Control = 17 Contracts Mgmt. = 10 Disbursements Mgmt. = 24 Grants Mgmt. = 7 Inter/IntraUnit Transactions = 18 Payroll Mgmt. = 18 Projects Mgmt. = 10 Revenue Accounting = 22 System Access and Controls = 18 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Current-State:</p> <p>Cataloged Business Processes = 60</p> <ul style="list-style-type: none"> Related Business Systems = 9 Related Reports = 33 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 60 Partial = 0 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 60</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10 Planned Spreadsheet Uploads = 4 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 19 Low = 32 None = 8 Uncertain = 1 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 2 Medium = 20 Low = 30 None = 8 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 3 Medium = 15 Low = 31 None = 11 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 4 Medium = 17 Low = 30 None = 8 Uncertain = 1 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 2 Complete = 57 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Current-State:</p> <p>Cataloged Business Systems = 12</p> <ul style="list-style-type: none"> Criticality: High = 5 Med = 2 Low = 0 None = 5 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 11 Partial = 0 Not Started = 1 <p>Cataloged Interfaces = 55</p> <ul style="list-style-type: none"> Inbound Interfaces = 40 Outbound Interfaces = 15 <p>Implementation:</p> <p>Business Systems Planned for Integration = 4</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 4 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment II - Documentation Updates: Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 3 <p>Planned Interfaces = 10</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 5 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Current-State:</p> <p>Unique FLAIR Data Elements = 143</p> <ul style="list-style-type: none"> Associated Unique Uses = 1303 Continued Use - Yes = 205 Continued Use - No = 43 <p>Associated Business Systems = 5</p> <p>Cataloged Reports = 108</p> <ul style="list-style-type: none"> Criticality: High = 91 Med = 18 Low = 3 None = 0 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 6/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = 4 Asset Management (AM) Planned Location Codes = 99 Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 1 - Track with Budget General Ledger (GL) Planned Budgetary Value Combo Edits = 865 Planned Local Funds = None Planned Organization ID's = 442 Planned OA1's = 470 Planned OA2's = None <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 3 Agency Data Outside of Primary Source System(s) = 1 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 2 In Progress = 0 Not Started = 0 Not Applicable 1 <p>Reports = TBD</p>

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.

DMS Risks								
Sheet Name	Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
DMS Risks	People Processes Technology Data	The requirement of Speedkeys for transactions can pose a problem for several of our enterprise systems. If the speedkeys are still hardcoded and unable to be changed once entered there is an additional risk of user error both on the entry of the speedkey and the selection.	Open	6 (Medium/High)	This topic was recently brought up in our monthly PALM Touchpoint with the DMS RC. DMS is seeking additional information on requirements.	Logged April 25, 2024	04/25/24	Finance and Administration / Eric Thiele
DMS Risks	People Processes Technology Data	Functionality. Will PALM deliver the functionality needed for DMS operations?	Open	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees. PALM is addressing this risk. June 20: PALM is requiring that agencies create and implement their own testing plans. That initiative is in planning.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Reviewed again Dec 20 - no change. Reviewed again April 24, 2024. Re-opened. Continuing to monitor. Reviewed again June 20, 2024. Edits made. Continuing to monitor.	02/22/24	Finance and Administration / Jennifer Gaines
DMS Risks	People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Continuing to monitor. Reviewed again Dec 20 - no change. Continuing to monitor. Reviewed again Feb 22 - no change. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/02/23	Finance and Administration / Sandy Watson
MFMP Risks	People Processes Technology Data	On March 1, 2024, the Department of Financial Services (DFS), Division of Accounting and Auditing (A&A) team met with the MFMP program to discuss its vendor management initiative. This initiative includes analyzing existing vendor management business processes, determining improvements, and developing a data clean-up plan. DFS A&A also proposed a new vendor portal solution that will impact the vendor registration and master vendor data exchange between MFMP and Florida PALM. We understand that DFS A&A plans to issue a competitive solicitation in July 2024 for the new portal, and the project could start before Florida PALM's January 2026 go-live date. MFMP and Florida PALM are discussing integration and interface requirements, including the master data vendor exchange. Per Florida PALM's schedule, Enterprise Business Systems will begin building in April 2024. Launching a design, test, and implementation effort for a new DFS vendor portal parallel with MFMP's Florida PALM implementation activities and during the current build schedule presents significant risk the MFMP to Florida PALM integration and interface implementation.	Open	6 (High/Medium)	MFMP and Florida PALM continue to design the master vendor data exchange based on MFMP and Florida PALM's existing requirements. MFMP will continue to work with DFS A&A on planning activities for the new vendor portal; however, based on the current lack of formal requirements, a defined implementation plan, timeline, etc., MFMP cannot begin building to support the new vendor portal at this time.		04/30/24	MFMP/PALM/DFS
FRS Risks	People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Reports are available. Plan for report identification and testing.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change. Reviewed again on June 18, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
DMS Risks	People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Medium)	Roll out sandbox test capabilities as sections are completed for Agencies to test. Sandbox environment is not secure for testing - PALM needs to work on true test environment. Sandbox status has not changed. PALM is addressing this risk.	Logged April 21, 2023. Reviewed again September 6, 2023. Reviewed again Nov 3, 2023. Mitigation notes updated. Reviewed again Dec 15, 2023. No change. Continuing to monitor. Reviewed again Feb 2 2024. No change. Continuing to monitor. Reviewed again April 24, 2024. No change. Continuing to monitor. Reviewed again June 20, 2024. No change. Continuing to monitor.	11/03/23	Division of State Group Insurance / Jason Ottinger
PF Risks	People Processes Technology	With development happening in multiple systems held by multiple organizations, schedule variance in different areas can have	Open	4 (Medium/Medium)	People First is on schedule and anticipates continuing to be in lock step with the project timeline well before the next stage date	Logged June 28, 2024	06/28/24	Michael Livingston / Tony Lloyd

		unforeseen impacts on People First development. If developments become too out of sync, it could cause issues with productivity and the ability to pass stage gates successfully.			Team has hired a project manager with primary focus on ensuring People First maintains PALM readiness. Additionally, People First will be adding significant staff augmentation to assist us.			
FRS Risks	People Processes Technology Data	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Open	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format. Continuing to monitor Class Code implications.	Logged Nov 6, 2023 Reviewed again Dec 20, 2023 and updated mitigation. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. Class Code System changes could create high impact for Retirement Interface Files. Reviewed again on June 18, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Any significant change to existing Retiree payroll, EFT processing, BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time.	Open	4 (Medium/Medium)	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Working with PALM to get more information to better define the programming needs.	Originally entered 02/17/2022. Reviewed again on June 18, 2024. No change.	02/17/22	Division of Retirement / Megan Biederman
STMS Risks	People Processes	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to departmental and enterprise systems affected by PALM implementation, at the same time. The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users.	Open	4 (Medium/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20, 2023. No change. Continuing to monitor. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again June 12, 2024. No change.	11/06/23	STMS / Casey Taylor
FRS Risks	People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.	Open	3 (High/Low)	Programming needs to be completed to allow for flexibility so funds can be released timely. Need more details on how this will work in PALM.	Logged Nov 6, 2023 Reviewed again on Dec 20, 2023. No change. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change. Reviewed again on June 18, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. In the process of working through the design with PALM. No work around except using the existing payroll system.	Originally entered 02/17/2022. Reviewed again on June 18, 2024. No change.	02/17/22	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately. This risk includes the timely and accurate posting of revenues in PALM. (These transactions record the receipt of retirement contributions of approximately \$6 billion per year.)	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. The risk would be on IRIS - would be able to take information from the Department of Revenue website and manually enter, reconcile, and adjust in IRIS.	Originally entered 02/17/2022. Reviewed again on June 18, 2024. No change.	02/17/22	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Retiree payroll warrants and EFTs (approximately \$12 billion per year for 472,000+ payees) not being processed timely and/or accurately.	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing - especially formal parallel testing to ensure everything is running properly for several cycles.	Originally entered 09/22/2023. Reviewed again on June 18, 2024. No change.	09/22/23	Division of Retirement / Megan Biederman
MFMP Risks	People	Over time, the Florida PALM project team has encountered staff turnover. This can present risk associated with knowledge transfer, or lack thereof, between the existing resource and their successor. New project staff must be informed and prepared to continue open integration and interface design decisions. Delayed or incomplete knowledge transfers for the successor may delay design decisions, thus risking the implementation of the MFMP to Florida PALM integration according to the existing timeline.	Open	2 (Medium/Low)	MFMP will work with Florida PALM to assist in expediting any knowledge transfer incoming successors require to mitigate delays in design decisions		05/01/24	PALM/MFMP
PF Risks	Processes Data	The need for parallel testing will increase the complexity of operations. Data will need to be maintained in a new environment and the legacy environment and could lead to inconsistencies.	Open	2 (Medium/Low)	Parallel testing meetings Scheduled for August 2024 to ensure that the needs of PALM project team align with the current processes implemented by People First team and vendor. In addition, People First team has brought in a full-time project manager so that the team can maintain PALM readiness and continue day to day operations without sacrificing either.	Logged June 28, 2024	06/28/24	Michael Livingston / Tony Lloyd
STMS Risks	People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API. Meetings with PALM have been initiated. Still early in the process. Close to resolution; will review next cycle.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change.	11/06/23	STMS / Casey Taylor

						Reviewed again July 12, 2024. Likely resolution next cycle.		
STMS Risks	Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again July 12, 2024. No change.	11/06/23	STMS / Casey Taylor
STMS Risks	Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Open	2 (Medium/Low)	Provide information about the Speed Key interface, as well as training about how agencies will be using it in PALM. Provide training about how Speed Keys will be used by travelers to communicate billing information to Fiscal Accountants. Meetings with PALM have been initiated. Still early in the process. CCN and Enterprise Partners are currently collaborating. Close to resolution; will review next cycle.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 19, 2023 and closed. Reviewed again and reopened April 24, 2024. Reviewed again July 12, 2024. Likely resolution next cycle.	12/19/23	STMS / Casey Taylor

DMS Issues

Sheet Name	Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
DMS Issues	Processes	MIP interfaces selected may not be 100% remediated without testing.	Open	Low - All impacts not listed as Critical or High	Could be manually resolved with more manpower, but would want to make changes to interface selection and possibly the interfaces themselves to account for missing / unknown elements.	If we mark "Remediation Complete" on the PALM Smartsheet, does that preclude us from making changes once testing starts?	01/15/25	OIT / Production Support / John Ross
DMS Issues	People Processes	The majority of the DMS End Users are new to DMS. An even larger percentage have held their current jobs at DMS for less than 5 years.	Open	Low - All impacts not listed as Critical or High	Consistent monitoring, training and follow up. Regular communication, meetings, and increased involvement in the project Readiness Workplan Tasks.	This issue was logged as low priority because half of the DMS End Users have worked for the state for over 15 years. The remainder have been in the state system for between 6 and 15 years. DMS End Users as a whole are familiar with and have worked in PALM, counteracting their short time with DMS and / or in their current position. These numbers represent minimal risk to the project.	01/30/26	Lance Dyal / Eric Thiele
FRS Issues	People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct. Reviewed again on Feb 9, 2024. No change. Reviewed again on April 19, 2024. No change. Reviewed again on June 18, 2024. No change.	12/01/25	Florida Retirement System / Megan Biederman
FRS Issues	People Processes Technology Data	EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop payments, etc., not being automated or not being processed timely and/or accurately.	Open	Low - All impacts not listed as Critical or High	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to use the FLAIR system if PALM was not working.	Reviewed 2022 entry. Re-entered April 19, 2024. Outstanding currently. Confident that PALM will address and work with FRS to resolve. Reviewed again on June 18, 2024. No change.	12/01/25	Florida Retirement System / Megan Biederman

DMS Assumptions

Sheet Name	Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
DMS Assumption	People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division. Reviewed again on Dec 27. No change. Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox.

						Reviewed again April 24, 2024. No change. Intend to address this general assumption in more detail with the End User Survey Analysis.
PF Assumptions	Processes Technology	Funding will continue as needed to maintain People First operationally as well as for changes necessary to implement the PALM project.	Logged	06/28/24	People First, PALM	No indication that this will become an issue.
PF Assumptions	People Processes Technology Data	The additional monies allocated to our vendor to fulfill necessary changes to People First to integrate with PALM will be sufficient for the project.	Logged	06/28/24	People First, PALM	No indication that this will become an issue.

DMS Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period	Comments or Updates
Technology Data	PALM Smartsheet Review of Interfaces, etc.	05/01/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	Focus: Segment I and II	
People Processes Technology Data	PALM Work Group Sessions	05/02/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.	This Week's Focus: Task 513 – Configuration Workbooks status review. Task 524 – End User Readiness Survey
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	05/03/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.		
People Processes Technology Data	PALM Bi-Monthly Report	05/07/24	Agency Sponsor, Agency Liaisons, Project Management Liaisons	Purpose: Review and approve PALM Bi-Monthly Report for March – April 2024. Review and approve proposed Enterprise Partner Bi-Monthly Report Dashboards.	PALM Bi-Monthly Reporting Dashboard review. Agency Sponsor briefing.	
Technology Data	PALM Smartsheet Review of Interfaces, etc.	05/07/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	Focus: Segment I and II	
People Processes Technology Data	Weekly People First / Aight PALM Status Meeting	05/07/24	Agency Liaisons, Business Liaisons, PM Liaisons	Weekly Meeting with DMS and Aight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log.	Recurring. On schedule. Meeting was useful.	
People Processes Technology Data	PALM Work Group Sessions	05/08/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.	
Processes Data	PF / Aight Functional Design Document Walkthrough	05/08/24	SMEs, PM Liaisons	Walkthrough of functional design document related to requirements for FL PALM Speedkey Interface.	One-time. Focus on FDDs. Useful.	
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	05/14/24	Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.		
Technology Data	PALM Smartsheet Review of Interfaces, etc.	05/14/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.		
People Processes Technology Data	Weekly People First / Aight PALM Status Meeting	05/14/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Aight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.	
Processes Technology Data	PF / Aight Functional Design Document Walkthrough	05/15/24	Business Liaisons, SMEs, PM Liaisons	Walkthrough of functional design document related to requirements for FL PALM personal data and privacy indicator conversion.	One time. Personal data and privacy indicator conversion. Meeting was useful.	
People Processes Technology Data	PALM Work Group Sessions	05/16/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Weekly status and work group meeting.	
Technology Data	PALM End User Survey	05/16/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Purpose: Discuss technical applications for Smartsheet vs Survey Monkey.		
People Processes Technology Data	Review DMS PALM Survey	05/16/24	Agency Liaisons, Project Management Liaisons	Purpose: Review and edit DMS PALM Survey questions and recipients list. Discuss analysis approach.		
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	05/17/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.		
People Processes Technology Data	PALM Status Update	05/21/24	Agency Liaisons, Project Management Liaisons	Purpose: Brief new management staff on PALM project progress and their role in it.		
Technology Data	PALM Smartsheet Review of Interfaces, etc.	05/21/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	Focus: new releases in the PALM Knowledge Center.	
People Processes Technology Data	Weekly People First / Aight PALM Status Meeting	05/21/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Aight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.	
People Processes Technology Data	PALM Work Group Sessions	05/23/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Focus: role responsibilities, CCN updates, new sponsor brief, etc.	

People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	05/24/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
Processes Technology Data	PF / Alight Functional Design Document Walkthrough	05/24/24	Business Liaisons, SMEs, PM Liaisons	Walkthrough of functional design document related to requirements for FL PALM employee retirement code conversion.	One-time. Retirement code conversion. Successful.
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	05/28/24	Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	
People Processes Technology Data	PALM Work Group Sessions	05/30/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	05/31/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
People Processes Technology Data	Retirement: PALM Check In	05/31/24	Project Management Liaisons and Business Liaisons	Meeting to brief on all PALM task between Evelyn and Megan.	
Technology Data	PALM Smartsheet Review of Interfaces, etc.	06/04/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	
People Processes Technology Data	Weekly People First / Alight PALM Status Meeting	06/04/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Alight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.
People Processes Technology Data	PALM Work Group Sessions	06/06/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Focus: End User Survey results
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	06/07/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
Technology Data	MFMP / FDOT/Florida PALM EPA: Encumbrance and Payment Processes - FDOT requested that MFMP join a discussion related to how they encumber funds and subsequently issue MFMP POs and payments.	06/07/24	Other	To discuss how FDOT encumbers funds and subsequently issue MFMP POs and payments. Through discussion, it was determined that functionally, this process will remain as it is today.	One time activity - focused on FDOT encumbering - meeting complete and successful.
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	06/11/24	Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	
People Processes Technology Data	Weekly People First / Alight PALM Status Meeting	06/11/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Alight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.
People Processes Technology Data	DMS PALM End User Readiness Survey Review	06/12/24	Agency Sponsor, Agency Liaisons, Project Management Liaisons	Purpose: Review the DMS PALM End user Readiness Survey results and confirm prior to submission to PALM. A dashboard has been created to display the results summary. This will be used in the meeting.	
People Processes Technology Data	Retirement: PALM Update	06/13/24	Project Management Liaisons, SMEs, Other	Meeting to introduce PALM tasks to Amber and some basics regarding the division and PALM.	
People Processes Technology Data	PALM Work Group Sessions	06/13/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	06/14/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	
People Processes Technology Data	PALM: Identifying and Reviewing Risks	06/18/24	Project Management Liaisons, SMEs, F&A, OIT/Production Support/Technical, Other	To identify risk associated with PALM in regards to the Division of Retirement.	
Technology Data	PALM Smartsheet Review of Interfaces, etc.	06/18/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	Focus: June 28 tasks
People Processes Technology Data	Weekly People First / Alight PALM Status Meeting	06/18/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Alight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.
People Processes Technology Data	PALM Work Group Sessions	06/20/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Focus: June 28 tasks and July Segment IV Workshops
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	06/21/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	

			Support Personnel		
People Processes Technology Data	Retirement/KPMG Bi-weekly status meeting	06/25/24	Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	
Technology Data	PALM Smartsheet Review of Interfaces, etc.	06/25/24	Agency Liaisons, Project Management Liaisons, OIT/Production Support/Technical	Weekly Technical Review Meetings in progress with OIT to review interfaces and address current tasks.	Focus: UAT Plan
People Processes Technology Data	PALM Reporting Dashboard Review	06/25/24	Agency Liaisons, Project Management Liaisons, PF Enterprise Partners	Purpose: Review PALM Bi-Monthly Reporting Dashboard and PF PALM Workbook space in Smartsheet.	Focus: Brief new PF PM on Smartsheet, PALM Reporting Workbook and Dashboard.
People Processes Data	PF PALM Dashboard Review	06/25/24	PM Liaisons	Transfer knowledge about the PALM Smart Sheets to new People First project manager to report enterprise partner readiness more effectively.	One time. Meeting was useful.
People Processes Technology Data	Weekly People First / Alight PALM Status Meeting	06/25/24	Business Liaisons, SMEs, PM Liaisons	Weekly Meeting with DMS and Alight (vendor) to discuss Project Status, FDDs (Functional Design Documents), Open questions and Discussion topics for Thursday/FLP weekly meeting, Review of Tech Log	Recurring. On schedule. Meeting was useful.
People Processes	PALM: People First / Alight Project Manager 1:1	06/25/24	PM Liaisons	Background information transferred on status of project from vendor point of view to new People First PMO.	One time. Meeting was useful.
People Processes Technology Data	Internal DMS Monthly PALM Connect	06/27/24	Agency Liaisons, Project Management Liaisons, Enterprise Partners, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Purpose: Agency Sponsor Briefing with Agency Liaisons, CCN, and Enterprise Partners. Brief updates from all DMS PALM project contributors.	Focus: UAT Plan, Long-term project schedule, Executive Steering Committee meeting notes, Advisory Council presentation, Seg IV workshops, tasks due in July and August, staff changes, and training initiatives.
People Processes Technology Data	Retirement: Stretch, Sway, and Stand Up with PALM	06/28/24	Agency Liaisons, Project Management Liaisons, Change Management Liaisons, SMEs, CCN, OIT/Production Support/Technical	Weekly Stand Up Meeting to catch up on all PALM Activities for the week, address any questions or concerns.	

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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DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Lance Dyal	lance.dyal@dms.fl.gov	07/12/24
March - April 2024	Katie Parrish	eric.thiele@dms.fl.gov	05/14/24
March - April 2024	Katie Parrish	evelyn.harrison@dms.fl.gov	05/13/24
January - February 2024	Katie Parrish	katie.parrish@dms.fl.gov	03/06/24

FRS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Kathy Gould	floridapalm@myfloridacfo.com	07/02/24

MFMP Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Tyler Brown	tyler.brown@dms.fl.gov	07/01/24

PF Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Tony Lloyd	tony.lloyd@dms.fl.gov	07/08/24

STMS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Gerard Steele	gerard.steele@dms.fl.gov	07/12/24