

### Helpful Links

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- Knowledge Center
- Florida PALM Workbook for DOAH
- Readiness Workplan

# DOAH Status Report Dashboard

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

### Reporting Period

May - June 2024

### Agency Sponsor

Megan Silver

### CCN Composition



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

#### Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 10
- 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 = 91.88%**
- Submitted Complete = 13
- Submitted Incomplete = 0
- Completed After Submission = 3

### RW Task Timeliness



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

#### RW Task Timeliness:

- Score = 96.51%**
- 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              | 04/29/24               |  | Submission Complete                | 05/09/24                         |
| N/A            | Processes                    | 515     | Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II | 01/29/24                | 04/12/24              | 50% - In Progress             |                        | DOAH team had to pause working on completing task due to the tornado striking on May 10 and year-end activities. Will complete this task in conjunction with Task 527. |                                    |                                  |
| N/A            | Technology                   | 519     | Remediate Agency Business Systems based on Segment I   | 01/29/24                | 06/28/24              | 100% - Submitted              | 02/14/24               |  | Submission Complete                |                                  |
| N/A            | People                       | 524     | Complete and Submit End User Readiness Survey Analysis   | 04/15/24                | 06/14/24              | 100% - Submitted              | 06/11/24               |  | 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              | 07/02/24               |  | Submission Complete                |                                  |
| N/A            | Processes                    | 527     | Identify Change Impacts and Update Agency Business Process Documentation for Segment III       | 04/15/24                | 07/12/24              |                               |                        |  |                                    |                                  |
| N/A            | Technology                   | 528     | Update Agency Business System Documentation for Segment III                                    | 04/15/24                | 07/12/24              | 100% - Submitted              | 07/11/24               |  |                                    |                                  |
| Indirect       | Technology                   | 529     | Update Florida PALM Conversion Inventory for Segment III                                       | 04/29/24                | 07/12/24              | 100% - Submitted              | 07/02/24               |  | Submission Complete                | 07/02/24                         |
| Indirect       | Technology                   | 530     | Update Florida PALM Interface Inventory for Segment III  | 04/15/24                | 07/12/24              | 100% - Submitted              | 07/11/24               |  |                                    |                                  |
| N/A            | Technology                   | 531     | Remediate Agency Business Systems based on Segment II  | 04/29/24                | 09/27/24              | 100% - Submitted              | 07/02/24               |  | Submission Complete                |                                  |
| N/A            | N/A                          | 532     | Submit Bimonthly Agency Readiness Status Report  | 05/01/24                | 05/13/24              | 100% - Submitted              | 05/08/24               |  | Submission Complete                |                                  |
| N/A            | N/A                          | 533     | Manage Agency Specific Implementation Schedule, Risks and Issues                               | 05/01/24                | 06/28/24              | 100% - Submitted              | 06/27/24               |  |                                    |                                  |
| N/A            | People                       | 534     | Update CCN and Project Contacts  | 06/03/24                | 06/14/24              | 100% - Submitted              | 06/11/24               |  | Submission Complete                |                                  |
| N/A            | People                       | 535     | Update Workforce Readiness Plan  | 06/17/24                | 08/02/24              |                               |                        |  |                                    |                                  |
| Indirect       | People                       | 536-A   | Create Agency Specific User Acceptance Testing Plan  | 06/17/24                | 08/16/24              |                               |                        |  |                                    |                                  |
| N/A            | People                       | 537     | Update Authorized Smartsheet Users   | 06/24/24                | 07/12/24              | 100% - Submitted              | 06/27/24               |  | Submission Complete                |                                  |
| N/A            | N/A                          | 538     | Submit Bimonthly Agency Readiness Status Report  | 07/01/24                | 07/12/24              | 100% - Submitted              | 07/08/24               |  | Submission Complete                |                                  |
| N/A            | N/A                          | 539     | Manage Agency Specific Implementation Schedule, Risks and Issues                               | 07/01/24                | 08/29/24              |                               |                        |  |                                    |                                  |
| N/A            | People                       | 540     | Share Florida PALM Updates   | 07/15/24                | 07/26/24              |                               |                        |  |                                    |                                  |

### People

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

#### Implementation:

**Planned Florida PALM End Users = 11**

- Business Process Groupings = 11/13

**Identified Subject Matter Experts = 10**

- **SMEs by Business Process Grouping**
- Account Mgmt. and Financial Reporting = 3
- Accounts Receivable = 3

### Processes

The sequence of procedures to accomplish a business objective.

#### Current-State:

**Cataloged Business Processes = 26**

- Related Business Systems = 0
- Related Reports = 19
- **Documentation Status:**
- Complete = 26 Partial = 0 Not Started = 0

### Technology

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

#### Current-State:

**Cataloged Business Systems = 3**

- **Criticality:**
- High = 3 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 0 Partial = 0 Not Started = 2
- Cataloged Interfaces = 0**

### Data

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

#### Current-State:

**Unique FLAIR Data Elements = 73**

- **Associated Unique Uses = 143**
- Continued Use - Yes = 49
- Continued Use - No = 39
- **Associated Business Systems = 0**
- Cataloged Reports = 52**

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

**Role Mapping = TBD**

**Training = TBD**

**Implementation:**

**Impacted Agency Business Processes = 26**

- Related Business Process Groupings = 6
- Planned Spreadsheet Uploads = 0
- **Level of Impact: People Changes**
- High = 1 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Processes Changes**
- High = 1 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Technology Changes**
- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Level of Impact: Data Changes**
- High = 0 Medium = 0 Low = 0 None = 0 Uncertain = 0
- **Segments I & II Documentation Update Status**
- Not Started = 0 In Progress = 0 Complete = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

**Implementation:**

**Business Systems Planned for Integration = 0**

- **Segment I - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0
- **Segment II - Documentation Updates:**
- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

**Planned Interfaces = 0**

- Inbound Interfaces = 0
- Outbound Interfaces = 0

**Criticality:**

- High = 11 Med = 25 Low = 17 None = 0

**Implementation:**

**Segments I & II Planned Configurations = 6/9**

- **Accounts Receivable (AR)**
- Planned Distribution Codes = 1
- **Asset Management (AM)**
- Planned Location Codes = 15
- Planned Associated Area ID's = 60
- **Commitment Control (KK)**
- Planned Option = Option # 1 - Track with Budget
- **General Ledger (GL)**
- Planned Budgetary Value Combo Edits = 59
- Planned Local Funds = None
- Planned Organization ID's = 18
- Planned OA1's = None
- 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.

**DOAH Risks**

| Critical Operational Elements | Risk Description   | Status | Risk Rating     | Mitigation/Response Strategy   | Reporting Period Comments or Updates  | Date of Status Change | Owner / Coordinator |
|-------------------------------|--|--------|-----------------|--|---|-----------------------|---------------------|
| People                        | Due to the staff's previous experience with system implementation, the staff's level of engagement regarding transitioning to new financial system may be low or non-existent. | Open   | 6 (High/Medium) | Agency Liaison will integrate PALM awareness through emails, meeting discussions and providing updates regarding PALM during management staff meetings. Agency Liaison will provide staff with PALM resources to become familiar with the system.  | Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff are assisting with completing PALM tasks. DOAH future end users have been introduced to the FL PALM Knowledge Center. CNN Members and SMEs will participate in the Segment IV meetings.   | 07/05/23              | Patricia Kenyon     |
| People                        | Due to the limited number of positions, staff may not be fully trained / confident to perform their accounting functions in PALM on Go Live Date.                              | Open   | 3 (High/Low)    | DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided. SMEs have participated in Segment III meetings and will continue to participate in Segment IV meetings. | Agency Liaison has integrated PALM awareness discussion during staff meetings. Accounting staff members are actively participating in completing PALM tasks. Accounting staff have been shown the PALM Knowledge Center and will review the information regarding their business processes. CCN and SMEs are participating in the Segment meetings to gain understanding of the impact changes. | 07/05/23              | Patricia Kenyon     |

**DOAH Issues**

| Critical Operational Elements | Issue Description  | Status | Priority   | Resolution Plan   | Reporting Period Comments or Updates   | Planned or Actual Resolution Date | Owner / Coordinator |
|-------------------------------|--|--------|--|---|--|-----------------------------------|---------------------|
| People                        | Accountant II position has become vacant which has created additional workload for our team. | Closed | Low - All impacts not listed as Critical or High | Fill the vacant position. All team members are assisting in completing the daily functions. | The 2nd candidate accepted the Accountant II position and their state date with DOAH was May 13th. | 05/31/24                          | Patricia Kenyon     |

**DOAH Assumptions**

| Critical Operational Elements    | Assumption   | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments or Updates  |
|----------------------------------|--|--------|------------------------|--|---|
| People Processes Technology Data | Staff will be able to function in PALM on Go Live Date | Logged | 09/08/23               | Budget, HR and Accounting staff          | Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. Accounting Staff participated in a overview discussion regarding PALM as we have a new accountant join the team. |

### DOAH Agency-Specific Readiness Activities

| Critical Operational Elements | Activity Description | Date(s) | Impacted Stakeholder(s) and/or System(s) | Objective | Reporting Period Comments or Updates |
|-------------------------------|----------------------|---------|--|-----------|--------------------------------------|
|                               |                      |         |  |           |                                      |

### Agency Sponsor Confirmation

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

Agency Sponsor Name: \*

Confirm \*

Submit

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### DOAH Status Report Confirmation

| Reporting Period        | Agency Sponsor Name: | Confirmed By:                 | Confirmation Date: |
|-------------------------|----------------------|-------------------------------|--------------------|
| May - June 2024         | Megan S. Silver      | megan.silver@doah.state.fl.us | 07/08/24           |
| March - April 2024      | Megan S. Silver      | megan.silver@doah.state.fl.us | 05/08/24           |
| January - February 2024 | Megan S. Silver      | megan.silver@doah.state.fl.us | 03/11/24           |