

Helpful Links

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

DOEA Status Report Dashboard

Reporting Period

May - June 2024

Agency Sponsor

Randy Pupo

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 = 5
- Duplicate Filled Role = 11
- 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 = 62.09%**
- Submitted On Time = 11
- Submitted Late = 15
- Pending Submission = 10

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Still working to document processes across division. RFQ in process to hire temporary staff to assist in compiling procedures and cross walking to PALM.		
	N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks		
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23			Implementation schedule baseline still being constructed. PM processes in the works.		
	N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks		
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23			Temporary staff to be hired FY 24/25 to manage PM related tasks		
	N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23			Implementation schedule baseline still being constructed. Temporary staff to be hired FY 24/25 to manage PM related tasks.		
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24			Implementation schedule baseline still being constructed. Temporary staff to be hired FY 24/25 to manage PM related tasks.		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/13/24	100% - Submitted	06/05/24	All configuration workbooks have been completed.	Submission Complete	
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		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Temporary staff began with agency to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	04/12/24	Business system related, no anticipated remediation.	Submission Complete	
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24			Implementation schedule baseline still being constructed.		
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/11/24	Enough responses received to begin analysis	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	07/11/24	Spoke with sections within finance to understand maintenance of accurate data. Document created for overall data clean up management shared and will update as necessary.	Submission Complete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Working on updating and identifying the business processes and how they tie to specific reports. Evaluating previous entries and their necessity. Temporary staff began with agency to compile and organize procedures in order to crosswalk to PALM processes.		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	04/29/24	No business systems interacting with FLAIR.	Submission Complete	
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/11/24	Verified needs with department heads.	Submission Complete	
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	04/29/24	No interface needs.	Submission Complete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	100% - Submitted	05/24/24	Business system related, no anticipated remediation.	Submission Complete	
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/14/24	Due to storm related delays task was submitted late.	Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24			Implementation schedule baseline still being constructed.		
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/11/24	Some positions will be filled when staff	Submission	

N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering	aug team is officially hired in FY24/25	Complete	
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	Project manager task when they begin. Likely will not be ready by 8/2.		
N/A	People	537	Update Authorized Smartsheet Users	06/24/24	07/12/24	100% - Submitted	07/11/24	Will be adding two more users once an email is established with agency. Two new employees.	Submission Complete
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/10/24	Submitted by Randy Pupo.	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			
N/A	People	540	Share Florida PALM Updates	07/15/24	07/26/24				

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 = 27</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 11</p> <ul style="list-style-type: none"> SMEs by Business Process Grouping Account Mgmt. and Financial Reporting = 1 Accounts Receivable = 1 Asset Accounting and Mgmt. = 1 Banking = 1 Budget Mgmt. and Cash Control = 1 Contracts Mgmt. = 1 Disbursements Mgmt. = 2 Grants Mgmt. = 2 Inter/IntraUnit Transactions = 1 Payroll Mgmt. = 4 Projects Mgmt. = 0 Revenue Accounting = 2 System Access and Controls = 3 <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 = 16</p> <ul style="list-style-type: none"> Related Business Systems = 5 Related Reports = 4 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 0 Partial = 0 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 16</p> <ul style="list-style-type: none"> Related Business Process Groupings = 0 Planned Spreadsheet Uploads = 0 <ul style="list-style-type: none"> Level of Impact: People Changes High = 0 Medium = 0 Low = 1 None = 0 Uncertain = 0 Level of Impact: Processes Changes High = 2 Medium = 1 Low = 0 None = 0 Uncertain = 1 Level of Impact: Technology Changes High = 0 Medium = 2 Low = 0 None = 0 Uncertain = 0 Level of Impact: Data Changes High = 0 Medium = 0 Low = 0 None = 1 Uncertain = 1 Segments I & II Documentation Update Status Not Started = 0 In Progress = 0 Complete = 0 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Current-State:</p> <p>Cataloged Business Systems = 5</p> <ul style="list-style-type: none"> Criticality: High = 0 Med = 0 Low = 0 None = 2 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 0 Partial = 1 Not Started = 0 <p>Cataloged Interfaces = 7</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 <p>Implementation:</p> <p>Business Systems Planned for Integration = 0</p> <ul style="list-style-type: none"> 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 <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Current-State:</p> <p>Unique FLAIR Data Elements = 70</p> <ul style="list-style-type: none"> Associated Unique Uses = 75 Continued Use - Yes = 49 Continued Use - No = 0 Associated Business Systems = 6 <p>Cataloged Reports = 37</p> <ul style="list-style-type: none"> Criticality: High = 9 Med = 3 Low = 8 None = 17 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 6/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = 1 Asset Management (AM) Planned Location Codes = 20 Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 2 - Control General Ledger (GL) Planned Budgetary Value Combo Edits = 268 Planned Local Funds = None Planned Organization ID's = 81 Planned OA1's = 665 Planned OA2's = None <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 5 Agency Data Outside of Primary Source System(s) = 0 Data Readiness/Cleansing Status: Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 0 <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.

DOEA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Ongoing staff aug to address Task 328.	Staff personnel on boarding, approx start date 6/3/2024	05/24/24	Glenn Elmer
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Medium)	As vacancies occur, targeting candidates with increased technological skills.	ongoing	05/24/24	Glenn Elmer

DOEA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	staffing level limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.	Only \$40,000 secured. Does not provide sufficient funding to begin to address needs. Delays will result in	12/01/23	Glenn Elmer

People	Staff limitations still exist	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue to identify options. Solution has not been identified.	Issue remains	07/01/24	Glenn Elmer
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DOEA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments or Updates
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DOEA 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	Speaking with current agency sponsor about the agency readiness survey creation and the RFQ in place for temporary staff to assist with completing some overdue tasks	05/14/24		Attempt to catch up on overdue tasks before busy time of Year End Activities		
Data	Reviewing resources to aid in clean up activities and where to begin on creating clean up processes	05/14/24	Accounting	Find best practices for our agency to clean up data and then maintain the clean up over two separate year end closings		
Processes	Meeting set with Agency Sponsor and SME to analyze needs of temp staff that will be coming in and the areas of focus to bring PALM tasks up to date	05/17/24		Determine the best course of action to sort through current processes and how the staff can be most efficient in completing tasks specific to business process documentation		
Data	Sent out a working document of current data clean up processes and asked to review and update during year end processing	06/07/24		To create an agency procedure document for data clean up and maintenance. Currently we clean annually, during year end.		

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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DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Randy Pupo	pupor@elderaffairs.org	07/10/24
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit elmere@elderaffairs.org)		03/13/24