

### Helpful Links

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- Readiness Workplan

# DOL Status Report Dashboard

### Reporting Period

May - June 2024

### Agency Sponsor

Becky Ajhar

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 = 8
- 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 = 99.17%
- Submitted Complete = 11
- Submitted Incomplete = 0
- Completed After Submission = 1

### RW Task Timeliness



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

#### RW Task Timeliness:

- Score = 94.17%
- 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	05/10/24	AR - Added missing org value, AM - Selected NO update, GL - ORG Tree structure added	Submission Complete	05/16/24
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. We anticipate finalizing the updated documentation within 3 weeks.  5/29 - Documentation for business processes reviewed and completed. Areas which require remediation have been identified and currently being updated by Finance Department, ETC unknown. 7/12/24 - Documentation updates still pending for submittal		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	06/14/24		Submission Complete	
N/A	People	524	Complete and Submit End User Readiness Survey Analysis	04/15/24	06/14/24	100% - Submitted	06/14/24		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	07/12/24			
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. 7/12/24 - Documentation updates still pending for submittal		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
Indirect	Technology	529	Update Florida PALM Conversion Inventory for Segment III	04/29/24	07/12/24	100% - Submitted	07/12/24			
Indirect	Technology	530	Update Florida PALM Interface Inventory for Segment III	04/15/24	07/12/24	100% - Submitted	07/12/24			
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	09/27/24	50% - In Progress				
N/A	N/A	532	Submit Bimonthly Agency Readiness Status Report	05/01/24	05/13/24	100% - Submitted	05/10/24		Submission Complete	
N/A	N/A	533	Manage Agency Specific Implementation Schedule, Risks and Issues	05/01/24	06/28/24	100% - Submitted	06/28/24			06/28/24
N/A	People	534	Update CCN and Project Contacts	06/03/24	06/14/24	100% - Submitted	06/12/24		Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	50% - In Progress				
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	07/03/24		Submission Complete	
N/A	N/A	538	Submit Bimonthly Agency Readiness Status Report	07/01/24	07/12/24	100% - Submitted	07/12/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	50% - In Progress	07/09/24			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 22</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 12/13</li> </ul> <p><b>Identified Subject Matter Experts = 10</b></p> <p><b>SMEs by Business Process Grouping</b></p> <ul style="list-style-type: none"> <li>Account Mgmt. and Financial Reporting = 2</li> <li>Accounts Receivable = 1</li> <li>Asset Accounting and Mgmt. = 1</li> <li>Banking = 1</li> <li>Budget Mgmt. and Cash Control = 1</li> <li>Contracts Mgmt. = 1</li> <li>Disbursements Mgmt. = 1</li> <li>Grants Mgmt. = 0</li> <li>Inter/IntraUnit Transactions = 1</li> <li>Payroll Mgmt. = 3</li> <li>Projects Mgmt. = 0</li> <li>Revenue Accounting = 1</li> <li>System Access and Controls = 1</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 49</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 3</li> <li>Related Reports = 5</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 91 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 49</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 2</li> <li>Planned Spreadsheet Uploads = 1</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 5 Complete = 0</li> </ul>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 7</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 7 Med = 0 Low = 0 None = 0</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 7 Partial = 0 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 30</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 28</li> <li>Outbound Interfaces = 2</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 6</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5</li> </ul> <p><b>Planned Interfaces = 21</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 8</li> <li>Outbound Interfaces = 11</li> </ul>	<p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 70</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 70</b></li> <li>Continued Use - Yes = 29</li> <li>Continued Use - No = 0</li> <li><b>Associated Business Systems = 0</b></li> </ul> <p><b>Cataloged Reports = 76</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 0 Med = 0 Low = 0 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 7/9</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>Planned Distribution Codes = 1</li> <li><b>Asset Management (AM)</b></li> <li>Planned Location Codes = 9</li> <li>Planned Associated Area ID's = None</li> <li><b>Commitment Control (KK)</b></li> <li>Planned Option = Option # 1 - Track with Budget</li> <li><b>General Ledger (GL)</b></li> <li>Planned Budgetary Value Combo Edits = 53</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 40</li> <li>Planned OA1's = 7</li> <li>Planned OA2's = 108</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 5</li> <li>Agency Data Outside of Primary Source System(s) = 0</li> <li><b>Data Readiness/Cleansing Status:</b></li> <li>Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 0</li> </ul> <p><b>Reports = TBD</b></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.

### DOL Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	One Super-User (Senior Financial Analyst) left the agency; as a result, the loss of historical knowledge pertaining to reporting and system administrative tasks may be a concern and may impact PALM training activities and implementation.	Open	9 (High/High)	Lottery will prioritize and advertise position, new hire TBA.		06/24/24	Finance
Technology Data	The Florida Lottery's new Claims and Payment system (CAPS) is scheduled to go live on July 27, 2024. The implementation of Lottery's CAPS may impact PALM training activities. The new CAPS will be replacing the current system known as Fortune.	Open	3 (Low/High)	Develop a proactive strategy for the upcoming launch of the new CAPS; will focus on early communication, training for PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	Ongoing	09/07/23	Chris Rorison

### DOL Issues

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

### DOL 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	Florida PALM will design and be able to record DOL manual payments currently handled outside of FLAIR today. 30.5 Manage Payments 30.5.1 Record Manual Payments	Logged	12/11/23	Disbursements	FLAIR screenshots of recording retailer incentives for manual payments
People Processes	Florida PALM Payroll Processing will be able to process refunds on Insurance Benefits (overpayments)	Logged	01/25/24	People First	

### DOL 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 Data	Remediate Agency Business Systems based on Segment I	05/13/24	Chris Rorison, Stella Bargas, Meghan Gregg, Debbie Martin, Melissa Ging, Diego Tolmos	Discuss task 519	
People Processes Data	Palm task review meetings - Lottery team	05/13/24	Chris Rorison, Stella Bargas, Meghan Gregg, Debbie Martin	Discuss task 515	
People Data	Palm task review meetings - Systems based on Segment I	05/22/24	Meghan Gregg, Debbie Martin	Discuss task 516	
People Processes	Palm task review meetings - Lottery team	06/24/24	Meghan Gregg, Stella Bargas	Discuss tasks 515, 533, and upcoming tasks due in July and August	

### 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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### DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
May - June 2024	Rebecca Ajhar	ajharb@flalottery.com	07/12/24
March - April 2024	Rebecca Ajhar	ajharb@flalottery.com	05/10/24
January - February 2024	Rebecca Ajhar	ajharb@flalottery.com	03/08/24