# DOL 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**

Becky Ajhar

| **CCN Composition** | **RW Task Completeness** | **RW Task Timeliness** | **Project-led Meeting Participation** |
|---|---|---|---|
| The Change Champion Network dial reflects the completeness of your CCN makeup. | The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512. | The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date. | The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period. |

**Change Champion Network:**

• Unique Filled Role = 8

• Duplicate Filled Role = 8

• Vacant Role = 0

**RW Task Completeness:**

**Score = 99.17%**

• Submitted Complete = 11

• Submitted Incomplete = 0

• Completed After Submission = 1

**RW Task Timeliness:**

**Score = 94.17%**

• Submitted On Time = 33

• Submitted Late = 2

• Pending Submission = 1

**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.<br><br>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. |

### People

**Implementation:**

**Planned Florida PALM End Users = 22**

• Business Process Groupings = 12/13

**Identified Subject Matter Experts = 10**

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 2

- Accounts Receivable = 1

- Asset Accounting and Mgmt. = 1

- Banking = 1

- Budget Mgmt. and Cash Control = 1

- Contracts Mgmt. = 1

- Disbursements Mgmt. = 1

- Grants Mgmt. = 0

- Inter/IntraUnit Transactions = 1

- Payroll Mgmt. = 3

- Projects Mgmt. = 0

- Revenue Accounting = 1

- System Access and Controls = 1

**Role Mapping = TBD**

**Training = TBD**

### Processes

**Current-State:**

**Cataloged Business Processes = 49**

• Related Business Systems = 3

• Related Reports = 5

• Documentation Status:

- Complete = 91 Partial = 0 Not Started = 0

**Implementation:**

**Impacted Agency Business Processes = 49**

• Related Business Process Groupings = 2

- Planned Spreadsheet Uploads = 1

• Level of Impact: People Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Technology Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 0 In Progress = 5 Complete = 0

### Technology

**Current-State:**

**Cataloged Business Systems = 7**

• Criticality:

- High = 7 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

**Cataloged Interfaces = 30**

- Inbound Interfaces = 28

- Outbound Interfaces = 2

**Implementation:**

**Business Systems Planned for Integration = 6**

• Segment I - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

• Segment II - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

**Planned Interfaces = 21**

- Inbound Interfaces = 8

- Outbound Interfaces = 11

### Data

**Current-State:**

**Unique FLAIR Data Elements = 70**

• Associated Unique Uses = 70

- Continued Use - Yes = 29

- Continued Use - No = 0

• Associated Business Systems = 0

**Cataloged Reports = 76**

• Criticality:

- High = 0 Med = 0 Low = 0 None = 0

**Implementation:**

**Segments I & II Planned Configurations = 7/9**

• Accounts Receivable (AR)

- Planned Distribution Codes = 1

• Asset Management (AM)

- Planned Location Codes = 9

- Planned Associated Area ID's = None

• Commitment Control (KK)

- Planned Option = Option # 1 - Track with Budget

• General Ledger (GL)

- Planned Budgetary Value Combo Edits = 53

- Planned Local Funds = None

- Planned Organization ID's = 40

- Planned OA1's = 7

- Planned OA2's = 108

**Conversions & Data Readiness**

• 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

**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.

### 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 *

Submit

Privacy Notice | Report Abuse

## 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 |