APD Status Report Dashboard

Readiness Workplan Tasks

100%
0%

- Completed
- Submitted Late
- Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.
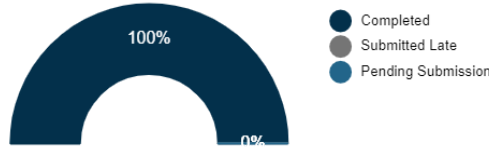
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Readiness Workplan Tasks:

Total Tasks = 14

- Completed = 14
- Submitted Late = 0
- Pending Submission = 0

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	100% - Completed in Requested Format	12/15/23	12/15 - Completed and posted to Smartsheet
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded 12/27 - noting the review with RC and will add information but this is the formal internal APD document and stands as published - new timelines are being updated with teams in January 2024
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/06/23	12/4 - Core Team Review to finalize and Submit 12/6 - Completed/Loaded 12/27 - noting the review with RC and will add information but this is the formal internal APD document and stands as published - new workforce readiness will be defined in the manner the RC asked for in the team reviews in January 2024
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/28/23	12/4 - APD has no contributing activity at this time - Business System Documentation is housed within IT and accessible/Help Desk in place. Test Cases will be submitted by Task Due date. Currently updating FRS/FAS in house Business System to clear out all queries that are outdated and align with the owner (strictly inhouse mini project) 12/6 - Updates to Business Smartsheet as reviewed with RC. 12/27 - IT Team has updated the documentation updates as reviewed with the PALM IT team - Chris and at this time there are no outstanding questions 12/28 - updates to smartsheet were completed based on the input and changes discussed with the PALM Team
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	12/28/23	12/4 - APD will have no change to the required interfaces from FL PALM - the interfaces will be the same for the current Business Systems and will require the PALM Technical information in order to make changes. No other updates needed at this time. 12/6 - Updates completed as reviewed with RC 12/27 - IT Team has updated the inventory as reviewed with the PALM IT team - Chris and at this time there are no outstanding questions 12/28 - updates to smartsheet were completed based on the input and changes discussed with the PALM Team
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/13/23	completed 11/10 Rose reviewed and submitted completion 11/13
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	12/4 - Core Team Review to finalize and Submit 12/27 - completed updates - status timeline readiness plan and risks
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	75% - Consolidating/Inputting Information for Submission		12/27 - updates within Smartsheet are current - will review for Sponsor's check in to approve and submit 1/8 - Due to Sponsor for Sighoff

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 9
- Vacant Role = 0

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

Participation:

- Meetings Attended = 4

Current-State:

Cataloged Business Processes = 243

- Related Business Systems = 4
- Related Reports = 31
- **Documentation Status:**
- Complete = 244 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

- **Criticality:**
- High = 9 Med = 0 Low = 0 None = 0
- **Documentation Status:**
- Complete = 8 Partial = 1 Not Started = 0

Cataloged Interfaces = 78

- Inbound Interfaces = 6
- Outbound Interfaces = 1

Implementation:

Business Systems Planned for Integration = 9

- **Segment I - Documentation Updates:**

Current-State:

Unique FLAIR Data Elements = 480

- **Associated Unique Uses = 1181**
- Continued Use - Yes = 1094
- Continued Use - No = 57
- **Associated Business Systems = 2**

Cataloged Reports = 112

- **Criticality:**
- High = 150 Med = 18 Low = 1 None = 0

Implementation:

- Conversions = TBD
- Configurations = TBD

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

- Complete = 0 Updating = 3 Evaluating = 0
Not Started = 0 Not Needed = 5

• Segment II - Documentation Updates: TBD

• Segment III - Documentation Updates: TBD

• Segment IV - Documentation Updates: TBD

Planned Interfaces = 13

- Inbound Interfaces = 3

- Outbound Interfaces = 7

- Spreadsheet Uploads = 3

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.

APD Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	-Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Open	6 (High/Medium)	- Implement standardized documentation procedures	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024	12/27/23	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People Processes Technology Data	Business Process Workflow - Process Duplication	Closed	6 (High/Medium)	- Regularly review and update process documentation to identify duplication	- Report process duplication findings in the monthly process improvement meetings. -moving to diagram and update existing completed task328	12/27/23	APD Core Team

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect	Measurement: Reconciliation issue noted: Migration Phase	12/08/23	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system	Measurement: Employee feedback and adoption rate - ongoing	10/24/23	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	12/27/23	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b intiatied with COA review	12/27/23	APD Core Team
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Data	APD Finance G/L Team - questioning when there will be a final approved full PALM Chart of Accounts listing	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions	This is will be an on-going -December 2023 - new	12/27/23	APD Finance Team

Data	PALM Chart of Accounts listing provided		deadlines or milestones	newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024	-December 2023 - new chart fields finalized and the APD Team will be working to align old to new		
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with the resources we will be able to catch up and move forward.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found	01/31/24	APD Sponsor and Finance Team
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes.	12/31/24	APD Sponsor and Finance Team

APD 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	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment

APD 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	APD - OWP for Additional Project Team Support	10/25/23	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	10/25 - Reg has been approved/funds pending budget amendment/then posting - target slides to November 2023
People	APD - OWP for Additional Project Team Support	11/02/23	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	11/2 - funding approved - budget amendment in process - can move forward with getting candidates
People	Task 506	11/08/23	APD Sponsor - CCN's SME's and PALM	11/8 Target for handoff to Rose Salinas for approval	On Track to Approve Prior to due date - 11/13
People Processes	PALM Task 501- APD Implementation Schedule	12/06/23	APD PM and Core Team	APD Timeline under PALM Project	Becky is revising the initial timeline in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new timelines and scheduled events - living documentation - and formalize 12/6 - Completed Attached here - Project Timeline
People Processes	PALM Task 502 - APD Risk Matrix	12/06/23	APD PM and Core Team	APD Risk Matrix under PALM Project	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize 12/6 - Completed Attached here - Project Risk Matrix
People Processes	PALM Task 503 - APD Workforce Readiness	12/06/23	APD PM and Core Team	APD Workforce needs under PALM Project	Staffing needs and requirements review - ongoing with APD Core team - Reg is in play for new Business Analyst and Tech Developer Defining the team support for all Business Modules - aligning teams with scheduling/overview sessions/training preparation/current PALM Alignment exercises. On-Going 12/6 - Completed Attached here - Project Workforce Readiness
People Processes	APD PM Collaboration lead with Commerce	10/19/23	APD PM and Commerce PM	Overview and mentoring for PALM Project initiation for new Commerce PM	Sharing of information/documents/overview of PALM engagement - mentoring
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/02/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - sample form review
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/09/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - overview of power point presentation on the positive effect of documenting tasks and keeping it simple
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/16/23	ALL APD Teams - Regions/Facilities/State	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328

Processes	Forum Weekly Call and Presentation		Regions/Facilities/State Office	Spreadsheet and Task List	regarding the progress of their efforts aligned with Task 328 - Review the importance of team work and teaming to align a task list per team on all relative and required tasks by team for completion to complete weekly/monthly/annual reporting of finances
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	11/30/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - review current status and answer questions
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	12/07/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - walk thru task requirements and provide a team by team review
People Processes	APD Specific - Business Process Forum Weekly Call and Presentation	12/14/23	ALL APD Teams - Regions/Facilities/State Office	Review Task documentation effort in Smartsheet Form/Excel Spreadsheet and Task List	Weekly call - 2 pm on Thursdays for all to have open forum regarding the progress of their efforts aligned with Task 328 - final effort for task completion - Asset Accounting Team and the Contract Team specific to add
People Processes	APD Specific - APD and PALM Touchpoint meeting	11/08/23	APD CCN's/SME's and the PALM RC's	Review status on PALM Tasks/APD initiatives and review	Monthly in-person meeting with the PALM RC's and the APD team CCN's and SME's - APD provides status prior to the meetings so that the review is smooth and informative
People Processes	APD Specific - APD and PALM Touchpoint meeting	12/13/23	APD CCN's/SME's and the PALM RC's	Review status on PALM Tasks/APD initiatives and review	Monthly in-person meeting with the PALM RC's and the APD team CCN's and SME's - APD provides status prior to the meetings so that the review is smooth and informative
People Processes	APD Specific - PM with Asset Management Team	11/08/23	APD PM - APD Asset Management Team	Review the involvement of the Asset Management in the PALM Project project - with the Business Process Workflow overview to document their team financial activities that are all impacted.	Onboarding of the new employee that will be leading the effort with the Asset Team
People Processes	APD Revenue Accounting Team	11/13/23	APD PM - APD Revenue Accounting Team	Business Process clarification and review	In person - face to face meetings assisting teams in their effort with the Business Process documentation
People Processes	APD Asset Management Survey Review with DFS	11/14/23	APD PM - APD Asset Management Team	Asset Management Survey completion and submission for the DFS team	review and answer the survey for submission
People Processes	APD Payroll Survey Review with DFS	11/14/23	APD PM - APD Payroll Team	Payroll Survey completion and submission for the DFS team	review and answer the survey for submission
People Processes	APD Specific - Payroll Values round table	11/16/23	APD Payroll Team	APD Team meeting attendee for one off Payroll People First information	Asked to participate in a round table
People Processes	APD Specific - Smartsheet Training session	11/20/23	APD - PM - Admin	APD specific to create reports and task analysis	APD is adopting Smartsheet for future use
People Processes	APD Specific - APD Allotments/Budget Team	11/29/23	APD PM and APD Allotments/Budget Team	Business Process clarification and review	In person - face to face meetings assisting teams in their effort with the Business Process documentation
People Processes	APD - Finance Team - informal review	12/04/23	APD Finance Team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Budget Teams Business Processes	12/11/23	APD Budget team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Payroll Team Business Processes	12/11/23	APD Payroll team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Disbursements Team Business Processes	12/12/23	APD Disbursement team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Revenue Accounting Team Business Processes	12/12/23	APD Revenue Accounting team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Contracts Team Business Processes	12/12/23	APDContracts team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD - Asset Management Team Business Processes	12/13/23	APD Asset Management team - PM	APD business process discussion	Assisting with in person review and overview of the business processes
People Processes	APD Smartsheet Updates review - All Teams	12/14/23	APD PM - All Teams	APD Informal calls with teams to review final efforts with Business Processes	In formal calls with questions or clarifications
People Processes	APD Teams Task Review	12/21/23	APD Teams and PM - internal Communication on upcoming Tasks	APD Readiness Task review	Align the teams with the next upcoming tasks readiness for 2024
People Processes Data	APD - Review - Process Task	12/15/23	APD PM and Finance Liaison	APD - quick review of the Smartsheet Business Processes	Review of the input provided by the teams for a quick once over - repurposed headers and completed in Smartsheet
People Processes Data	APD - Contracts Team Survey Review for DFS	12/19/23	APD PM and Contracts Team	APD Contracts Survey DFS	Answered and reviewed questions and submitted online to DFS
People Processes Data	APD - GrantsTeam Survey Review for DFS	12/19/23	APD PM and Grants Team	APD Grants Survey DFS	Answered and reviewed questions and submitted online to DFS
People Processes Data	APD - Projects Team Survey Review for DFS	12/19/23	APD PM and Projects Team	APD Projects Survey DFS	Answered and reviewed questions and submitted online to DFS with the Budget team for APD due to APD not really having Projects as in other agencies
People Processes Technology Data	Weekly APD Core Team Status Report	10/19/23	APD PALM Core Team	Keep Sponsor - Rose Salinas and Primary Core Team - Dee Warren and Ramon Evans fully up to date on APD Finance Team Activities	Providing APD Key Stake holders/Core Team members updated with status so that they are able to talk to any PALM topic and where APD is in the Project process
People Processes Technology Data	Weekly APD Core Team Status Report	11/02/23	APD PALM Core Team	Keep Sponsor - Rose Salinas and Primary Core Team - Dee Warren and Ramon Evans fully up to date on APD Finance Team Activities	Providing APD Key Stake holders/Core Team members updated with status so that they are able to talk to any PALM topic and where APD is in the Project process
People Processes Technology Data	High Fives	11/02/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	Tuesday Task Talks	10/24/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Tuesday Task Talks	10/31/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Tuesday Task Talks	11/07/23	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Business Process Open Forum	10/19/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Business Process Open Forum	10/26/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Business Process Open Forum	11/02/23	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People	Business Process Open Forum	11/08/23	APD Finance Teams as a	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status -

Processes Technology Data			whole		effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Advisory Council Meeting	10/18/23	APD PALM Core Team	PALM Council participation	Ramon and Becky back each other up to be in attendance for every meeting
People Processes Technology Data	PALM Task 500 - APD Agency Charter/Scope	12/06/23	APD PM and Core Team	APD Scope/Charter under PALM Project	Becky is revising the initial Scope/Charter - PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new readiness impact and formalize 12/6 - Completed Attached here - Charter/Scope
People Processes Technology Data	APD Core Team Weekly Status Meeting	10/26/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD Core Team Weekly Status Meeting	11/02/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD Core Team Weekly Status Meeting	11/09/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD/PALM Monthly Touchpoint - November	11/08/23	APD Core Team/CCN/SMEs	Monthly Touchpoint to review Agency Readiness and engagement	November - Meeting onsite and blended with the Business Process Forum audience (CCN's and SME's plus additional team members.
People Processes Technology Data	PALM Agency Collaboration	10/19/23	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky and Tulani met and talked to all things PALM
People Processes Technology Data	PALM Agency Collaboration - shared documents	10/23/23	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky shared the High Fives/Contact lists/power point presentations to help bring Tulani into the fold with way to help her department catch up to PALM initiatives
People Processes Technology Data	PALM RC call - catch up	10/18/23	PALM and APD	PALM Catch up and Smartsheet Status clarifications	Becky and Jordan - review some correct documentation methods using Smartsheet for status input
People Processes Technology Data	October Advisory Council Meeting	10/18/23	PALM and APD	Advisory council of agencies to the PALM Team	Ramon in attendance for latest updates and review of project efforts from PALM
People Processes Technology Data	APD Facility - Tacachale Accounting Review Call	10/18/23	APD SME and PM	Facilities accounting practices focus	discussion and overview of the efforts from the facility perspective and in conjunction with their payroll activities
People Processes Technology Data	Budget Team - Small Team internal review	10/24/23	Budget Team In Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Disbursement Team	10/24/23	Disbursement Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Financials Team	10/25/23	Financials Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Task 504	10/30/23	Business System Documentation Seg I - APD IT Team	Update Agency Business System Documentation for Segment I. This includes functional requirements, technical requirements, and test cases from reviewing Segment I resources.	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 505	10/30/23	Florida PALM Interface Inventory for Segment I	Update Florida PALM Interface Inventory for Segment I. Identify and document interface needs for Florida PALM implementation by reviewing Segment I resources	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 507	11/08/23	APD = All Finance Teams	Manage Agency-specific Implementation Schedule, Risks and Issues	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize
People Processes Technology Data	PALM Touchpoint and Business Process Forum Meeting	11/08/23	- All APD Finance Teams	In Person meeting with PALM RC's and also to bring the APD Teams into a focused PALM initiative/environment	PALM Monthly Touchpoint meetings will be critical to information dissemination
People Processes Technology Data	APD Specific - High Fives - Communication Letter	11/02/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - High Fives - Communication Letter	11/27/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - High Fives - Communication Letter	12/22/23	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call	11/02/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/09/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/16/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	11/30/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology	APD Specific - CORE Team Status Update Weekly Call/email report	12/07/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up

Data					Project Manager	
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/14/23	APD Core Team		Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/21/23	APD Core Team		Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	12/28/23	APD Core Team		Weekly meeting/teams call to review the updates and status of activity with the PALM Project for insight to align with the Sponsor/Business Liaison/Advisory Council Member and Project Manager	Important call that helps with awareness and keeping everyone informed of progress, issues, roadblocks, plans and effort - email report with documented status for back-up
People Processes Technology Data	APD Specific - IT Team	11/13/23	APD PM - APD IT Team		Review of the Task effort due to amendments for task 326 and Role effort with the Finance teams in the business process flow efforts	IT team input on the updates and their alignment with the finance team business process workflows
People Processes Technology Data	APD Specific - APD IT Team	11/14/23	APD PM - APD IT Team		APD Team meeting for PALM Status and Review	Overview - update and review
People Processes Technology Data	APD Collaboration - PM Commerce	11/21/23	APD PM - PM from Commerce		Assist and help with the PALM Project overview and onboarding	APD - PM is mentoring other PM's
People Processes Technology Data	APD Specific - APD IT Team	12/04/23	APD Internal team review of Business Systems Inventory and understanding of the changes to come - ABC and Iconnect		Understanding and review	IT effort to complete updates to tasks and then answer PALM Team technical team questions on current inventory and direction
People Processes Technology Data	APD Specific - Core Team review of Charter/Risks/Change	12/04/23	APD Core Team - Sponsor/Business Liaison/Advisory Council Member/Project Manager		APD review of the formal documents - Charter/Risk and Change as well as timeline	In-depth review to approve and formalize the project documents due in Task requirements and also as an update to the current Project Implementation Document within APD
People Processes Technology Data	APD Team Building	12/22/23	APD CORE Team		APD Team Review for PALM Project addition	Business Analyst Opportunity review

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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: *

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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Rose Salinas	rose.salinas@apdcares.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23

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