CITRUS 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

November - December 2023

Agency Sponsor

Christine Marion

Readiness Workplan Tasks

78%
21%
0%

- ● Completed
- ● Submitted Late
- ● Pending Submission
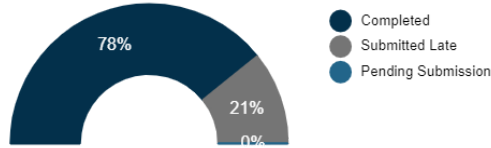
The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 14

- • Completed = 11
- • Submitted Late = 3
- • 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	12/21/23	
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	12/08/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/15/23	
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/08/23	
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/15/23	
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	Voucher print program has been replaced, no agency business system interfaces will be needed.
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/09/24	No interface needs are identified at this time.
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/09/23	
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	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/09/24	

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.

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.

People

Change Champion Network:

- • Unique Filled Role = 2
- • Duplicate Filled Role = 12
- • Vacant Role = 0

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

Participation:

- • Meetings Attended = 4
- • Meetings Missed = 0

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

Implementation:

- • Training = TBD

Processes

Current-State:

Cataloged Business Processes = 31

- • Related Business Systems = 3
- • Related Reports = 42
- • **Documentation Status:**
- - Complete = 31 Partial = 0 Not Started = 0

Implementation:

- • Role Mapping = TBD

Technology

Current-State:

Cataloged Business Systems = 4

- • **Criticality:**
- - High = 4 Med = 0 Low = 0 None = 0
- • **Documentation Status:**
- - Complete = 4 Partial = 0 Not Started = 0

Cataloged Interfaces = 1

- - Inbound Interfaces = 1
- - 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: TBD**
- • **Segment III - Documentation Updates: TBD**
- • **Segment IV - Documentation Updates: TBD**

Planned Interfaces = 0

- - Inbound Interfaces = 0
- - Outbound Interfaces = 0
- - Spreadsheet Uploads = 0

Data

Current-State:

Unique FLAIR Data Elements = 70

- • **Associated Unique Uses = 70**
- - Continued Use - Yes = 21
- - Continued Use - No = 0
- • **Associated Business Systems = 2**

Cataloged Reports = 54

- • **Criticality:**
- - High = 31 Med = 12 Low = 5 None = 0

Implementation:

- • Conversions = TBD
- • Configurations = 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.

CITRUS Risks

CITRUS 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 size of agency and small accounting staff, same person must have multiple roles or back up roles	Open	6 (Medium/High)	We had hoped to request additional appropriation to hire OPS/contract help during the project. However, the process for making these requests has not been identified to us.	Appropriation for Additional funding was granted in CATF. This trust fund does not have sufficient fund balance to support using these funds. They will be reverted.	11/01/23	C Marion
People	The majority of PALM meetings have moved to "in-person" meetings in Tallahassee. Due to staffing and budget issues, travel to Tallahassee (a ten hour round trip) precludes us from sending staff to these meetings.	Closed	6 (Medium/High)	It is difficult to get new staff up to speed. We are reviewing previously recorded meetings as time allows. I think this will be a significant issue as we get closer to go-live.	We are attending online meetings whenever possible and following up with recordings when available.	11/08/23	C Marion
People	All new accounting staff. Staff members previously on PALM team have left the agency.	Closed	4 (Medium/Mediu	We have assigned previous roles to new staff, but there will be a learning curve.	Staff is being trained and are being brought in to the PALM meetings. Regular meetings have been established to review RW tasks and assign tasks.	11/08/23	C Marion
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings	09/19/23	C Marion

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Citrus does not have a dedicated project manager to ensure all PALM activities are completed, Tasks are updated, and staff is provided direction.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Without additional project funding, staff will complete tasks as time allows.	Instructions for requesting PALM resources are not clear. No progress on this issue	07/01/24	CCN
Technology Data	Citrus uses a voucher print program that was written in-house and is not documented	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Citrus will research possible voucher print programs other agencies are utilizing, and determine if there is one that meets our needs	Eform application installed on Dec 28th to replace in-house voucher print program	01/01/24	IT

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR funding has not been made available to Citrus. CATF does not have sufficient fund balance to absorb additional costs
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff continues to attend workshops, and will begin attending in person as we are able in January.
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.
People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins

CITRUS 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	Discussion with OPB	01/03/24	Christine, OPB	Discuss options for receiving GR funding for FY2024-25	Discussed amended LBR submittal. OPB suggests sending document stating needs rather than submitting as an amendment, anticipate FY2024-25 to be administered funds
People Processes	PALM Team meeting - review Task 501, 502, 328	11/16/23	ALL	Review Charter and receive feedback, Review implementation schedule, Develop plan to complete Task 328	As of December 14, Charter is ready to submit
People Processes	Consult with D. Screws on progress toward TAsk 328, identifying business processes, subprocesses, and documentation of same	12/13/23	Lucy, Kay, other as needed	With expertise in FLAIR processes, Dianne can review what has been done and make recommendations to the team	Task 328 Smartsheet was updated with Primary roles, based on Dianne's feedback. Since this is a living document, further tweaks may be needed. Staff continues work on documentation
People Processes	Citrus Touchpoint Meeting	12/14/23	Lucy, Christine, others as available	Discuss status of current tasks and receive feedback from PALM team	Discussed statuses of current Tasks, which will be completed by Dec 15th, with Task 328 being 95% complete. Also discussed funding for PALM project.
People Processes	PALM Team Meeting	12/28/23	Lucy, Christine, others as available	Check-in between holidays on status of current tasks, determine what items need to be completed	Meeting cancelled due to additional admin leave granted and staff annual leave. Tasks are on schedule for completion by due dates.
People Processes	PALM Team Meeting	01/04/24	Lucy, Christine, Kay, Angela, Melissa	Update on tasks due in January, plan for office coverage while Kay and Lucy are in Tally at PALM design workshops	Although we were sent a link to register for the design workshops remotely, we decided it would be good to attend in person this time. Executive Director Shepp dropped in on the meeting, to encourage staff and let them know she appreciated their efforts and teamwork.
Processes	Segment II Financials Wave Webinars	12/05/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes	Segment II Financials Wave Webinars	12/06/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes	Segment II Financials Wave Webinars	12/07/23	ALL	Attend webinar for Segment II Financials	All Accounting staff tuned in, and listened as they were able.
Processes Technology	Install Eform voucher print program	12/28/23	George, Melissa, Kay, Angela	Replace in-house written voucher print routine that is not documented with a program that can be interfaced with PALM in the future.	George worked with Eform to install the program on Dec 28th. It is installed for Kay and Melissa. There are still some issues with the program that are being worked out.
Technology	Eform voucher demo - to replace in-house voucher print program	12/12/23	George, Kay, Lucy, Angela, Melissa	Determine if Eform is a solution that can replace in-house voucher print program and integrate with PALM	After demo, Citrus has requested a quote for implementation of eForm software.

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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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23

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November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24
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