

**Helpful Links**

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

# AHCA Status Report Dashboard

**Reporting Period**

November - December 2024

**Agency Sponsor**

Lynn Smith

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.

**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 Timeliness**



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

**Project-led Meeting Participation**



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Change Champion Network:**

- Unique Filled Role = 12
- Duplicate Filled Role = 4
- Vacant Role = 0

**RW Task Completeness:**

- Score = 88.20%**
- Submitted Complete = 39
  - Submitted Incomplete = 0
  - Completed After Submission = 11

**RW Task Timeliness:**

- Score = 73.01%**
- Submitted On Time = 40
  - Submitted Late = 36
  - Pending Submission = 6

**Meeting Participation:**

- Meetings Attended = 6
- 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 |
|----------------|------------------------------|---------|--|-------------------------|-----------------------|---|------------------------|---|------------------------------------|----------------------------------|
| 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            |                        | 11/1 - Discussed completion of the tasks and in the process of documentation<br>8/30 - On-going process for updates. Identifying most important processes to document.<br>7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated.<br>6/28 - Continuing discovery of processes performed by the BFS team<br>4/30 - New Resources are reviewing as is to identify gaps.<br>4/12 - Documentation of business processes have not begun due to resource constraints |                                    |                                  |
| N/A            | Technology                   | 519     | Remediate Agency Business Systems based on Segment I   | 01/29/24                | 06/28/24              | 75% - Consolidating/Inputting Information for Submission            |                        | 11/1 - Completed remediation for the Chart of Account structure<br>9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements.<br>8/30 - Development team is actively involved with the remediation, beginning with the Chart of Accounts.   |                                    |                                  |
| N/A            | Processes                    | 527     | Identify Change Impacts and Update Agency Business Process Documentation for Segment III       | 04/15/24                | 07/12/24              | 75% - Consolidating/Inputting Information for Submission            |                        | 8/30 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked.<br>6/28 - Continuing discovery of processes performed by the BFS team   |                                    |                                  |
| N/A            | Technology                   | 531     | Remediate Agency Business Systems based on Segment II  | 04/29/24                | 10/04/24              | 75% - Consolidating/Inputting Information for Submission            |                        |   |                                    |                                  |
| N/A            | Processes                    | 543     | Identify Change Impacts and Update Agency Business Process Documentation for Segment IV        | 07/22/24                | 10/18/24              | 50% - In Progress   |                        |   |                                    |                                  |
| N/A            | Technology                   | 547     | Remediate Agency Business Systems based on Segment III   | 07/22/24                | 12/13/24              | 25% - Beginning Initial Internal Meetings and Information Gathering |                        | 9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements.  |                                    |                                  |
| Direct         | Data                         | 555-A   | Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)                         | 10/07/24                | 11/22/24              | 100% - Submitted  | 11/25/24               |   | Submission Complete                |                                  |
| N/A            | Technology                   | 561     | Remediate Agency Business Systems based on Segment IV  | 10/21/24                | 03/14/25              |   |                        |   |                                    |                                  |
| Direct         | Data                         | 555-B   | Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)                | 10/28/24                | 11/22/24              | 100% - Submitted  | 12/02/24               |   | Submission Complete                |                                  |
| N/A            | N/A                          | 562     | Submit Bimonthly Agency Readiness Status Report  | 11/01/24                | 11/12/24              | 100% - Submitted  | 11/12/24               |   | Submission Complete                |                                  |
| N/A            | N/A                          | 563     | Manage Agency Specific Implementation Schedule, Risks and Issues                               | 11/01/24                | 12/27/24              | 100% - Submitted  | 01/02/25               |   | Submission Complete                |                                  |

|          |            |       |  |          |          |   |          |   |                     |          |
|----------|------------|-------|--|----------|----------|---|----------|---|---------------------|----------|
| Direct   | Data       | 555-C | Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)   | 11/08/24 | 12/06/24 | 100% - Submitted  | 01/02/25 | 12-20 AHCA team is researching property help documents to determine actions that need to be taken and then contacting DFS if it cannot be determined how to add the amount to the Property Master file. The team has not encountered the issue before. There are only a few records. About 99% complete with this task. | Submission Complete |          |
| Direct   | Technology | 557   | Confirm Interface Inventory for Cycle 2 Interface Testing  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/13/24 |   | Submission Complete |          |
| N/A      | Technology | 558   | Update Agency Business System Documentation  | 11/18/24 | 01/10/25 | 100% - Submitted  | 01/08/25 |   | Submission Complete |          |
| Direct   | Data       | 567-A | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/12/24 |   | Submission Complete |          |
| Direct   | Data       | 567-B | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/19/24 |   | Submission Complete | 01/03/25 |
| Direct   | Data       | 567-C | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/16/24 |   | Submission Complete |          |
| Direct   | Data       | 567-D | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/05/24 | Not being used  | Submission Complete | 12/05/24 |
| Direct   | Data       | 567-E | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/19/24 |   | Submission Complete |          |
| Direct   | Data       | 567-G | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/12/24 |   | Submission Complete |          |
| Direct   | Data       | 567-H | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/05/24 | Projects is not used by the Agency.   | Submission Complete | 12/05/24 |
| Direct   | Data       | 567-I | Share, Review, and Update Configuration Workbooks  | 11/18/24 | 12/13/24 | 100% - Submitted  | 12/16/24 |   | Submission Complete |          |
| Indirect | People     | 536-C | Create Agency Specific User Acceptance Testing Plan  | 12/09/24 | 01/31/25 | 50% - In Progress   |          |   |                     |          |
| N/A      | Processes  | 560   | Submit Change Analysis Tool  | 12/09/24 | 01/31/25 |   |          |   |                     |          |
| Indirect | People     | 564   | Update Future Florida PALM Users   | 12/09/24 | 01/10/25 | 100% - Submitted  | 01/10/25 |   |                     |          |
| N/A      | People     | 568   | Create Training Plan for Agency Managed End User Training  | 12/09/24 | 03/28/25 |   |          |   |                     |          |
| Direct   | Data       | 567-J | Share, Review, and Update Configuration Workbooks  | 12/18/24 | 01/17/25 | 25% - Beginning Initial Internal Meetings and Information Gathering |          |   |                     |          |
| Direct   | Data       | 567-K | Share, Review, and Update Configuration Workbooks  | 12/18/24 | 01/17/25 |   |          |   |                     |          |
| Direct   | Data       | 567-P | Share, Review, and Update Configuration Workbooks  | 12/18/24 | 01/17/25 | 25% - Beginning Initial Internal Meetings and Information Gathering |          |   |                     |          |
| Direct   | Data       | 658-A | Submit Data Field Mapping  | 12/18/24 | 01/31/25 |   |          |   |                     |          |
| Direct   | Data       | 658-B | Submit Data Field Mapping  | 12/18/24 | 01/31/25 |   |          |   |                     |          |
| N/A      | N/A        | 569   | Submit Bimonthly Agency Readiness Status Report  | 12/30/24 | 01/10/25 | 100% - Submitted  | 01/10/25 |   |                     |          |
| N/A      | N/A        | 570   | Manage Agency Specific Implementation Schedule, Risks and Issues   | 12/30/24 | 02/28/25 |   |          |   |                     |          |
| Direct   | Data       | 658-C | Submit Data Field Mapping  | 01/06/25 | 01/31/25 |   |          |   |                     |          |
| Indirect | Technology | 576   | Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing | 01/06/25 | 03/28/25 |   |          |   |                     |          |

| People  | Processes   | Technology   | Data  |
|---|---|--|---|
| <p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 28</b></p> <ul style="list-style-type: none"> <li>• Business Process Groupings = 12/13</li> </ul> <p><b>Identified Subject Matter Experts = 13</b></p> | <p>The sequence of procedures to accomplish a business objective.</p> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 67</b></p> <ul style="list-style-type: none"> <li>• Related Business Process Groupings = 10/13</li> <li>• Planned Spreadsheet Uploads = 4</li> </ul> | <p>The applications or tools used to process, track, or report on financial operations.</p> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 23</b></p> <p><b>Planned Interfaces = 17</b></p> <ul style="list-style-type: none"> <li>- Inbound Interfaces = 2</li> <li>- Outbound Interfaces = 15</li> </ul> | <p>Information used in or produced from an agency's financial business operations.</p> <p><b>Implementation:</b></p> <p><b>Configuration</b></p> <ul style="list-style-type: none"> <li>• <b>Commitment Control (KK)</b></li> <li>- Budget Allotments - Control Option = Option # 2 - Track with Budget</li> <li>- Account ChartField Tier Selection = Account Tier #3: Family</li> <li>- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree</li> <li>• <b>Org Security Rule = Agencywide</b></li> <li>• <b>Optional ChartFields</b></li> <li>- OA1 = To Be Configured</li> <li>- OA2 = Not To Be Configured</li> <li>- PC Category = To Be Configured</li> <li>- PC Subcategory = To Be Configured</li> <li>- PC Source Type = Not To Be Configured</li> </ul> <p><b>Conversion</b></p> <ul style="list-style-type: none"> <li>• <b>Optional Conversions</b></li> <li>- Accounts Receivable = Not Needed</li> <li>- Assets = Needed</li> <li>- Contracts = Needed</li> <li>- Customers = Not Needed</li> <li>- Encumbrances = Needed</li> <li>- Grants = Needed</li> <li>- Projects = Not Needed</li> <li>- Projects Balances = Not Needed</li> </ul> |

## Agency Reported

The Risks, Issues, and Assumptions tables below display only items that were marked confirmed and were opened/logged, closed/resolved or active during the reporting period.

### AHCA Risks

| Critical Operational Elements | Risk Description   | Status | Risk Rating     | Mitigation/Response Strategy   | Reporting Period Comments or Updates   | Date of Status Change | Owner / Coordinator |
|-------------------------------|--|--------|-----------------|--|--|-----------------------|---------------------|
| Processes Data                | If there is not an accounting system available in December 2025, AHCA will not be able to complete the Weekly Medicaid Run and will not have the ability to pay the providers, costing the State, millions of dollars in fines/penalties.  | Open   | 9 (High/High)   | Change statutory requirements.   |  | 11/25/24              | Lynn Smith          |
| People                        | If Florida PALM project scope increases based upon unidentified agency requirements that were missed, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).   | Open   | 6 (High/Medium) | Request administrative funding from the Legislature.   | On-going   | 11/02/23              | Phyllis Wander      |
| People Processes              | Given that Budget resources in the Bureau of Financial Services are involved in the 25/26 Legislative Budget Request Process, if the budget team has not provided a plan for accomplishing Florida PALM YE UAT by 1/25/2025, AHCA will not provide Agency Readiness for Stage Gate 4 for Agency Readiness. | Open   | 6 (High/Medium) | Continue to use the resources adding resources from the IT team (Business Consultants) to perform the testing for the Agency | Additional business analysis resource (IT) has been added to address the year end process analysis and what needs to be accomplished by the BFS Team | 11/18/24              | Lynn Smith          |

### AHCA Issues

| Critical Operational Elements | Issue Description   | Status | Priority   | Resolution Plan   | Reporting Period Comments or Updates                    | Planned or Actual Resolution Date | Owner / Coordinator |
|-------------------------------|---|--------|--|---|---|-----------------------------------|---------------------|
| People                        | As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments. | Open   | High - Impacts the ability of the agency to meet deadlines or milestones | Hire additional BFS staff with different skillsets; and do not make it a requirement to possess FLAIR experience.<br>Hire additional staff augmented staff to perform more of the Florida PALM related tasks. | 12/30-There are currently 15 vacancies, down from 22    | 03/28/25                          | Hughes, Levis       |
| People Processes              | AHCA Florida PALM team needs at least two additional resources for the remainder of the Florida PALM project. The Agency currently has budget to hire one additional resource, but needs budget to hire the second.   | Open   | High - Impacts the ability of the agency to meet deadlines or milestones | Obtain budget to hire additional staff  | 1/8/2025-Completing the documentation for the amendment | 01/31/25                          | Wander, Phyllis     |
| People                        | Matriculation of knowledgeable business process and the SunFocus Application resources' will hinder the progress of the project.  | Open   | High - Impacts the ability of the agency to meet deadlines or milestones | Short term is to ensure documentation is current for jobs roles   | 1/8/2025-Identifying undocumented processes             | 02/28/25                          | Hughes, Levis       |
| Technology                    | Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness of task to continue to be low.  | Open   | Low - All impacts not listed as Critical or High                         | Update the comments of the remediation tasks as they become complete.   |   | 05/30/25                          | Wander, Phyllis     |

### AHCA Assumptions

| Critical Operational Elements | Assumption | Status | Date Logged or Removed | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments or Updates |
|-------------------------------|------------|--------|------------------------|--|--------------------------------------|
|                               |            |        |                        |  |                                      |

### 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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### AHCA Status Report Confirmation

| Reporting Period         | Agency Sponsor Name: | Confirmed By:                  | Confirmation Date: |
|--------------------------|----------------------|--------------------------------|--------------------|
| November - December 2024 | Lynn Smith           | lynn.smith@ahca.myflorida.com  | 01/10/25           |
| September - October 2024 | Lynn Smith           | lynn.smith@ahca.myflorida.com  | 11/12/24           |
| July - August 2024       | Lynn Smith           | lynn.smith@ahca.myflorida.com  | 09/10/24           |
| May - June 2024          | Lynn Smith           | lynn.smith@ahca.myflorida.com  | 07/03/24           |
| March - April 2024       | Lynn Smith           | lynn.smith@ahca.myflorida.com  | 05/09/24           |
| January - February 2024  | Sonya Smith          | sonya.smith@ahca.myflorida.com | 03/11/24           |