

**Helpful Links**

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

# APD Status Report Dashboard

**Reporting Period**

November - December 2024

**Agency Sponsor**

Rose Salinas

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

**CCN Composition**



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

**Change Champion Network:**

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

**RW Task Completeness**



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

**RW Task Completeness:**

- Score = 86.91%**
- Submitted Complete = 32
  - Submitted Incomplete = 0
  - Completed After Submission = 23

**RW Task Timeliness**



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

**RW Task Timeliness:**

- Score = 98.55%**
- Submitted On Time = 80
  - Submitted Late = 3
  - Pending Submission = 0

**Project-led Meeting Participation**



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

**Meeting Participation:**

- Meetings Attended = 4
- 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	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission		11/4 - IT Team is addressing - Business System by Business System		
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	100% - Submitted	12/06/24	11/15 - reviewing the mock test error report in shared drive 11/21 - actively looking into Mock trail errors and fall out 12/6 - assets and open encumbrance's MFMP = email out to PALM - response is Property ID -may need an answer from PALM	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/12/24	11/18 - K working to prep for next activity	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/07/25	11/18 - documentation is updated - in review tho 12/16 - KB is leading the APD Data team review for any new updates 12/27 meeting to review - Core team 12/30 - Core team final review - 1/2 1/6 - to be submitted Tuesday after review 1/7 - checked and comments updated		
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/10/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/10 - agency sponsor has completed form and APD selections have been made.	Submission Complete	12/10/24
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/13 - reviewed by team for accuracy, Smartsheet completed 12/16 - HB is working to populate the spreadsheet as needed 12/19 - Resubmitted based on Verification Form feedback 12/20 - 12/19 Resubmission remains incomplete as of 12/20, 1017p. See verification form for info. 12/30 - update to be completed with January Task - PALM Team aware 1/3 - reviewed with Dora/PALM Team APD to close out by mid week - 1/8	Submission Complete	01/07/25
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/12 - reviewed by team for accuracy, Smartsheet completed	Submission Complete	
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/12 - reviewed by team for accuracy, Smartsheet completed	Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/13 - reviewed by team for accuracy, Smartsheet completed	Submission Complete	12/17/24
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/12 - Reviewed against corrected locations, all updates made	Submission Complete	12/17/24
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/12 - reviewed no changes to	Submission Complete	

								previous selections		
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/10/24	11/18 - team working thru the task requirements and scheduled team input for review - Core team review 12/10 - completed, org security not used within APD	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25	75% - Consolidating/Inputting Information for Submission		12/16 - APD PALM Team has been in review of the current USER Testing plan and also the PALM Template. Notes for change and updates are in progress 12/19 - we are working thru current with PALM template adjustments 12/30 - currently working up the additions to the UAT plan - Core team and APD Team participation - to be completed by 1/31 1/9 - 567-C completed -Team is working on it.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25	75% - Consolidating/Inputting Information for Submission		12/16 - PM and BA working to update the tools - in progress 12/30 - Core team working to update/input data 1/9 - Team is working on it.		
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/08/25	12/16 - Team has reviewed and APD handles security differently - decisions in progress 12/19 - working thru user matrix 12/30 - updates made - review with Core team scheduled for 1/2 1/6 - to be submitted on 1/8 1/8 - completed and reviewed - updates on internal excel spreadsheet - Ashlie checked		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25	50% - In Progress		12/16 - reviewing the task in depth with APD PALM Team 12/30 - BA and PM in review of training docs that will be incorporated in the APD plans 1/7 - re-read task - use template		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	75% - Consolidating/Inputting Information for Submission		January due date! 1/7 - team reviewed and working 1/9 - 567-C completed -Team is working on it.		
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	75% - Consolidating/Inputting Information for Submission		January due date! 1/7 - team reviewed and working 1/9 - 567-C completed -Team is working on it.		
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	75% - Consolidating/Inputting Information for Submission		January due date! 1/7 - team reviewed and working 1/9 - 567-C completed -Team is working on it.		
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	01/31/25	75% - Consolidating/Inputting Information for Submission		January due date! 12/30 - working on worksheet 1/9 - Team is working on it.		
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25	75% - Consolidating/Inputting Information for Submission		January due date! 12/30 - working worksheet 1/9 - Team is working on it.		
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25	1/2 - email to Rose for review - she is back in office on 1/6 1/7 - reminder to Rose 1/8 - reminder and link to Rose 1/9 - signed off by Roe		
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering		1/9 - Team is working on it.		
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	25% - Beginning Initial Internal Meetings and Information Gathering				

### People

The staff and stakeholders affected by your agency's transition to Florida PALM.

#### Implementation:

Planned Florida PALM End Users = 73

- Business Process Groupings = 13/13

Identified Subject Matter Experts = 41

### Processes

The sequence of procedures to accomplish a business objective.

#### Implementation:

Impacted Agency Business Processes = 236

- Related Business Process Groupings = 10/13
- Planned Spreadsheet Uploads = 2

### Technology

The applications or tools used to process, track, or report on financial operations.

#### Implementation:

Business Systems Planned for Integration = 8

Planned Interfaces = 28

- Inbound Interfaces = 6
- Outbound Interfaces = 22

### Data

Information used in or produced from an agency's financial business operations.

#### Implementation:

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 2 - Track with Budget

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• **Optional Conversions**

- Accounts Receivable = Not Needed
- Assets = Needed
- Contracts = Needed
- Customers = Not Needed
- Encumbrances = Needed
- Grants = Not Needed
- Projects = Needed
- Projects Balances = Needed

## 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.

### 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 12/13 - being addressed in UAT plan	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 12/13 - being addressed in UAT plan	12/08/23	PALM Team/APD Project Team
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 12/13 - new coa and field specifications being supported based on PALM parameters	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 12/13 - UAT Development in process	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc 12/13 - ongoing	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - leaving open - documenting any issues	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - all APD ABS are being upgraded to support PALM Specs	04/24/24	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) 12/13 - we are all not familiar with the new platform	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 12/13 - track in UAT	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 12/13 - working to schedule around critical Finance dates	12/27/23	APD Teams
People Processes Technology	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 -	12/27/23	APD Financial Accounting Team

Data					APD is in clean up mode going forward. 12/13 - UAT to be training effort by PALM		
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 12/13 - PALM Team	12/27/23	APD IT Team
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 12/13 - APD does not know what we dont know yet!	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 12/13 - IT Teams to support as needed - new PALM Helpdesk access	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 12/13 - addressing timeframe for 2025 - 12/19 - 1/7	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 12/13 - APD working on Archive for FAS/FRS archive for all data prior to PALM Migration - internal APD	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV 12/13 - s/B non issue- keep open	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - should not effect APD = keep open	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - APD will be prepared in advance leaving open for now	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - API - interface questions continue as APD works to build	04/24/24	ALL APD Finance and IT Teams
Technology Data	Data Breach	Open	6 (High/Medium)	Implement multi-factor authentication, encrypt sensitive data, and regularly audit access logs	12/13 - global issue for any could based applications	10/31/24	ALL APD Finance and IT Teams
Technology Data	Unauthorized Access (Insider Threat)	Open	6 (High/Medium)	Apply role-based access controls, monitor user activities, and conduct regular training for employees on data security	Conduct periodic internal audits and monitor for suspicious activity 12/13 - checking internal APD users access abilities SSO	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incomplete Test Coverage	Open	6 (High/Medium)	Define comprehensive test cases based on requirements, prioritize critical features, conduct test case reviews	Ensure requirements traceability to avoid missed scenarios 12/13 - UAT plan updates in progress with CORE Team	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Data Security in Test Environment	Open	6 (High/Medium)	Mask or anonymize sensitive data, limit access to test environment, and encrypt data at rest and in transit	Use dummy data where possible to minimize risks 12/13 - testers are primary and secondary SMF's with	10/31/24	ALL APD Finance and IT Teams

					each team and CORE Team		
People Processes Technology Data	Defects Missed in UAT	Open	6 (High/Medium)	Implement multiple testing stages (functional, integration, regression), train testers on critical business flows, and conduct defect reviews	Encourage detailed documentation and communication for defect reporting 12/13 - create a capture log for PALM during UAT - incorporating into the UAT plan	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unclear Exit Criteria for UAT	Open	6 (High/Medium)	Define clear pass/fail criteria, set quality benchmarks, and ensure all criteria are met before exiting UAT	Review exit criteria with stakeholders before starting UAT 12/13 - open until PALM provides UAT plan for go - no go	10/31/24	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 - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase 12/13 - part of updated convergence plan - teams noting now	02/06/24	APD Finance 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 12/13 - training for APD = being developed - no PALM training at this time	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 12/13 - APD to determine addition Training Headcount	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - UAT - keep open	01/26/24	ALL APD Finance and IT Teams
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - IT team working thru each ABS at this time	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building 12/13 - PALM Log for all IT questions ongoing	04/24/24	ALL APD Finance and IT Teams
Technology Data	Service Downtime/Disruptions	Open	4 (Medium/Medium)	Implement failover and disaster recovery protocols, choose a provider with SLAs for high availability, monitor system uptime	Inform users in case of downtime and provide transparent communication 12/13 - testing now for impacts = all teams	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Environment Downtime	Open	4 (Medium/Medium)	Plan for backup environments, perform load testing on UAT, and have an incident response plan for UAT	Inform stakeholders of potential downtime impacts 12/13 - working with 12/19-1/7 freeze timeframe - exercise by teams within APD at this time	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incorrect Test Data Use	Open	4 (Medium/Medium)	Set up accurate and relevant test data, train testers on data setup, and maintain a standardized test data set	Establish guidelines for creating and using test data 12/13 - scenarios review in progress	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Inadequate UAT Documentation	Open	4 (Medium/Medium)	Maintain detailed test plans, cases, and results, and set documentation standards; conduct reviews to ensure clarity	Ensure all stakeholders have access to up-to-date UAT documentation 12/13 - UAT scenarios/stories being captured at this time for 1st qtr 2025	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Poor Test Case Prioritization	Open	4 (Medium/Medium)	Identify high-risk areas for prioritization, work with stakeholders to prioritize based on business impact	Focus on areas with high impact on the application's functionality 12/13 - Teams are in review of their critical tasks	10/31/24	ALL APD Finance and IT Teams
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 be initiated with COA review 12/13 - UAT to document in plan	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - open data/cloud - IT question-challenge	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Roll Back Plan to be included in the Conversion Plan	Open	3 (High/Low)	APT to incorporate the parallel effort with current business processes and also with the strategy	Prepare for unexpected issues	08/27/24	ALL APD Finance and IT Teams

Technology Data				process with PALM Data and ABS alignment.	that cause risk during migration causing significant problems that will stop progress forward into PALM 12/13 - UAT and PALM to provide a plan for migration time frame		
Technology Data	Data Loss due to Cloud Provider Failure	Open	3 (High/Low)	Enable regular automated backups, store backups in geographically separate regions, test data restoration	Partner with reputable providers with a history of reliability 12/13 - PALM issue - may impact service	10/31/24	ALL APD Finance and IT Teams
Technology Data	Inaccurate Financial Data	Open	3 (High/Low)	Implement input validation checks, automate data reconciliation, perform regular audits on financial data	Include error reporting mechanisms and alerts for users 12/13 - APD reconciliation will be part of the UAT to determine that FLAIR Data base was migrated/in sandbox/and mapped correctly	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unauthorized Access to UAT Environment	Open	3 (High/Low)	Use role-based access controls, monitor access logs, and enforce MFA for test environment access	Regularly review UAT environment access rights 12/13 - not certain of the user access and will be tested in UAT	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - APD Teams to determine migration trust	01/26/24	ALL APD Finance and IT Teams
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 12/13 - training for APD = being developed - no PALM training at this time	12/27/23	IT 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 12/13 - Training still open - will also be a part of UAT	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - shouldnt be an issue per PALM - but keeping open	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - APD IT team working any issues and aligning PAYROLL	01/26/24	ALL APD Finance and IT Teams

#### 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 Technology Data	APD Grant Field	Closed	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2 8/27 - still reviewin g- as this is a unique field to APD - we will incorporate the conversion with a plan to make certain this is mapped correctly 12/10 - COA updated with OA2 for the funds (not grants) in PALM	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD IT TEAM Collaboration with the PALM IT Team	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD will continue with the Excel Spreadsheet listing of IT questions that will be shared to the Readiness Coordinator for APD and filter to the relevant PALM team members for answers and acknowledgement - this is a solution that was proposed by the PALM Team - APD would like to work more collaboratively in the IT effort - as we have begun work to establish efforts for business as usual and develop PALM spec initiatives that are currently known. 12/10 - improved efforts - APD seeks a better collaboration effort as important agency wide corrections and updates could be effectively supported in a timely manner	This is going to be an ongoing challenge as timing is of the essence and with a delay in responses - the pace is slowed and falls back to last minute activities for completion	01/31/26	APD IT Teams/APD PALM Team and Core Team
People	APD is in the process of a Business	Closed	High - Impacts the ability	ABC project is pending a hold to address current	4/24 - the Business	12/30/24	APD IT Team

Processes Technology Data	System re-write to the ABC system and this will require a 2 x re-write for support as PALM is onboarded		of the agency to meet deadlines or milestones	and PALM affected activity. KB/Tech Analyst is engaged to drive decisions	<del>System requirements at APD are unique due to the clients services provided. Need to update is critical but the affect to do this 2x is being measured. TBD on the outcome and IT decisions</del> <del>6/25 - reconsideration of the internal FRG APD Database updates flow and build will not effect ABC re-write at this time</del>		
People Processes Technology Data	APD Asset Inventories - Locations physical address alignment across systems to include Solaris	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get FLAIR and Solaris Data corrected/updated/changed/added/deleted for all Physical locations associated with APD either HQ/Regions/Facilities/Regions 12/10 - Asset team is working thru updates and system adds/moves and changes	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval - re-write of procedures and documentation to correct processes - aligning with the asset module workflow within PALM 8/27 - still in process with IT team - PALM specs being used and PALM CORE Team working with IT teams to support the changes expected	12/20/24	APD Agency as a whole

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 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst	
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 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD	
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 12/13 - UAT - timeframe is the test	
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 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.	
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters	Logged	02/28/24	APD Project Team/APD IT Team	Accounting Alignment 4/24 - In process with Task 513 - also in data cleanse effort 12/13 - APD Completed to test in UAT	
People	APD Organizational Structure is fully defined and corelated to the correct org code by personnel alignment - updated by HR	Logged	02/28/24	APD Project Team/APD IT Team	Organizational Alignment 4/24 - APD faces a reorganization over the next 9 months - thru Dec. 2024. Approvals remain outstanding. The PALM requirements will be "as is" for the agency and updates will occur when approvals move thru. There will be no wait time or hold to update. Following the Task requirements of 513 toward the May due date. 12/13 - base on current to date ORG code for APD	
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.	Logged	02/28/24	APD Project Team/APD IT Team	4/24 - this remains a big concern on the handling of this data prior to conversion. The data pull for the conversion must be aligned correctly so that the PALM load places the data into the OA2 field in support of the accounting requirements for APD. Planning within APD is on-going as understanding of the data requirements becomes available. APD has discussed in several Touchpoint meetings and also reviewed with the PALM IT RC Lead Chris. 6/25 - Consideration into the conversion plan and how data will	

					map. Need to review all possibilities 12/13 - considerations completed
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.	Logged	04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion. 6/26 - data cleansing continues and will continue thru the next 18 months. Updates will be made in FLAIR as required by the accounting daily/weekly/monthly
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer	Logged	04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.
People Processes Technology Data	Data Security Compliance	Logged	08/27/24	APD Finance Teams	The cloud-based system will comply with all state and federal regulations regarding data privacy and security, such as CJIS, HIPAA, or IRS 1075, as applicable
People Processes Technology Data	No Major Changes to Existing Workflows,	Logged	08/27/24	APD Finance Teams	Assumes minimal disruption to existing business processes or workflows, and that the new system can adapt to existing operational requirements.
Processes Technology Data	High Availability and Reliability	Logged	08/27/24	APD Finance Teams	The cloud-based system will be more reliable than the legacy mainframe, with a guaranteed uptime and robust disaster recovery capabilities.
Technology Data	Scalability	Logged	08/27/24	APD Finance Teams	The new system can handle future growth in terms of users, transactions, and data volume without requiring significant reconfiguration or additional infrastructure
People Processes Technology Data	Realistic Timeline.	Logged	08/27/24	APD Finance Teams	The project will follow a realistic timeline with adequate buffers for unforeseen delays, ensuring that all milestones are met without excessive pressure
People Processes Technology Data	Auditability	Logged	08/27/24	APD Finance Teams	The new system will provide sufficient audit trails and logs to satisfy internal and external audit requirements.
People Processes Technology Data	UAT Environment Mirrors Production Environment	Logged	10/31/24	UAT Team, IT	Confirm that configurations and settings match production before UAT begins
People Processes Technology Data	UAT -Test Data Accurately Reflects Real User Data Scenarios	Logged	10/31/24	UAT Team, QA	Test data generation in progress; validation with real user scenarios needed
People Processes Technology Data	All Key Stakeholders are Available for UAT Feedback	Logged	10/31/24	Business Users, Project Lead	Stakeholders have confirmed availability, but final schedule pending
People Processes Technology Data	All Major Functionalities are Developed and Deployed in UAT	Logged	10/31/24	UAT Team, Development	90% of functionalities are ready; remaining features are expected by the end of this week
People Processes Technology Data	UAT Test Cases Cover All Critical Business Requirements	Logged	10/31/24	UAT Team, Business Analyst	Initial review complete; updates to test cases in progress based on new requirements

### 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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### APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Rose Salinas	rose.salinas@apdcares.org	01/09/25
September - October 2024	Rose Salinas	rose.salinas@apdcares.org	11/08/24
July - August 2024	Rose Salinas	rose.salinas@apdcares.org	09/09/24
May - June 2024	Rose Salinas	rose.salinas@apdcares.org	07/01/24
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24