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 2024

Agency Sponsor

Christine Marion

CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation

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

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

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

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

Change Champion Network:
• Unique Filled Role = 7
• Duplicate Filled Role = 9
• Vacant Role = 0

RW Task Completeness:
Score = 81.49%
• Submitted Complete = 32
• Submitted Incomplete = 3
• Completed After Submission = 12

RW Task Timeliness:
Score = 92.41%
• Submitted On Time = 58
• Submitted Late = 16
• Pending Submission = 5

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	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	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	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/19/24		Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	100% - Submitted	11/22/24		Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/08/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	50% - In Progress				
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	100% - Submitted	12/03/24	All errors which are the responsibility of Citrus have been resolved. Numerous errors remain, but are the responsibility of Florida PALM to correct during the process revisions prior to the Mock 2 conversion.	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25					
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24		Submission Complete	
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	12/12/24
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24		Submission Complete	12/09/24
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24		Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24		Submission Complete	12/17/24
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24		Submission Complete	12/04/24
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				

Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	Pending Resubmission	01/09/25		Submission Incomplete	
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					
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25					
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	01/09/25			01/09/25
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					
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
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

People

Implementation:

Planned Florida PALM End Users = 9

• Business Process Groupings = 11/13

Identified Subject Matter Experts = 6

Processes

Implementation:

Impacted Agency Business Processes = 32

• Related Business Process Groupings = 9/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 3

Planned Interfaces = 26

- Inbound Interfaces = 0

- Outbound Interfaces = 26

Data

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #2: Groupings

- 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 = Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Not Needed

- Grants = Needed

- Projects = Not Needed

- Projects Balances = Not 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.

CITRUS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	On 11/14/2024, Florida PALM finalized the parameters (scope and schedule) regarding interface selection, interface testing, and data warehouse design in a way that makes it impossible for Citrus to create interfaces with our agency business systems at Go-live, hampering the ability of the agency to conduct business related to revenue collection, contract tracking, and overseas payments.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	On 12/12/24, Citrus elected to select all "outbound" interfaces from Florida PALM and will be requesting funds in an OWP to solicit and contract for a data repositing solution to collect all Florida PALM data and provide more advanced, robust, and specific reporting capabilities than Florida PALM presented on 11/14/24. In addition, as the DW solution for Florida PALM is not planned for full functionality at Go-live, Citrus will also be constructing our own reports from PALM data in this environment.		12/13/24	Project Manager
Technology Data	The PALM team presents some workshops as webinars, but the technology is not very good. Audio is either choppy with echoes, or completely nonexistent.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	It is not possible for us to travel to Tallahassee for every meeting. The quality of the webinars is so low that it is not productive for our team to participate	PALM has improved the quality of some recordings, but not all. We are moving the resolution date out to the end of July to see how the Design	07/31/24	PALM

					meetings go.		

CITRUS 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** *

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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Christine Marion	cmarion@citrus.myflorida.com	01/09/25
September - October 2024	Christine Marion	cmarion@citrus.myflorida.com	11/08/24
July - August 2024	Christine C Marion	cmarion@citrus.myflorida.com	09/06/24
May - June 2024	Christine Marion	cmarion@citrus.myflorida.com	07/09/24
March - April 2024	Christine Marion	cmarion@citrus.myflorida.com	05/02/24
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24