DBPR Status Report Dashboard

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

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 = 12

• Duplicate Filled Role = 6

• Vacant Role = 0

RW Task Completeness:

Score = 99.26%

• Submitted Complete = 52

• Submitted Incomplete = 0

• Completed After Submission = 2

RW Task Timeliness:

Score = 94.13%

• Submitted On Time = 67

• Submitted Late = 13

• Pending Submission = 0

Meeting Participation:

• Meetings Attended = 5

• 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	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	12/13/24	FLAIR Object Codes to be configured in PALM OA2 and Versa will be remediated to do the same. Specifications to produce ARI010 out of Versa Regulation have been drafted, reviewed, and turned over to DBPR IT. Specifications for spreadsheet uploads IUI001 and API041 still be developed and are being managed under PALM Task 561. Revenue Codes Crosswalk - COA Lookup Table has been provided to DBPR IT for DBPR entries only.	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/05/24	Reviewed Conversions with Accounting Systems Analyst	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	100% - Submitted	11/21/24	Outstanding question on a contract that was inactivated in FACTS but remains Active in FLAIR (out of sync)	Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/05/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	100% - Submitted	12/26/24	November and December 2024	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	11/26/24	No missing values for Assets per research. DEPR errors are all okay.	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	11/26/24	ABS information updated and no interfaces at this time	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25	Added new Technical and User Documentation for Versa for DBPR		
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	Determining if with or without budget	Submission Complete	
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	Only Orgs with activity over the last 2 years were configured	Submission Complete	
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	Contains all OCA values	Submission Complete	
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	Contains all Object Codes values; special characters removed	Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24		Submission Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	No updates since last cleanup	Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	DBPR has no projects	Submission Complete	
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	11/26/24	Going with Agency Wide	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		The final UAT Testing Plan has been drafted and is being reviewed internally by DBPR Project Directors.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering	01/07/25			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/07/25			
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/07/25	DBPR believes only one Distribution Code is needed; however, sub-locations have had recent activity against them.		
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	75% - Consolidating/Inputting		Director of Admin considering removal of one revolving account.		

						Information for Submission				
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	75% - Consolidating/Inputting Information for Submission		One Speedkey has Category of 030000, which is not allowed, but is needed. Question out to RC.		
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	01/31/25	75% - Consolidating/Inputting Information for Submission		Reviewing differences between Organizations configured and those being converted.		
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25	75% - Consolidating/Inputting Information for Submission		Reviewing differences between Organizations configured and those being converted.		
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25	All related updates applied to Smartsheet	Submission Complete	
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		Covers January and February 2025		
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	01/31/25	75% - Consolidating/Inputting Information for Submission		No mapping of Grants to occur		
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	**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 = 32

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 23

Processes

Implementation:

Impacted Agency Business Processes = 98

• Related Business Process Groupings = 9/13

• Planned Spreadsheet Uploads = 0

Technology

Implementation:

Business Systems Planned for Integration = 2

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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 #3: No Tree Assigned

• **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 = 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.

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners Create visual aids, mapping documents, and other PALM educational tools.	PALM Task 568 - DBPR End User Training Plan has been released and is actively being worked. PALM Education continues to be an area of focus.	04/08/24	Gary Townsend
Processes	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders		04/08/24	Thomas Richardson
People Processes Technology Data	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete work flows	Open	3 (High/Low)	Mitigation - Continue to expose the staff to Business Process and related details and ensure they have access to all tools (UAT sandbox, etc.)	End Users were updated in Smartsheet. DBPR end users need to assist with User Story creation. DBPR end users need to assist with identifying Sources of data	04/18/24	Thomas Richardson

Category	Risk	Status	Priority	Mitigation / Action	Notes	Date	Owner
People Processes Technology Data	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete Future-State Business Processes once we go live	Open	3 (High/Low)	Mitigation - Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	Action Item #69 was created to establish a repository for PALM post-production install support items. It is believed data queries, direct PALM access, and reports will provide all of the necessary data that is needed by Finance & Accounting and no new tool will be necessary.	04/23/24	Thomas Richardson
People Processes Technology Data	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Engaging DBPR SMEs to assist with User Stories should help. Current-State to Future-State Crosswalk sessions are behind the scheduled dates the OCM lead requested. An Assumption (#44) was added for getting caught up. Current-State to Future-State Crosswalk sessions should resolve.	05/31/24	Thomas Richardson
People Processes Technology Data	If all various Future-State Business Process scenarios (including anomalies and non-happy path conditions) are not identified and accounted for in test scripts, then testing will not be comprehensive and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Work with DBPR SMEs and identify all possible scenarios. Account for these scenarios in UAT test scripts in advance of scheduled UAT.	User Stories are being created, and this should flesh out all scenarios. Decreasing Probability from 2 to 1. Some anomalies and scenarios are trickling in from F&A staff. A Task for each process crosswalk session has been added to identify any anomalies or scenarios. Changed Probability from 3 to 2.	07/03/24	Thomas Richardson
People Processes Technology Data	If significant time is not spent planning and preparing for UAT as well as business processes not intended to be performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Open	3 (High/Low)	Mitigation - If significant time is not spent planning and preparing for UAT as well as business processes not being performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	UAT Testing Plan draft (PALM Task 536-C) has been drafted and is under internal DBPR review. Significant UAT planning and documentation has been accomplished. PALM Task 536-C is being released on 12/9/24 and internal definition of defect tiers has been drafted and discussed.	07/17/24	Thomas Richardson
People Processes Technology Data	If DBPR does not test all send/receive transactions for iInter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	This has been added as a Task on the Leadership Summary of Tasks.	08/16/24	Thomas Richardson
People Processes Technology Data	If all possible situations for getting large amounts of data into FLAIR are not addressed with automated replacements in PALM, hand-typing data into PALM could be error prone and inefficient	Closed	3 (High/Low)	Identify all high-volume data imports into FLAIR currently and identify possible spreadsheet uploads that can be utilized	An API041 upload spreadsheet mapping was reviewed with the Disbursements Team.	12/04/24	Thomas Richardson
People Technology Data	If FGCC does not provide the necessary details (conditional logic, valid values, Chart of Accounts table lookup values) in a timely manner, then FGCC will not be able to receive bank deposits from Versa in the ARI010 upload spreadsheet and these deposits will not be applied in PALM	Closed	3 (High/Low)	Log and track appropriate action items, follow-up with FGCC Project Manager (periodically), facilitate communications/discussions with DBPR IT, provide COA Table Lookup entries for FGCC only so they can be reviewed and updated, and ensure DBPR IT has what they need to complete Versa Regulation remediation as scheduled	Transferred to FGCC Project Manager. Determined FGCC will be able to log in and pick up Versa Bank Deposit files.	11/13/24	Thomas Richardson
People Processes Technology Data	If all PALM CMS Wave processes already in production that have a current FLAIR component have not been identified how the FLAIR piece will be replaced, then we will have problems executing Business Processes when the PALM Financial Wave is deployed to production considering FLAIR is going away at that time	Open	3 (High/Low)	Identify all PALM Business Processes done by DBPR in production today and identify all that have a FLAIR component, review the FLAIR components in detail and identify a replacement, confirm the approach, and test the approach during Financial Wave UAT.	Lyndell Francis is currently researching.	11/13/24	Thomas Richardson
People Processes Technology Data	If DBPR does not have a cutover plan for the duration when FLAIR is shut down but PALM is not yet available, then key business processes may not be able to be completely timely and could have negative consequences.	Closed	3 (High/Low)	Create a Cutover Plan that Identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	See Action Item #24. Risk was escalated to Issue #2 that has since been closed. See Task 547 (ABS remediation). See AI #56.	11/27/24	Thomas Richardson
Data	If an approach/solution/revision for how to populate the Payment Method in the ARI010 upload spreadsheet is not determined by the PALM Technical Team in a timely manner, then DBPR ABS remediation (Versa) by DBPR IT will not be completed in accordance with the schedule and negatively impact UAT and the DBPR PALM Readiness Project.	Closed	3 (High/Low)	Share with the readiness Coordinator Team, ensure the question is added to the DBPR Question Log, and follow up periodically.	A meeting was conducted to review all pertinent PALM CMS Business Processes with a FLAIR component, and it was determined no special action is required to prepare for the retirement of FLAIR for the PALM CMS processes.	12/18/24	Thomas Richardson
People Processes Technology	If PALM Future-State Business Processes are not stable and subject to significant change during or after education presented to DBPR end users, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	2 (Medium/Low)	Mitigation - Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes. Identify any shortcomings in Future-State Business Processes and communicate them to the DFS PALM Project team via the RC as soon as possible	Current-State to Future-State Crosswalk sessions are behind schedule but are taking place. A template for addressing flow changes as well as technical changes is being developed.	06/19/24	Thomas Richardson
People Processes	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Open	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	Added to anomalies and scenarios folder.	08/19/24	Jennifer Gaines
People Processes Technology	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not	Open	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	Once PALM Task 573-A is released, PALM roles should be well-defined.	08/19/24	Thomas Richardson

| Data | have the desired flexibility once we go to production with PALM | | | | | Organizational Security is going to be handled Agency-wide per configuration PALM Task 567-I that has been completed. | | |
| People Processes Technology Data | If all potential manual work arounds conducted by Finance and Accounting staff that center around Versa are not addressed as a result of PALM remediation, then an opportunity to eliminate inefficiencies and increased potential risks could remain | Closed | 2 (Medium/Low) | Identify manual work arounds completed in FLAIR today, conduct analysis, and determine if they can be resolved programmatically by DBPR IT within Versa | No manual workarounds will be required | 12/04/24 | Thomas Richardson |

DBPR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	A timely approach/solution/revision for how to populate the Payment Method in the ARI010 upload spreadsheet has not been determined by the PALM Technical Team. The DBPR ABS remediation (Versa) by DBPR IT will not be completed in accordance with the schedule and negatively impact UAT and the DBPR PALM Readiness Project.	Closed	Critical - Impacts the ability of the agency to move forward with work without resolution	Share with the readiness Coordinator Team, ensure the question is added to the DBPR Question Log, and follow up periodically.	This issue was resolved. Payment Method will not be populated with all of the desired values; however, Versa will continue to product a QLIK report that includes all detail remittance types. If this information is required, DBPR F&A staff can view the QLIK report.	12/02/24	Thomas Richardson

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR end users	
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Project Schedule is reviewed, updated, and managed daily
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR end users PALM	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than January 2026.	Logged	04/01/24	All DBPR end users PALM	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR end users PALM	The DBPR staff remain active and engaged
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR end users PALM	
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership.	Logged	04/01/24	All DBPR end users Thomas Richardson PALM	
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All DBPR end users Versa FLAIR@BPR	Versa is the only ABS being remediated.
People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR will have no direct interfaces from ABSs to PALM (at least at Go LIve).
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All DBPR end users PALM FLAIR	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All DBPR end users PALM FLAIR	
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR end users PALM	The Project Schedule is updated and managed on a daily basis. Snapshots are captured on a weekly basis.
People Processes Technology Data	Testing of remediated business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All DBPR end users PALM	Versa remediation continues. One PALM Spreadsheet Upload has been completed and two more are in the works.
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	The Project Schedule is updated and managed on a daily basis.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contrace Organizational Change Lead	
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All DBPR end users OCM Lead PALM	PALM training Tasks are under way.
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR was engaged n the required data cleansing.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Data cleansing and conversion Tasks were completed for Mock 2.
People	The Florida PALM Project will provide a Chart of Accounts	Logged	04/01/24	DFS PALM Development Staff	

Data	crosswalk, interface layouts, and conversion layouts.			All DBPR end users PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	None identified yet.
People Processes Technology Data	Language in the To Be Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	Staff continue to review PALM Business Processes.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	All PALM CMS processes that include a FLAIR component, were revisited to determine if the FLAIR component (because FLAIR is going away) needs to be replaced or accounted for. It was determined that nothing special needs to be done to account for FLAIR going away.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding To Be Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy.	Logged	05/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR end users	Received confirmation only UAT environment in April 2025.
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All DBPR end users	Has been included in the UAT Testing Plan (Task 536)
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All DBPR end users PALM PALM Website	Future-State Business Processes are currently being reviewed with DBPR staff.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	All FLAIR Reports data elements were updated in the Reports Smartsheet
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by Florida PALM and are not the responsibility of DBPR	Logged	06/21/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	These will be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios.
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR PALM Readiness Project stakeholders	
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that it does not become outdated and obsolete.	Logged	08/07/24	All DBPR PALM Readiness Project stakeholders	The PMP quarterly review is currently under way. Names on the DBPR Org Chart is one area that will need to be closely monitored.
Data	All PALM reports will include all Chart of Accounts fields (including OA2)	Logged	08/16/24	All DBPR PALM Readiness Project stakeholders PALM	All OA2 (FLAIR Object Codes) have been configured per PALM Task 567-D.
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	All DBPR PALM Readiness Project stakeholders PALM	
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR PALM Readiness Project stakeholders PALM	
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	10/23/24	All DBPR PALM Readiness Project stakeholders PALM	
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in April 2025	Logged	11/27/24	All DBPR Stakeholders Gary Townsend PALM	The Current-State to Future-State Business Processes were rearranged, rescheduled, with revised tasks with the input from the OCM Lead.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	All DBPR Revenue Accounting Stakeholders PALM Versa Regulation	The PALM Technical Team is limiting the Payment Method values that will be stored in PALM. The Remittance Type values included in the QLIK report should be sufficient.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the Project Schedule	Logged	12/04/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks have been rescheduled and are getting caught up in the Project Schedule.
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks are currently under way.
People Processes Technology Data	all Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT	Logged	12/18/24	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	At the December STMS Update conducted on 12/17/24, STMS indicated they will be providing all of the scenarios for STMS that need to be tested.

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]

DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Sally Huggins	sally.huggins@myfloridalicense.com	01/09/25
September - October 2024	Sally Huggins	sally.huggins@myfloridalicense.com	11/05/24
July - August 2024	Sally Huggins	sally.huggins@myfloridalicense.com	09/09/24
May - June 2024	Sally Huggins	sally.huggins@myfloridalicense.com	07/11/24
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24