DMS 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

Lance Dyal

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 = 10
- Duplicate Filled Role = 6
- Vacant Role = 0

RW Task Completeness:

Score = 92.04%
- Submitted Complete = 41
- Submitted Incomplete = 1
- Completed After Submission = 12

RW Task Timeliness:

Score = 97.47%
- Submitted On Time = 75
- Submitted Late = 7
- 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	12/10/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	Pending Resubmission	10/08/24	Completed the Speedkeys (1) and Payroll (2) Spreadsheets and checked them back into the secure DMS PALM portal.	Submission Incomplete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/15/24		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	Mock Conversions Smartsheet is now complete.	Submission Complete	12/06/24
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/07/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	100% - Submitted	12/19/24		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	12/04/24	Mock Conversions Smartsheet is now complete	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/10/24		Submission Complete	
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	12/17/24
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	01/09/25
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	12/18/24
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	12/13/24		Submission Complete	12/19/24
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	12/18/24
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	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	01/09/25			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	75% - Consolidating/Inputting Information for Submission		DMS: Updates will be ongoing.		
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	25% - Beginning Initial Internal Meetings and Information Gathering				
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	25% - Beginning Initial Internal Meetings and Information Gathering				
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	25% - Beginning Initial				

						Internal Meetings and Information Gathering				
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		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				
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
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.

Implementation:

People
Planned Florida PALM End Users = 73
• Business Process Groupings = 12/13
Identified Subject Matter Experts = 51

Processes
Impacted Agency Business Processes = 60
• Related Business Process Groupings = 10/13
• Planned Spreadsheet Uploads = 4

Technology
Business Systems Planned for Integration = 4
Planned Interfaces = 9
- Inbound Interfaces = 5
- Outbound Interfaces = 3

Data
Configuration
• **Commitment Control (KK)**
- Budget Allotments - Control Option = Option # 3 - Track without Budget
- Account ChartField Tier Selection = Account Tier #1: Highest
- Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree
• **Org Security Rule = Agencywide**
• **Optional ChartFields**
- OA1 = To Be Configured
- OA2 = Not 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 = 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.

DMS Risks

Sheet Name	Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
FRS Risks	People Processes Technology Data	Retiree payroll warrants and EFTs (approximately $12 billion per year for 472,000+ payees) not being processed timely and/or accurately. Currently, because we are using the accounts payable module, instead of a payroll module, we may not be able to schedule payrolls with a specific timing. We may not be guaranteed that the payments will be made timely, or the checks will be printed prior to the pay date. • Pay dates for Retired Payroll is set a year in advance. After going through an approval process, these dates are sent to DFS every year before December prior to the year beginning. (Payroll schedule attached.) o This may need to be adjusted on the fly for natural disasters. o Pay date for Retired Payroll is the last business day of every month, as required by statute (F.S. 121.091(1), F.S. 121.091(3), and F.S. 121.091(4)). o Florida PALM needs to be responsible for scheduling changes or adjustments. • We believe we can make this work using the Accounts Payable (AP) module, however, this could be an extremely human driven and coordinated process, if this cannot be pre-established with supplemental and monthly fixed dates. • Of other known retirement systems, none process benefit payments through Accounts Payable (AP) modules. • Potential Options:	Open	9 (High/High)	Going through confirming requirements, build an acceptable design, extensive testing - especially formal parallel testing to ensure everything is running properly for several cycles. Working with PALM to get more information to better define the programming needs.	2023-09-22 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-13 - Updated Impact Rating to (3) High and Probability Rating to (2) Medium 2024-12-19 - Updated Probability Rating to (3) High and added additional language to the description to better clarify why the risk has intensified.	09/22/23	Division of Retirement / Megan Biederman

		o Have a direct interface with the state disbursement bank (currently JP Morgan) (this is how other states function). o Third Party sending bank files to and from our state disbursement bank account. o Build the AP module around our pay cycle. (Supplemental and Monthly)						
DMS Risks	People Processes Technology Data	The requirement of Speedkeys for transactions can pose a problem for several of our enterprise systems. If the speedkeys are still hardcoded and unable to be changed once entered there is an additional risk of user error both on the entry of the speedkey and the selection.	Open	6 (Medium/High)	This topic was recently brought up in our monthly PALM Touchpoint with the DMS RC. DMS is seeking additional information on requirements. Workshop in Sept 2024 will address this along with a required RW Task. Oct 23: This task has been completed and submitted for Payroll and Pcard. There will be another opportunity to review and edit. Dec 18: New task will provide an opportunity to review and edit prior to UAT and Go Live.	Logged April 25, 2024 Reviewed again Aug 28, 2024. Edits made. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor. Review date TBD. Hardcoding no longer an issue.	04/25/24	Finance and Administration / Eric Thiele
DMS Risks	Processes Technology Data	Developing test plans before the system is available will limit test coverage.	Open	6 (Medium/High)	Have test bed available prior to UAT execution. Oct 23: UAT Plan currently in development to address this. Waiting on PALM to provide more info. Dec 18: No change. Continuing to monitor.	Logged Oct 9, 2024.	10/09/24	OIT / FMS
DMS Risks	People Processes Technology Data	Key SMEs will be involved in annual processes at the same time that they are required to attend PALM training and participate in PALM taks driven efforts,	Closed	6 (Medium/High)	Bandwidth for SMEs and End Users is at risk. Mitigation would involve a staff augmentation, Key time period for highest risk is June-Sept 2025. Dec 18: This risk is addressed in Risk ID 004.	Logged Oct 23, 2024	12/18/24	OIT/FMS/Stephen Russell
DMS Risks	People Processes	Timeline and Resources. There are multiple overlapping Palm tasks with due dates that utilize the same personnel resources as statutorily required tasks during year end.	Open	6 (High/Medium)	Complete the tasks early or ask for a later due date. Most PALM tasks completed early - some still in progress. Year end required tasks complete. Dec 18: Key staff are required to do fiscal year end close out. Also required to participate in UAT and Training activities. Attempting to mitigate this risk with staff augmentation.	Logged April 27, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2, 2023 and closed. Reviewed again Dec 18, 2024 and reopened.	12/18/24	Finance and Administration / Eric Thiele
DMS Risks	People Processes Technology Data	Functionality, Will PALM deliver the functionality needed for DMS operations?	Open	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees. PALM is addressing this risk. June 20: PALM is requiring that agencies create and implement their own testing plans. That initiative is in planning. Oct 23: Implementation plan in development. UAT plan is in progress. Dec 18: Still evaluating interface requirements in light of new business requirements. UAT plan will address this and is in progress.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Reviewed again Dec 20 - no change. Reviewed again April 24, 2024. Re-opened. Continuing to monitor. Reviewed again June 20, 2024. Edits made. Continuing to monitor. Reviewed again Aug 28, 2024. Continuing to monitor. Oct 23: No change. Continuing to monitor. Dec 18: Remediation in progress. Continuing to monitor.	02/22/24	Finance and Administration / Stephen Russel
DMS Risks	People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change. Continuing to monitor. Reviewed again Dec 20 - no change. Continuing to monitor. Reviewed again Feb 22 - no change. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again Aug 28, 2024. No change. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor.	11/02/23	Finance and Administration / Sandy Watson
FRS Risks	People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed. Retirement needs to be able to go negative in specific funds, not all funds have been approved that are required to be able to go into negative cash balances. Specifically fund 70500 (need to invest Health Insurance Subsidy (HIS) and Investment Plan (IP) Investment Vouchers need to post even if the fund is negative in cash), other funds needed were previously approved. The current process has allowed us to keep loss of earnings at a minimum, however, if the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts we will be forced to pay more loss of earnings which would negatively effect the Florida Retirement System (FRS) Trust Fund.	Open	6 (High/Medium)	Programming needs to be completed to allow for flexibility so funds can be released timely. Continue to work with the PALM team.	2023-11-6 - Logged 2023-12-20 - No change. 2024-02-09 - No change. 2024-04-19 - No change. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Updated description and mitigation/response strategy to give more	11/07/23	Division of Retirement / Megan Biederman

Risk	Category	Description	Status	Rating	Response Strategy	Review Notes	Date	Owner
						details. Raised the probability rating.		
[FRS Risks](#)	People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Plan for report identification and testing. Verify reports are available.	2023-11-6 - Logged

2023-12-20 - No change.

2024-02-09 - No change.

2024-04-19 - No change.

2024-06-18 - No change.

2024-09-04 - No change.

2024-10-25 - No change.

2024-12-19 - No change. | 11/07/23 | Division of Retirement / Megan Biederman |
| [FRS Risks](#) | People Processes Technology Data | Any significant change to existing Retiree payroll, EFT processing (EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop payments, etc., not being automated or not being processed timely and/or accurately.), BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time. | Open | 6 (High/Medium) | Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to create online entries manually in Florida PALM. Working with PALM to get more information to better define the programming needs. | 2022-02-17 - Originally entered.

2024-06-18 - No change.

2024-09-04 - No change.

2024-10-25 - No change.

2024-12-13 - Updated Impact Rating to (3) High and Probability Rating to (2) Medium
2024-12-19 - Updated language in description and mitigation/response strategy to include language from closed Issue #3. | 02/17/22 | Division of Retirement / Megan Biederman |
| [DMS Risks](#) | People Processes Technology Data | Functionality.
Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date? | Open | 4 (Medium/Mediu | Roll out sandbox test capabilities as sections are completed for Agencies to test.

Sandbox environment is not secure for testing - PALM needs to work on true test environment.

Sandbox status has not changed. PALM is addressing this risk.

Aug 8: This remains a risk until UAT goes into production. Waiting on a status update from PALM on how the sandbox will function during UAT.

Oct 23: No change. Continuing to monitor.

Dec 18: No change. Continuing to monitor. Testing environment for UAT will use historical mock data. | Logged April 21, 2023. Reviewed again September 6, 2023.

Reviewed again Nov 3, 2023.
Mitigation notes updated.

Reviewed again Dec 15, 2023.
No change. Continuing to monitor.

Reviewed again Feb 2 2024.
No change. Continuing to monitor.

Reviewed again April 24, 2024. No change. Continuing to monitor.

Reviewed again June 20, 2024. No change. Continuing to monitor.

Reviewed again Aug 8, 2024. No change. Continuing to monitor.

Reviewed again Aug 28, 2024. No change. Expect to monitor more closely during UAT activities.

Reviewed again Dec 18, 2024. No change. Expect to monitor more closely during UAT activities. | 11/03/23 | Division of State Group Insurance / Jason Ottinger |
| [FRS Risks](#) | People Processes Technology Data | Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System) | Open | 4 (Medium/Mediu | Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.

Continuing to monitor Class Code implications by being aware of what is coming out of HR regarding class codes. | 2023-11-6 - Logged

2023-12-20 - Updated mitigation.

2024-02-09 - No change.

2024-04-19 - Class Code System changes could create high impact for Retirement Interface Files.

2024-06-18 - No change.

2024-09-04 - No change.

2024-10-25 - No change.

2024-12-19 - Added clarification in Response Strategy. | 11/07/23 | Division of Retirement / Megan Biederman |
| [STMS Risks](#) | People Processes | Timeline.
Competing deadlines immediately prior to go-live.
Fiscal accountants and other users will be trying to learn PALM as well as changes to departmental and enterprise systems affected | Open | 4 (Medium/Mediu | Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.

Meetings with PALM have been initiated. Still early in the process. | Logged Sept 8, 2023.

Reviewed again Nov 6, 2023 - no change.

Reviewed again Dec | 11/06/23 | STMS / Casey Taylor |

		by PALM implementation, at the same time.The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users.				20. No change. Continuing to monitor. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again June 12, 2024. No change. Reviewed again on Sept 10, 2024. No change. Reviewed again on Oct 29, 2024. No change. Reviewed again on Dec 18, 2024.		
FRS Risks	People Processes Technology Data	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. In the process of working through the design with PALM. No work around except using the existing payroll system.	2022-02-17 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Confirmed this risk is still valid and ratings are appropriate.	02/17/22	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately. This risk includes the timely and accurate posting of revenues in PALM. (These transactions record the receipt of retirement contributions of approximately $6 billion per year.) If this risk happens, Retirement would not be able to receive the revenue and be able to invest (loss of earnings) and allocate to employer's accounts (the delay will affect allocations to balance the retirement reports which will delay posting of contribution data in IRIS which delays funds transfers to Investment Plan member accounts which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to Retirement).	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. The risk would be on IRIS - would be able to take information from the Department of Revenue website and manually enter, reconcile, and adjust in IRIS. Completed everything regarding strategy, need to test in UAT.	2022-02-17 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Updated description to added more detail.	02/17/22	Division of Retirement / Megan Biederman
STMS Risks	People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API. Meetings with PALM have been initiated. Still early in the process. Close to resolution; will review next cycle.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again July 12, 2024. Likely resolution next cycle. Reviewed again Sept 10, 2024. Design sessions are in process. Reviewed again on Oct 29, 2024. Design/development in process. Reviewed again on Dec 18, 2024. Design/development in progress.	11/06/23	STMS / Casey Taylor
STMS Risks	Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again July 12, 2024. No change. Reviewed again Sept 10, 2024. No change. Reviewed again Oct 29, 2024. Development and testing in progress. Reviewed again on Dec 18, 2024. Development in progress.	11/06/23	STMS / Casey Taylor
STMS Risks	Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Open	2 (Medium/Low)	Provide information about the Speed Key interface, as well as training about how agencies will be using it in PALM. Provide training about how Speed Keys will be used by travelers to communicate billing information to Fiscal Accountants. Meetings with PALM have been initiated. Still early in	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 19, 2023 and closed	12/19/23	STMS / Casey Taylor

DMS Issues

Sheet Name	Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
STMS Issues	Technology Data	Error while testing web service connection.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PALM Team is troubleshooting the connection issue and will schedule a meeting for resolution when available.	Reviewed again on Dec 18, 2024. PALM team will contact us with an update when available.	11/08/24	PALM
DMS Issues	Processes	MIP interfaces selected may not be 100% remediated without testing.	Open	Low - All impacts not listed as Critical or High	Could be manually resolved with more manpower, but would want to make changes to interface selection and possibly the interfaces themselves to account for missing / unknown elements. Oct 23: Confirmed interfaces. MIP has updated and automated internal FLAIR reports. Next steps are in progress - id data fields that need to be integrated with MIP and PALM.	If we mark "Remediation Complete" on the PALM Smartsheet, does that preclude us from making changes once testing starts? Reviewed again Aug 28, 2024. No change. Continuing to monitor. Oct 23: Continuing to monitor. Dec 18: Continuing to monitor. Some remediation complete and some still in progress. Process mapping in progress.	01/15/25	OIT / Production Support / John Ross
DMS Issues	People Processes	The majority of the DMS End Users are new to DMS. An even larger percentage have held their current jobs at DMS for less than 5 years.	Open	Low - All impacts not listed as Critical or High	Consistent monitoring, training and follow up. Regular communication, meetings, and increased involvment in the project Readiness Workplan Tasks.	This issue was logged as low priority because half of the DMS End Users have worked for the state for over 15 years. The remainder have been in the state system for between 6 and 15 years. DMS End Users as a whole are familiar with and have worked in PALM, counteracting their short time with DMS and / or in their current position. These numbers represent minmal risk to the project. Reviewed again Aug 28, 2024. No change. Continuing to monitor. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor. Staff augs have been briefed and risk level is minimal to date.	01/30/26	Lance Dyal / Eric Thiele
FRS Issues	People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct. 2024-02-09 - No change. 2024-04-19 - No change. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - No Changes	12/01/25	Florida Retirement System / Megan Biederman
FRS Issues	People Processes Technology	EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop...	Closed	Low - All impacts not listed as Critical or High	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all...	Reviewed 2022 entry. Re-entered April 19, 2024.	12/19/24	Florida Retirement System / Megan Biederman

| | | payments, etc., not being automated or not being processed timely and/or accurately. | | designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to create online entries manually in Florida PALM. | Outstanding currently. Confident that PALM will address and work with FRS to resolve.

2024-06-18 - No change.

2024-09-04 - No change.

2024-10-25 - No change.

2024-12-19 - Agreed as a group this is not an issue, ensured description language was captured in Risk #6 and closed issue. | |

DMS Assumptions

Sheet Name	Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
DMS Assumption	People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division. Reviewed again on Dec 27. No change. Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox. Reviewed again April 24, 2024. No change. Intend to address this general assumption in more detail with the End User Survey Analysis. Reviewed again Aug 8. No change. Reviewed again on Aug 28. No change. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor. Some staff aug is now in place.
FRS Assumption	Data	The State Retirement file from Bureau of State Payrolls (BOSP) will contain all of the same data elements that it currently contains, the reporting will function as it currently does, and Retirement will continue receiving the same information from People First.	Logged	08/28/24	Bureau of Enrollment and Contributions, IRIS	2024-10-25: Worked with PALM, they confirmed the file properties will be the same, however, leaving open until testing. 2024-12-19: Reviewed, no changes.

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

Privacy Notice | Report Abuse

DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Lance Dyal	lance.dyal@dms.fl.gov	01/10/25
September - October 2024	Lance Dyal	lance.dyal@dms.fl.gov	11/07/24
July - August 2024	Lance Dyal	lance.dyal@dms.fl.gov	09/11/24
May - June 2024	Lance Dyal	lance.dyal@dms.fl.gov	07/12/24
March - April 2024	Katie Parrish	eric.thiele@dms.fl.gov	05/14/24
March - April 2024	Katie Parrish	evelyn.harrison@dms.fl.gov	05/13/24
January - February 2024	Katie Parrish	katie.parrish@dms.fl.gov	03/06/24

FRS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Kathy Gould	kathy.gould@dms.fl.gov	12/20/24
September - October 2024	Kathy Gould	kathy.gould@dms.fl.gov	11/07/24
July - August 2024	Kathy Gould	kathy.gould@dms.fl.gov	09/05/24
May - June 2024	Kathy Gould	floridapalm@myfloridacfo.com	07/02/24

MFMP Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Tyler Brown	tyler.brown@dms.fl.gov	01/07/25
September - October 2024	Tyler Brown	tyler.brown@dms.fl.gov	11/07/24
July - August 2024	Tyler Brown	tyler.brown@dms.fl.gov	09/11/24
May - June 2024	Tyler Brown	tyler.brown@dms.fl.gov	07/01/24

PF Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Michael Livingston	michael.livingston@dms.fl.gov	12/19/24
September - October 2024	Tony Lloyd	tony.lloyd@dms.fl.gov	10/31/24
July - August 2024	Tony Lloyd	tony.lloyd@dms.fl.gov	09/09/24
May - June 2024	Tony Lloyd	tony.lloyd@dms.fl.gov	07/08/24

STMS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Casey Taylor	casey.taylor@dms.fl.gov	12/18/24
September - October 2024	Casey Taylor	casey.taylor@dms.fl.gov	10/30/24
July - August 2024	Casey Taylor	casey.taylor@dms.fl.gov	09/11/24
May - June 2024	Gerard Steele	gerard.steele@dms.fl.gov	07/12/24