

Helpful Links

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

DOE 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

Suzanne Pridgeon

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 5
- 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 = 79.80%**
- Submitted Complete = 29
- Submitted Incomplete = 5
- Completed After Submission = 17

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 = 92.32%**
- Submitted On Time = 70
- Submitted Late = 8
- Pending Submission = 4

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	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	Documentation is still in progress. To be completed the according to the rubric, the documentation must be completed.	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	Pending Resubmission	10/03/24		Submission Incomplete	11/07/24
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	Pending Resubmission	09/11/24	Susanne to confirm July-August 2024 to be marked complete. -dlt, 12/9	Submission Incomplete	11/12/24
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24	Test cases has not been identified yet.	Submission Incomplete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/21/24		Submission Complete	12/04/24
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	100% - Submitted	12/09/24		Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/12/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	100% - Submitted	12/27/24		Submission Complete	
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	50% - In Progress				
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/13/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress				
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24		Submission Complete	
Direct	Data	567-B	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-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	12/16/24
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	
Direct	Data	567-G	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-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	12/16/24
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	50% - In Progress				

Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	50% - In Progress			
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	01/31/25	50% - In Progress			
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25	50% - In Progress			
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	50% - In Progress			
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.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 124</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 13</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 49</p> <ul style="list-style-type: none"> Related Business Process Groupings = 7/13 Planned Spreadsheet Uploads = 1 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 10</p> <p>Planned Interfaces = 12</p> <ul style="list-style-type: none"> Inbound Interfaces = 6 Outbound Interfaces = 5 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = 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.

DOE Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
Processes Technology Data	Significant delay in receiving the technical requirements	Open	6 (High/Medium)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	Quicker response time has lowered the risk level.	06/25/24	Project Manager
People Processes Technology Data	<p>A potential risk for the TraQ application not being ready for User Acceptance Testing (UAT) is the possibility of incomplete functionality or unresolved bugs. If critical features are not fully implemented or existing issues have not been addressed, it can lead to:</p> <ol style="list-style-type: none"> Delays in Project Timeline: UAT is a crucial phase, and if the application isn't ready, it can push back the overall project schedule, affecting subsequent phases such as deployment and user training. Increased Costs: Remediation efforts to fix issues identified during UAT can lead to unexpected costs, particularly if extensive changes are needed or if additional resources are required. User Dissatisfaction: If the application does 	Open	6 (High/Medium)	<p>Clear Communication: Maintain Transparent Communication with Stakeholders about timelines, potential risk and the importance of maintaining the project schedule.</p> <p>Risk Management Plan: Create a comprehensive risk plan to outline potential risk and the impacts on the application and the timeline of the project.</p>	New Risk	12/13/24	Application Owner

	not meet user expectations during UAT, it can result in negative feedback, eroding user confidence and satisfaction, which may impact future adoption. 4. Reputational Damage: Failing to deliver a functional product on time can harm the organization's reputation, especially if stakeholders or customers are relying on the application for critical business operations. 5. Compliance Risks: If the application is intended to meet specific regulatory or compliance standards, not being ready for UAT could lead to non-compliance issues, resulting in legal or financial repercussions.						
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change 10/01/2024 This risk will remain throughout the project	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team (anyone working on PALM)). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	No update - 10/11/2024	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	4 (Medium/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified. 10/01/2024 The quicker response by PALM have lowered the risk level.	05/30/24	Project Manager
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies. 10/01/20/24 This risk remains current	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	No update-10/11/2024	01/12/24	DTI and Aware technical teams
People Processes Technology Data	The project is heavily reliant on one individual (Matt Kirkland) who possesses the primary knowledge of the business applications. If this individual becomes unavailable (due to illness, departure, or other reasons), there is a risk of project delays, errors, and reduced efficiency in resolving technical or operational challenges. Impact: -Delays in project timelines due to the lack of expertise available to address critical issues. -Reduced quality of deliverables due to incomplete understanding of business applications. -Increased operational and knowledge transfer costs if the individual exits or is unavailable. -Potential for project failure in critical phases where the knowledge is essential.	Open	3 (High/Low)	1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members. 2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible. 3.) Cross-Training: Train other team members to create redundancies in expertise. 4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity. 5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise. By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity.	New Risk Assessment	11/22/24	DOE Leadership
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task. 10/01/2024 No new system has been identified.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	No update - 10/11/2024	01/30/24	AWARE Team

DOE Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Technology Data	Task 519 remediation phase 1 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	No update as of 10/11/2024	12/02/24	PM/DTI
People Processes Technology Data	Task 531 remediation phase 2 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New issue	12/02/24	PM/DTI

PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.

DOE Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023

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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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	01/10/25
September - October 2024	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	11/12/24
July - August 2024	Matt Kirkland	matt.kirkland@fldoe.org	09/11/24
May - June 2024	Matt Kirkland	matt.kirkland@fldoe.org	07/12/24
March - April 2024	Matt Kirkland	matt.kirkland@fldoe.org	05/13/24
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24