DOEA 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
Teresa Johnson

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

RW Task Completeness:
Score = 90.82%
- Submitted Complete = 42
- Submitted Incomplete = 1
- Completed After Submission = 6

RW Task Timeliness:
Score = 71.25%
- Submitted On Time = 44
- Submitted Late = 27
- Pending Submission = 7

Meeting Participation:
- Meetings Attended = 5
- Meetings Missed = 1

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
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		Temporary staff has been hired to manage PM related tasks.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	50% - In Progress		Created draft document. Internal review scheduled. Still working to document processes and crosswalk to PALM processes to determine scripts.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	08/01/24	Business system related, no anticipated remediation.	Submission Complete	08/01/24
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	50% - In Progress		Created draft document. Internal review scheduled. Still working to document processes and crosswalk to PALM processes to determine scripts.		
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	10/18/24	Uploaded the verified file in the main DOEA folder. I couldn't edit the file in the web browser so I downloaded a copy instead. Then had issues reuploading to the mock 1 > projects folder.	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/21/24	DOEA does not have any business systems interacting with FLAIR and will not have any business systems interacting with PALM.	Submission Complete	
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	Updated records with errors in FACTS. Still reviewing data for further clean up.	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	Uploaded records of task, risk, and issue meeting.	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	12/02/24	Addressed Asset and Encumbrance errors. One error must be addressed in RW-567 because a new Org must be added.	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	11/19/24	Updated comments in smartsheets. No interfaces needs currently.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	11/21/24	No business systems affected by the PALM implementation that need to have their documentation updated.	Submission Complete	
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24	Q1: Control; Q2: Highest; Q3: Tree 2	Submission Complete	12/27/24
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	Pending Resubmission	12/12/24	RP and TF confirmed task was completed and up to date in smartsheets. Removed & from workbook.	Submission Incomplete	12/17/24
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24	RP confirmed task was completed and up to date in smartsheets. Removed & from workbook.	Submission Complete	12/17/24
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24	RP confirmed task was completed and up to date in smartsheets	Submission Complete	
Direct	Data	567-E	Share, Review, and Update	11/18/24	12/13/24	100% - Submitted	12/09/24	RP confirmed task was completed and	Submission	

			Configuration Workbooks					up to date in smartsheets	Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24	CE confirmed task was completed and up to date in smartsheets	Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24	CE confirmed task was completed and up to date in smartsheets	Submission Complete	
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24	RP and TF confirmed task was completed. Not planning to use this feature at this time due to smaller nature of the Department.	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	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/06/25	Confirmed with TF that task was completed.	Submission Complete	
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	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	Confirmed with Teresa that the status report was submitted.		
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	100% - Submitted	01/09/25	Marked as completed due to DOEA not having any business systems interfacing with Florida PALM.		

People

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

Implementation:

Planned Florida PALM End Users = 28

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 10

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 176

• Related Business Process Groupings = 12/13

• Planned Spreadsheet Uploads = 0

Technology

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

Implementation:

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Implementation:

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 1 - Control

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

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

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = 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.

DOEA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Processes documented and cross walking has begun.	Processes were documented by 10/31/24 and crosswalking has begun.	12/27/24	Randy Pupo

						begun.		
Data	While cleaning up existing data, making sure new data entered meets PALM requirements for conversion	Open	2 (Low/Medium)	Reviewing conversion inventory carefully to minimize post go-live clean up. Also communicating new requirements to staff.	Procured consulting services to aid in data clean up and other activities.	12/27/24	Nancy Frye

DOEA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Staff limitations still exist, turnover creates knowledge gaps	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working on retention and building processes and procedures so when turnover occurs, knowledge is not completely lost	Have completed current process documentation. Knowledge gaps still exist in Agency processes while new staff are being trained.	06/24/25	Ryan White
Processes	Current processes may be outdated or not fully known creating issues in determining how they will be done in PALM	Open	Low - All impacts not listed as Critical or High	Working to build processes and utilize resources for when employees are learning and understanding the "why", and when possible looking in the knowledge center to understand how it will change	In progress of cross walking processes so that staff can review while learning.	01/31/25	Ann Habib

DOEA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOEA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Reviewed all outstanding and current tasks with new Project Manager	09/18/24			
Processes	Supervisors reviewed desk procedures captured by contractor team and had them finalize the documents to begin cross walking to PALM Processes	10/07/24			
Data	Pulled various reports to determine data readiness prior to mock conversions being released.	10/28/24		To determine if our current procedures need to be updated to maintain data clean-up	

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

DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Teresa Johnson	johnsont@elderaffairs.org	01/10/25
September - October 2024	Teresa Johnson	johnsont@elderaffairs.org	11/12/24
July - August 2024	Randy Pupo	pupor@elderaffairs.org	09/12/24
May - June 2024	Randy Pupo	pupor@elderaffairs.org	07/10/24
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit	elmere@elderaffairs.org	03/13/24