

Helpful Links

- Dashboard Snapshots
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- Readiness Workplan

DOH Status Report Dashboard

Reporting Period

November - December 2024

Agency Sponsor

Robert Herron

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

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- 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 = 87.22%**
- Submitted Complete = 34
 - Submitted Incomplete = 2
 - Completed After Submission = 18

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 = 98.19%**
- Submitted On Time = 80
 - Submitted Late = 1
 - Pending Submission = 2

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	25% - Beginning Initial Internal Meetings and Information Gathering	06/14/24	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Interface files have updates based on questions or corrections asked to the PALM team, thus interface file is not finalized. 2) Some questions asked about the interfaces from Segment I for remediation are crucial and many technical decisions are made based on the answers provided by PALM 3) Part of remediation and data dependencies are contingent on Segment IV and recap in October	Submission Incomplete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies are contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 9/27 now 10/4		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 12/13 (Task end date)		
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	This task has been completed by the agency to the best of our abilities due to the Mock Conversion files containing inactive / terminated data.	Submission Complete	12/03/24
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25					
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	This task has been completed by the agency to the best of our abilities due to the Mock Conversion files containing inactive / terminated data.	Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/03/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	Pending Resubmission	12/18/24		Submission Incomplete	
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	100% - Submitted	12/03/24	This task has been completed by the agency to the best of our abilities due to the Mock Conversion files containing inactive / terminated data. We also mentioned to the Project in our November TouchPoint meeting dated November 26 that the data that we received in POC001 is duplicated	Submission Complete	

								Project team was to fix this error.		
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/11/24		Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25			
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24		Submission Complete	
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24	The instructions provided for this task were unclear and DOH got on a call with the PALM team on 12/13 to get clarifications and answers for the Task to be completed. DOH will resubmit this task the week of 12/16.	Submission Complete	12/19/24
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24	Updated and resent 12/12	Submission Complete	12/17/24
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24	Updated and resent 12/13	Submission Complete	12/13/24
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24		Submission Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24		Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24	Updated and resent 12/12	Submission Complete	12/17/24
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/11/24		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25					
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	01/31/25					
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25					
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25					
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25					
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25					
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25					
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	01/31/25					
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	01/31/25					
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25			
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25					
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	01/31/25					
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	03/28/25					

People

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

Implementation:

- Planned Florida PALM End Users = 457
- Business Process Groupings = 12/13
- Identified Subject Matter Experts = 17

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

- Impacted Agency Business Processes = 62
- Related Business Process Groupings = 13/13
- Planned Spreadsheet Uploads = 3

Technology

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

Implementation:

- Business Systems Planned for Integration = 53
- Planned Interfaces = 43
- Inbound Interfaces = 16
- Outbound Interfaces = 26

Data

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

Implementation:

Configuration

- Commitment Control (KK)**
 - Budget Allotments - Control Option = Option # 3 - Track without Budget
 - Account ChartField Tier Selection = Account Tier #3: Family
 - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned
- Org Security Rule = Agency Defined**
- 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 = 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.

DOH Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.	Lack of testing environment for Financials and Payroll wave. Reviewed risk and agency continues to monitor this risk. Updated: 06/14/2024	02/14/22	PALM & DOH
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.	As the requirements, interfaces, process flows, and updates to interfaces files and reports come to us in Segments; Review, process changes and remediation are fragmented. Reviewed risk and agency continues to monitor this risk. Updated: 06/14/2024	02/14/22	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	04/30/24	PALM & DOH
Processes	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information. Meeting set up with DFS the week of 4/29 and 05/06	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	04/30/24	PALM & DOH
Processes	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	08/16/23	PALM & DOH
Technology	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	08/21/23	PALM & DOH
Processes	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	Within the realm of financial audit, we need to show financial documents in support of financial activity. This is the need that we have identified at our agency. Reviewed & Updated: 06/14/2024	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	02/14/22	PALM & DOH
People Processes Technology	The training timeframe given will not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	09/25/23	PALM & DOH
People Data	Missing or Incomplete information. For e.g., 567B – Org Configuration. Tasks like this one are critical to DOH. This task also has dependencies for the agency to get back Speed keys in this case.	Open	9 (High/High)	Clear understanding and instructions from the Project team to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.		12/18/24	PALM & DOH
Technology	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	02/14/22	PALM & DOH
Processes	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	10/18/23	PALM & DOH
People Processes	Enterprise entities like AG/IG's offices or Agencies like DMS. DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and a struggle to learn a new system and deal with the influx in sampled trips being returned.	Open	6 (High/Medium)	DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH	Reviewed risk and agency continues to monitor this risk. Reviewed: 06/14/2024	02/21/24	PALM & DOH
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or	Open	4 (Medium/Medium)	DOH needs to know how this will work in PALM	Reviewed risk and agency continues to monitor this risk.	10/18/23	PALM & DOH

December 2025 when PRP is to process in January 2026 using the PALM data?
 • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 2026?
 • If only the balances are rolling over to PALM, then what about the voucher details?

This is specific for Payroll Reallocation, but this will be true for all Vouchers.

Reviewed: 06/14/2024

DOH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH Assumptions

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

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

Confirm *

Submit

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DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Robert Herron	robert.herron@flhealth.gov	01/09/25
September - October 2024	Robert Herron	robert.herron@flhealth.gov	11/01/24
July - August 2024	Robert Herron	robert.herron@flhealth.gov	09/09/24
May - June 2024	Robert Herron	robert.herron@flhealth.gov	07/10/24
March - April 2024	Robert Herron	robert.herron@flhealth.gov	05/08/24
January - February 2024	Robert Herron	robert.herron@flhealth.gov	03/07/24