

**Helpful Links**

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# EOG Status Report Dashboard

**Reporting Period**

November - December 2024

**Agency Sponsor**

Dawn Hanson

*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 = 5
- Duplicate Filled Role = 12
- 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 = 95.00%**
- Submitted Complete = 48
  - Submitted Incomplete = 2
  - Completed After Submission = 8

**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 = 99.52%**
- Submitted On Time = 82
  - Submitted Late = 1
  - Pending Submission = 0

**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	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	10/18/24	n/a This was submitted on time. There are no business systems to update.	Submission Complete	10/23/24
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/19/24	EOG does not have any projected. Awaiting confirmation of completion from DEM. Confirmed completed from M. Braun. 11/19/2024	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/23/24	n/a This was submitted on time. There are no business systems to update.	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	11/19/24	EOG does not have any projected. Awaiting confirmation of completion from DEM. Confirmed completed from M. Braun. 11/19/2024	Submission Complete	
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	12/13/24	Updated for Assumptions and confirmed no issues. This was re-submitted with corrections on 12/19/2024. I do not see any new comments on requiring resubmission again.	Submission Complete	12/26/24
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	100% - Submitted	12/06/24	Awaiting response from PALM team regarding assets with no value. Team is researching options.	Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/13/24	No interfaces at this time. As of 12/20/2024 and 12/26/2024, there are still no interfaces to test.	Submission Incomplete	12/26/24
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	12/19/24	No business systems at this time. As of 12/20/2024 and 12/26/2024, there are still no new business systems to test.	Submission Incomplete	12/26/24
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024.	Submission Complete	
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. DEM updated to remove special characters on 12/18/2024.	Submission Complete	12/17/24
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/16/2024.	Submission Complete	
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/17/2024.	Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/17/2024.	Submission Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/16/2024.	Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/17/2024.	Submission Complete	
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/13/24	Confirmed DEM completion 12/13/2024. Confirmed EOG completion 12/17/2024.	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	01/08/25			

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	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><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 9</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Identified Subject Matter Experts = 5</b></p>	<p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 151</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 13/13</li> <li>Planned Spreadsheet Uploads = 0</li> </ul>	<p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 0</b></p> <p><b>Planned Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul>	<p><b>Implementation:</b></p> <p><b>Configuration</b></p> <ul style="list-style-type: none"> <li><b>Commitment Control (KK)</b> <ul style="list-style-type: none"> <li>Budget Allotments - Control Option = Option # 3 - Track without Budget</li> <li>Account ChartField Tier Selection = Account Tier #2: Groupings</li> <li>Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree</li> </ul> </li> <li><b>Org Security Rule = Agency Defined</b></li> <li><b>Optional ChartFields</b> <ul style="list-style-type: none"> <li>OA1 = To Be Configured</li> <li>OA2 = Not To Be Configured</li> <li>PC Category = To Be Configured</li> <li>PC Subcategory = To Be Configured</li> <li>PC Source Type = To Be Configured</li> </ul> </li> </ul> <p><b>Conversion</b></p> <ul style="list-style-type: none"> <li><b>Optional Conversions</b> <ul style="list-style-type: none"> <li>Accounts Receivable = Not Needed</li> <li>Assets = Needed</li> <li>Contracts = Needed</li> <li>Customers = Not Needed</li> <li>Encumbrances = Needed</li> <li>Grants = Needed</li> <li>Projects = Needed</li> <li>Projects Balances = Needed</li> </ul> </li> </ul>

### 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.

EOG Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources. Training is indicated as being conducted prior to go live in the July-December, 2025 timeframe. The July-Mid-Oct timeframe is the busiest of the year with most duties falling to a very limited number of staff.	Open	9 (High/High)	The EOG will monitor staff workload. Please re-consider timeframe for trainings to keep the project on schedule and allow for agency statutory deadlines to be met.	Updated upon review of timeline.	10/11/24	Kelley Sasso
People Processes Technology Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	Open	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries. It was determined that many of the solutions initially discussed will not be able to be effectively implemented. We will continue to monitor and meet with the PALM team as the final design takes shape to determine the best methodologies for the differentiation of data. System configuration will be tested during UAT to determine what will be policy or procedure driven changes vs. what will require additional PALM knowledge or staff resources.	Updated.	12/13/24	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals.	No change.	10/31/23	Kelley Sasso
People Processes Data	Nomenclature is changing in from FLAIR terms to PALM terms. Some fields in PALM are named the same as in FLAIR but with different meanings/uses. Examples are category, asset location, etc. This will primarily be a training challenge; however, there exists the risk that procedures, guidelines, data, queries, etc will be misinterpreted or not updated properly.	Open	6 (Medium/High)	The EOG will work to highlight terminology/naming differences to mitigate risk of confusion.	No change.	06/06/24	Kelley Sasso

People Processes Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing Segment IV -Inter-Unit transactions, we noted that all receiving transactions may be rolled together with no ability to discern 'ownership' of the transaction since only OLO is required. Sent suggestions to the PALM team requesting addition fields be mandatory. Also requested that search menus be available on each workcenter screen to filter out unneeded transactions to only those relevant to DEM or EOG.	Open	6 (Medium/High)	The EOG has reported the issue and made suggestions to FL PALM as potential solutions.	New.	08/23/24	Kelley Sasso
People Processes	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant.	Open	4 (Medium/Medi)	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vochered. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use.	Updated upon review of most recent configurations values worksheets.	06/06/24	Kelley Sasso
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	No change.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need. The EOG will test PALM's inventory solution during UAT to determine if it will meet our agency's needs.	No change.	04/16/24	Kelley Sasso
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso

#### EOG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	No issues to report.	Closed	Low - All impacts not listed as Critical or High	There is no issue or resolution required.		12/19/24	Kelley Sasso

#### EOG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	01/23/24	All Administrative Services.	Discussed with D. Thomas on 1/19/2024.

#### 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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#### EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/07/25
September - October 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/24
July - August 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/09/24
May - June 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	07/03/24
March - April 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	05/06/24
January - February 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/05/24