FCOR Status Report Dashboard

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

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 = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness:
Score = 99.63%
- Submitted Complete = 52
- Submitted Incomplete = 0
- Completed After Submission = 2

RW Task Timeliness:
Score = 95.75%
- Submitted On Time = 72
- Submitted Late = 8
- Pending Submission = 0

Meeting Participation:
- Meetings Attended = 6
- 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	08/01/24	FCOR doesn't have any ABS systems to update documentation or remediation needed.	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	10/24/24	FCOR doesn't have any Projects, but have completed all the required fields.	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/17/24	FCOR doesn't have any ABS systems to update documentation or remediation needed.	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	11/17/24		Submission Complete	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/08/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	100% - Submitted	12/20/24		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	11/21/24		Submission Complete	
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	100% - Submitted	12/17/24	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required		
Direct	Data	567-A	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	Sponsor submitted these yesterday.	Submission Complete	12/20/24
Direct	Data	567-B	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/12/24	Updates made.	Submission Complete	12/17/24
Direct	Data	567-C	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24	One OCA deleted.	Submission Complete	
Direct	Data	567-D	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/04/24	We are not currently using the OA2.	Submission Complete	
Direct	Data	567-E	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/06/24		Submission Complete	
Direct	Data	567-G	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/09/24		Submission Complete	
Direct	Data	567-H	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/05/24	FCOR doesn't have any Projects.	Submission Complete	
Direct	Data	567-I	Share, Review, and Update Configuration Workbooks	11/18/24	12/13/24	100% - Submitted	12/10/24		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	01/31/25	25% - Beginning Initial Internal Meetings and Information Gathering				
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	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	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				

						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	**01/06/25**			
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				
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**	FCOR doesn't have any ABS systems to update so no interfaces or remediation required		

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.

People

<u>Implementation:</u>

Planned Florida PALM End Users = 16

• Business Process Groupings = 7/13

Identified Subject Matter Experts = 18

Processes

<u>Implementation:</u>

Impacted Agency Business Processes = 18

• Related Business Process Groupings = 3/13

• Planned Spreadsheet Uploads = 0

Technology

<u>Implementation:</u>

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

<u>Implementation:</u>

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 = 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 = Not 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.

FCOR 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	Staffing issue impacting data cleansing activity to be completed on-time for Data Conversion.	Closed	9 (High/High)	Requested the new Project Manager to request additional staffing from OIT to assist with remediation and data cleanup efforts.	1. Data Analyst has been onboarded in October/2024. 2. All delayed data cleansing activities are completed by 12/04/2024. 3. Data Conversion iterations are started and the Team continued to work on correcting the data conversion errors and the master files.	12/04/24	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the 12 agency based system.	Open	9 (High/High)	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that. Therefore, the FDC/ FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces. 2. Solution approach for New Database and CAIRS has been prepared. 3. Architectural design of the solution currently in-progress.	03/14/25	Dipak Roy, OIT PM

Category	Risk	Status	Rating	Action Plan	Updates	Due Date	Owner
People Processes Technology	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Open	6 (High/Medium)	1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT	11/05/2024 : Solution concept shared with the OIT experts to review and guide FDC PALM team on the next steps for technical solutioning. 11/06/2024 : Initial resourcing plan has been reviewed with OIT leadership and received alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design and Technology platform.	06/30/25	Dipak Roy, OIT PM
People Processes Technology Data	Unavailability of archived FLAIR Information Warehouse shall impact business continuity of agency business systems and processes which are dependent on legacy/ historical FLAIR data.	Open	6 (High/Medium)	1. Interact with Florida PALM team and get confirmation on archival of FLAIR Information Warehouse (IW) availability for future use. 2. Plan for remediation of legacy reporting needs out of FLAIR IW data.	12/13/2024: Florida PALM team confirmed that archival strategy yet to be finalized. Therefore agency team expected to go ahead with remediation of legacy reports requirements with a local solution. Next step is to work with the FDC OIT team, to plan for archival of FLAIR IW data into the archived BARS tool (Budget & Accounting Reporting Solution).	06/30/25	Dipak Roy, OIT PM
People Processes	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Utilize the PALM site to develop and deploy a 3-part preliminary training series to future PALM end users. The training series will be followed by a Process Gap Analysis and Process Gap Remediation activity for each Business process group. Action 2: Identify future PALM superusers, to participate in the preliminary PALM training series and closing activities. Action 3: Once available, leverage the Sandbox and Demo sessions to further familiarize users with system functionality.	The Change Management Lead is driving the action items. Presentation completion percentages are detailed below. ---------------------------- Training Series Title: Preliminary PALM EndUser Orientation Training 1: Orientation to PALM Modules-50% Training 2: Orientation to PALM Business Process Groups-50% Training 3: Orientation to PALM Business Process Models-10% Training 4: Orientation to PALM Roles & Workflows-0% 12/17/2024: CML-Training Development is underway and is on track to be completed by January 31, 2025. 12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated. Training liaison has been engaged to prepare for overall training plan and training materials.	06/30/25	Erica Starling, Financial Administrator
People Processes Technology Data	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.	Open	6 (High/Medium)	1. Prepare the UAT testing team thoroughly, regarding Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.	12/05/2024: Florida PALM team held across-agency kick-off of the UAT planning activity. There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT. Most of the preparation activities are affected by non-availability of the final system.	06/30/25	Erica Starling, Financial Administrator
People Processes Technology Data	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Launch the Process Gap Analysis and Process Gap Remediation Planning/ Implementation Activities at the conclusion of the 3-Part PALM End user Orientation preliminary trainings. -- Preliminary PALM End User Orientation Training Series -- Closing Activity 1: Process Gap Analysis -- Closing Activity 2: Process Gap Remediation Planning & Implementation Action 2: Outputs from Activity-1:Process Gap Analysis will be leveraged to finalize and document the deltas between the As-Is and To-Be states. Action 3. Output implementation plans from Activity-2:Process Gap Remediation Planning & Implementation will be launched to resolve the deltas for each Business Process Group. Action 4. Delta remediation effectiveness and progress will be tracked and monitored.	12/17/2024: CML-Training Development is underway and will precede the initiation of the Closing Process Gap Analysis and Remediation activities. The deployment of the training Series is on track to launch by February 01, 2025. 11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM). Identification of specific remediation plan has been initiated.	09/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping &	Open	6 (High/Medium)	1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.	12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing.	09/30/25	Erica Starling, Financial Administrator

Critical Operational Elements	Description	Status	Priority	Action Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
	remediation, Trainings, agency systems remediations, and UAT preparation & execution.				To continue working on to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supporting activities to ensure agency readiness for PALM project.		
People Processes Technology	Insufficient information on access security model and planning of changes to current users role/ responsibilities may impact agency user readiness/ adoption.	Open	4 (Medium/Medium)	Action 1: People Readiness Lead will develop a Role Mapping Workbook to document and map current state positions to future PALM roles and Business Process Groups. Action 2: People Readiness Lead will leverage the PALM site (Now RWP 560: Topics & Activities Workbook) to obtain and map future PALM roles and to all PALM Business Process Groups. Action 3: People Readiness Lead will leverage the Current State Position Catalogue to obtain the current state roles and collaborate with FDC Project Manager and SMEs to map those roles to the documented future PALM roles within the Role Mapping workbook (Now RWP 560: Topics & Activities Workbook) for each Business Process Group. Action 4: People Readiness Lead in collaboration with the FDC Training lead will utilize the PALM site and Role Mapping Workbook to develop and deploy a 4-part preliminary training series to future PALM end users. Training 4 of the series will focus specifically on future PALM roles allowing the training participant to understand the linkage between their current role and future PALM role. Training 4: End User Orientation to PALM Roles & Workflows.	Action 1 : Completed Action 2 : Completed the internal workings 12/17/2024: CML-The provision of the RWP 560-"Topics & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched. 12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topics & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new workbook. 11/15/2024: CML-People Readiness Lead completed the development of the RoleMapping Workbook and socialized workbook with the project team. 11/30: Team started exploring the user & security roles definitions in the Florida PALM portal.	06/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/ historical data.	Open	3 (High/Low)	Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components	11/06/2024 : Overall requirement was reviewed with OIT leadership and received alignment. Currently in discussion with OIT Systems Management team to identify a solution. Next step is implement and test the solution.	06/30/25	Dipak Roy, OIT PM

FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Crosstrain staff to ensure adequate backup. 2. Cross training will be completed during the project to ensure operational resiliency.	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	David Eskin, FDC Finance and Accounting/Systems Reporting
People Processes	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets.	1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions. 2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues.	01/06/26	Erica Starling, Financial Administrator
People Processes Technology Data	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Onboard additional staff aug position with FLAIR data experience.	1. Created RFQ for an additional staff aug position. 2. The resource has been onboarded in early December 2024.	12/31/24	Erica Starling, Financial Administrator
Processes Technology	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g. UAT Test Plan, UAT Test Scripts, Future State Work Processes	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.	9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work. 10/16/2024: UAT high level plan was shared in PALM advisory council meeting. 11/20/2024: BA requirement has been reviewed with the OIT leadership and available vendors are being evaluated.	01/13/25	Dipak Roy, OIT PM

FCOR 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	FCOR's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FCOR will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	List of agency business systems are documented, i.e. as-is state, systems in the scope of remediation. Remediation approach for 2 systems are finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FCOR UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan.
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop it is understood that the IT development activities for enterprise systems are in-progress.
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g., ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities	Removed	12/20/24	All agency business systems and CCN roles	Organizational Change Management (OCM) Lead was onboarded and started working 05/06/2024. Onboarded project team from OIT including Project Manager, Business Analyst and Data Analyst. Key SMEs from F&A team has been engaged actively.
People Processes Technology	FCOR will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Removed	12/20/24	All agency business systems and CCN roles	Task 328 has been completed.

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]

FCOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2024	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	01/06/25
September - October 2024	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	11/08/24
July - August 2024	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	09/10/24
May - June 2024	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	07/12/24
March - April 2024	Gina Giacomo	karencarter@fcor.state.fl.us	05/09/24
January - February 2024	Gina Giacomo	ginagiacomo@fcor.state.fl.us	03/08/24