

**Helpful Links**

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

# FSDB 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**

Tracie Snow

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 4
- 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 = 82.88%**

- Submitted Complete = 31
- Submitted Incomplete = 3
- 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 = 96.17%**

- Submitted On Time = 61
- Submitted Late = 17
- 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 = 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              | 09/10/24               | We do not use agency interfaces to PALM   | Submission Complete                |                                  |
| Direct         | Data                         | 541-C   | Complete Configuration Workbooks for Segment IV                                 | 08/26/24                | 10/04/24              | Pending Resubmission          | 10/18/24               |   | Submission Incomplete              | 10/24/24                         |
| 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               | We do not consistently use this field but I have allowed one just for testing purposes.   | Submission Complete                | 11/19/24                         |
| N/A            | Technology                   | 561     | Remediate Agency Business Systems based on Segment IV                           | 10/21/24                | 03/14/25              | 100% - Submitted              | 10/24/24               | NA  | Submission Complete                |                                  |
| Direct         | Data                         | 555-B   | Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002) | 10/28/24                | 11/22/24              | Pending Resubmission          | 12/10/24               |   | Submission Incomplete              |                                  |
| N/A            | N/A                          | 562     | Submit Bimonthly Agency Readiness Status Report                                 | 11/01/24                | 11/12/24              | 100% - Submitted              | 11/13/24               |   | Submission Complete                |                                  |
| N/A            | N/A                          | 563     | Manage Agency Specific Implementation Schedule, Risks and Issues                | 11/01/24                | 12/27/24              | 100% - Submitted              | 01/10/25               |   |                                    |                                  |
| Direct         | Data                         | 555-C   | Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)          | 11/08/24                | 12/06/24              | Pending Resubmission          | 12/10/24               | Converted files are missing the complete record in many cases or do not adhere to GAAP and DFS guidance resulting in forced errors from lack of accounting knowledge. The complete FLAIR record is not being captured resulting in supposed errors. | Submission Incomplete              |                                  |
| Direct         | Technology                   | 557     | Confirm Interface Inventory for Cycle 2 Interface Testing                       | 11/18/24                | 12/13/24              | 100% - Submitted              | 01/08/25               |   | Submission Complete                |                                  |
| N/A            | Technology                   | 558     | Update Agency Business System Documentation                                     | 11/18/24                | 01/10/25              | 100% - Submitted              | 01/10/25               | NA - We do not use agency business systems to interface with PALM.  |                                    |                                  |
| Direct         | Data                         | 567-A   | Share, Review, and Update Configuration Workbooks                               | 11/18/24                | 12/13/24              | 100% - Submitted              | 12/12/24               |   | Submission Complete                |                                  |
| Direct         | Data                         | 567-B   | Share, Review, and Update Configuration Workbooks                               | 11/18/24                | 12/13/24              | 100% - Submitted              | 12/10/24               |   | Submission Complete                |                                  |
| Direct         | Data                         | 567-C   | Share, Review, and Update Configuration Workbooks                               | 11/18/24                | 12/13/24              | 100% - Submitted              | 12/10/24               |   | Submission Complete                |                                  |
| Direct         | Data                         | 567-D   | Share, Review, and Update Configuration Workbooks                               | 11/18/24                | 12/13/24              | 100% - Submitted              | 12/10/24               |   | 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              | 12/10/24               |   | Submission Complete                | 12/18/24                         |
| Direct         | Data                         | 567-H   | Share, Review, and Update Configuration Workbooks                               | 11/18/24                | 12/13/24              | 100% - Submitted              | 12/10/24               |   | 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              | 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              | 100% - Submitted              | 01/10/25               |   |                                    |                                  |
| 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              |                               |                        |   |                                    |                                  |
| 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              | 01/13/25               |   | Submission Complete                |                                  |
| 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   |
|---|---|---|--|
| <p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <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 = 4</b></p> | <p>The sequence of procedures to accomplish a business objective.</p> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 7</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 7/13</li> <li>Planned Spreadsheet Uploads = 0</li> </ul> | <p>The applications or tools used to process, track, or report on financial operations.</p> <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>Information used in or produced from an agency's financial business operations.</p> <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 #3: Family</li> <li>Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree</li> </ul> </li> <li><b>Org Security Rule = Agencywide</b></li> <li><b>Optional ChartFields</b> <ul style="list-style-type: none"> <li>OA1 = To Be Configured</li> <li>OA2 = 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 = Needed</li> <li>Assets = Needed</li> <li>Contracts = Needed</li> <li>Customers = Needed</li> <li>Encumbrances = Needed</li> <li>Grants = Needed</li> <li>Projects = Not Needed</li> <li>Projects Balances = Not 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.

| FSDB Risks                    |                  |        |             |                              |                                      |                       |                     |
|-------------------------------|------------------|--------|-------------|------------------------------|--------------------------------------|-----------------------|---------------------|
| Critical Operational Elements | Risk Description | Status | Risk Rating | Mitigation/Response Strategy | Reporting Period Comments or Updates | Date of Status Change | Owner / Coordinator |
|                               |                  |        |             |                              |                                      |                       |                     |

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

| FSDB 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 \***

### FSDB Status Report Confirmation

| Reporting Period         | Agency Sponsor Name: | Confirmed By:     | Confirmation Date: |
|--------------------------|----------------------|-------------------|--------------------|
| November - December 2024 | Tracie C. Snow       | snowt@fsdbk12.org | 01/13/25           |
| September - October 2024 | Tracie C. Snow       | snowt@fsdbk12.org | 11/13/24           |
| July - August 2024       | Tracie C. Snow       | snowt@fsdbk12.org | 09/17/24           |
| May - June 2024          | Tracie C. Snow       | snowt@fsdbk12.org | 07/11/24           |
| March - April 2024       | Tracie C. Snow       | snowt@fsdbk12.org | 05/15/24           |
| January - February 2024  | Tracie C. Snow       | snowt@fsdbk12.org | 03/18/24           |