AHCA 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

September - October 2024

Agency Sponsor

Lynn Smith

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 reflects 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 = 10
- Duplicate Filled Role = 4
- Vacant Role = 0

RW Task Completeness:

Score = 89.71%
- Submitted Complete = 27
- Submitted Incomplete = 0
- Completed After Submission = 8

RW Task Timeliness:

Score = 70.45%
- Submitted On Time = 34
- Submitted Late = 27
- Pending Submission = 5

Meeting Participation:
- Meetings Attended = 5
- 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	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		11/1 - Discussed completion of the tasks and in the process of documentation 8/30 - On-going process for updates. Identifying most important processes to document. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		11/1 - Completed remediation for the Chart of Account structure 9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements. 8/30 - Development team is actively involved with the remediation, beginning with the Chart of Accounts.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		8/30 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission				
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24		Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/04/24		Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	10/07/24		Submission Complete	
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				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	11/01/24
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/07/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM		

								remediation requirements.		
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	09/20/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/11/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/21/24	10/15- Completed the Default funding workbook. Team had problems with a locked cell that had incorrect information. 10/07 - Completed (100%) the P-Card portion of the Speedkey workbook and most of the Payroll. About 11% of the payroll position funding needs to be completed. Research needs to be complete with HR to complete the position funding that were created new for this FY as well as a few positions that are questionable. We are planning to have both Smartsheet completed by end of day on 8/9. 10/03 - Awaiting direction from RC on how to complete the task. Cannot check in as directed.	Submission Complete	
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/10/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	11/01/24		N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/06/24		N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	09/24/24		Submission Complete	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	11/04/24		Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	50% - In Progress				
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/25/24		Submission Complete	
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	25% - Beginning Initial Internal Meetings and Information Gathering				
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	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 28

• Business Process Groupings = 12/13

Identified Subject Matter Experts = 13

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 0

- Accounts Receivable = 4

- Asset Accounting and Mgmt. = 2

- Banking = 0

- Budget Mgmt. and Cash Control = 2

- Contracts Mgmt. = 1

- Disbursements Mgmt. = 2

- Grants Mgmt. = 1

- Inter/IntraUnit Transactions = 1

- Payroll Mgmt. = 1

- Projects Mgmt. = 0

- Revenue Accounting = 1

- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 67

• Related Business Systems = 5

• Related Reports = 31

• Documentation Status:

- Complete = 65 Partial = 0 Not Started = 1

Implementation:

Impacted Agency Business Processes = 67

• Related Business Process Groupings = 10

- Planned Spreadsheet Uploads = 4

• Level of Impact: People Changes

- High = 10 Medium = 9 Low = 16 None = 1 Uncertain = 0

• Level of Impact: Processes Changes

- High = 0 Medium = 20 Low = 15 None = 1 Uncertain = 0

• Level of Impact: Technology Changes

- High = 1 Medium = 30 Low = 4 None = 1 Uncertain = 0

• Level of Impact: Data Changes

- High = 0 Medium = 31 Low = 4 None = 1 Uncertain = 0

• Segments I & II Documentation Update Status

- Not Started = 16 In Progress = 21 Complete = 0

• Segment III Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Technology

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

Current-State:

Cataloged Business Systems = 23

• Criticality:

- High = 20 Med = 0 Low = 2 None = 1

• Documentation Status:

- Complete = 3 Partial = 15 Not Started = 0

Cataloged Interfaces = 19

- Inbound Interfaces = 14

- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 23

• Segment I - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0

• Segment III Documentation Update Status

- Not Started = 0 In Progress = 0 Complete = 0

Planned Interfaces = 14

- Inbound Interfaces = -2

- Outbound Interfaces = 12

Data

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

Current-State:

Unique FLAIR Data Elements = 82

• Associated Unique Uses = 82

- Continued Use - Yes = 1

- Continued Use - No = 0

• Associated Business Systems = 22

Cataloged Reports = 62

• Criticality:

- High = 59 Med = 0 Low = 0 None = 0

Implementation:

Segments I & II Planned Configurations = 7/9

• Accounts Receivable (AR)

- Planned Distribution Codes = 13

• Asset Management (AM)

- Planned Location Codes = 13

- Planned Associated Area ID's = 50

• Commitment Control (KK)

- Planned Option = Option # 1 - Track with Budget

• General Ledger (GL)

- Planned Budgetary Value Combo Edits = 694

- Planned Local Funds = None

- Planned Organization ID's = 192

- Planned OA1's = 632

- Planned OA2's = None

Segment IV Planned Configurations

- Started = 2 Not Started = 0

Conversions & Data Readiness
• Conversions Needed = 9
• Agency Data Outside of Primary Source System(s) = 0
• **Data Readiness/Cleansing Status:**
- Complete = 5 In Progress = 0 Not Started = 0 Not Applicable 0
Reports = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

AHCA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	If Florida PALM project scope increases based upon unidentified agency requirements that were missed, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander
People Processes	Given that Budget resources in the Bureau of Financial Services are involved in the 25/26 Legislative Budget Request Process, if the budget team has not provided a plan for accomplishing Florida PALM YE UAT by 1/25/2025 , AHCA will not provide Agency Readiness for Stage Gate 4 for Agency Readiness.	Open	6 (High/Medium)	Continue to use the resources adding resources from the IT team (Business Consultants) to perform the testing for the Agency		11/12/24	Lynn Smith

AHCA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Hire additional staff augmented staff to perform more of the Florida PALM related tasks.		03/28/25	Smith, Sonya
People Processes	AHCA Florida PALM team needs at least two additional resources for the remainder of the Florida PALM project. The Agency currently has budget to hire one additional resource, but needs budget to hire the second.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Obtain budget to hire additional staff		11/29/24	Smith, Lynn
People	Matriculation of knowledgeable business process and the SunFocus Application resources' will hinder the progress of the project.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Short term is to ensure documentation is current for jobs roles		12/27/24	Smith, Sonya
Technology	Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness of task to continue to be low.	Open	Low - All impacts not listed as Critical or High	Update the comments of the remediation tasks as they become complete.		05/30/25	Wander, Phyllis

AHCA Assumptions

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

AHCA 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 Technology	Florida PALM Technical Meeting	09/09/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People Technology	AR Module-Lease Bond/Receipts Walkthrough	09/09/24	Bureau of Financial Services; Vendor Devlopment Team	To review user screens for SunFocus Remediation	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	09/10/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People	Florida PALM-Financial Services Ecosystem Management Status	09/16/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Technology	Florida PALM Technical Meeting	09/16/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People Technology	Florida PALM Technical Meeting	09/23/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People	Florida PALM-Financial Services Ecosystem Management Status	09/23/24	Bureau of Financial Services; BPC	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes	Weekly Florida PALM Chat with Ex Sponsor	09/24/24	Executive Sponsor	To review specific issues; processes; questions,budget	
People Technology	Florida PALM Technical Meeting	09/30/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People	Weekly Project Team Meeting	10/02/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People	Florida PALM Technical Meeting	10/07/24	Vendor development	To provide requirements to the development team	

Technology			team/AHCA BPC/PM		
People	Florida PALM-Financial Services Ecosystem Management Status	10/07/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People	Budget Transaction Process Discussion 1	10/09/24	Bureau of Financial Services; BPC	To review impacts of Florida PALM Budget changes to BFS teams	
People Data	Florida PALM Task 541- C SPEEDKEY and PAYROLL	10/13/24	Bureau of Financial Services	Review Instructions for Task 541-C	
People	Florida PALM-Financial Services Ecosystem Management Status	10/14/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Technology	Florida PALM Technical Meeting	10/14/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People Technology	Task 546 Interface Discussion	10/16/24	BPC/PM	To review impacts of Florida PALM interface needs	
People	Budget Transaction Process Discussion 1	10/16/24	Bureau of Financial Services; BPC	To review impacts of Florida PALM Budget changes to BFS teams	
People	SunFocus/SunPALM Chartfield Mapping	10/17/24	Bureau of Financial Services; BPC	To review impacts of Florida PALM Chart of Accounts	
People	Florida PALM-Financial Services Ecosystem Management Status	10/21/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Technology	Florida PALM Technical Meeting	10/21/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People	Budget Transaction Process Discussion 2	10/22/24	Bureau of Financial Services; BPC	To review impacts of Florida PALM Budget changes to BFS	
People	Weekly Project Team Meeting	10/23/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	
People Technology	Florida PALM Technical Meeting	10/28/24	Vendor development team/AHCA BPC/PM	To provide requirements to the development team	
People	Weekly Project Team Meeting	10/30/24	Bureau of Financial Services; BPC	To review specific issues; processes; questions	

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: *

[   ]

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AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	11/12/24
July - August 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	09/10/24
May - June 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	07/03/24
March - April 2024	Lynn Smith	lynn.smith@ahca.myflorida.com	05/09/24
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24