

**Helpful Links**

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

# APD Status Report Dashboard

**Reporting Period**

September - October 2024

**Agency Sponsor**

Rose Salinas

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.

**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 Timeliness**



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

**Project-led Meeting Participation**



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Change Champion Network:**

- Unique Filled Role = 12
- Duplicate Filled Role = 4
- Vacant Role = 0

**RW Task Completeness:**

- Score = 85.48%**
- Submitted Complete = 25
  - Submitted Incomplete = 2
  - Completed After Submission = 15

**RW Task Timeliness:**

- Score = 98.55%**
- Submitted On Time = 65
  - Submitted Late = 2
  - Pending Submission = 0

**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	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables 9/30 - Team working all 10/16 - reviewed/Hayley finishing up with team participation 10/18 - Submitted! 11/6 - Kristopher/Becky - updating for the documentation based on updates to inventory sheet 11/7 - reviewed for % updates and for documentation IV 11/13 - remains incomplete. See task verification for more information. -dit	Submission Incomplete	11/07/24
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	7/25 - BA/PM reviewing new TASKS for internal documentation/teams responsibilities 8/19 - BA managing within Internal Tracker for teams updates/reviews and deliverables 9/30 - Team working all 10/16 - reviewed/Hayley finishing up with team participation 10/18 - Submitted! 11/4 - Team is working and addressing several critical questions with the PALM Team - to be cleared by Friday 11/8	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	75% - Consolidating/Inputting Information for Submission		7/25 - planning IT Team review 8/19 - IT Team in Review and working Data Warehouse - ABS attention 9/30 - Team working all 10/31 - Immediate actions: Finalize materialized views, prepare for UAT Key contacts available for support - PALM project alignment ensures readiness for finance and IT priorities 11/4 - meeting by Core team in review and prepping to post into Smartsheet		
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/05/24	9/4 - meeting scheduled for 1:30 pm est Thursday Sept 5	N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	100% - Submitted	10/18/24	9/30 - reviewing 10/3 - IT team reviewing Biz Sys et al 10/17 - review in progress - finished - team call discussion and then submit 10/18 - Submitted! Resubmitted as complete	Submission Complete	10/31/24
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	09/25/24	9/25 - completed by IT Team - Screenshots attached	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	75% - Consolidating/Inputting Information for Submission		10/16 - in review 11/4 - each team participating with the Core team in review and updates - any corrections to be made in PALM Smartsheet 11/12 - team review and in prep work for the Smartsheet updates		
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	11/01/24	10/16 - in review	Submission Complete	
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/25/24	10/16 - Becky working list in excel and updating for load into Smartsheet 10/21 - getting things into Smartsheet 10/25 - Smartsheet updated for all communications - APD specific - 100%	Submission Complete	10/31/24
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		11/4 - IT Team is addressing - Business System by Business System		

Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	75% - Consolidating/Inputting Information for Submission		11/4 - BA working with teams to review/update change as needed 11/12 - Team call in review and prep work for sheets	
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/08/24	11/4 - updates to resubmissions in progress - Sponsor to sign off by 11/12	Submission Complete
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	50% - In Progress			
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24				

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 = 74</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Identified Subject Matter Experts = 41</b></p> <ul style="list-style-type: none"> <li><b>SMEs by Business Process Grouping</b></li> <li>Account Mgmt. and Financial Reporting = 3</li> <li>Accounts Receivable = 2</li> <li>Asset Accounting and Mgmt. = 3</li> <li>Banking = 2</li> <li>Budget Mgmt. and Cash Control = 2</li> <li>Contracts Mgmt. = 2</li> <li>Disbursements Mgmt. = 3</li> <li>Grants Mgmt. = 2</li> <li>Inter/IntraUnit Transactions = 20</li> <li>Payroll Mgmt. = 6</li> <li>Projects Mgmt. = 4</li> <li>Revenue Accounting = 2</li> <li>System Access and Controls = 2</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p>The sequence of procedures to accomplish a business objective.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 236</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 6</li> <li>Related Reports = 34</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 236 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 236</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 10</li> <li>Planned Spreadsheet Uploads = 2</li> </ul> <ul style="list-style-type: none"> <li><b>Level of Impact: People Changes</b></li> <li>High = 14 Medium = 6 Low = 47 None = 167 Uncertain = 0</li> <li><b>Level of Impact: Processes Changes</b></li> <li>High = 13 Medium = 45 Low = 61 None = 115 Uncertain = 0</li> <li><b>Level of Impact: Technology Changes</b></li> <li>High = 15 Medium = 5 Low = 62 None = 152 Uncertain = 0</li> <li><b>Level of Impact: Data Changes</b></li> <li>High = 17 Medium = 13 Low = 11 None = 193 Uncertain = 0</li> </ul> <p><b>Segments I &amp; II Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 138</li> </ul> <p><b>Segment III Documentation Update Status</b></p> <ul style="list-style-type: none"> <li>Not Started = 0 In Progress = 0 Complete = 138</li> </ul>	<p>The applications or tools used to process, track, or report on financial operations.</p> <p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 9</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 9 Med = 0 Low = 0 None = 0</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 8 Partial = 1 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 78</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 6</li> <li>Outbound Interfaces = 1</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 8</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7</li> <li><b>Segment III - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7</li> </ul> <p><b>Planned Interfaces = 29</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 2</li> <li>Outbound Interfaces = 25</li> </ul>	<p>Information used in or produced from an agency's financial business operations.</p> <p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 480</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 1181</b></li> <li>Continued Use - Yes = 1094</li> <li>Continued Use - No = 57</li> <li><b>Associated Business Systems = 2</b></li> </ul> <p><b>Cataloged Reports = 112</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 150 Med = 18 Low = 1 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 7</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>Planned Distribution Codes = 3</li> <li><b>Asset Management (AM)</b></li> <li>Planned Location Codes = 368</li> <li>Planned Associated Area ID's = None</li> <li><b>Commitment Control (KK)</b></li> <li>Planned Option = Option # 1 - Track with Budget</li> <li><b>General Ledger (GL)</b></li> <li>Planned Budgetary Value Combo Edits = 382</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 359</li> <li>Planned OA1's = 230</li> <li>Planned OA2's = 65</li> </ul> <p><b>Segment IV Planned Configurations</b></p> <ul style="list-style-type: none"> <li>Started = 2 Not Started = 0</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 10</li> <li>Agency Data Outside of Primary Source System(s) = 0</li> <li><b>Data Readiness/Cleansing Status:</b></li> <li>Complete = 6 In Progress = 0 Not Started = 0 Not Applicable 0</li> </ul> <p><b>Reports = TBD</b></p>

## 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.

APD Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	- Teams will be attending focus group meetings 1st qtr 2024 - focus on how to	12/27/23	APD CCN

						embrace training to adjust to change		
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams	
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams	
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams	
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc	04/24/24	ALL APD Finance and IT Teams	
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams	
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams	
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams	
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward.	12/27/23	APD Financial Accounting Team	
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team	
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams	
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team	
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams	
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams	

People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Data Breach	Open	6 (High/Medium)	Implement multi-factor authentication, encrypt sensitive data, and regularly audit access logs	Ensure compliance with industry standards such as GDPR, SOC 2	10/31/24	ALL APD Finance and IT Teams
Technology Data	Unauthorized Access (Insider Threat)	Open	6 (High/Medium)	Apply role-based access controls, monitor user activities, and conduct regular training for employees on data security	Conduct periodic internal audits and monitor for suspicious activity	10/31/24	ALL APD Finance and IT Teams
Technology Data	Lack of Incident Response Plan	Open	6 (High/Medium)	Develop and test an incident response plan, train staff on incident protocols, and document response steps	Establish a clear communication plan for users during incidents	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incomplete Test Coverage	Open	6 (High/Medium)	Define comprehensive test cases based on requirements, prioritize critical features, conduct test case reviews	Ensure requirements traceability to avoid missed scenarios	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Data Security in Test Environment	Open	6 (High/Medium)	Mask or anonymize sensitive data, limit access to test environment, and encrypt data at rest and in transit	Use dummy data where possible to minimize risks	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Defects Missed in UAT	Open	6 (High/Medium)	Implement multiple testing stages (functional, integration, regression), train testers on critical business flows, and conduct defect reviews	Encourage detailed documentation and communication for defect reporting	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unclear Exit Criteria for UAT	Open	6 (High/Medium)	Define clear pass/fail criteria, set quality benchmarks, and ensure all criteria are met before exiting UAT	Review exit criteria with stakeholders before starting UAT	10/31/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building	04/24/24	ALL APD Finance and IT Teams
Technology Data	Service Downtime/Disruptions	Open	4 (Medium/Medium)	Implement failover and disaster recovery protocols, choose a provider with SLAs for high availability, monitor system uptime	Inform users in case of downtime and provide transparent communication	10/31/24	ALL APD Finance and IT Teams
Technology Data	Poor User Access Management	Open	4 (Medium/Medium)	Require strong passwords, apply principles of least privilege, and establish periodic access reviews	Ensure proper training on access management and change protocols	10/31/24	ALL APD Finance and IT Teams
Technology Data	Inadequate Vendor Security Controls	Open	4 (Medium/Medium)	Conduct vendor security assessments, require providers to comply with certifications (e.g., ISO 27001), and monitor third-party risks	Evaluate vendor SLAs and security protocols	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Environment Downtime	Open	4 (Medium/Medium)	Plan for backup environments, perform load testing on UAT, and have an incident response plan for UAT	Inform stakeholders of potential downtime impacts	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Lack of Stakeholder Engagement	Open	4 (Medium/Medium)	Involve stakeholders early, provide clear UAT objectives, and conduct regular status meetings	Allocate roles and responsibilities for stakeholder engagement	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incorrect Test Data Use	Open	4 (Medium/Medium)	Set up accurate and relevant test data, train testers on data setup, and maintain a standardized test data set	Establish guidelines for creating and using test data	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Inadequate UAT Documentation	Open	4 (Medium/Medium)	Maintain detailed test plans, cases, and results, and set documentation standards; conduct reviews to ensure clarity	Ensure all stakeholders have access to up-to-date UAT documentation	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Poor Test Case Prioritization	Open	4 (Medium/Medium)	Identify high-risk areas for prioritization, work with stakeholders to prioritize based on business impact	Focus on areas with high impact on the application's functionality	10/31/24	ALL APD Finance and IT Teams
People Processes	Regression Issues in UAT	Open	4 (Medium/Medium)	Conduct automated regression testing, establish a baseline of critical functionalities, and perform	Regularly update regression test cases	10/31/24	ALL APD Finance and IT Teams

Technology Data				continuous integration tests	to match recent changes		
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Roll Back Plan to be included in the Conversion Plan	Open	3 (High/Low)	APT to incorporate the parallel effort with current business processes and also with the strategy process with PALM Data and ABS alignment.	Prepare for unexpected issues that cause risk during migration causing significant problems that will stop progress forward into PALM	08/27/24	ALL APD Finance and IT Teams
Technology Data	Data Loss due to Cloud Provider Failure	Open	3 (High/Low)	Enable regular automated backups, store backups in geographically separate regions, test data restoration	Partner with reputable providers with a history of reliability	10/31/24	ALL APD Finance and IT Teams
Technology Data	Regulatory Non-Compliance	Open	3 (High/Low)	Regularly update application in line with regulatory changes, engage compliance experts, and conduct annual compliance reviews	Stay informed on global regulatory requirements (e.g., GDPR, SOX)	10/31/24	ALL APD Finance and IT Teams
Technology Data	Inaccurate Financial Data	Open	3 (High/Low)	Implement input validation checks, automate data reconciliation, perform regular audits on financial data	Include error reporting mechanisms and alerts for users	10/31/24	ALL APD Finance and IT Teams
Technology Data	Malware or Ransomware Attack	Open	3 (High/Low)	Utilize advanced threat detection, conduct regular penetration testing, educate users on phishing and ransomware	Regularly update security protocols and anti-malware solutions	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unauthorized Access to UAT Environment	Open	3 (High/Low)	Use role-based access controls, monitor access logs, and enforce MFA for test environment access	Regularly review UAT environment access rights	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV	01/26/24	ALL APD Finance and IT Teams

#### APD 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	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration 4/22 - remains a critical consideration as this will be a mapping and scripting issue due to: APD Does NOT have Grants - use of the field in FLAIR caused this to be "called" a grant - this will become OCA2 8/27 - still reviewin g- as this is a unique field to APD - we will incorporate the conversion with a plan to make certain this is mapped correctly	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD IT TEAM Collaboration with the PALM IT Team	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD will continue with the Excel Spreadsheet listing of IT questions that will be shared to the Readiness Coordinator for APD and filter to the relevant PALM team members for answers and acknowledgement - this is a solution that was proposed by the PALM Team - APD would like to work more collaboratively in the IT effort - as we have begun work to establish efforts for business as usual and develop PALM spec initiatives that are currently known.	This is going to be an ongoing challenge as timing is of the essence and with a delay in responses - the pace is slowed and falls back to last minute activities for completion	09/26/25	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management	07/01/24	APD AM Team - BA - PM - Core Team

					Team 4/22 - the inventory clean up and alignment with G/L cleanse is in progress - not yet closed 8/27 - still open and will review by 9/30		
People	APD Organizational changes will change the alignment of the personnel within the agency - but no approvals are final and there remain accounting adjustments to support until the accounting structure can be corrected	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get DMS approvals thru based on the Director's changes to organizational structure and chart - currently a draft	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval	07/31/24	APD Agency as a whole
People Processes Technology Data	APD Asset Inventories - Locations physical address alignment across systems to include Solaris	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The teams are working to get FLAIR and Solaris Data corrected/updated/changed/added/deleted for all Physical locations associated with APD either HQ/Regions/Facilities/Regions	4/24 - APD accounting is keeping the org codes in place that are currently in use based on FLAIR and will change as needed (approvals come thru) but there is no date when this will be accomplished. No changes to existing orgs at this time - and that is imposed on the PALM project activity. 6/26 - update to close in July 31 - organizational changes are pending DMS updates/Approval - re-write of procedures and documentation to correct processes - aligning with the asset module workflow within PALM 8/27 - still in process with IT team - PALM specs being used and PALM CORE Team working with IT teams to support the changes expected	12/20/24	APD Agency as a whole
People Processes Technology Data	Custom development and Thorough Testing	Open	High - Impacts the ability of the agency to meet deadlines or milestones	work in a sprint IP effort to write - test - move forward with the data base effort being built for PALM -	8/27 - creating the testing effort to make certain the APD strategy for PAL database within APD to support the data from PALM will be fully tested and a test plan will be vetted by the teams	09/26/25	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT - Incorrect Financial Calculations	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Identify source of calculation errors, debug relevant code, and retest with correct data	Testing of calculations delayed until fix is applied	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	Missing User Permissions in UAT Environment	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Adjust role-based access settings, review permissions with security team, and re-test access levels	Certain roles still unable to access key features	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT Delays in Report Generation	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Optimize report generation code, test under various load conditions, and monitor performance	Issue impacts reporting functionality; delays are unacceptable for go-live	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT Data Sync Errors with External Systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Troubleshoot sync protocol, verify external API configurations, and conduct integration testing	Sync errors intermittent, but testing will resume once fix is confirmed	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT User Login Failures	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Resolve MFA configuration, update security protocols, and verify login flows post-fix	Issue resolved with updated MFA configurations	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT Poor Load Performance During Peak Hours	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Identify bottlenecks, perform load testing, and adjust resource allocation	Performance tests show improvement, retesting required to confirm	09/27/24	APD IT Teams/APD PALM Team and Core Team
Processes Data	Data Quality issue	Open	Low - All impacts not listed as Critical or High	Ongoing efforts with all teams to cleanse data in FLAIR	8/27 - ongoing issue and ongoing cleanse in progress	02/28/25	PM/BA/Finance Teams
People Processes Technology Data	UI Display Issues on Different Devices	Open	Low - All impacts not listed as Critical or High	Implement responsive design fixes, test across multiple device types, and validate display	Display issues noted on specific mobile devices, testing ongoing	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT Unclear Error Messages	Open	Low - All impacts not listed as Critical or High	Update error messages to provide clear guidance, review with UX team, and retest	Review of error message clarity and usefulness is in progress	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT Test Data Inconsistencies	Open	Low - All impacts not listed as Critical or High	Refresh test data, standardize setup procedures, and train UAT team on data use guidelines	Data inconsistencies affecting test results; awaiting data refresh	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	Missing or Incomplete UAT Documentation	Open	Low - All impacts not listed as Critical or High	Create additional documentation, update test cases, and assign responsible team for updates	Review meeting scheduled to confirm updated documentation adequacy	09/27/24	APD IT Teams/APD PALM Team and Core Team
People Processes Technology Data	UAT - Defect Logging Issues in Tracking Tool	Open	Low - All impacts not listed as Critical or High	Work with tool vendor to resolve logging issue, and conduct training for testers	Logging tool updated and functioning correctly after fix	09/27/24	APD IT Teams/APD PALM Team and Core Team

APD 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	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst
People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters	Logged	02/28/24	APD Project Team/APD IT Team	Accounting Alignment 4/24 - In process with Task 513 - also in data cleanse effort
People	APD Organizational Structure is fully defined and corelated to the correct org code by personnel alignment - updated by HR	Logged	02/28/24	APD Project Team/APD IT Team	Organizational Alignment 4/24 - APD faces a reorganization over the next 9 months - thru Dec. 2024. Approvals remain outstanding. The PALM requirements will be "as is" for the agency and updates will occur when approvals move thru. There will be no wait time or hold to update. Following the Task requirements of 513 toward the May due date.
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.	Logged	02/28/24	APD Project Team/APD IT Team	4/24 - this remains a big concern on the handling of this data prior to conversion. The data pull for the conversion must be aligned correctly so that the PALM load places the data into the OCA2 field in support of the accounting requirements for APD. Planning within APD is on-going as understanding of the data requirements becomes available. APD has discussed in several Touchpoint meetings and also reviewed with the PALM IT RC Lead Chris. 6/25 - Consideration into the conversion plan and how data will map. Need to review all possibilities
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.	Logged	04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion. 6/26 - data cleansing continues and will continue thru the next 18 months. Updates will be made in FLAIR as required by the accounting daily/weekly/monthly
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer	Logged	04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.
People Processes Technology Data	Data Security Compliance	Logged	08/27/24	APD Finance Teams	The cloud-based system will comply with all state and federal regulations regarding data privacy and security, such as CJIS, HIPAA, or IRS 1075, as applicable
People Processes Technology Data	No Major Changes to Existing Workflows,	Logged	08/27/24	APD Finance Teams	Assumes minimal disruption to existing business processes or workflows, and that the new system can adapt to existing operational requirements.
Processes Technology Data	High Availability and Reliability	Logged	08/27/24	APD Finance Teams	The cloud-based system will be more reliable than the legacy mainframe, with a guaranteed uptime and robust disaster recovery capabilities.
Technology Data	Scalability	Logged	08/27/24	APD Finance Teams	The new system can handle future growth in terms of users, transactions, and data volume without requiring significant reconfiguration or additional infrastructure
People Processes Technology Data	Realistic Timeline.	Logged	08/27/24	APD Finance Teams	The project will follow a realistic timeline with adequate buffers for unforeseen delays, ensuring that all milestones are met without excessive pressure
People Processes Technology Data	Auditability	Logged	08/27/24	APD Finance Teams	The new system will provide sufficient audit trails and logs to satisfy internal and external audit requirements.
People Processes Technology Data	UAT Environment Mirrors Production Environment	Logged	10/31/24	UAT Team, IT	Confirm that configurations and settings match production before UAT begins
People Processes Technology Data	UAT -Test Data Accurately Reflects Real User Data Scenarios	Logged	10/31/24	UAT Team, QA	Test data generation in progress; validation with real user scenarios needed

People Processes Technology Data	All Key Stakeholders are Available for UAT Feedback	Logged	10/31/24	Business Users, Project Lead	Stakeholders have confirmed availability, but final schedule pending
People Processes Technology Data	All Major Functionalities are Developed and Deployed in UAT	Logged	10/31/24	UAT Team, Development	90% of functionalities are ready; remaining features are expected by the end of this week
People Processes Technology Data	UAT Test Cases Cover All Critical Business Requirements	Logged	10/31/24	UAT Team, Business Analyst	Initial review complete; updates to test cases in progress based on new requirements

#### APD Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	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 \*

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#### APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Rose Salinas	rose.salinas@apdcares.org	11/08/24
July - August 2024	Rose Salinas	rose.salinas@apdcares.org	09/09/24
May - June 2024	Rose Salinas	rose.salinas@apdcares.org	07/01/24
March - April 2024	Rose Salinas	rose.salinas@apdcares.org	05/09/24
January - February 2024	Rose Salinas	rose.salinas@apdcares.org	03/08/24