

Helpful Links

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

DBPR Status Report Dashboard

Reporting Period

September - October 2024

Agency Sponsor

Sally Huggins

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

CCN Composition



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

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 6
- 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 = 99.00%**
- Submitted Complete = 38
- Submitted Incomplete = 0
- Completed After Submission = 2

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 = 92.88%**
- Submitted On Time = 51
- Submitted Late = 13
- 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 = 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	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	100% - Submitted	08/20/24	Versa Regulation (ABS) remediation is being tracked under Task 547	Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/02/24		Submission Complete	
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/26/24	Have 2 rows with multiple organizations.	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	08/20/24	Cleansing plans for 4 remaining required conversions were confirmed.	Submission Complete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	10/15/24	Current-State Business Process 7.01 will be handled by DFS going forward. INTER/INTRAUNIT processes have been added.	Submission Complete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	08/22/24	No updates identified and required at this time and have confirmed with Versa even though there will be remediation.	Submission Complete	
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/20/24	Confirmed 4 conversions identified as needed (Conversion Inventory & Data Readiness Smartsheet).	Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/29/24	No interfaces being developed at this time. Completed meeting with new Accounting Systems Analyst to review all ABSs and confirm information provided (removed all "Uncertains")	Submission Complete	09/24/24
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		FLAIR Object Codes to be configured in PALM OA2 and Versa will be remediated to do the same. Specifications to produce ARI010 out of Versa Regulation have been drafted, reviewed, and turned over to DBPR IT. Specifications for spreadsheet uploads UII001 and API041 still be developed and are being managed under PALM Task 561. Revenue Codes Crosswalk - COA Lookup Table has been provided to DBPR IT for DBPR entries only.		
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/30/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	09/24/24	Draft reviewed internally by DBPR.	Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/04/24	All Payroll and PCard SpeedKeys have been defined and entered into Secure File Share. Some Positional Funding Workbook entries are outdated so a placeholder SpeedKey (PYPLACEHLD) was entered. One position was Deactivated (see the Comments Column). New appropriations are not present but will be added later under Task 567. Resubmitted on 10/23/24.	Submission Complete	10/16/24
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/09/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/31/24	All of September and October updates are posted to Smartsheet(s)	N/A	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	11/01/24	Revolving Funds need resolved; review complete	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	11/05/24	Reviewed Conversions with Accounting Systems Analyst	Submission Complete	
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/25/24	All updates have been posted	Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				

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	11/05/24		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		November and December 2024	
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
--------	-----------	------------	------

The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
--	--	--	---

<p>Implementation:</p> <p>Planned Florida PALM End Users = 32</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 23</p> <p>SMEs by Business Process Grouping</p> <ul style="list-style-type: none"> Account Mgmt. and Financial Reporting = 7 Accounts Receivable = 7 Asset Accounting and Mgmt. = 8 Banking = 7 Budget Mgmt. and Cash Control = 7 Contracts Mgmt. = 2 Disbursements Mgmt. = 7 Grants Mgmt. = 1 Inter/IntraUnit Transactions = 5 Payroll Mgmt. = 1 Projects Mgmt. = 1 Revenue Accounting = 9 System Access and Controls = 4 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>Current-State:</p> <p>Cataloged Business Processes = 98</p> <ul style="list-style-type: none"> Related Business Systems = 11 Related Reports = 25 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 85 Partial = 13 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 98</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9 Planned Spreadsheet Uploads = 0 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 0 None = 98 Uncertain = 0 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 80 Medium = 0 Low = 0 None = 18 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 80 Medium = 0 Low = 0 None = 18 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 80 Low = 0 None = 18 Uncertain = 0 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 52 <p>Segment III Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 30 	<p>Current-State:</p> <p>Cataloged Business Systems = 11</p> <ul style="list-style-type: none"> Criticality: High = 6 Med = 2 Low = 1 None = 2 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 9 Partial = 0 Not Started = 1 <p>Cataloged Interfaces = 1</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 0 <p>Implementation:</p> <p>Business Systems Planned for Integration = 2</p> <ul style="list-style-type: none"> Segment I - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment II - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 Segment III - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Current-State:</p> <p>Unique FLAIR Data Elements = 84</p> <ul style="list-style-type: none"> Associated Unique Uses = 85 Continued Use - Yes = 48 Continued Use - No = 32 <p>Associated Business Systems = 37</p> <p>Cataloged Reports = 55</p> <ul style="list-style-type: none"> Criticality: High = 20 Med = 19 Low = 15 None = 0 <p>Implementation:</p> <p>Segments I & II Planned Configurations = 6/9</p> <ul style="list-style-type: none"> Accounts Receivable (AR) Planned Distribution Codes = 52 Asset Management (AM) Planned Location Codes = 9 Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 1 - Track with Budget General Ledger (GL) Planned Budgetary Value Combo Edits = 661 Planned Local Funds = None Planned Organization ID's = 368 Planned OA1's = 31 Planned OA2's = None <p>Segment IV Planned Configurations</p> <ul style="list-style-type: none"> Started = 2 Not Started = 0 <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 8 Agency Data Outside of Primary Source System(s) = 0 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 4 In Progress = 0 Not Started = 0 Not Applicable 0 <p>Reports = TBD</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.

DBPR Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	If all various Future-State Business Process scenarios (including anomalies and non-happy path conditions) are not identified and accounted for in test scripts, then testing will not be comprehensive and could negatively impact DBPR PALM readiness	Open	6 (High/Medium)	Mitigation - Work with DBPR SMEs and identify all possible scenarios. Account for these scenarios in UAT test scripts in advance of scheduled UAT.	Non-happy path scenarios for Bank Deposits have been identified by the Project Manager. All SpeedKeys will need to be tested during UAT. Will be covered at Future-State review sessions. Increased Probability from 2 to 3 given likelihood some scenarios could be overlooked.	07/03/24	Thomas Richardson
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners Create visual aids, mapping documents, and other PALM educational tools.	PALM education, UAT training, and Florida PALM training is being planned. Anomalies and various scenarios are being identified so they can be tested.	04/08/24	Gary Townsend

Processes	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Open	3 (High/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	No DBPR-specific requirements have been identified at this time	04/08/24	Thomas Richardson
People Processes Technology Data	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete work flows	Open	3 (High/Low)	Mitigation - Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)		04/18/24	Thomas Richardson
People Processes Technology Data	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete Future-State Business Processes once we go live	Open	3 (High/Low)	Mitigation - Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	Added as an assumption (#40) It is anticipated that all needed data can be obtained from PALM via queries as and when needed.	04/23/24	Thomas Richardson
People Processes Technology Data	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	A mapping document has been started that illustrates FLAIR transactions to PALM equivalents.	05/31/24	Thomas Richardson
People Processes Technology Data	If significant time is not spent planning and preparing for UAT as well as business processes not intended to be performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Open	3 (High/Low)	Mitigation - If significant time is not spent planning and preparing for UAT as well as business processes not being performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	UAT planning and test case development is under way. Per Task 536-B the testing and error management process has been defined.	07/17/24	Thomas Richardson
People Processes Technology Data	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	Looking to partner with FDACS (also AHCA and DOH), DMS (transfers for services), and DFS (sends Child Labor). This is related to Action Item #40	08/16/24	Thomas Richardson
People Processes Technology Data	If all possible situations for getting large amounts of data into FLAIR are not addressed with automated replacements in PALM, hand-typing data into PALM could be error prone and inefficient	Open	3 (High/Low)	Identify all high-volume data imports into FLAIR currently and identify possible spreadsheet uploads that can be utilized	A meeting with FGCC to discuss Bank Deposits (ARI010) was conducted and details necessary to support them have been identified. Additional upload spreadsheets that are not generated by DBPR ABSs are being analyzed for potential use. PALM spreadsheet uploads IUI001 and API041 are being leveraged and output by Versa Regulation. According to DBPR IT, there are three large volume outputs that Versa produces today for FLAIR and all 3 have been identified in PALM as spreadsheet uploads. ARI010 is being leveraged out of Versa for Bank Deposits. Other processes are being researched.	09/04/24	Thomas Richardson
People Technology Data	If FGCC does not provide the necessary details (conditional logic, valid values, Chart of Accounts table lookup values) in a timely manner, then FGCC will not be able to receive bank deposits from Versa in the ARI010 upload spreadsheet and these deposits will not be applied in PALM	Open	3 (High/Low)	Log and track appropriate action items, follow-up with FGCC Project Manager (periodically), facilitate communications/discussions with DBPR IT, provide COA Table Lookup entries for FGCC only so they can be reviewed and updated, and ensure DBPR IT has what they need to complete Versa Regulation remediation as scheduled	See Action Items #54, 55, 57, 60, 61 in the Action Item Log	10/30/24	Thomas Richardson
People Processes Technology	If PALM Future-State Business Processes are not stable and subject to significant change during or after PALM education presented to DBPR end users, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	2 (Medium/Low)	Mitigation - Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes. Identify any shortcomings in Future-State Business Processes and communicate them to the DFS PALM Project team via the RC as soon as possible	Increased Probability from 1 to 2.	06/19/24	Thomas Richardson
People Processes	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Open	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	The Organizational Change Manager will assist in defining who should have what role. A spreadsheet will be established that includes all roles and who is responsible for what in each business process. This will aid in establish roles.	08/19/24	Jennifer Gaines
People Processes Technology Data	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Open	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	email notifications will be set up and tested in test scripts during UAT.	08/19/24	Thomas Richardson
People Processes Technology Data	If all potential manual work arounds conducted by Finance and Accounting staff that center around Versa are not addressed as a result of PALM remediation, then an opportunity to eliminate inefficiencies and increased potential risks could remain	Open	2 (Medium/Low)	Identify manual work arounds completed in FLAIR today, conduct analysis, and determine if they can be resolved programmatically by DBPR IT within Versa	FGCC Casino Activity Payments are being researched currently. A meeting with FGCC has been scheduled and prepared for. A meeting with FGCC has been scheduled and prepared for. One item to consider is eliminate the manual splitting of the FGCC and DBPR bank deposits (TR30s) by having Versa create separate output files (ARI010). Other similar solutions are being reviewed.	09/18/24	Thomas Richardson

DBPR Issues

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

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR end users	
Processes	The Agency Project schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Project Schedule is reviewed and updated daily
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR end users PALM	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than January 2026.	Logged	04/01/24	All DBPR end users PALM	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR end users PALM	The DBPR staff remain active and engaged
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR end users PALM	
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership.	Logged	04/01/24	All DBPR end users Thomas Richardson PALM	
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All DBPR end users Versa FLAIR@BPR	Some progress has been made; Data warehouse design not yet completed will impact this
People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All DBPR end users PALM FLAIR	
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All DBPR end users PALM FLAIR	
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project schedule.	Logged	04/01/24	All DBPR end users PALM	
People Processes Technology Data	Testing of remediated business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All DBPR end users PALM	
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Detailed Testing Tasks were added to the Project Schedule
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contrace Organizational Change Lead	
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All DBPR end users OCM Lead PALM	
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Data cleansing and conversion Tasks were completed
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	Language in the To Be Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding To Be Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy.	Logged	05/01/24	DFS PALM Development Staff All DBPR end users PALM	These Current-State Business Processes are being assigned to arbitrary Segment 5 for scheduling/priority purposes.
People	A Test environment will be made available to F&A staff so	Logged	06/12/24	All DBPR end users	Received confirmation only UAT environment in April 2025.

Processes Technology Data	they can learn from them					
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All DBPR end users	To be included in the UAT Test Plan (Task 536)	
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All DBPR end users PALM PALM Website		
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	Several FLAIR Reports data elements were updated in the Reports Smartsheet	
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by Florida PALM and are not the responsibility of DBPR	Logged	06/21/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	These will be remediated by the time scheduled testing begins	
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR PALM Readiness Project stakeholders	Related to question added to Question Log Smartsheet about who populates the RTM for global PALM Business Processes that apply to all Agencies	
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that it does not become outdated and obsolete.	Logged	08/07/24	All DBPR PALM Readiness Project stakeholders	Names on the DBPR Org Chart is one area that will need to be closely monitored.	
Data	All PALM reports will include all Chart of Accounts fields (including OA2)	Logged	08/16/24	All DBPR PALM Readiness Project stakeholders PALM	DBPR will be using the OA2 field in PALM to house the Object Codes and OA1 field in PALM to house the FLAIR OCA data	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	All DBPR PALM Readiness Project stakeholders PALM	No direct interfaces are being developed for DBPR ABSs at this time	
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR PALM Readiness Project stakeholders PALM	FLAIR@BPR will be replaced in PALM via queries (canned and ad hoc)	
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	10/23/24	All DBPR PALM Readiness Project stakeholders PALM	FLAIR@BPR will be replaced in PALM via queries (canned and ad hoc)	

DBPR 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 Processes Technology Data	Prepared for and conducted meeting with the Project Directors	09/03/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday	
People Processes Technology Data	Review and revise PALM Smartsheets	09/03/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To keep all project details current and up-to-date		Updates to staff and contacts were applied
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	09/04/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items		
People Processes Technology Data	Work with F&A Bureau Chief to research Bank Deposit data in PALM for ABS remediation	09/04/24	Jennifer Gaines Thomas Richardson	To obtain details necessary to complete ABS remediation specifications		Upload spreadsheet ARI010
People Processes Technology Data	Participated in Weekly Task Talk session	09/05/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks		
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	09/05/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	09/05/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status		emailed agenda and minutes to participants
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/06/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support		
People Processes Data	Saved a weekly snapshot of the Project Schedule in Excel and MS Project formats and posted in the Project Central Repository	09/06/24	DBPR Supervisors/Managers Thomas Richardson	Provide a format of the Project Schedule that everyone can review		
People Processes Technology Data	Schedule Internal DBPR Meeting to go over upload spreadsheet IUI001 Details	09/06/24	Sally Huggins Jennifer Gaines Lyndell Francis Thomas Richardson	To obtain details necessary to complete ABS remediation specifications		Equivalent for TR94s in FLAIR for transferring funds for Debit Memos
People Processes Technology Data	Schedule and conduct review of bank deposit corrections (Internal DBPR Meeting) related to upload spreadsheet ARI010 Details	09/06/24	Sally Huggins Jennifer Gaines Lyndell Francis Thomas Richardson	To obtain details necessary to complete ABS remediation specifications		
People Processes Technology Data	Participate in F&A walkthru CIU	09/06/24	Sally Huggins Jennifer Gaines Lyndell Francis Thomas Richardson	To obtain details necessary to complete ABS remediation specifications		Tour of intake unit
People Processes Data	Participate in Segment IV Design Workshop	09/10/24	Thomas Richardson Gary Townsend Jennifer Gaines	To keep up with Segment IV design		Carry/Certified Forward & Budget Close
People Processes Technology Data	Completed Task 551 - Submit Bimonthly Agency Readiness Status Report; obtained approval from Readiness Coordinator (ahead of schedule)	09/10/24	All DBPR Stakeholders PALM Leadership	To ensure DBPR status is communicated and the project is being managed effectively		
People Processes Data	Participate in Segment IV Design Workshop	09/11/24	Thomas Richardson Gary Townsend Jennifer Gaines	To keep up with Segment IV design		Account Management and Financial Reporting

People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	09/11/24	Sally Huggins Jennifer Gaines Thomas Richardson	To provide a thorough and accurate account of the DBPR Readiness activities conducted throughout the reporting period	
People Processes Data	Participate in Segment IV Design Workshop	09/12/24	Thomas Richardson Gary Townsend Jennifer Gaines	To keep up with Segment IV design	Account Management and Financial Reporting
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	09/13/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/13/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in MS Project and Excel formats and posted in the Project Central Repository	09/13/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Review UAT and regular Questions Smartsheet(s) for Answers and act accordingly for answers provided	09/13/24	Thomas Richardson	To ensure that information received is incorporated into project work products	
People Processes Technology Data	Worked on FLAIR Transaction to PALM Equivalents Spreadsheet	09/13/24	Thomas Richardson	To provide PALM educational materials for DBPR staff to help them transition	
People Processes Technology Data	Review and revise PALM Smartsheets	09/13/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To keep all project details current and up-to-date	Updates to staff and contacts were applied
People Processes Technology Data	Schedule a conduct an internal DBPR meeting to establish specifications for upload spreadsheet IUI001 to remediate ABS Versa Regulation (Task 547)	09/13/24	Sally Huggins Jennifer Gaines Lyndell Francis Thomas Richardson Gary Townsend	So Versa can automate in PALM the equivalent of TR94s in FLAIR	
People Processes Data	Saved a weekly snapshot of the Project Schedule in MS Project and Excel formats and posted in the Project Central Repository	09/13/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/13/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	09/17/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Worked on Task 541-C and defined Payroll Speedkeys; applied to a SpeedKey cheatsheet	09/17/24	All DBPR Gary Townsend	To ensure all required SpeedKeys are named with built-in intelligence and data elements are accurately defined	
People Processes Technology Data	Worked on Task 541-C and defined Payroll Speedkeys; applied to a SpeedKey cheatsheet	09/18/24	All DBPR Gary Townsend	To ensure all required SpeedKeys are named with built-in intelligence and data elements are accurately defined	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	09/18/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	
People Processes Technology Data	Participated in Weekly Task Talk session	09/19/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	09/19/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/20/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in MS Project and Excel formats and posted in the Project Central Repository	09/20/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	09/20/24	DBPR Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	
Technology Data	Identify FLAIR Reports data elements	09/23/24	All DBPR Gary Townsend Thomas Richardson	To ensure the equivalent data elements are available in PALM	Started with the reports labelled as critical
Technology Data	Define Payroll SpeedKeys for OPS and Special Categories (Task 541-C)	09/24/24	DBPR Payroll Sally Huggins Jennifer Gaines Derrick Thomas Thomas Richardson	To complete PALM Task 541-C	
People Processes Technology Data	Updated Task 536-B in RW Task Tracker to Submitted after attaching reviewed UAT Testing Plan	09/24/24	All DBPR Gary Townsend Thomas Richardson	To complete PALM Task 536-B	
People Processes Technology Data	Updated Smartsheet for Agency Business Systems (ABS) and removed any "uncertain" entries. Updated Task 546 in RW Task Tracker to Submitted.	09/24/24	All DBPR Gary Townsend Thomas Richardson	To complete PALM Task 546	
Technology Data	Conduct meeting to review proposed Payroll SpeedKeys (Task 541-C)	09/25/24	DBPR Payroll Sally Huggins Jennifer Gaines Derrick Thomas Thomas Richardson	To ensure the proposed Payroll SpeedKeys are accurately configured	
People Processes Technology Data	Identify and document new Assumptions	09/25/24	All DBPR Stakeholders PALM Leadership	To keep assumptions and RAID documentation current up-to-date	

People Processes Technology Data	Conducted biweekly RAID Review	09/25/24	Sally Huggins Jennifer Gaines Thomas Richardson	To ensure Project Directors are on board and understand all logged and managed Risks, Action Items, Issues, and Decisions. Assumptions as well.	
People Processes Technology Data	Update Stakeholder contacts, RW Task Tracker, and PALM Smartsheet(s)	09/25/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM	To keep all DBPR PALM Readiness project information current and accurate	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	09/26/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/27/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in MS Project and Excel formats and posted in the Project Central Repository	09/27/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	09/27/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	
People Processes Data	Saved a weekly snapshot of the Project Schedule in MS Project and Excel formats and posted in the Project Central Repository	09/27/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Conduct session to establish Chart of Accounts Crosswalk to facilitate ABS Versa Regulation remediation for Task 547	09/30/24	All DBPR Finance & Accounting DBPR IT PALM Versa Regulation	Ensure DBPR IT has what it needs to remediate Versa Regulation for PALM Task 547	Versa output is upload spreadsheet ARI0010
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/01/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	10/02/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Reviewed and updated all Smartsheet(s).	10/03/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM	To keep all project information and details current and up to date.	
Technology Data	Identify FLAIR Reports data elements	10/03/24	All DBPR Gary Townsend Thomas Richardson FLAIR	To ensure the equivalent data elements are available in PALM	Started with the reports labelled as critical
People Processes Technology Data	Research PALM upload spreadsheets for Versa (ABS) remediation	10/03/24	DBPR Finance & Accounting Staff DBPR IT Versa PALM	To make uploads to PALM from Versa as efficient as possible	This could impact ABS remediation design for Versa - API041
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/03/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Data	Work on Task 541-C - update Secure File Share Configuration Smartsheet(s) for SpeedKeys	10/04/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Derrick Thomas Nicole Jacobik PALM FLAIR	To complete the required and released PALM Task	An Excel User Cheat Sheet that includes all SpeedKeys was created and posted as well
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	10/04/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	10/04/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	10/04/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Technology Data	Review the ABS Versa Regulation database layout and established recommended changes to field names	10/04/24	All DBPR end users FLAIR PALM	To facilitate design specifications and mapping related to Versa Regulation going forward	
People Data	Prepare and Finalize SpeedKey tool for use by Payroll and PCARD users	10/07/24	All DBPR Payroll and Pcard end users FLAIR PALM	To provide a tool that provides all SpeedKey details for quick reference of DBPR staff	
People Processes Data	Researched Current-State reports and related data elements within each; also, reviewed similar Future-State reports	10/08/24	All DBPR end users FLAIR PALM	To make sure all data elements used in Current-State Business Processes are identified and Future-State in understanding where these data elements reside in PALM	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/08/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	10/09/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly	10/09/24	Sally Huggins Jennifer Gaines Thomas Richardson	To report all DBPR PALM Readiness project activities conducted	Posted to Smartsheet

Data	Status reporting period				
People Processes Technology Data	Participated in Weekly Task Talk session	10/10/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/10/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	10/11/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	10/11/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Review Future-State (PALM) Business Processes and identify those that involve Inter/IntraUnit transfers.	10/15/24	All DBPR end users Jennifer Gaines Gary Townsend PALM	So Future-State Business Processes can be documented accurately	
People Data	Create a matrix for all Org Code, EO, and Object code combinations that map to Fund Codes and provide to DBPR IT so Versa can be modified to populate the Fund on IUI001 upload spreadsheets.	10/15/24	All DBPR end users FLAIR PALM	To facilitate a table lookup for COA values needed by Versa Regulation (ABS) to populate spreadsheet uploads	
People Processes	Completed Task 543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV; obtained approval from Readiness Coordinator (ahead of schedule)	10/15/24	All DBPR Stakeholders	To ensure DBPR has documented all business processes and to complete PALM Tasks timely and with accuracy	Inter/IntraUnit processes were added to Future State processes
People Processes Technology Data	Conducted a meeting with DBPR Bureau Chief to address Configuration Workbooks for Segment 4 (Task 541-C)	10/16/24	Jennifer Gaines Thomas Richardson	To complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Reviewed and updated RAID logs and Posted to Central Repository. Mitigated Risks, completed Action Items, and documented Decisions. Posted weekly snapshots of RAID Logs to the Central Repository.	10/16/24	Thomas Richardson	To reduce project impediments and to manage and document all RAID items	Posted to Smartsheet
People Processes Technology Data	Review Executive Steering Committee meeting notes to identify progress on development and then updated the Project Schedule for related tasks	10/16/24	Jennifer Gaines Lyndell Francis Michelle Stauffer Thomas Richardson	To ensure DBPR Project Schedule is current and up-to-date for all tasks	
People Processes Technology Data	Schedule, prepare and conduct meeting with FGCC to discuss ABS (Versa Regulation remediation for Task 547	10/17/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend DBPR Stakeholders	To learn about the design of the Business Model	Covered details for Bank Deposits, corrections, and debit memos using PALM spreadsheet upload ARI010
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	10/17/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Technology Data	Participated in Weekly Task Talk session	10/17/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	10/18/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	10/18/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Participated in DBPR/FL PALM Monthly Readiness Touchpoint meeting with PALM Readiness Coordinators	10/18/24	DBPR Supervisors/Managers	To ensure the Readiness Coordinators and DBPR Supervisors and Managers are on the same page related to PALM Readiness progress and to resolve any outstanding questions	Prepared in advance
People Processes Technology Data	Completed Task 541-C - Complete Configuration Workbooks for Segment IV; obtained approval from Readiness Coordinator (slightly behind schedule)	10/22/24	All DBPR Thomas Richardson	To ensure data conversion is addressed and to complete PALM Tasks timely and with accuracy	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/22/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Data	Update all Contacts Smartsheet(s)	10/22/24	All DBPR stakeholders Nicole Jacobik All Readiness Coordinators	To keep the information current and accurate	
People Processes Technology Data	Completed Task 543 - Identify Change Impacts and Update Agency Business Process Documentation for Segment IV; obtained approval from Readiness Coordinator	10/23/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To document and understand the change impacts to People, Processes, Technology, and Data and to complete a required PALM Task	Added newly identified Inter/IntraUnit processes to Smartsheet
People Processes Technology Data	Identified and documented new assumptions	10/23/24	Sally Huggins Thomas Richardson	Provide Project Management support and to keep the assumptions current and up to date	Posted to Smartsheet
Processes Data	Participated in Chart of Accounts Presentation to Finance & Accounting Staff	10/23/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend All DBPR Finance & Accounting staff PALM	Provide awareness and education related to data changes for key data elements in PALM	Presentation COA Tool posted to Project Repository
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/24/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Participated in Weekly Task Talk session	10/24/24	Thomas Richardson	Keep abreast of changes and guidance for the completion of PALM Tasks	
People	Reviewed Risks and Issues with	10/24/24	Sally Huggins	To ensure the DBPR leadership has an opportunity to	Posted to Smartsheet

Processes Technology Data	Project Sponsor every other week		Jennifer Gaines Thomas Richardson	review all RAID items on a regular basis and to provide her feedback/input	
People Processes Technology Data	Completed Task 559 - Share Florida PALM Updates; obtained approval from Readiness Coordinator (ahead of schedule)	10/25/24	All DBPR Thomas Richardson	To ensure data conversion is addressed and to complete PALM Tasks timely and with accuracy	July, August, September 2024
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	10/25/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	Completed tasks are rolled up
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	10/25/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Technology Data	Reviewed and updated all Smartsheet(s).	10/25/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Nicole Jacobik PALM	To keep all project information and details current and up to date.	
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/29/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Identified all DBPR Agency-specific Project Tasks that were conducted throughout the 2-month Bimonthly Status reporting period	10/30/24	Sally Huggins Jennifer Gaines Thomas Richardson	To report all DBPR PALM Readiness project activities conducted	Posted to Smartsheet
People Processes Technology Data	Identified and managed Risks (Risk Register), Action Items (Action Item Log), Issues (Issue Log), and Decisions (Decision Log) (RAID items) every week	10/30/24	Sally Huggins Jennifer Gaines Thomas Richardson	To manage and mitigate risks and issues that could negatively impact PALM Readiness (and the project)	Posted to Smartsheet
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors to go over SpeedKeys	10/30/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend Derrick Thomas	To obtain information necessary to complete Task 541-C and configure SpeedKeys	Payroll and Pcard SpeedKeys were defined
People Processes Technology Data	Continued discussions, planning, and execution of PALM Education of the DBPR end users	10/30/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure DBPR DBPR staff are getting acclimated with PALM details	
People Processes Technology Data	Schedule, prepare for, and conduct a meeting with DBPR IT to go over ABS Versa Regulation design specifications	10/31/24	Sally Huggins Jennifer Gaines Lyndell Francis Jessie Rideout Alice Ibarra Michelle Stauffer Thomas Richardson DBPR IT	To ensure DBPR IT has the necessary detail specifications so the ABS Versa Regulation can be remediated to provide data in the required PALM format	This is for spreadsheet upload ARI010 and other Versa remediation.
People Processes Data	Saved a weekly snapshot of the Project Schedule in PDF and Excel formats and posted in the Project Central Repository	10/31/24	Sally Huggins Jennifer Gaines Thomas Richardson	Provide a format of the Project Schedule that everyone can review	
People Processes Technology Data	Completed Task 552 - Manage Agency Specific Implementation Schedule, Risks and Issues and updated the RW Task Tracker Smartsheet; approval not required	10/31/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To ensure ABS documentation is thorough and accurate and to complete PALM Tasks timely and with accuracy	September and October 2024
People Processes Technology Data	Completed Task 541-D -Complete Configuration Workbooks for Segment IV - General Ledger (GL); obtained approval from Readiness Coordinator (ahead of schedule)	10/31/24	All DBPR Revenue Team Thomas Richardson Jennifer Gaines Sally Huggins Gary Townsend	To ensure DBPR has configured Cash Management details so available in PALM when needed	
People Processes Data	Prepared for and conducted Biweekly DBPR PALM Readiness Project Meeting; prepared and posted minutes	10/31/24	DBPR Supervisors/Managers Thomas Richardson	To keep all DBPR Supervisors and Managers in the loop on all project activities and status	emailed agenda and minutes to participants
People Processes Technology Data	Prepared for and conducted meeting with the Project Directors	10/31/24	Sally Huggins Jennifer Gaines Thomas Richardson Gary Townsend	To obtain information necessary to accurately manage the project	Every Tuesday and Thursday
People Processes Technology Data	Completed DBPR PALM Readiness Project Weekly Status report and posted in the Project Repository	10/31/24	Sally Huggins Jennifer Gaines Thomas Richardson	Report project status to provide management support	emailed to Project Directors
People Processes Technology Data	Managed Tasks and assignments from the Project Schedule daily; updated the working copy of the Project Schedule	10/31/24	DBPR Supervisors/Managers Thomas Richardson	To ensure all project tasks are being completed on time	
People Processes Technology Data	Provide DBPR IT with Revenue Codes Crosswalk (COA Lookup Table) and ARI010 upload spreadsheet ABS Versa Regulation design specifications and request a follow up meeting	10/31/24	Sally Huggins Jennifer Gaines Lyndell Francis Jessie Rideout Alice Ibarra Michelle Stauffer Thomas Richardson DBPR IT	To ensure DBPR IT has the necessary detail specifications so the ABS Versa Regulation can be remediated to provide data in the required PALM format	This is for spreadsheet upload ARI010 and other Versa remediation that splits FGCC's bank deposits out.
People Processes Technology Data	Completed Task 541-D -Complete Configuration Workbooks for Segment IV - General Ledger (GL); obtained approval from Readiness Coordinator (ahead of schedule)	10/31/24	All DBPR Revenue Team Thomas Richardson Jennifer Gaines Sally Huggins Gary Townsend	To ensure DBPR has configured General Ledger Interest Apportionment and so details will be available in PALM when needed	

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 *

DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Sally Huggins	sally.huggins@myfloridalicense.com	11/05/24
July - August 2024	Sally Huggins	sally.huggins@myfloridalicense.com	09/09/24
May - June 2024	Sally Huggins	sally.huggins@myfloridalicense.com	07/11/24
March - April 2024	Sally Huggins	sally.huggins@myfloridalicense.com	05/13/24
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24