

**Helpful Links**

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- Readiness Workplan

# DOE Status Report Dashboard

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

**Reporting Period**

September - October 2024

**Agency Sponsor**

Suzanne Pridgeon

**CCN Composition**



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

**Change Champion Network:**

- Unique Filled Role = 11
- Duplicate Filled Role = 5
- 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 = 73.95%**
- Submitted Complete = 22
  - Submitted Incomplete = 5
  - Completed After Submission = 11

**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 = 92.99%**
- Submitted On Time = 57
  - Submitted Late = 7
  - Pending Submission = 2

**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	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress				
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/06/24		Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	100% - Submitted	10/10/24		Submission Complete	10/15/24
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24		Submission Complete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	Documentation is still in progress. To be completed the according to the rubric, the documentation must be completed.	Submission Incomplete	
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/10/24		Submission Complete	11/07/24
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/18/24	Planned integration column is lock and cannot be updated by the Agency.	Submission Incomplete	11/07/24
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/30/24		Submission Complete	10/24/24
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/10/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/03/24		Submission Complete	11/07/24
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/11/24		Submission Incomplete	11/12/24
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/31/24		N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/04/24		N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24	Test cases has not been identified yet.	Submission Incomplete	
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	10/03/24		Submission Complete	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	11/01/24		Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/24/24	All columns have been updated	Submission Incomplete	10/30/24
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/12/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	50% - In Progress				
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People	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><b>Implementation:</b></p> <p><b>Planned Florida PALM End Users = 88</b></p> <ul style="list-style-type: none"> <li>Business Process Groupings = 13/13</li> </ul> <p><b>Identified Subject Matter Experts = 13</b></p> <p><b>SMEs by Business Process Grouping</b></p> <ul style="list-style-type: none"> <li>Account Mgmt. and Financial Reporting = 1</li> <li>Accounts Receivable = 1</li> <li>Asset Accounting and Mgmt. = 1</li> <li>Banking = 1</li> <li>Budget Mgmt. and Cash Control = 2</li> <li>Contracts Mgmt. = 2</li> <li>Disbursements Mgmt. = 1</li> <li>Grants Mgmt. = 1</li> <li>Inter/IntraUnit Transactions = 1</li> <li>Payroll Mgmt. = 2</li> <li>Projects Mgmt. = 1</li> <li>Revenue Accounting = 2</li> <li>System Access and Controls = 1</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Processes = 37</b></p> <ul style="list-style-type: none"> <li>Related Business Systems = 5</li> <li>Related Reports = 1</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 36 Partial = 0 Not Started = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Impacted Agency Business Processes = 37</b></p> <ul style="list-style-type: none"> <li>Related Business Process Groupings = 6</li> <li>Planned Spreadsheet Uploads = 1</li> </ul> <p><b>Level of Impact: People Changes</b></p> <ul style="list-style-type: none"> <li>High = 23 Medium = 7 Low = 7 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Processes Changes</b></p> <ul style="list-style-type: none"> <li>High = 22 Medium = 7 Low = 7 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Technology Changes</b></p> <ul style="list-style-type: none"> <li>High = 22 Medium = 7 Low = 7 None = 0 Uncertain = 0</li> </ul> <p><b>Level of Impact: Data Changes</b></p> <ul style="list-style-type: none"> <li>High = 22 Medium = 10 Low = 3 None = 0 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 = 37</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 = 37</li> </ul>	<p><b>Current-State:</b></p> <p><b>Cataloged Business Systems = 26</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 23 Med = 0 Low = 0 None = 1</li> </ul> <p><b>Documentation Status:</b></p> <ul style="list-style-type: none"> <li>Complete = 7 Partial = 1 Not Started = 9</li> </ul> <p><b>Cataloged Interfaces = 0</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 0</li> <li>Outbound Interfaces = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Business Systems Planned for Integration = 9</b></p> <ul style="list-style-type: none"> <li><b>Segment I - Documentation Updates:</b></li> <li>Complete = 0 Updating = 6 Evaluating = 0 Not Started = 0 Not Needed = 0</li> <li><b>Segment II - Documentation Updates:</b></li> <li>Complete = 0 Updating = 5 Evaluating = 0 Not Started = 0 Not Needed = 1</li> <li><b>Segment III - Documentation Updates:</b></li> <li>Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0</li> </ul> <p><b>Planned Interfaces = 7</b></p> <ul style="list-style-type: none"> <li>Inbound Interfaces = 2</li> <li>Outbound Interfaces = 4</li> </ul>	<p><b>Current-State:</b></p> <p><b>Unique FLAIR Data Elements = 443</b></p> <ul style="list-style-type: none"> <li><b>Associated Unique Uses = 574</b></li> <li>Continued Use - Yes = 124</li> <li>Continued Use - No = 3</li> <li><b>Associated Business Systems = 6</b></li> </ul> <p><b>Cataloged Reports = 87</b></p> <ul style="list-style-type: none"> <li><b>Criticality:</b></li> <li>High = 87 Med = 13 Low = 1 None = 0</li> </ul> <p><b>Implementation:</b></p> <p><b>Segments I &amp; II Planned Configurations = 6/9</b></p> <ul style="list-style-type: none"> <li><b>Accounts Receivable (AR)</b></li> <li>Planned Distribution Codes = 8</li> <li><b>Asset Management (AM)</b></li> <li>Planned Location Codes = 1050</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 = 882</li> <li>Planned Local Funds = None</li> <li>Planned Organization ID's = 725</li> <li>Planned OA1's = 576</li> <li>Planned OA2's = None</li> </ul> <p><b>Segment IV Planned Configurations</b></p> <ul style="list-style-type: none"> <li>Started = 1 Not Started = 1</li> </ul> <p><b>Conversions &amp; Data Readiness</b></p> <ul style="list-style-type: none"> <li>Conversions Needed = 11</li> <li>Agency Data Outside of Primary Source System(s) = 4</li> <li><b>Data Readiness/Cleansing Status:</b></li> <li>Complete = 6 In Progress = 0 Not Started = 0 Not Applicable 1</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.

DOE Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
Processes Technology Data	Significant delay in receiving the technical requirements	Open	6 (High/Medium)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	Quicker response time has lowered the risk level.	06/25/24	Project Manager
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change  10/01/2024 This risk will remain throughout the project	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team (anyone working on PALM)). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	No update - 10/11/2024	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if	02/14/24	DOE

					the level of risk moving throughout the Project.		
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	4 (Medium/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified.  10/01/2024 The quicker response by PALM have lowered the risk level.	05/30/24	Project Manager
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.  10/01/20/24 This risk remains current	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	No update-10/11/2024	01/12/24	DTI and Aware technical teams
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task.  10/01/2024 No new system has been identified.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	No update - 10/11/2024	01/30/24	AWARE Team

DOE Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Technology Data	Task 519 remediation phase 1 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	No update as of 10/11/2024	12/02/24	PM/DTI
People Processes Technology Data	Task 531 remediation phase 2 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New issue	12/02/24	PM/DTI

DOE Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed	
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office		Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change	
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.		Schedule PALM simulations schedule for 08/2023 and 09/2023

DOE 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	Status Report	09/06/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology	DTI Weekly Status report	09/06/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	DTI Weekly Status report	09/13/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Processes Technology Data	System Functional requirement meeting for Indirect Cost	09/16/24	PM, BA and Business unit	Track the requirements for Indirect Cost	
Processes Data	DOE SpeedKey Meeting	09/18/24	PM, BA and Business Units	Complete Speed keys for PALM Task	
People Processes Data	FLAGS Application Process meeting	09/18/24	PM, BA and Business Units	Capture the business process for the FLAGS application	
People	Status Report	09/19/24	Project Manager, Financial Manager Comptroller and Deputy Comptroller	Provide PALM status within DOE	
People Technology	DTI Weekly Status report	09/19/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst	Provided weekly status on PALM file status and Database build.	

		Manager			
People Processes Data	Indirect Cost Process Meeting	09/24/24	PM, BA and Business Units		
People Technology	DTI Weekly Status report	09/26/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	Weekly Status report	09/27/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Processes	Process GAP analysis	10/02/24	Project Manager and BA	Determine the change impact for task 543	
People Processes	Process GAP analysis	10/03/24	Project Manager and BA	Determine the change impact for task 543	
Processes Data	DOE SpeedKey Meeting	10/03/24	PM, BA and Business Units	Complete Speed keys for PALM Task	
People Technology	DTI Weekly Status report	10/04/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	DTI Weekly Status report	10/10/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	Weekly Status report	10/11/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Processes Data	Payroll Process Meeting	10/17/24	PM, BA and Business Units	To capture to Process the DOE business Processes for Payroll	
People Technology	Weekly Status report	10/18/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Data	Default Interest Apportionment Workbook	10/21/24	PM, BA and Business Units	Complete task 541D	
People Technology	DTI Weekly Status report	10/21/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Processes Data	Payroll Process Meeting	10/23/24	PM, BA and Business Units	To capture to Process the DOE business Processes for Payroll	
People Processes Data	PALM FLAGS Application functionality changes and design -Kickoff Meeting	10/23/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Capture requirement for FLAGS Application	
People Technology	Weekly Status report	10/24/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
People Technology	DTI Weekly Status report	10/24/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	
Technology Data	Files revisions	10/29/24	AWARE Team, Business Unit, PM and BA	Review the PALM files	
People Processes Data	PALM FLAGS Application functionality changes and design -Kickoff Meeting	10/30/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Capture requirement for FLAGS Application	
People Technology	DTI Weekly Status report	10/31/24	Project Manager, Comptroller, Deputy Comptroller, Business Analyst, Business Analyst Manager	Provided weekly status on PALM file status and Database build.	

#### 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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#### DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	11/12/24
July - August 2024	Matt Kirkland	matt.kirkland@fldoe.org	09/11/24
May - June 2024	Matt Kirkland	matt.kirkland@fldoe.org	07/12/24
March - April 2024	Matt Kirkland	matt.kirkland@fldoe.org	05/13/24
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24