DOEA 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

Teresa Johnson

CCN Composition	RW Task Completeness	RW Task Timeliness	Project-led Meeting Participation

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

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

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

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

Change Champion Network:
- Unique Filled Role = 11
- Duplicate Filled Role = 5
- Vacant Role = 0

RW Task Completeness:

Score = 91.14%
- Submitted Complete = 31
- Submitted Incomplete = 0
- Completed After Submission = 4

RW Task Timeliness:

Score = 65.78%
- Submitted On Time = 28
- Submitted Late = 26
- Pending Submission = 8

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	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	50% - In Progress		Continuing to work on initial draft and adding agency specific tasks.	N/A	
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23			Temporary staff has been hired to manage PM related tasks.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	100% - Submitted	05/24/24	Business system related, no anticipated remediation.	Submission Complete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	People	536-A	Create Agency Specific User Acceptance Testing Plan	06/17/24	08/16/24	50% - In Progress		Created draft document. Internal review scheduled. Still working to document processes and crosswalk to PALM processes to determine scripts.		
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/10/24	Reviewing Projects.	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	10/15/24	Confirmed with Tyler that the DOEA Conversion Inventory & Data Readiness workbook is up to date with our agency's latest needs.	Submission Complete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		Regularly engaging SMEs to compare current business processes to PALM business processes.		
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	08/01/24	Business system related, no anticipated remediation.	Submission Complete	08/01/24
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/15/24	Confirmed with Tyler that the DOEA Conversion Inventory & Data Readiness workbook is up to date with our agency's latest needs.	Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/01/24	No interface needs.	Submission Complete	08/01/24
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	100% - Submitted	08/01/24	Business system related, no anticipated remediation.	Submission Complete	08/01/24
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/23/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	50% - In Progress		Created draft document. Internal review scheduled. Still working to document processes and crosswalk to PALM processes to determine scripts.		
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/18/24	Adjusted the data in the excel files in the secure SharePoint.	Submission Complete	10/22/24
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/12/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/28/24	Meeting on a weekly cadence to review risks, issues, and tasks. Attached latest reports before the month ends.	N/A	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/15/24	Updated DOEA General Ledger Allocation workbook in Smartsheet. Confirmed with Tyler and Randy it was ready to submit.	Submission Complete	
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	10/18/24	Uploaded the verified file in the main DOEA folder. I couldn't edit the file in the web browser so I downloaded a copy instead. Then had issues reuploading to the mock 1 > projects folder.	Submission Complete	
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/23/24	Got final approval on all components. Scheduled email to be sent out 10/25/24 10am eastern	Submission Complete	

N/A	Technology	**561**	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	**10/21/24**	DOEA does not have any business systems interacting with FLAIR and will not have any business systems interacting with PALM.	Submission Complete	
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		Met with teams to go over task instructions and supplemental documents to get the review started		
N/A	N/A	**562**	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	**11/12/24**		Submission Complete	
N/A	N/A	**563**	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24	25% - Beginning Initial Internal Meetings and Information Gathering		Have a standing reoccurring meeting.		
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.

People

Implementation:

Planned Florida PALM End Users = 27

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 10

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 1

- Accounts Receivable = 1

- Asset Accounting and Mgmt. = 1

- Banking = 1

- Budget Mgmt. and Cash Control = 1

- Contracts Mgmt. = 1

- Disbursements Mgmt. = 2

- Grants Mgmt. = 1

- Inter/IntraUnit Transactions = 1

- Payroll Mgmt. = 3

- Projects Mgmt. = 1

- Revenue Accounting = 1

- System Access and Controls = 3

Role Mapping = TBD

Training = TBD

Processes

Current-State:

Cataloged Business Processes = 8

• Related Business Systems = 0

• Related Reports = 1

• Documentation Status:

- Complete = 1 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 8

• Related Business Process Groupings = 1

• Planned Spreadsheet Uploads = 0

• **Level of Impact: People Changes**

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

• **Level of Impact: Processes Changes**

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

• **Level of Impact: Technology Changes**

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

• **Level of Impact: Data Changes**

- High = 0 Medium = 2 Low = 0 None = 0 Uncertain = 0

• **Segments I & II Documentation Update Status**

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

• **Segment III Documentation Update Status**

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

Technology

Current-State:

Cataloged Business Systems = 5

• **Criticality:**

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

• **Documentation Status:**

- Complete = 0 Partial = 1 Not Started = 0

Cataloged Interfaces = 7

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• **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

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 75**

- Continued Use - Yes = 49

- Continued Use - No = 0

• **Associated Business Systems = 6**

Cataloged Reports = 37

• **Criticality:**

- High = 9 Med = 3 Low = 8 None = 17

Implementation:

Segments I & II Planned Configurations = 6/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 1

• **Asset Management (AM)**

- Planned Location Codes = 20

- Planned Associated Area ID's = None

• **Commitment Control (KK)**

- Planned Option = Option # 2 - Control

• **General Ledger (GL)**

- Planned Budgetary Value Combo Edits = 268

- Planned Local Funds = None

- Planned Organization ID's = 81

- Planned OA1's = 665

- Planned OA2's = None

Segment IV Planned Configurations

- Started = 1 Not Started = 1

Conversions & Data Readiness

• Conversions Needed = 10

• Agency Data Outside of Primary Source System(s) = 0

• **Data Readiness/Cleansing Status:**

- Complete = 6 In Progress = 0 Not Started = 0 Not Applicable 0

Reports = TBD

Agency Reported

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

DOEA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Ongoing staff aug to address Task 328.	Processes should be fully documented by 10/1/24 and crosswalking will begin	05/24/24	Randy Pupo
Data	While cleaning up, making sure staff maintains the clean data	Open	1 (Low/Low)	Reviewing conversion inventory carefully and understadning the impact of having to clean up post go-live	Will continue to monitor	09/05/24	Nancy Frye

DOEA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Liaison time limitations result in difficulties in meeting Palm activity	Closed	High - Impacts the ability of the agency to meet	Requested PALM funding to secure additional resources for PALM readiness activities	New PM started.	10/15/24	Randy Pupo

	deadlines.		deadlines or milestones				
People	Staff limitations still exist, turnover creates knowledge gaps	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Working on retention and building processes and procedures so when turnover occurs, knowledge is not completely lost	Almost fully staffed and have completed current process documentation. Knowledge gaps still exist due to newness of the staff.	06/24/25	Ryan White
Processes	Current processes may be outdated or not fully known creating issues in determining how they will be done in PALM	Open	Low - All impacts not listed as Critical or High	Working to build processes and utilize resources for the "why", and when possible looking in the knowledge center to understand how it will change	In progress of cross walking processes so that staff can review while learning.	04/01/25	Nancy Frye

DOEA Assumptions

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

DOEA 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	Reviewed all outstanding and current tasks with new Project Manager	09/18/24			
Processes	Supervisors reviewed desk procedures captured by contractor team and had them finalize the documents to begin cross walking to PALM Processes	10/07/24			
Data	Pulled various reports to determine data readiness prior to mock conversions being released.	10/28/24		To determine if our current procedures need to be updated to maintain data clean-up	

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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DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Teresa Johnson	johnsont@elderaffairs.org	11/12/24
July - August 2024	Randy Pupo	pupor@elderaffairs.org	09/12/24
May - June 2024	Randy Pupo	pupor@elderaffairs.org	07/10/24
March - April 2024	Randy Pupo	pupor@elderaffairs.org	05/14/24
January - February 2024	Glenn Elmer (CFO posit	elmere@elderaffairs.org	03/13/24