DOL 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
Becky Ajhar

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 = 7
- Duplicate Filled Role = 9
- Vacant Role = 0

RW Task Completeness:
Score = 96.22%
- Submitted Complete = 32
- Submitted Incomplete = 0
- Completed After Submission = 5

RW Task Timeliness:
Score = 94.33%
- Submitted On Time = 58
- Submitted Late = 4
- Pending Submission = 3

Meeting Participation:
- Meetings Attended = 5
- Meetings Missed = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. We anticipate finalizing the updated documentation within 3 weeks. 5/29 - Documentation for business processes reviewed and completed. Areas which require remediation have been identified and currently being updated by Finance Department. ETC unknown. 7/12/24 - Documentation updates still pending for submittal		
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		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. 7/12/24 - Documentation updates still pending for submittal		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	100% - Submitted	08/09/24		Submission Complete	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/07/24		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	08/07/24		Submission Complete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	100% - Submitted	10/17/24		Submission Complete	
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	08/07/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	10/17/24		Submission Complete	
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	09/09/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/09/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	09/20/24		Submission Complete	10/10/24
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/11/24		Submission Complete	
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	100% - Submitted	10/30/24		N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/17/24		N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	100% - Submitted	10/17/24		Submission Complete	
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	10/04/24		Submission Complete	
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/24/24	Submitted with items in yellow as two old BE's from 2020/2021 and 2021/2022 are listed but no longer being used. There is not a "No" option under Configure Value	Submission Complete	

Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	100% - Submitted	10/09/24		Submission Complete	
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/25/24		Submission Complete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25					
Direct	Data	555-B	Complete Data Cleansing Based on Mock Conversion 1 (CTC001, GMC001, and PCC002)	10/28/24	11/22/24					
N/A	N/A	562	Submit Bimonthly Agency Readiness Status Report	11/01/24	11/12/24	100% - Submitted	11/01/24		Submission Complete	
N/A	N/A	563	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/24	12/27/24					
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001	11/08/24	12/06/24					

People

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

Implementation:

Planned Florida PALM End Users = 22

• Business Process Groupings = 11/13

Identified Subject Matter Experts = 10

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 2

- Accounts Receivable = 1

- Asset Accounting and Mgmt. = 1

- Banking = 1

- Budget Mgmt. and Cash Control = 1

- Contracts Mgmt. = 1

- Disbursements Mgmt. = 1

- Grants Mgmt. = 0

- Inter/IntraUnit Transactions = 1

- Payroll Mgmt. = 3

- Projects Mgmt. = 0

- Revenue Accounting = 1

- System Access and Controls = 1

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 49

• Related Business Systems = 3

• Related Reports = 5

• Documentation Status:

- Complete = 91 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 49

• Related Business Process Groupings = 2

- Planned Spreadsheet Uploads = 1

• **Level of Impact: People Changes**

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• **Level of Impact: Processes Changes**

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• **Level of Impact: Technology Changes**

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

• **Level of Impact: Data Changes**

- High = 0 Medium = 56 Low = 0 None = 0 Uncertain = 0

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

- Not Started = 0 In Progress = 5 Complete = 0

• **Segment III Documentation Update Status**

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

Technology

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

Current-State:

Cataloged Business Systems = 7

• Criticality:

- High = 7 Med = 0 Low = 0 None = 0

• Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 28

- Outbound Interfaces = 2

Implementation:

Business Systems Planned for Integration = 6

• **Segment I - Documentation Updates:**

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

• **Segment II - Documentation Updates:**

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

• **Segment III - Documentation Updates:**

- Complete = 1 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 5

Planned Interfaces = 30

- Inbound Interfaces = 11

- Outbound Interfaces = 17

Data

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

Current-State:

Unique FLAIR Data Elements = 70

• **Associated Unique Uses = 70**

- Continued Use - Yes = 29

- Continued Use - No = 0

• **Associated Business Systems = 0**

Cataloged Reports = 76

• Criticality:

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

Implementation:

Segments I & II Planned Configurations = 7/9

• **Accounts Receivable (AR)**

- Planned Distribution Codes = 1

• **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 = 53

- Planned Local Funds = None

- Planned Organization ID's = 40

- Planned OA1's = 7

- Planned OA2's = 108

Segment IV Planned Configurations

- Started = 1 Not Started = 1

Conversions & Data Readiness

• Conversions Needed = 8

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

• **Data Readiness/Cleansing Status:**

- Complete = 4 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.

DOL Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	The Florida Lottery's new Claims and Payment system (CAPS) is scheduled to tentatively go-live in the second quarter of 2025. The implementation of Lottery's CAPS may impact PALM training activities. The new CAPS will be replacing the current system known as Fortune.	Open	4 (Medium/Medium	Develop a proactive strategy for the upcoming launch of the new CAPS; will focus on early communication, training for PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	Ongoing	09/07/23	Chris Rorison

DOL Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes	Current CAP prioritization is impacting PALM activities.	Open	Low - All impacts not listed as Critical or High	None at this time.			Meghan Gregg

DOL Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	Florida PALM will design and be able to record DOL manual payments currently handled outside of FLAIR today. 30.5 Manage Payments 30.5.1 Record Manual Payments	Logged	12/11/23	Disbursements	FLAIR screenshots of recording retailer incentives for manual payments
People Processes	Florida PALM Payroll Processing will be able to process refunds on Insurance Benefits (overpayments)	Logged	01/25/24	People First	

DOL 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	Palm task review meetings - Lottery team	09/09/24	Meghan Gregg, Stella Bargas, Chris Rorison	Revisited all previous outstanding tasks (515 and 527) and discussed current outstanding task 550A, next steps still forthcoming. Confirmed attendance for Sept 10-12 workshops	
People Technology Data	Palm task review meetings - Lottery team	09/23/24	Meghan Gregg, Chris Rorison, Melissa Ging, Diego Tolmos, Robert McCelvy, Perry West	Discuss task 554 - specifically cycle 1 connectivity testing	
People Processes Data	Palm task review meetings - Lottery team	10/07/24	Meghan Gregg, Melissa Ging, Diego Tolmos, Robert McCelvy	Discuss the RSA key connection and upcoming tasks	
People Processes Data	Palm task review meetings - Lottery team	10/21/24	Meghan Gregg, Stella Bargas, Chris Rorison, Diego Tolmos, Robert McCelvy	Discuss task 559 and pending items (RSA key connection verification); review and update risk and issue log.	

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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DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Rebecca Ajhar	ajharb@flalottery.com	11/01/24
July - August 2024	Rebecca Ajhar	ajharb@flalottery.com	09/11/24
July - August 2024	Rebecca Ajhar	ajharb@flalottery.com	09/11/24
May - June 2024	Rebecca Ajhar	ajharb@flalottery.com	07/12/24
March - April 2024	Rebecca Ajhar	ajharb@flalottery.com	05/10/24
January - February 2024	Rebecca Ajhar	ajharb@flalottery.com	03/08/24