

Helpful Links

- Dashboard Snapshots
- Knowledge Center
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- Readiness Workplan

DVA Status Report Dashboard

Reporting Period

September - October 2024

Agency Sponsor

AI Carter

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

CCN Composition



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

RW Task Completeness



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

RW Task Timeliness



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

Project-led Meeting Participation



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

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 13
- Vacant Role = 0

RW Task Completeness:

- Score = 85.41%**
- Submitted Complete = 28
 - Submitted Incomplete = 3
 - Completed After Submission = 6

RW Task Timeliness:

- Score = 84.71%**
- Submitted On Time = 44
 - Submitted Late = 16
 - Pending Submission = 6

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	50% - In Progress	06/28/24	ETA by July 2024 - RFQ in process RC comment: as of 8/20, task remains incomplete via review with E. RiceMorgan. Anticipate completion by end of December 2024. VACO Analyst Jose Gutierrez working through Business processes.	Submission Incomplete	08/02/24
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	07/12/24	Remains incomplete. 1. Mark None where spreadsheet uploads are not identified. 2. Complete process documentation updates for Segments I, II, and III. -dit, 11/6/2024	Submission Incomplete	09/19/24
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	100% - Submitted	09/19/24		Submission Complete	
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	75% - Consolidating/Inputting Information for Submission		Agency continues to work through risk issues and issues. Procurement progressing. Vendor listing provided and interviews scheduled with vendors. Vendor (VACO) selected and integration has begun. Vendor attended meetings and duties outlined and implementation schedule updated. SOPs to be completed by end of December 2025. Nov 6, 2024: Agency continues to work through its SOPs to ensure procedures and processes marry with those in PALM. Simultaneously we continue to work through tasks and attend workshops and UAT requirements while performing hurricane recovery operations and nursing home inspections/assessments and Legislative Budget action items. Having a much smaller administrative staff than other Agencies makes meeting suspenses challenging.	N/A	
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/29/24		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	09/19/24		Submission Complete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	100% - Submitted	09/19/24		Submission Complete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/21/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	100% - Submitted	10/23/24		Submission Complete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	Pending Resubmission	09/26/24	Thank you for completing Speedkey sheet. A few updates are required, and are outlined in the Task Verification form.	Submission Incomplete	10/31/24

										-dit, 11/6/2024 Speedkey workbook is blank. -dit, 10/4/2024
N/A	N/A	551	Submit Bimonthly Agency Readiness Status Report	08/30/24	09/11/24	100% - Submitted	09/10/24			Submission Complete
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	50% - In Progress				N/A
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/23/24			N/A
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	50% - In Progress				
Direct	Technology	554	Participate in Connectivity Testing for Cycle 1 Interface Testing	09/16/24	10/04/24	100% - Submitted	09/24/24			Submission Complete
Direct	Data	541-D	Complete Configuration Workbooks for Segment IV - General Ledger (GL)	10/07/24	11/01/24	100% - Submitted	10/31/24			Submission Complete
Direct	Data	555-A	Complete Data Cleansing Based on Mock Conversion 1 - Projects (PCC001)	10/07/24	11/22/24	50% - In Progress				
N/A	People	559	Share Florida PALM Updates	10/14/24	10/25/24	100% - Submitted	10/24/24			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	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	11/06/24			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 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 = 60</p> <ul style="list-style-type: none"> Business Process Groupings = 12/13 <p>Identified Subject Matter Experts = 9</p> <ul style="list-style-type: none"> SMEs by Business Process Grouping Account Mgmt. and Financial Reporting = 5 Accounts Receivable = 5 Asset Accounting and Mgmt. = 5 Banking = 3 Budget Mgmt. and Cash Control = 5 Contracts Mgmt. = 9 Disbursements Mgmt. = 5 Grants Mgmt. = 9 Inter/IntraUnit Transactions = 9 Payroll Mgmt. = 3 Projects Mgmt. = 9 Revenue Accounting = 5 System Access and Controls = 5 <p>Role Mapping = TBD</p> <p>Training = TBD</p>	<p>Current-State:</p> <p>Cataloged Business Processes = 110</p> <ul style="list-style-type: none"> Related Business Systems = 2 Related Reports = 39 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 88 Partial = 12 Not Started = 0 <p>Implementation:</p> <p>Impacted Agency Business Processes = 110</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9 Planned Spreadsheet Uploads = 1 <p>Level of Impact: People Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 109 None = 0 Uncertain = 0 <p>Level of Impact: Processes Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 107 None = 2 Uncertain = 0 <p>Level of Impact: Technology Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 0 None = 109 Uncertain = 0 <p>Level of Impact: Data Changes</p> <ul style="list-style-type: none"> High = 0 Medium = 0 Low = 0 None = 109 Uncertain = 0 <p>Segments I & II Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 48 Complete = 59 <p>Segment III Documentation Update Status</p> <ul style="list-style-type: none"> Not Started = 0 In Progress = 0 Complete = 0 	<p>Current-State:</p> <p>Cataloged Business Systems = 2</p> <ul style="list-style-type: none"> Criticality: High = 1 Med = 1 Low = 0 None = 0 <p>Documentation Status:</p> <ul style="list-style-type: none"> Complete = 0 Partial = 2 Not Started = 0 <p>Cataloged Interfaces = 3</p> <ul style="list-style-type: none"> Inbound Interfaces = 3 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 = 2 Segment II - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2 Segment III - Documentation Updates: Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 2 <p>Planned Interfaces = 5</p> <ul style="list-style-type: none"> Inbound Interfaces = 3 Outbound Interfaces = 0 	<p>Current-State:</p> <p>Unique FLAIR Data Elements = 70</p> <ul style="list-style-type: none"> Associated Unique Uses = 70 Continued Use - Yes = 48 Continued Use - No = 0 <p>Associated Business Systems = 0</p> <p>Cataloged Reports = 49</p> <ul style="list-style-type: none"> Criticality: High = 41 Med = 3 Low = 5 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 = 10 Asset Management (AM) Planned Location Codes = 38 Planned Associated Area ID's = None Commitment Control (KK) Planned Option = Option # 1 - Track with Budget General Ledger (GL) Planned Budgetary Value Combo Edits = 149 Planned Local Funds = None Planned Organization ID's = 28 Planned OA1's = 14 Planned OA2's = None <p>Segment IV Planned Configurations</p> <ul style="list-style-type: none"> Started = 1 Not Started = 1 <p>Conversions & Data Readiness</p> <ul style="list-style-type: none"> Conversions Needed = 11 Agency Data Outside of Primary Source System(s) = 0 <p>Data Readiness/Cleansing Status:</p> <ul style="list-style-type: none"> Complete = 7 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.

DVA 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	Setup and Integration Staffing	Open	9 (High/High)	Agency is seeking to hire contract personnel to support the setup and integration of FLORIDA PALM within the Agencies overall structure. This is an unfunded mandate and the Agency critically needs these assets to support a successful transition of this system. The Agency submitted a Legislative Budget Request to secure funding mitigate this shortfall.	No subject matter expertise in local area. Agency is challenged to hire its internal staffing shortages. 8 March: Received solicitation documents from DBPR and will use them to develop solicitations for Agency. 14 May 2024: Reviewing question responses from Vendor but initial assessment is the vendor is not qualified to do the work we require. 11/6/2024: Agency has had a Contract Manager and an analyst on site for about 2 1/2 months now and both are working feverishly with our Agency staff to ensure pre-implementation requirements are being addressed. October 2024 activities were hindered by Hurricanes Helene and Milton. Funding for these two personnel is estimated to run out in April 2024.	11/06/24	Al Carter, Chief of Staff
Processes Technology	PeopleFirst Payroll integration may be impacted as we are unclear how this interface will work.	Open	6 (Medium/High)	Monitor PeopleFirst updates to ensure we can adapt to any new dependencies that may evolve.	No change. 14 May 2024: No change; monitoring continues.	05/14/24	Al Carter, Chief of Staff
People	Contracting and Procurement	Open	6 (High/Medium)	Our Agency is unique and may require system remediation as a product of implementation as our processes and procedures change as federal, state, and local statutes, laws, and administrative codes change. FDVA may have to redesign or retool existing business processes and designs. This could impact the Agency meeting its deliverables to its clients and impact the overall implementation of the project statewide.	Continuous process. Agency continues to work with FLAIR, MATRIXCARE and the like to determine if PALM will seamlessly transition these programs in part of totally based on our Agency day-to-day requirements. Agency met with one Vendor and provided questions for validate vendors ability to perform Project Management function. Based on initial responses to questions, indications are that it is doubtful the vendor can meet Agency requirements. 11/6/2024: Our selected vendor has no experience with FLAIR and MATRIXCARE. As such, we are working to bring them on line with our processes and procedures in hopes that they can assist in mapping them to the PALM system.	11/06/24	Al Carter, Chief of Staff
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with FLAIR-end is a risky proposition given the unknown compatibility issues with other systems and business processes our Agency employs to conduct its day-to-day operations.	Open	6 (High/Medium)	Mimic FLAIR functionality exactly or as close to this standard as possible. If there are deviations from FLAIR functionality, there should be extensive retesting and training, hopefully a year ahead of implementation. Agencies are limited in staff, support and available resources for the implementation and the execution following implementation. Allowing some lead time prior to implementation to prepare may reduce inherent risks.	In progress. 14 Apr 2024: Vendor, based on questions provided may not be able to provide the assistance our Agency needs. If this solicitation is not fruitful, this will significantly impact our timeline and ability to complete required and recommended tasks.	05/14/24	Agency Fiscal, Finance & Accounting, and Billing
People Processes	Agency size and small administrative staff has a few people having multiple roles.	Open	4 (Medium/Medium)	Staff will have to be flexible and OPS personnel may be required to augment existing staff to get project implemented.	Information Technology staff working to hire personnel to work the PALM infrastructure transition while simultaneously working its telephony and network infrastructure project. 8 Mar 2024: Agency is undertaking a telephone and infrastructure upgrade simultaneously as we work through PALM integration matters, making it difficult to focus limited Information Technology resources. 11/6/2024: Agency requested additional IT personnel in the upcoming Legislative Session to assist with PALM integration. Agency will know the results of this request in May 2025.	11/06/24	Dr. Teresa Stillwell/Romelle Dials

People Technology	IT staff has limited knowledge of the FLORIDA PALM system and will take time to get trained up, especially given their existing Agency requirements.	Open	4 (Medium/Medium)	We will have to grow IT Staff experience as we move through the implementation process.	Ongoing. Internal staff working to learn PALM nuances on top of revamping the Agencies telephone and network infrastructure statewide, with only 9 IT personnel. Agency has drafted and will be submitting a FY 2025/26 Legislative Budget Request for additional IT personnel to support PALM integration.	04/25/24	Al Carter, Chief of Staff
Processes Data	FLAIR and FLORIDA PALM data will be different in its representation which may cause challenges when performing data analysis functions.	Open	4 (Medium/Medium)	Staff will incur extra time and possible productivity lag when trying to crosswalk and translate data.	14 May 2024. Down two key team members during this reporting period, which slowed productivity. We have no 100% dedicated assets to this project as we are one person deep in most of our functional areas and those assets must do their day-to-day job as well as work through the PALM activities.	05/14/24	Al Carter, Chief of Staff
People Processes	Staff Turnover. Agency staff turnover while decreasing, still remains over 16% in the Administrative areas mostly impacted by FL PALM.	Open	4 (Medium/Medium)	We continue to put out job announcements and canvas local colleges and universities. The respective candidates respond that State salaries are too low. We don't have sufficient Agency budget to increase salaries to support our existing requirements, not to mention this increased workload. Reaching out to other Agencies to see what their strategies are, beyond contracting personnel.	Reached out to DoH on 7 March 2024 to determine what options they are using beyond contracting and to gain insights into the strategies they used to remediate infrastructure shortfalls. 14 May 2024: Job announcements continue to be reposted but to date, no bites in our immediate and surrounding areas.	05/14/24	Al Carter, Chief of Staff - Coordinator

DVA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Personnel to support the implementation of FLORIDA PALM within the Agencies processes	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request resources via the Legislative Budget Request process.	Legislative budget requests are granted at the end of the Legislative Session which occurs during the first week of May, but if approved, are effective 1 July of the next fiscal year.	08/30/24	Al Carter, Chief of Staff
People Processes Data	Submitted a contract solicitation for a Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Solicitation done week of April 17, 2024. Will hopefully select an appropriate vendor to meet Agency needs.	Only one Vendor replied to procurement, and Agency is not confident the vendor can meet Agency needs. 11/6/2024: Vendor on board and working to ensure our plan continues to move forward. Vendor on staff now for 2 1/2 months.	05/31/24	Al Carter, Chief of Staff

DVA Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	Funding will be approved/provided by the Florida Legislature to secure personnel needed to support the Agencies PALM transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	Requested in Agency LBR as of August 15, 2023. 11/6/2024: Agency received limited funding and is working to stretch this funding until the end of the fiscal year. However, indications are that funding for our VACO contractors will run out in April 2025. Agency will work with PALM Executive Committee to ascertain funds to continue implementation.	
Technology	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	TBD after funding is secured. Procuring a vendor who can provide a Project Manager to oversee/support PALM integration O/A April 25, 2024. 11/6/2024: After two months with the new Vendor (VACO) Agency continues to work through ensuring they understand Agency processes so we can collectively determine how they will integrate into PALM. VACO team, comprised of two persons, in concert with function SME's has taken on the challenge of SOP revision and mapping to PALM processes.	
People Processes Data	FDVA Executive leadership, including Project Sponsor, will support the project by providing resources, access to systems and stakeholders and by supported the organizational change management strategy created by the project team.	Logged	09/18/23	Agency wide	State provided resources, but not timely to allow Agency to secure project management and contract support staff resources. Those agencies undergoing the initial implementation were able to secure contract staff with PALM and related accounting staff. Current solicitations have yielded only one vendor, who at initial glance may not be qualified to do the work. 11/6/2024: Agency working with contracted project manager and analyst to ensure PALM requirements for integration continues according to schedule. Agency has had to adjust SOP development and PALM Mapping due to impending personnel retirements.	
People Processes Technology Data	FDVA project stakeholders, involved parties, project team, and other involved parties will be available to provide support, feedback, and review of material to meet readiness requirements and project milestones.	Logged	09/18/23	Agency wide	Missing project manager and some key IT and related accounting vendors to support this impending implementation. Working through this process. 11/6/2024: Project Manager on staff now for two months but environmental issues have slowed progress as staff was pulled to support Hurricane Helene and Milton recovery. IT personnel have been requested in the upcoming LBR for the FY 2025/26 legislative year and the Agency will await the results to determine impact to "go live" implementation.	
People Processes Technology Data	The State level Florida PALM project team will provide key information identifying the functionality, business processes, and timeline of the larger project, in a timely manner, to facilitate timely planning and execution.	Logged	09/18/23	State and Agency implementation team.	Agency continues to work with the assigned readiness coordinator to meet tasks. Our unique functions limit the amount of assistance that Ms. Thomas can render. Hopefully with the eventual hiring of a Project Manager, we will meet deployment objectives. 11/6/2024: Project Manager in conversation and coordination with our Agency assigned coordinator.	

DVA Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Processes Technology Data	Segment IV Design Workshop: Carry/Certified Forward	09/10/24	Select Agency PALM Team and Contractors	Segment Design Training for SMEs and select users	Segment IV Design Workshops: September 10-12
Processes Technology Data	Segment IV Design Workshop: Account Management and Financial Reporting	09/11/24	Select Agency PALM Team and Contractors	Segment Design Training for SME's and select users	Segment IV Design Workshops: September 10-12

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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DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Alfred D. Carter	al.carter@fdva.fl.gov	11/06/24
September - October 2024	Alfred D. Carter	al.carter@fdva.fl.gov	11/01/24
July - August 2024	Alfred D. Carter	al.carter@fdva.fl.gov	09/10/24
May - June 2024	Alfred D. Carter	al.carter@fdva.fl.gov	06/28/24
March - April 2024	Alfred D. Carter	al.carter@fdva.fl.gov	05/09/24
January - February 2024	Alfred D. Carter	al.carter@fdva.fl.gov	03/07/24