

Helpful Links

- Dashboard Snapshots
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- Florida PALM Workbook for LEG
- Readiness Workplan

LEG Status Report Dashboard

Reporting Period

September - October 2024

Agency Sponsor

Brendan Jones

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 = 14
- Duplicate Filled Role = 10
- 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 = 76.67%**
- Submitted Complete = 25
- Submitted Incomplete = 7
- Completed After Submission = 4

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 = 89.13%**
- Submitted On Time = 45
- Submitted Late = 18
- Pending Submission = 4

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	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	Pending Resubmission	05/13/24	Ongoing. Leg team will continue its efforts in ensuring the requirements of this task is complete prior to conversion. We hope to provide an anticipated completion date ASAP. Verified data cleansing files were transmitted and completed by DFS. This is complete.	Submission Incomplete	10/18/24
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	25% - Beginning Initial Internal Meetings and Information Gathering		System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes.		
Direct	Data	541-A	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	08/22/24	The AG's office is the only area that utilizes Project ID in FLAIR for the Legislature. It is used as a cost tracking mechanism. In discussion with the AG's office, it was decided we would not use the PC Module for Project ID tracking and instead use the OA2 charfield with a smart coded number similar to how they use Project ID in FLAIR today. Therefore no conversion is needed.	Submission Complete	09/10/24
Direct	Data	541-B	Complete Configuration Workbooks for Segment IV	07/22/24	09/06/24	100% - Submitted	09/12/24		Submission Complete	
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	50% - In Progress		Reviewing master balances to confirm cleansing.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24		Submission Incomplete	
Direct	Technology	545-A	Update and Finalize Florida PALM Conversion Inventory for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24		Submission Incomplete	
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		Pending meetings for EDR, and for AG's office to confirm what interfaces will be used.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24					
Direct	People	549	Submit Training Survey	08/12/24	09/20/24	100% - Submitted	08/22/24		Submission Complete	
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	Pending Resubmission	10/10/24		Submission Incomplete	
Direct	Data	541-C	Complete Configuration Workbooks for Segment IV	08/26/24	10/04/24	100% - Submitted	10/04/24		Submission Complete	
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	Met internally on 10/28/2024 and reviewed Schedule and Risks and Issues documents. Updated documents attached.	N/A	
Direct	Technology	550-B	Participate in Technical Meeting to Receive Credentials and Access	09/03/24	09/13/24	100% - Submitted	09/06/24		N/A	
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending	10/18/24		Submission	

LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not possess, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hire F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

LEG Assumptions

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

LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

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 *

Submit

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LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2024	Brendan Jones	jones.brendan@leg.state.fl.us	11/12/24
July - August 2024	Brendan Jones	jones.brendan@leg.state.fl.us	09/12/24
May - June 2024	Brendan Jones	jones.brendan@leg.state.fl.us	07/12/24
March - April 2024	Brendan Jones	jones.brendan@leg.state.fl.us	05/15/24
January - February 2024	Lisa Swindle	mentillo.mike@leg.state.fl.us	03/04/24