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DBPR Status Report Dashboard

Reporting Period

September - October 2025

Agency Sponsor

Sally Huggins

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

RW Task Timeliness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 97.17%

Submitted On Time = 38

Submitted Late = 6

Pending Submission = 1

Other Task Timeliness



Other Task Timeliness:

Score = 94.05%

Submitted On Time = 66

Submitted Late = 13

Pending Submission = 0

RW Task Completeness

Direct Impact Task Completeness



Direct Task Completeness:

Score = 92.61%

Submitted Complete = 41

Submitted Incomplete = 3

Completed After Submission = 2

Other Task Completeness



Other Task Completeness:

Score = 98.04%

Submitted Complete = 50

Submitted Incomplete = 1

Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

Change Champion Network:

Unique Filled Role = 9

Duplicate Filled Role = 6

Vacant Role = 1

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
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		The next test for API002 will be in December.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	01/09/26	50% - In Progress		User Stories are being rewritten to match Topics and Activities in PALM.		
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet.	07/14/25	12/19/25	50% - In Progress		In prep for pre-UAT we found a few roles that were missing assignments. We are working through these.		
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	11/07/25	75% - Consolidating/Inputting Information for Submission		GLC001 is outstanding as A&A research closing entries from 2018. RC is looking into it.		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/17/25	100% - Submitted	10/17/25	Forms were submitted and confirmed complete.	Submission Complete	
Direct	Data	661	Update Conversion Field Mapping	08/11/25	11/05/25	100% - Submitted	10/30/25	All code issues have been resolved.	Submission Complete	
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	11/05/25	100% - Submitted	10/30/25	All code issues have been resolved	Submission Complete	
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25		Task Closed - Submission Incomplete	
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	100% - Submitted	09/30/25	DBPT-IT is meeting late this afternoon to work on the file.	Submission Complete	
Direct	Data	662-A	Submit Updated Configuration Workbooks - State Program Selection for Budget Allotments	09/15/25	10/29/25	100% - Submitted	10/29/25	Submitted by Sally on 10/28/2025	Submission Complete	
Indirect	N/A	665	Submit Monthly Progress Report - Testing	10/01/25	10/31/25	100% - Submitted	10/31/25	The next test for the Versa file will be in December 2025	Submission Complete	
N/A	People	666	Share Florida PALM Updates	10/13/25	10/24/25	100% - Submitted	10/21/25	Communications have been sent and information uploaded to our PALM Implementation Teams Channel. Examples are posted in the DBPR Agency Communications Smart Sheet.	Submission Complete	
N/A	N/A	627	Submit Bimonthly Agency Readiness Status Report	11/03/25	11/10/25	100% - Submitted	11/10/25			
Indirect	N/A	667	Submit Monthly Progress Report - Testing	11/03/25	11/25/25					

Agency Reported

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

DBPR Risks										
Status	Date Opened	Date Closed	Primary Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for Sep. - Oct. 2025
Open and Mitigating	01/13/25		Agency Business System	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Stable	9 (High/High)	DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed.	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	There may not be enough time for DBPR IT to make modifications in time to be retested	20251017: The second round of corrections have been made to the Versa file. We will pull a test file and schedule with PALM to test the interface again.
Closed	09/12/25	09/22/25		Test Cases are being written for PALM against user stories written for FLAIR. These may be too "high level" for staff to understand and may require more detailed test cases to be written, causing more delays in readiness for Online UAT	Stable	6 (Medium/High)	Test cases for testing PALM were not consistent with user stories based on FLAIR processes. In our monthly meeting with our RC, she suggested we, instead, base user stories on PALM Topics and Activities.	Review the newly released steps from PALM to see if these can be used in Test Cases for SMEs	Delays may be encountered for Online UAT Testing	We have started writing User Stories based on PALM Topics and Activities. We are using existing user stories to understand and map DBPR Processes to PALM Topics and Activities. This will create an issue in that we will likely not meet our 10/17/2025 deadline for completing UAT documentation.
Open and Monitoring	06/11/25		Conversion/Configuration	If Mock 3 conversion data is not full cleansed and converted from FLAIR to PALM, then DBPR could have incomplete and/or inaccurate data in the UAT environment and that could negatively impact UAT testing	Stable	6 (High/Medium)	This Risk relates to PALM Tasks 571, 657, and 659 that are very substantial and impactful. The due dates are aggressive.	Work closely with SMEs and data experts and closely monitor and manage PALM Tasks 571, 657/657-A, and 659.	Incomplete or inaccurate data for the UAT Online sessions.	20251017: The issues with Mock 3 data have been identified and are being cleaned up. The date for cleanup was extended to 10/29/2025.
Closed	09/12/25	10/17/25	Staffing/Resource Availa	The OCM has been out due to illness so communications GL User Stories, and other tasks are not getting the level of attention they need.	Stable	6 (High/Medium)	The OCM Lead is also serving as BA,	Determine an ETA for the OCM Manager. If this cannot be identified, elevate to an issue.	Delays may be encountered in coordinating Training and in UAT testing.	20251017: The OCM has returned. Due to Pre-UAT, the OCM has changed focus from User Stories to Test Cases so the staff can be prepared. We will return to user story development after Pre-UAT testing.
Open and Mitigating	02/19/25		User Acceptance Testing	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Stable	4 (Medium/Medium)	Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities.	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	DBPR SMEs will have minimal time to catch up review of business processes	20251021: SMEs are reviewing the system in Pre-UAT and are learning a lot from actually being in the system.
Open and Mitigating	04/09/24		Business Process Change	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Decreasing	3 (High/Low)	Requires Organizational Change Management	Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners. Create visual aids, mapping documents, and other PALM educational tools.	PALM readiness for DBPR could be negatively impacted	20251017: We are posting links to the new demo videos and process steps to all members of the DBPR - PALM Implementation Team Channel. We will continue to update SMEs and End User members as more demos and process steps are added.
Open and Mitigating	05/31/24		Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Decreasing	3 (High/Low)	Documentation on Future-State business processes is being provided by The Project on the PALM website.	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	20251021: New UAT Prep materials, videos and Pre-UAT sessions are alleviating some anxiety.
Open and Mitigating	11/15/24		Deployment/Cutover	If DBPR does not have a	Stable	3 (High/Low)	Down time and other conditions need to be	Create a Cutover Plan that Identifies all	Key business processes may not be	20251021: Deployment was pushed to January 2027 and that is improving

				cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.			planned for to ensure a smooth transition.	planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	able to be completely timely and could have negative consequences	confidence. More realistic timelines for UAT testing and recovery means PALM is taking the need for adjustments seriously.
Open and Mitigating	01/13/25		Business Process Change	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely, efficient, and successful completion of UAT	Stable	3 (High/Low)	It is important to have detailed and comprehensive test scripts in order to conduct thorough testing and reduce the possibility of errors in production.	Ensure that crosswalks, user stories, and flow detail diagrams are covered at a detail level. Ensure sources of data required to complete business processes (e.g. FLAIR@BPR, Reports, queries, etc are identified for current processes so equivalents (when applicable can be identified before test scripts are created.	Negative impact to the timely, efficient, and successful completion of UAT	20251017: PALM has begun creating step-by-step instructions and videos for SMEs attending UAT since there is no access to a test environment for writing test cases. The PM and the OCM are writing test cases based on videos provided by PALM. Until they attend some form of UAT, it is difficult to predict the level of detail needed in the test cases.
Open and Mitigating	04/23/24		Conversion/Configuration	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live	Stable	2 (Medium/Low)	FLAIR@BPR has been a tool that DBPR staff have relied to run real-time custom queries to get current data necessary to complete business functions.	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live with PALM	20251021: PALM is working on a DW tool and report configurations on the PALM site are answering some questions. Some PALM reports may reduce the need for queries in some cases, but not all. Mapping Report data is on the "To Do" list.
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Stable	2 (Medium/Low)	It would be better to have real transfers occur involving the actual real-life players to get more real testing and to reduce the likelihood of unanticipated errors.	Identify an Agency that we can partner up with and coordinate send/receive testing with them	UAT testing could be inadequate and could negatively impact DBPR PALM readiness	20251017: IU Processes are included in Pre-UAT for the Advisory Council agencies. IU Processes will be tested then.
Open and Mitigating	08/19/24		Conversion/Configuration	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Stable	2 (Medium/Low)	We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world.	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	DBPR may not have the desired email notification flexibility once we go to production with PALM	20251021: It is too early to compare email notification needs from FLAIR to PALM. The PALM system provides multiple methods of notifications/communications from within. It may be necessary to compare during UAT just how many PALM processes replace the need for emails.

DBPR Issues									
Status	Date Opened	Date Closed	Priority	Primary Issue Category	Issue Title	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for Sep. - Oct. 2025
Open	06/04/25		Critical - Impacts the abil	Interface	ABS Versa Regulation remediation is behind schedule	DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule.	Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT.	10/31/25	20251017: The last remaining issue is completed. We will pull another file and ask to schedule another interface test with PALM.
Open	09/26/25		High - Impacts the ability	User Acceptance Testing	Rewrite of User Stories and Test Cases	DBPR was informed in the September 19th DBPR/FL Palm Monthly Readiness Meeting that user stories should have been written for the activities (column Activity Name) in the Florida PALM Topics and Activities Smartsheet.	Export the PALM Topics and Activities list and write user stories for them. Work with business units to show how the new user stories apply to the same business processes they will be doing in PALM. The resulting user stories will have test cases written for them. Resolution date TBD.	12/19/25	10/03/2025: PALM extended the schedule to January 2027. This gives us more time to complete the user story rewrite and test cases.

DBPR Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for Sep. - Oct. 2025
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR division/office staff	20251028: There have not been any issues regarding support resources this period.
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR division/office staff	20251028: There have not been any issues regarding engagement by knowledgeable resources in this period.
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR division/office staff	20251028: As noted in #s 3 & 5, staff have participated as needed with the PM and CCN on PALM Tasks.
People Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	20251028: This continues to be a work in progress.
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM. Note: A snapshot of FLAIR@BPR data query tool will be retained and available for subsequent use of historical data only.	Logged	04/01/24	All DBPR stakeholders	20251028: Leaving this open as an assumption in that, moving back to FLAIR for all state agencies, other than for searching historical content, would be even more difficult than making corrections to PALM.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Logged	04/01/24	All DBPR stakeholders	20251028: We will know more after Full UAT if there are any missing pieces in the transition.
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	All DBPR stakeholders	20251028: Business process changes are becoming more visible since PALM added process steps in UAT Preparations.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	20251028: Process changes will be reviewed but not finalized until full UAT.
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	20251028: DBPR is currently testing API002 with PALM.
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	20251028: When SMEs have access to PALM in Online or Full UAT this will no longer be an assumption.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	DBPR Sponsor Project Manager Organizational Change Manager	20251028: Funding has not been an issue and resources have joined the project for DBPR.
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager	20251028: PALM is adding more training materials for UAT Preparation, and has been adding detailed steps and demo videos to help with the transition.

				Organizational Change Manager Finance & Accounting Bureau Chief	help with training.
People Processes Technology Data	The Department will support data cleansing. PALM configuration and conversion tasks will facilitate this cleansing.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: DBPR is actively updating and clearing out errors in configuration and conversion data
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: PALM has Smartsheets for agencies to track user stories and test cases for traceability.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: DBPR staff have been reviewing process flows with the PM and CCN and there have not been any issues.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Logged	05/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: While processes in PALM do not exactly mirror existing state in FLAIR, they are there, just improved and faster.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251028: A Pre-UAT environment has been provided, but is not accessible to all SMEs.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Logged	06/14/24	Project Manager Business Analyst	20251028: If Steps in UAT Prep can be considered "Base Test Scripts" than this may no longer be an assumption.
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Logged	06/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251028: It is not enough to review future processes in flowcharts. Staff will not be at ease until they can play in a testing ground before UAT.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	20251028: There have been mentions of a data dictionary to be built by PALM but it can't be released until the end of the project when the level of changes is greatly decreased.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251028: DBPR is testing its only ABS currently with PALM
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	20251028: There have not been any business requirements unique to DBPR at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	20251028: The Project Management Plan will be updated once the schedule for January 2027 is flushed out.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Logged	08/16/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251028: The Chart of Account fields are currently available in PALM Smartsheets.
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	20251028: DBPR is adopting interfaces appropriate for the agency.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	20251028: We have yet to test query functionality and reports in PALM or the DW.
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	20251028: We'll know more when testing is complete.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	20251028: Versa will continue to be used as an agency application after PALM is deployed and implemented. Until that time this assumption will remain on the list.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Logged	12/04/24	All DBPR division/office staff Project Manager Organizational Change Manager	20251028: Crosswalks can be done within the new scheduled timeframe.

People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create/enhance all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR division/office staff Project Manager Organizational Change Manager	20251029: Details and anomalies are being discovered in the Test Case development process instead of User Stories since detailed steps in PALM were needed.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Logged	12/18/24	Project Manager Business Analyst	20251029:Agencies are working together on user stories and test scripts.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	10/29/2025: The schedule and tasks due are reviewed at least twice a week.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	10/29/2025: The Change Analysis sheets are getting a closer look since we are filling in the blanks as processes are updated in PALM
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	10/29/2025: We are on schedule to test again in December.
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	20251029: With PALM providing UAT materials in the form of steps and demo videos, there are no specific challenges to training at this time/
People Processes Data	DBPR as well as the Project will follow PMI best practices and Rule 60GG statute.	Logged	05/28/25	IV&V endorses this.	20251028: DBPR continues to follow 60GG
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Removed	10/28/25	All DBPR stakeholders	20251028: The DBPR Sponsor is attending Pre-UAT meetings showing that the dedication to this project is absolute. Therefore, we are removing this assumption as of this date.
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Removed	10/28/25	All DBPR stakeholders	20251028: The Project Schedule exists and is being used to track scope and progress of tasks. This is not an assumption but a task.
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan (Smartsheet).	Removed	10/28/25	Project Manager Organizational Change Manager DBPR Sponsor	20251028: PALM has and continues to communicate tasks in both the Agency Readiness page, and the RW Tracker Smartsheet. This is no longer an assumption.
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Removed	10/28/25	All DBPR stakeholders	20251028: This assumption is now a reality thanks to PALM extending the schedule to January 2027. This is no longer an assumption.
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Removed	10/28/25	DBPR Executive Leadership Project Manager	20251028: As noted in #9, the project sponsor is active in managing the PALM project and supporting the PM. This is no longer an assumption.
People Processes Technology Data	The Department will remediate all agency business systems (ABS) impacted by Florida PALM that cannot be retired.	Removed	10/28/25	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	20251028: The agency is actively working with PALM on their only ABS, Versa. This is no longer an assumption.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Removed	10/28/25	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: This is no longer an assumption. DBPR is cleaning up conversion data.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Removed	10/28/25	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	20251028: PALM has provided these materials. This is no longer an assumption.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Removed	10/28/25	DBPR Revenue staff Project Manager Finance & Accounting Bureau Chief DBPR Sponsor	20251028: Remediation of processes after the CMS wave were not necessary. This is no longer an assumption.
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Removed	10/28/25	All DBPR division/office staff Project Manager Organizational Change Manager	20251028: Closing this assumption since the date has moved for UAT, and Pre-UAT is revealing more detail in transactions and future state processes.
People Processes Technology Data	All appropriate supplier data (including detail addresses) will be converted and available in PALM	Removed	10/29/25	All DBPR division/office staff	20291025: Supplier data was supplied for PALM.
People	The new Business Analyst will be onboarded and available to attend PALM Training during the initial leg of UAT in August 2025.	Removed	10/28/25	Project Manager Business Analyst	20251028: The OCM Manager is serving as the business analyst for this project. This is no longer an assumption

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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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2025	Sally Huggins	sally.huggins@myfloridalicense.com	11/10/25
July - August 2025	Sally Huggins	sally.huggins@myfloridalicense.com	09/10/25
May - June 2025	Sally Huggins	sally.huggins@myfloridalicense.com	07/08/25
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25

