Understanding your Dashboard

A Status Report Dashboard (example shown below in Figures 1, 2 and 3) has been created within your agency's Florida PALM Workbook in Smartsheet. The format of the Dashboard allows for a simplified view of readiness data and easy submission of the Bimonthly Agency Readiness Status Report.
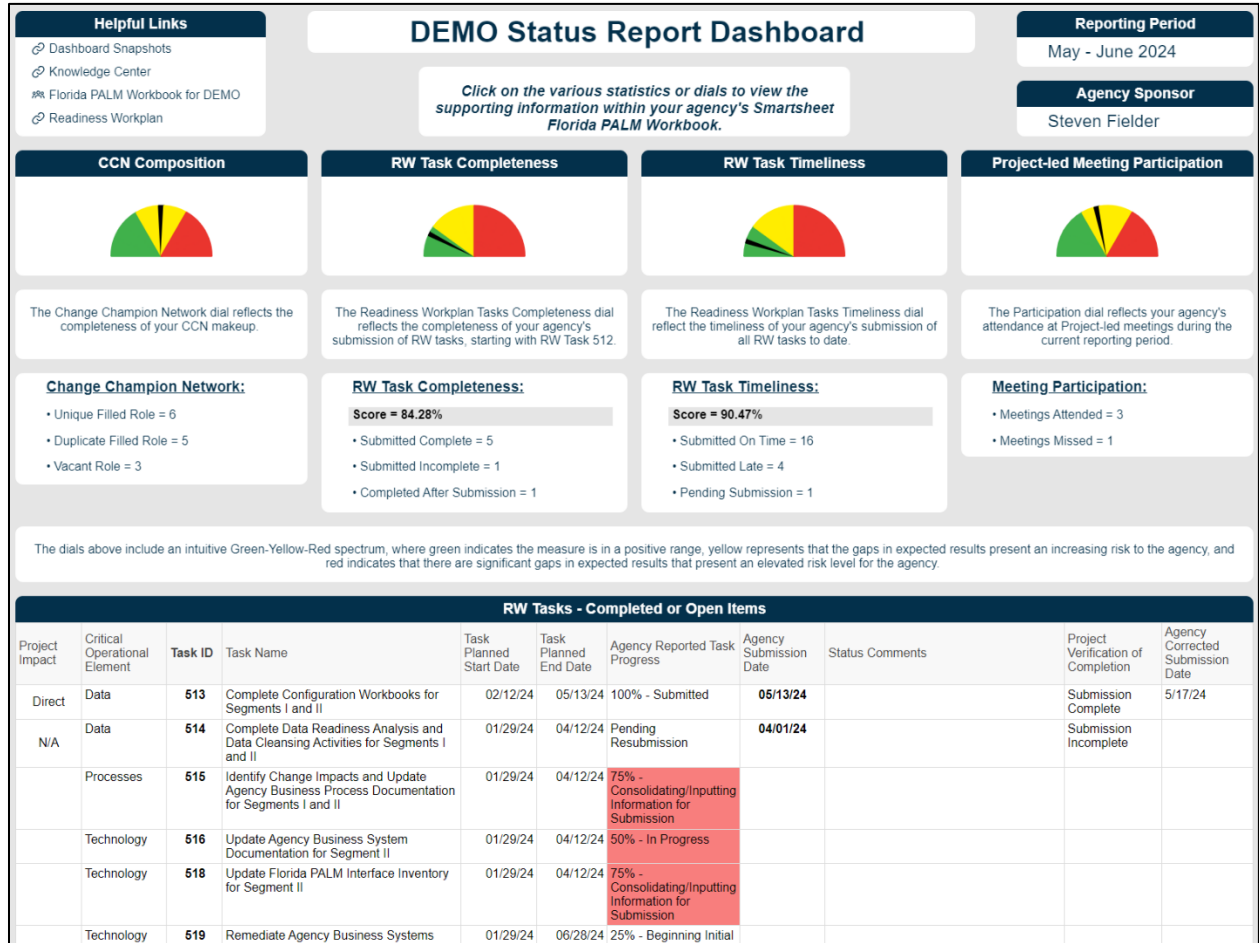

Figure 1: <Agency Acronym> Status Report Dashboard, Readiness Workplan Section
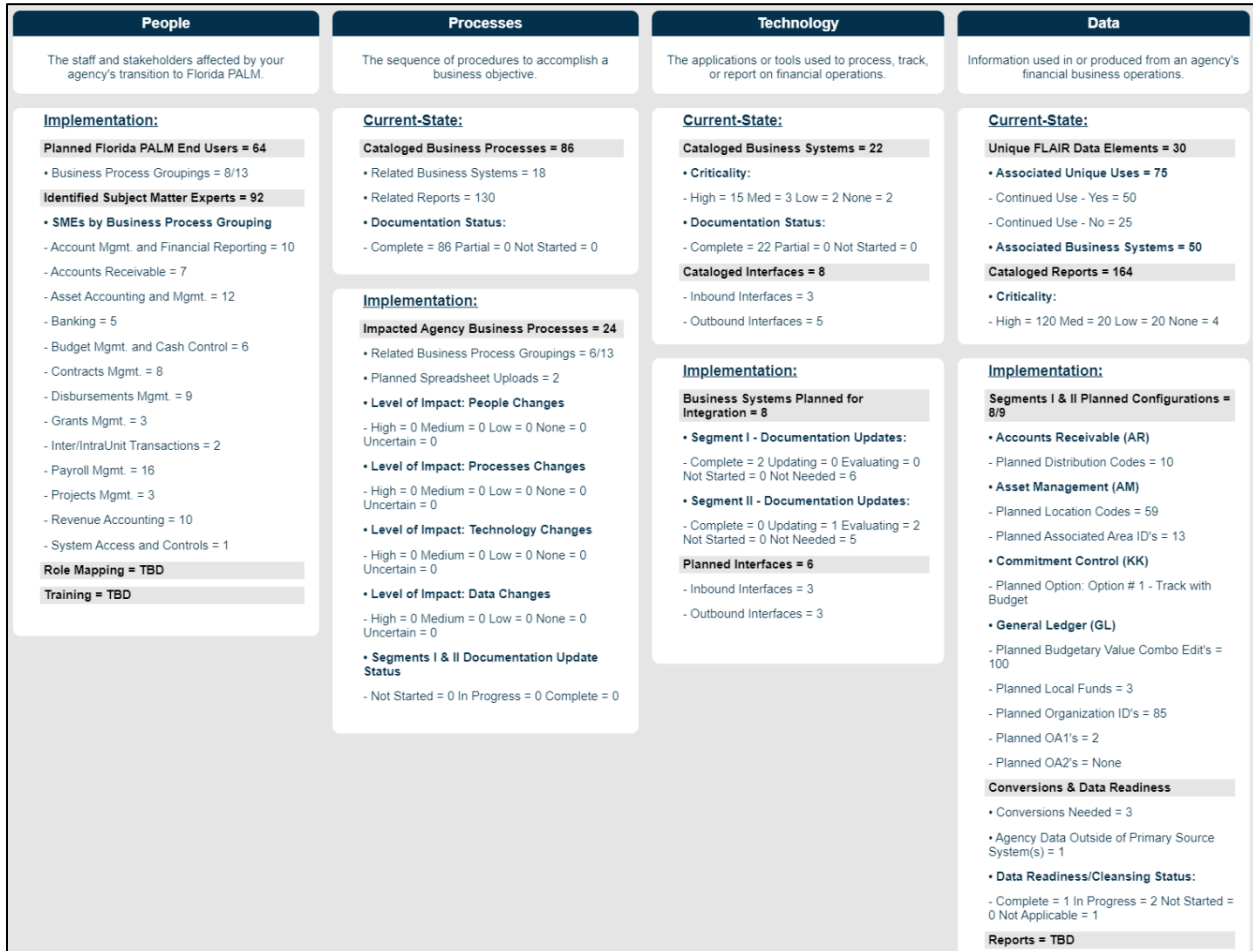
People

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

Implementation:

Planned Florida PALM End Users = 64

• Business Process Groupings = 8/13

Identified Subject Matter Experts = 92

• SMEs by Business Process Grouping

- Account Mgmt. and Financial Reporting = 10
- Accounts Receivable = 7
- Asset Accounting and Mgmt. = 12
- Banking = 5
- Budget Mgmt. and Cash Control = 6
- Contracts Mgmt. = 8
- Disbursements Mgmt. = 9
- Grants Mgmt. = 3
- Inter/IntraUnit Transactions = 2
- Payroll Mgmt. = 16
- Projects Mgmt. = 3
- Revenue Accounting = 10
- 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 = 86

• Related Business Systems = 18

• Related Reports = 130

• Documentation Status:

- Complete = 86 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = 24

• Related Business Process Groupings = 6/13

• Planned Spreadsheet Uploads = 2

• Level of Impact: People Changes

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

• Level of Impact: Processes Changes

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

• Level of Impact: Technology Changes

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

• Level of Impact: Data Changes

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

• Segments I & II 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 = 22

• Criticality:

- High = 15 Med = 3 Low = 2 None = 2

• Documentation Status:

- Complete = 22 Partial = 0 Not Started = 0

Cataloged Interfaces = 8

- Inbound Interfaces = 3
- Outbound Interfaces = 5

Implementation:

Business Systems Planned for Integration = 8

• Segment I - Documentation Updates:

- Complete = 2 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 6

• Segment II - Documentation Updates:

- Complete = 0 Updating = 1 Evaluating = 2 Not Started = 0 Not Needed = 5

Planned Interfaces = 6

- Inbound Interfaces = 3
- Outbound Interfaces = 3

Data

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

Current-State:

Unique FLAIR Data Elements = 30

• Associated Unique Uses = 75

- Continued Use - Yes = 50
- Continued Use - No = 25

• Associated Business Systems = 50

Cataloged Reports = 164

• Criticality:

- High = 120 Med = 20 Low = 20 None = 4

Implementation:

Segments I & II Planned Configurations = 8/9

• Accounts Receivable (AR)

- Planned Distribution Codes = 10

• Asset Management (AM)

- Planned Location Codes = 59
- Planned Associated Area ID's = 13

• Commitment Control (KK)

- Planned Option: Option # 1 - Track with Budget

• General Ledger (GL)

- Planned Budgetary Value Combo Edit's = 100
- Planned Local Funds = 3
- Planned Organization ID's = 85
- Planned OA1's = 2
- Planned OA2's = None

Conversions & Data Readiness

• Conversions Needed = 3

• Agency Data Outside of Primary Source System(s) = 1

• Data Readiness/Cleansing Status:

- Complete = 1 In Progress = 2 Not Started = 0 Not Applicable = 1

Reports = TBD

Figure 2: <Agency Acronym> Status Report Dashboard, Readiness Workplan Section

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.

DEMO Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Grant Tracking System remediation will not be completed in time to perform testing with Florida PALM	Open	9 (High/High)	A contract amendment is being developed to update requirements (scope) to the current agreement with the vendor.		07/14/23	John Smith, Chief of Finance and Budget
Technology	Poor vendor response to RFQ	Open	1 (Low/Low)	An extended response time will be included. A pre-response conference will be held prior to the response due date.		08/10/23	John Smith, Chief of Finance and Budget

DEMO Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Key Agency F&A Resource Resigned	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for a replacement. In the meantime, the agency is hiring the employee back with in a temporary OPS position.		09/15/23	John Smith, Chief of Finance and Budget

DEMO 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	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/03/23	All agency business systems	

DEMO Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date	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

DEMO Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2023	Steven Fielder	floridapalmtest@outlook.com	08/29/23

Figure 3: <Agency Acronym> Status Report Dashboard, Agency Reported and Agency Sponsor Confirmation Sections

The information contained within your agency's Dashboard is fed through the following resources:

- Project maintained Florida PALM Meetings Attendance Tracker
- Agency maintained and updated (through agency specific Florida PALM Workbook in Smartsheet):
  - Change Champion Network
  - Readiness Workplan Task Tracker
  - Planned Florida PALM End Users
  - Role Mapping (future task)
  - Training (future task)
  - Inventories:
    - Current-State Business Processes
    - Impacted Agency Business Processes
    - Current-State Business Systems
    - Current-State Interfaces
    - Business Systems Planned for Integration
    - Implementation Interfaces

- FLAIR Data Elements
- Current-State Reports
- Configuration Workbooks
- Conversion Inventory & Data Readiness
- Implementation Interfaces
  - o Status Reporting:
    - Agency Risks
    - Agency Issues
    - Agency Assumption
    - Agency-Specific Readiness Activities

Clicking on the various statistics, dials, or reports within your Dashboard will navigate you to one of the resources listed above so that you are able to view or make updates to the supporting information, as needed.

Navigation

The Dashboard is located within the Agency Readiness folder (Figure 4) of your agency specific Florida PALM Workbook in Smartsheet. A Smartsheet User Guide has been developed to assist agency users on how to use Smartsheet.
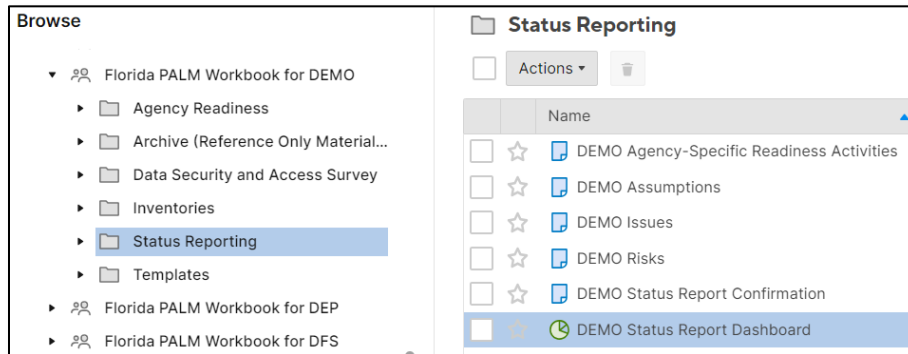
Figure 4: Florida PALM Workbook for <Agency Acronym> folder structure in Smartsheet

Helpful Links Section

The website links listed within the Helpful Links section of your Dashboard (Figure 5) navigate to:

- Dashboard Snapshots: Repository of snapshots for all previous reporting periods
- Knowledge Center: The online resource for business process models and file layouts for interfaces, reports, and conversions
- Florida PALM Workbook for <Agency Acronym>
- Readiness Workplan: List of tasks all agencies must complete to be ready for Florida PALM implementation.
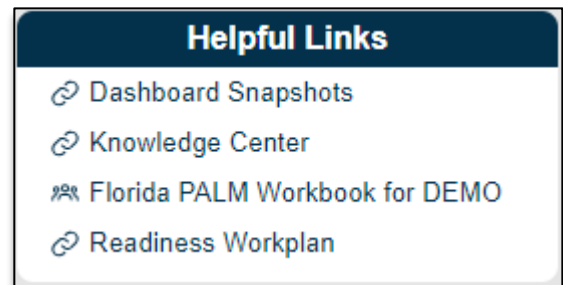
Reporting Period Section

The Reporting Period section (Figure 6) indicates the two-month period that is being reported in your Bimonthly Agency Readiness Status Report. The Bimonthly Agency Readiness Status Report is due on or around the 10th day following the close of each bimonthly reporting period. Due dates are identified in the Readiness Workplan (RW).

Figure 6: Reporting Period section

The dates displayed in this section of your Dashboard will automatically update to the next reporting period 30 days after the close of the previous reporting period. For example, the text in the Reporting Period section of your Dashboard will change from 'March – April 2024', to 'May – June 2024' on June 1, 2024. However, throughout the reporting period, you will be able to access the source worksheet (e.g., Agency Risks) in Smartsheet to make updates throughout your current reporting period.

Agency Sponsor Section

The Agency Sponsor section (Figure 7) lists the Primary Agency Sponsor name identified within your agency's Change Champion Network worksheet. The Primary Agency Sponsor is responsible for submitting your agency's Bimonthly Readiness Agency Status Report.

Figure 7: Agency Sponsor Section

Agency Dials Section

The four dials located at the top of the Dashboard (Figure 8) 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. Each dial represents a maximum score that equals 100%.

CCN Composition and Project-led Meeting Participation:
- Green equals a score between 100% and 66.6667%
- Yellow equals a score between 66.6666% and 33.3334%
- Red equals a score between 33.3333% and 0%

RW Task Completeness and RW Task Timeliness:
- Green equals a score between 100% and 80%
- Yellow equals a score between 79% and 50%
- Red equals a score between 49% and 0%
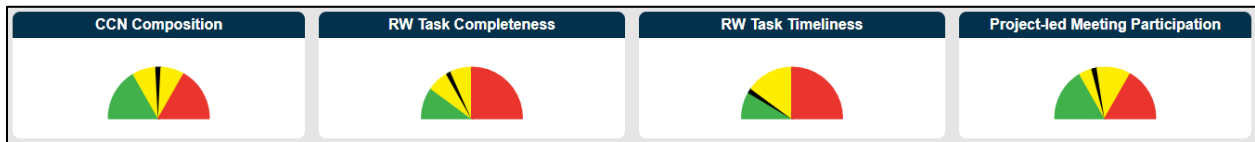
Figure 8: Agency Dials Section

CCN Composition

The Change Champion Network (CCN) Composition dial has a set maximum score of 14 (100%), as that is the total number of CCN Primary and Backup roles expected for each agency.

- Uniquely filled role assignments earn 1 point each
- Duplicate role assignments earn 0.25 points each
- Vacant role assignments earn 0 points

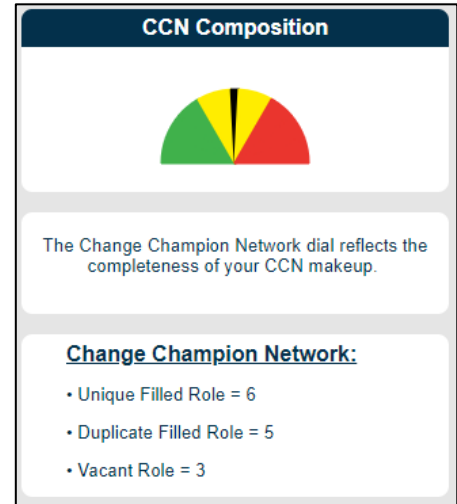In the example (Figure 9), the total score is 6.25 or 44.6% which represents a yellow score for agency CCN assignments at that agency.

Figure 9: CCN Composition

RW Task Completeness

RW tasks are tasks that are assigned by the Project to every agency. Timely and accurate completion of RW tasks is critical for the overall success of Florida PALM implementation. The RW Task Completeness section reflects the completeness of your agency's RW task submission as determined by the Project, starting with RW Task 512. There are two categories of completeness whose combined average are used to determine your agency's an overall completeness score:

Figure 10: RW Task Completeness

Submission Complete

Submission Complete means that the task was submitted with all required items listed in the Task Completion Rubric found in the task instruction.

Expectations
- Within 5 business days after submitting your task, your Agency Liaison and Project Management Liaison will receive an email notification via Smartsheet letting them know that the task submission has been verified as complete by the Project.

Scoring
- All task submissions that have been verified as complete by the Project based on initial task submission receive a score of 100% for completeness.

Submission Incomplete

Submission Incomplete means that the task was not submitted with all required items (e.g., missing information) listed in the Task Completion Rubric found in the task instruction.
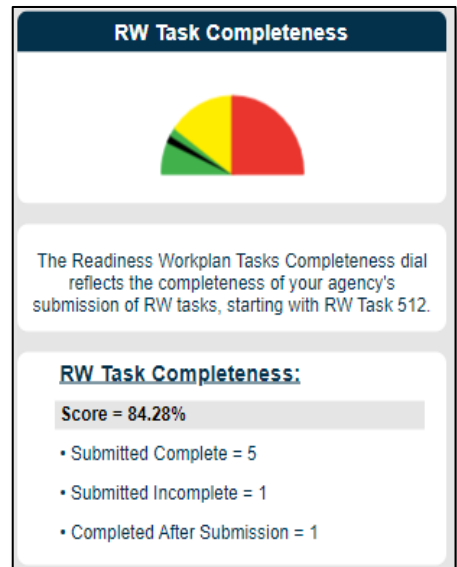
Expectations

- Within 5 business days after submitting your task, your Agency Liaison and Project Management Liaison will receive an email notification via Smartsheet letting them know that the task submission has been verified as incomplete (according to the task's completion criteria). Upon receiving this notification, the following changes will be reflected within your Agency's Readiness Workplan Task Tracker:
  - The Agency Reported Task Progress will change from *100% - Submitted* to *Pending Resubmission*.
  - A Task Verification Form which details why the determination of incomplete was made will be attached to the corresponding task row.
- Your agency is required to view the Task Verification Form, make all necessary corrections/updates, and then resubmit the task by going to the Agency Reported Task Progress column and reselecting *100% - Submitted.*

Scoring

- Starting with the initial Project verification of completion date, every additional 5 business days before your agency resubmits the task will deduct 10 points from a starting task completion score of 100%. For example, if your Agency Liaison and Project Management Liaison receive an email notification from Smartsheet stating that a specific RW task has been verified as incomplete on April 1, 2024:
  - If the task is corrected and resubmitted between April 1 – 7 = 90%
  - If the task is corrected and resubmitted between April 8 – 14 = 80%
  - If the task is corrected and resubmitted between April 15 – 19 = 70%
- If the task is resubmitted but verified again as Submission Incomplete the score calculations will not stop. Starting from the initial Project verification of completion date, calculations will only stop once the task has been marked as Submission Complete.
- RW tasks receive a 0% score for completeness for as long as they remain in Submitted Incomplete status.

NOTE: *The RW Task Completeness section does not apply to RW tasks prior to 512, the Bimonthly Agency Readiness Status Reports, and the Manage Agency-specific Implementation Schedule, Risks, and Issues tasks. These tasks are not included when calculating your agency's RW Task Completeness total average score.*
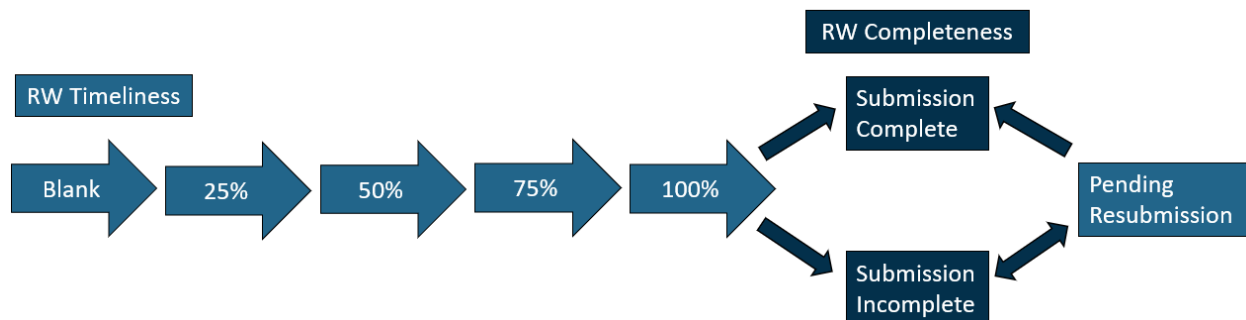

Figure 11: RW Completeness and Timeliness Process

RW Task Timeliness

The RW Task Timeliness section reflects the timeliness of your agency's initial submission of all RW tasks to date and reflects an average score based on the following categories (this calculation is not affected by your agencies RW Task Completeness determination):

- Submitted on Time – the number of RW tasks your agency submitted by the task planned end date.
  - Tasks in this category receive a score of 100% for timeliness.
- Submitted Late – the number of RW tasks your agency submitted after the task planned end date.
  - Tasks in this category receive a 10-point deduction for every additional 5 business days, beyond the task planned end date, before your agency makes its initial task submission in the Readiness Workplan Task Tracker.
- Pending Submission – the number of RW tasks that are past due and still in progress
  - Tasks in this category receive a score of 0% for timeliness until an initial submission has been made in the Readiness Workplan Task Tracker.
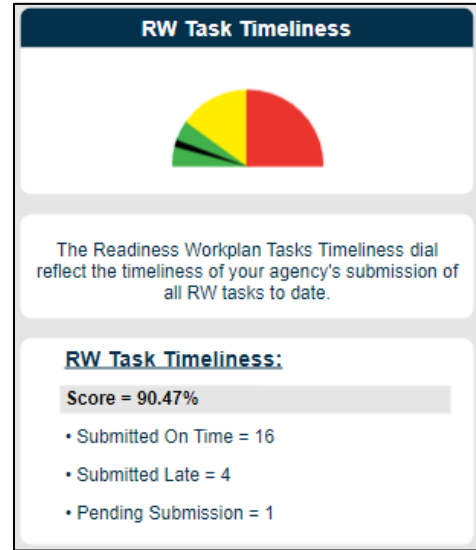
Figure 12: RW Task Timeliness

Project-led Meeting Participation

The Project-led Meeting Participation dial (Figure 13) maximum is equal to the total number of Project-led meetings held within the current reporting period (i.e., Touchpoints, Town Halls). Agencies are attributed 1 point per meeting, towards that total, if at least one agency representative attends in person or attends remotely.
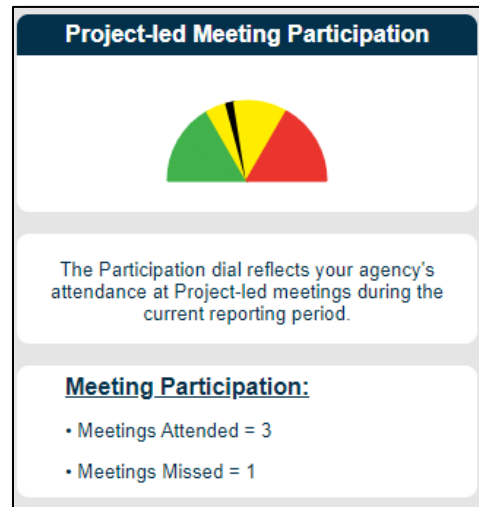

Figure 13: Participation Dial

RW Task Completed or Open Items Section

The RW Tasks – Completed or Open Items table (Figure 14) shows a compiled report of all the open RW tasks for the reporting period and any tasks from previous reporting periods that have not yet been submitted. This section includes:

- Project Impact
  - Direct – Agency readiness activity or information provided will be used by the Project to complete implementation or cutover activities.

- o Indirect – Agency readiness activity impacts future Project activity or will be used in future agency readiness activity or to produce information that will be used by the Project to complete implementation activities.
    - o N/A – Agency readiness activity or information benefits an agency's readiness for Florida PALM but does not directly or indirectly impact a Project activity.
- Critical Operational Element
- Task ID
- Task Name
- Task Planned Start Date
- Task Planned End Date
- Agency Reported Task Progress
    - o 25% - Beginning Initial Internal Meetings and Information Gathering
    - o 50% - In Progress
    - o 75% - Consolidating/Inputting Information for Submission
    - o 100% - Submitted
    - o Pending Resubmission
- Agency Submission Date
- Status Comments
- Project Verification of Completion
    - o Submission Complete
    - o Submission Incomplete
    - o N/A
- Agency Corrected Submission Date

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 Comments	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24		Submission Complete	
N/A	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	Pending Resubmission	01/12/24	Awaiting internal agency decision meeting scheduled for 2/23/24 to finalize interface needs. Based on Segment I review, two agency business systems will either be replaced or will need Florida PALM interfaces.	Submission Incomplete	
N/A	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	75% - Consolidating/Inputting Information for Submission		On track to complete following internal meeting with Payroll unit on 2/26/24.		
N/A	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/10/24	100% - Submitted	01/10/24		N/A	

Figure 14: Readiness Workplan Tasks – Completed or Open

People, Processes, Technology, and Data Section

The People, Processes, Technology and Data section of your dashboard (Figure 15) shows high-level summary Current-State and/or Implementation related data counts pulled from worksheets within your agency specific workbook. This data is collected through Readiness Workplan tasks which fall under one or more of the four critical operational elements (People, Processes, Technology, and Data) as they are completed by your agency.
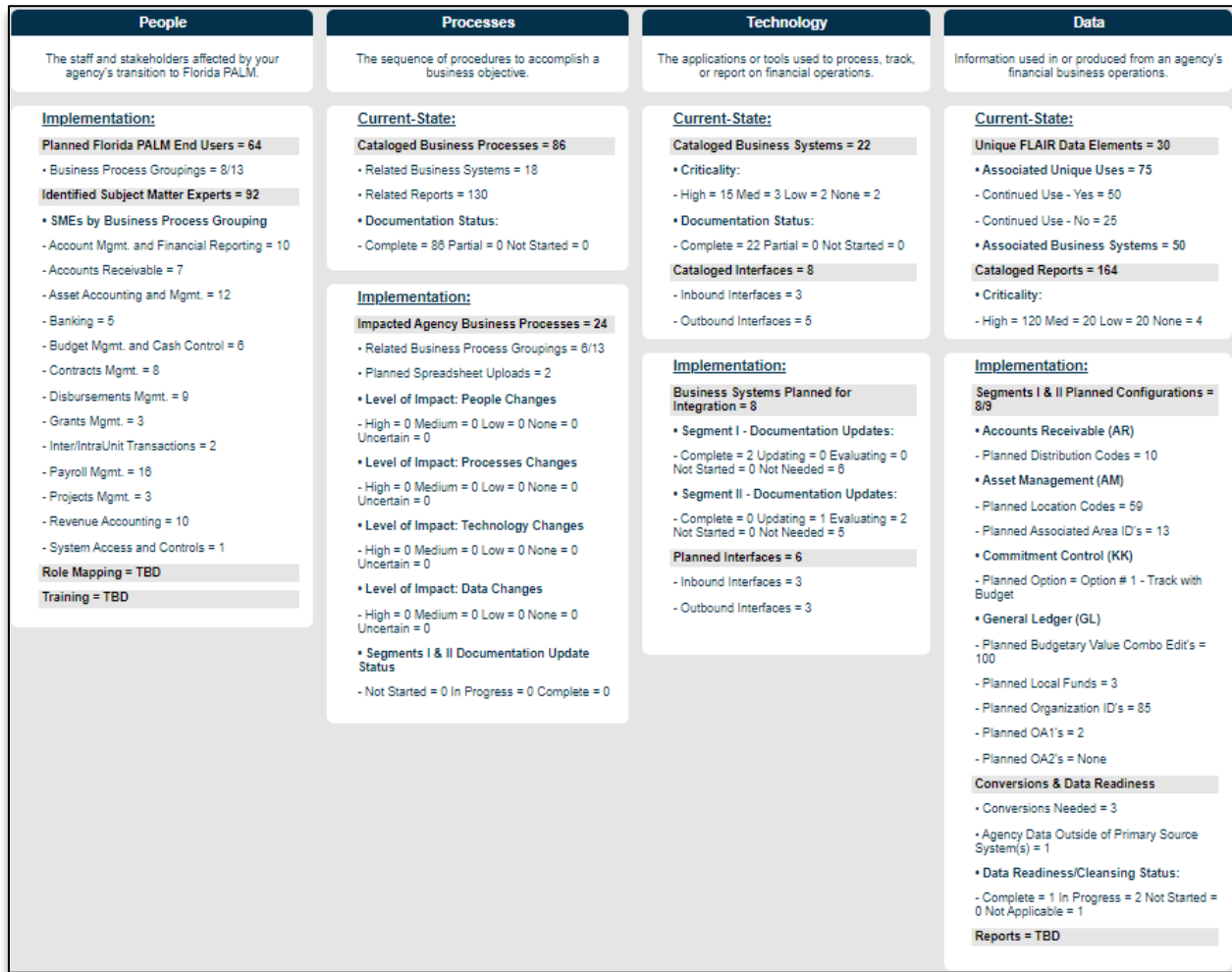
Figure 15: People, Processes, Technology, and Data

People

The "People" critical operational element is defined as the staff and stakeholders affected by your agency's transition to Florida PALM (e.g., leadership, technical and functional owners, subject matter experts, and end users). It focuses on staffing, skill gaps, knowledge, awareness, and buy-in which is crucial to transformation of agency business operations. This section of your Dashboard is intended to provide information about your agency's current progress with people related readiness efforts.

Implementation:

Included within this section are the following counts and placeholders:

Table 1: Implementation People Detailed Counts

People Related Counts	Source Worksheet	Calculation Description
Planned Florida PALM End Users	<Agency> Implementation End Users	Total count of rows containing data.
• Business Process Groupings		Total count of unique business process groupings selected within

People Related Counts	Source Worksheet	Calculation Description
		the "Business Process Grouping(s)" column.
Identified Subject Matter Experts	\<Agency\> Subject Matter Experts	Total count of rows containing data.
• SMEs by Business Process Grouping		Listed for each business process grouping, the total count of SMEs with the selected business process grouping in the "Applicable Business Process Grouping" column.
Role Mapping	N/A	Placeholder for future RW task.
Training	N/A	Placeholder for future RW task.

Processes

The "Processes" critical operational element is focused on the sequence(s) of procedures to accomplish an agency's business objectives. Current statewide and agency-specific business processes are changing and require resources (both people and technology) to learn, adopt, and adapt to the future-state sequence. This section of your Dashboard is intended to provide information about your agency's efforts to understand and document current processes and to transform your business processes for the changes brought about by Florida PALM.

Current-State:

Included within this section are the following counts and placeholders:

Table 2: Current-State Processes Detailed Counts

Process Related Counts	Source Worksheet	Calculation Description
Cataloged Business Processes	\<Agency\> Current-State Business Processes	Total count of processes listed in the "Business Process" column.
• Related Business Systems		Total count of unique business systems selected in the "Related Current-State ABS" column.
• Related Reports		Total count of unique reports selected in the "Related Current-State Reports" column.
• Documentation Status		Total count of each selected status within the "Current-State Documentation Status" column: Complete, Partial, and Not Started.

Implementation:

Included within this section are the following counts and placeholders:

Table 3: Implementation Processes Detailed Counts

Process Related Counts	Source Worksheet	Calculation Description
Impacted Agency Business Processes	\<Agency\> Current-State Business Process	Total count of processes listed that have at least one selection in the

Process Related Counts	Source Worksheet	Calculation Description
		"Related Business Process Model(s)" column.
• Related Business Process Groupings		Total count of related business process groupings identified based on the selections in the "Related Business Process Model(s)" column.
• Planned Spreadsheet Uploads		Total count of the Spreadsheet Uploads selected in the "Florida PALM Spreadsheet Upload Selection(s)" column.
• Level of Impact: People Changes		Total count of each selected status within the "Level of Impact – People Changes" Column: High, Medium, Low, None, Uncertain.
• Level of Impact: Processes Changes		Total count of each selected status within the "Level of Impact – Processes Changes" Column: High, Medium, Low, None, Uncertain.
• Level of Impact: Technology Changes		Total count of each selected status within the "Level of Impact – Technology Changes" Column: High, Medium, Low, None, Uncertain.
• Level of Impact: Data Changes		Total count of each selected status within the "Level of Impact – Data Changes" Column: High, Medium, Low, None, Uncertain.
• Segments I & II Documentation Update Status		Total count of each selected status within the "Segments I & II Documentation Status" column: Updates Not Started, Updates In Progress, Updates Complete.

Technology

The "Technology" critical operational element is focused on the applications or tools used to process, track, or report on financial operations. This section of your Dashboard is intended to provide information about your agency's efforts to understand and document current business systems and technology tools and to remediate and integrate those systems for the changes brought about by Florida PALM.

Current-State:

Included with this section are the following counts and placeholders:

Table 4: Current-State Technology Detailed Counts

Technology Related Counts	Source Worksheet	Calculation Description
Cataloged Business Systems	<Agency> Current-State Business Systems	Total count of unique business system names listed in the "Business System Name" column.
• Criticality		Total count of each selected criticality within the "Business System Criticality" column: High, Medium, Low, None.
• Documentation Status		The total count of each selected status within the "Current-State Technical Documentation Status" column: Complete, Partial, Not Started.
Cataloged Interfaces	<Agency> Current-State Interfaces	Total count of unique interfaces listed in the "Interface Long Name" column.
• Inbound Interfaces		Total count of inbound interfaces listed in the "Inbound to Agency / Outbound from Agency" column.
• Outbound Interfaces		Total count of outbound interfaces listed in the "Inbound to Agency / Outbound from Agency" column.

Implementation:

Included within this section are the following counts:

Table 5: Implementation Technology Detailed Counts

Technology Related Counts	Source Worksheet	Calculation Description
Business Systems Planned for Integration	<Agency> Implementation Interfaces & Documentation	Total count of business systems listed in the "Agency Business Systems" column.
• Segment I – Documentation Updates		Total count of each selected status within the "ABS Documentation Status based on Segment I" column: Complete, Updating, Evaluating, Not Started, Not Needed.
• Segment II – Documentation Updates		Total count of each selected status within the "ABS Documentation Status based on Segment II" column: Complete, Updating, Evaluating, Not Started, Not Needed.
Planned Interfaces	<Agency > Implementation Interfaces & Documentation	Total count of planned interfaces for implementation in the "Florida PALM Interface Selection(s)" column.
• Inbound Interfaces		Total count of planned inbound interfaces selected in the "Florida PALM Interface Selection(s)" column.

Technology Related Counts	Source Worksheet	Calculation Description
• Outbound Interfaces		Total count of planned outbound interfaces selected in the "Florida PALM Interface Selection(s)" column.

Data

The "Data" critical operational element is focused on information used in or produced from an agency's financial business operations. An agency's data supports its people, processes, and technology and should be evaluated and monitored against those distinct purposes. This section of your Dashboard is intended to provide information about your agency's efforts to understand and document current data uses and needs and to prepare your data and reporting needs for the changes brought about by Florida PALM.

Current-State:

Included within this section are the following counts:

Table 6: Current-State Data Detailed Counts

Data Related Counts	Source Worksheet	Calculation Description
Unique FLAIR Data Elements	\<Agency\> FLAIR Data Elements Inventory	Total count of unique FLAIR data elements listed in the "FLAIR Data Element" column.
• Associated Unique Uses		Total count of rows containing data.
- Continued Use - Yes		Total counts of rows with a selection of "Yes" in the "Continued Use" column.
- Continued Use - No		Total counts of rows with a selection of "Yes" in the "Continued Use" column.
• Associated Business Systems		Total count of associated business systems selected in the "Agency Business Systems: Name" column.
Cataloged Reports	\<Agency\> Current-State Reports	Total count of reports listed in the "Report Name" column.
• Criticality		Total count of each selected status within the "Criticality" column: High, Medium, Low, None.

Implementation:

Included within this section are the following counts:

Table 7: Implementation Data Detailed Counts

Data Related Counts	Source Worksheet	Calculation Description
Segments I & II Planned Configurations	Configuration Workbook Inventory Folder	Of the nine available configurations for Segments I & II, total count of agency identified configurations needed.

Data Related Counts	Source Worksheet	Calculation Description
• Accounts Receivable (AR)	• <Agency> Distribution Code	N/A
- Planned Distribution Codes	• <Agency> Location Definition	Total count of rows with a selection of "Yes" within the "Configure Value" column.
• Asset Management (AM)	• <Agency> Area ID Values	N/A
- Planned Location Codes	• <Agency> Allotments Budget Structure Control	Total count of rows with a selection of "Yes" within the "Configure Value" column.
- Planned Associated Area ID's	• <Agency> Budgetary Value Combination Edit	Total count of rows with a selection of "Yes" within the "Configuration Needed" column.
• Commitment Control (KK)	• <Agency> Local Funds	N/A
- Planned Option	• <Agency> Organization	Allotments budget structure control option selection: Option #1 – Track with Budget, or Option #2 – Control.
• General Ledger (GL)	• <Agency> Other Accumulator 1 (OA1)	N/A
- Planned Budgetary Value Combo Edit's	• <Agency> Other Accumulator 2 (OA2)	Total count of rows with a selection of "Yes" within the "Configure Value" column.
- Planned Local Funds		Total count of rows with a selection of "Revolving Fund (Non-CRA)" within the "Account Type" column.
- Planned Organization ID's		Total count of rows with a selection of "Yes" or "New" within the "Configure Value" column.
- Planned OA1's		Total count of rows with a selection of "Yes" within the "Configure Value" column.
- Planned OA2's		Total count of rows with a selection of "Yes" within the "Configuration Needed" column.
Conversions & Data Readiness	<Agency> Conversion Inventory & Data Readiness	N/A
• Conversions Needed		Total count of conversions needed in the "Conversion Needed" column.
• Agency Data Outside of Primary Source System(s)		Total count of agency data outside of primary source system in the "Agency Data Outside of Primary Source System(s)" column.
• Data Readiness/Cleansing Status		Total count of each selected status in the "Data Cleansing Plan" column: Complete, In Progress, Not Started, Not Applicable.
Reports	N/A	Placeholder for future RW task.

Agency Reported Section

The Agency Reported section (Figure 16) displays agency reported readiness risks, issues, assumptions and agency-specific activities. Agencies will maintain sheets within Smartsheet to provide status updates. Status report data relevant to the reporting period will be displayed on the Dashboard:

- Agency Risks will display any open risks or any risks that were closed within the reporting period, sorted by highest risk rating.
- Agency Issues will display any open issues or any that were closed within the reporting period, sorted by highest priority.
- Agency Assumptions will display any logged assumptions or assumptions that were removed within the reporting period, sorted by status (logged then removed).
- Agency-Specific Activities will display any activities that occurred during the reporting period, sorted by date.

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.

DEMO Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Grant Tracking System remediation will not be completed in time to perform testing with Florida PALM	Open	9 (High/High)	A contract amendment is being developed to update requirements (scope) to the current agreement with the vendor.		07/14/23	John Smith, Chief of Finance and Budget
Technology	Poor vendor response to RFQ	Open	1 (Low/Low)	An extended response time will be included. A pre-response conference will be held prior to the response due date.		08/10/23	John Smith, Chief of Finance and Budget

DEMO Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Key Agency F&A Resource Resigned	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for a replacement. In the meantime, the agency is hiring the employee back with in a temporary OPS position.		09/15/23	John Smith, Chief of Finance and Budget

DEMO 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	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/03/23	All agency business systems	

DEMO Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Technology	Conducted a monthly meeting with agency business system owners to discuss current-state and remediation needs	02/06/24	All agency business systems	Ensure regular updates and information is shared between the core support team and the technical system owners	A new risk related to the Grant Tracking System was identified during this month's meeting (See Agency Risks worksheet).
Data	Continued analysis for data clean-up of Org Codes and Project IDs	02/21/24	Grant Tracking System All agency users	To review the extent of the use of Org Codes and Project IDs	Current action item on track to be complete by 12/31/23. Next step will be to prioritize the clean-up activities.

Figure 16: Agency Reported Section

Agency Sponsor Confirmation Section

The Agency Sponsor Confirmation (Figure 17) allows for easy submission of Dashboard, as required for Bimonthly Status Reporting. Upon submission, a confirmation status will appear in the Status Report Confirmation section.

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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DEMO Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:

Figure 17: Agency Sponsor Confirmation Section