

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.

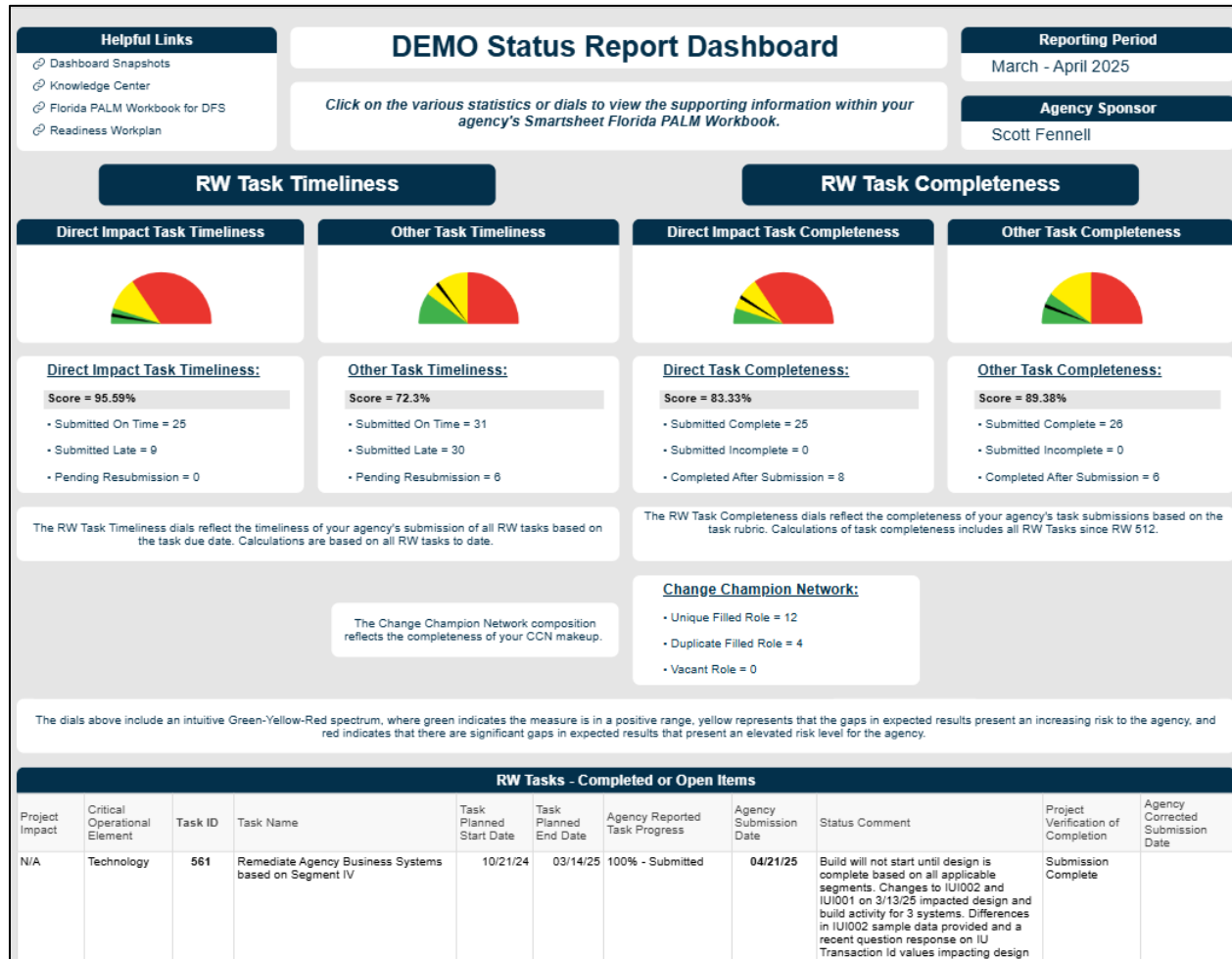


Figure 1: <Agency Acronym> Status Report Dashboard, Readiness Workplan Section

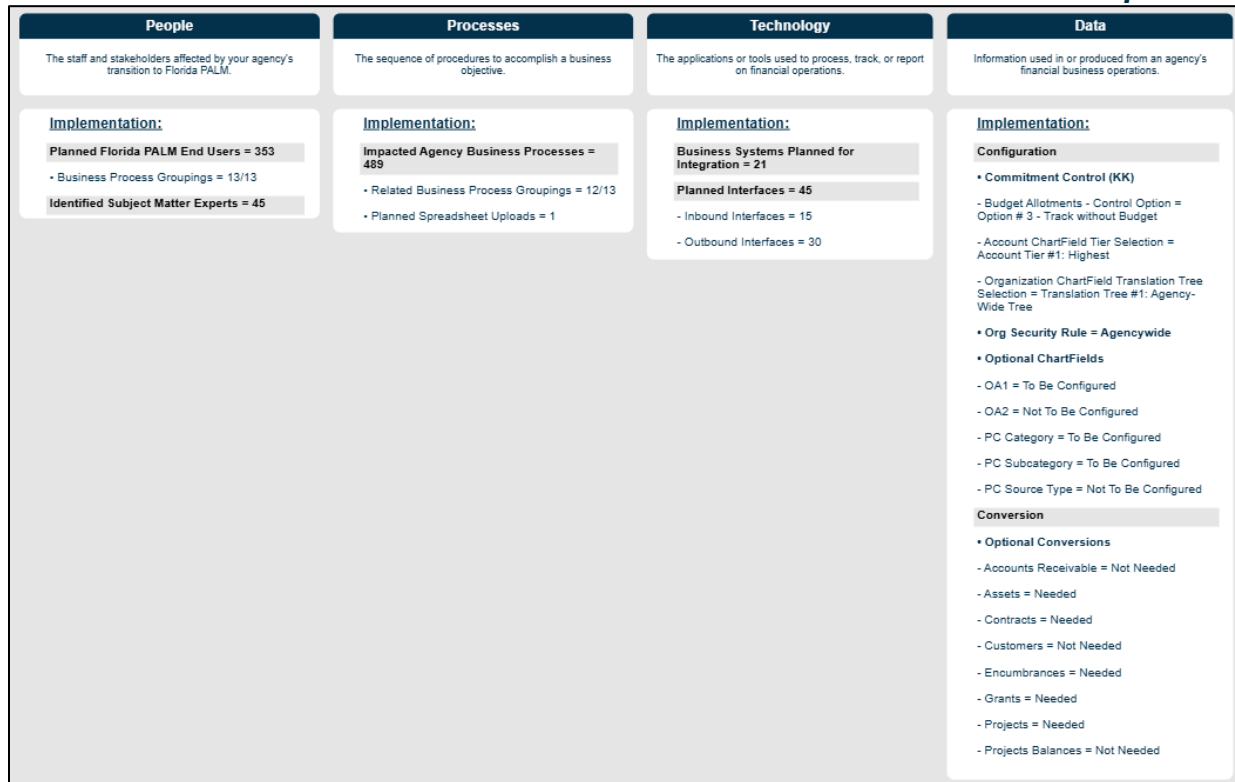


Figure 2: <Agency Acronym> Status Report Dashboard, People, Processes, Technology, and Data Section

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.													
DEMO Risks													
Risk ID	Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Impact Rating	Probability Rating	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Becomes an Issue	Reporting Period Comments or Updates
001	Open and Monitoring	04/23/25		Identity Provider (IdP)	Free bird	Increasing	Medium (2) - Moderate impact	High (3) - Likely to occur often or soon	5 (Medium/Hig	Bird wants to be free	Watch the bird for struggling	Bird will bite	
DEMO Issues													
Issue ID	Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Risk Number	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments or Updates		
001	Open	04/02/25	04/25/25	High - Impacts the ability of the agency to meet deadlines or milestones	Business Process Change Staffing/Resource Availability	Issue Title	001	Background about issue. example. Background about issue. example. Background about issue. example. Background about issue. example. Background about issue. example.	Action planAction planAction planAction planAction planAction planAction planAction plan	02/07/24	Interviews scheduled		
DEMO Assumptions													
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for March - April 2025								
Technology	The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces and business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems									
Agency Sponsor Confirmation													
<p>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.</p> <p>Agency Sponsor Name: *</p> <input type="text"/> <p><input type="checkbox"/> Confirm *</p> <p><input type="button" value="Submit"/></p> <p>Privacy Notice Report Abuse</p>													
DEMO Status Report Confirmation													
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:										
January - February 2025	Scott Fennell	scott.fennell@myfloridacfo.com	03/06/25										

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:

- Agency maintained and updated (through agency specific Florida PALM Workbook in Smartsheet):
 - Change Champion Network
 - Subject Matter Experts
 - Readiness Workplan Task Tracker
 - Implementation End Users
 - Inventories:
 - Current-State Business Processes
 - Current-State Business Systems
 - Implementation Interfaces
 - Configuration Workbooks
 - Conversion Inventory
 - Status Reporting:
 - Agency Risks
 - Agency Issues
 - Agency Assumption

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.

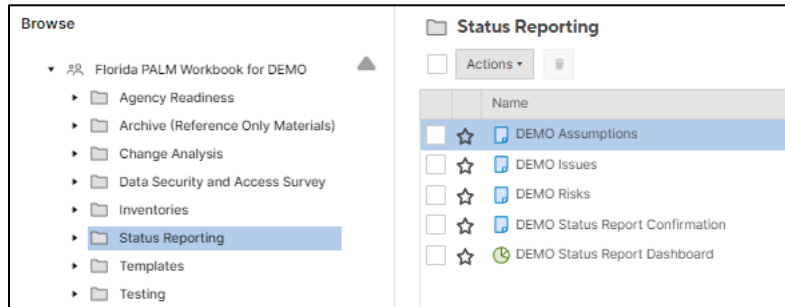


Figure 4: Florida PALM Workbook for <Agency Acronym> folder structure in Smartsheet

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.

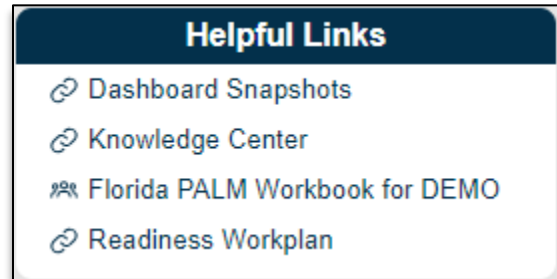


Figure 5: Helpful Links section

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 2025', to 'May – June 2025' on May 30, 2025. 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%.

RW Direct Impact Task Timeliness and RW Task Completeness:

- Green equals a score between 100% and 90%
- Yellow equals a score between 89% and 70%
- Red equals a score between 69% and 0%

RW Other Task Timeliness and RW Task Completeness:

- Green equals a score between 100% and 80%
- Yellow equals a score between 79% and 50%
- Red equals a score between 49% and 0%

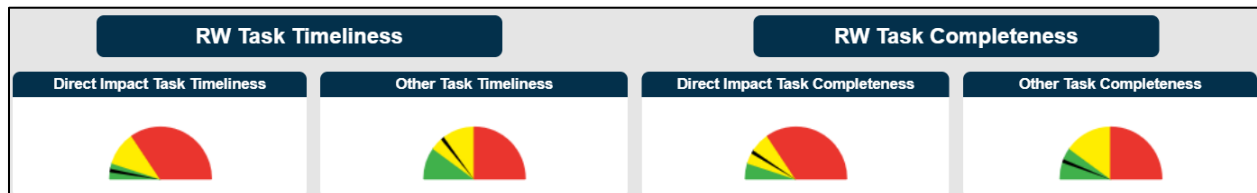


Figure 8: Agency Dials Section

RW Task Timeliness

RW tasks 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 Timeliness section includes two separate dials to distinguish the timeliness of your agency's initial submission of RW tasks with a direct Project impact and the timeliness of all other RW tasks. The dials reflect an average score based on the following categories (this calculation is not affected by your agency's RW Task Completeness determination):

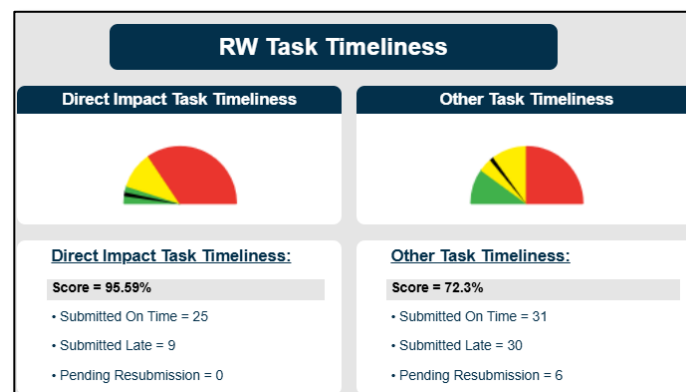


Figure 9: RW Task Timeliness

- 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.
 - Direct Impact Tasks in this category receive a 10% deduction for every additional 3 business days beyond the task planned end date before your agency makes its initial task submission, in the Readiness Workplan Task Tracker.
 - Other Tasks in this category receive a 10% 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.

NOTE: The scoring for Direct Impact Tasks was updated on 05/01/2025, as approved by the ESC. Tasks with a due date prior to 05/01/2025 will remain scored based on the old scale, which provided a 5-day grace period. The total score reflected on the Dashboard Dial for Direct Impact Tasks is representative of a combined composite score.

RW Task Completeness

The RW Task Completeness section includes two separate dials and reflects the completeness of your agency's direct impact RW task submissions and all other RW task submissions, 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 completeness score for each dial:

Submission Complete

Submission Complete means 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.

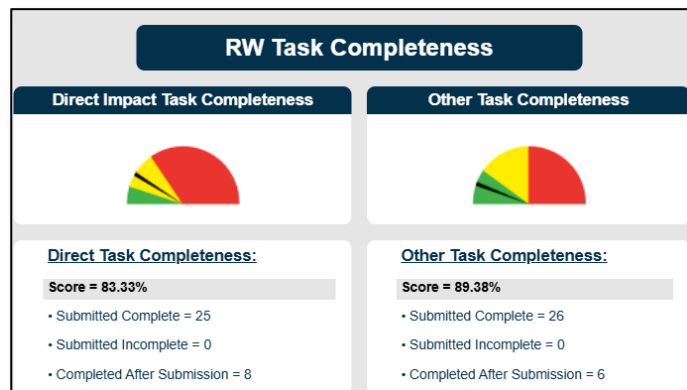


Figure 10: RW Task Completeness

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 in your agency's Task Tracker and reselecting *100% - Submitted*.

NOTE: *The RW Task Completeness section does not apply to RW tasks prior to 512.*

Direct Impact Task Scoring

- Starting with the initial Project verification of completion date, for every 3 business days, the task will deduct 10% 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 July 1, 2025:
 - If the task is corrected and resubmitted between July 1 – 3 = 90%
 - If the task is corrected and resubmitted between July 4 – 6 = 80%
 - If the task is corrected and resubmitted between July 7 – 9 = 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 scoring for Direct Impact Tasks was updated on 05/01/2025, as approved by the ESC. Tasks with a due date prior to 05/01/2025 will remain scored based on the old scale, which provided a 5-day period between scoring reduction. The total score reflected on the Dashboard Dial for Direct Impact Tasks is representative of a combined composite score.*

Other Task Scoring

- Starting with the initial Project verification of completion date, for every 5 business days, the task will deduct 10% 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 July 1, 2025:
 - If the task is corrected and resubmitted between July 1 – 7 = 90%
 - If the task is corrected and resubmitted between July 8 – 14 = 80%
 - If the task is corrected and resubmitted between July 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.

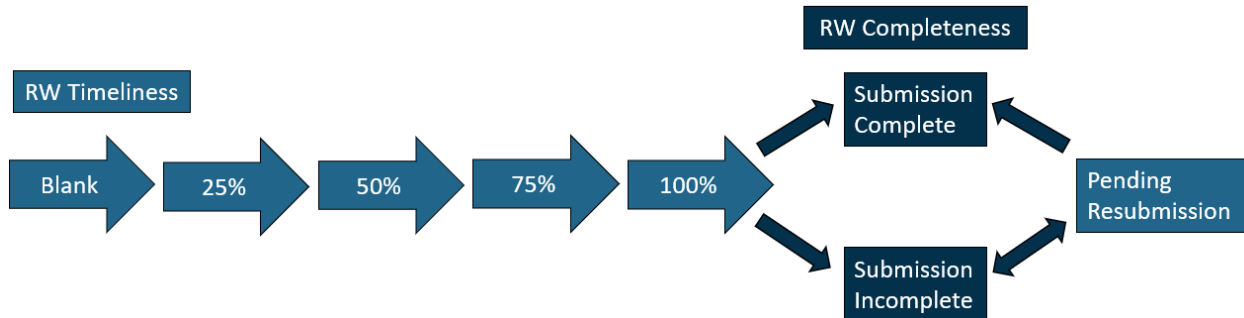


Figure 11: RW Completeness and Timeliness Process

CCN Composition

The Change Champion Network (CCN) Composition lists the count of uniquely filled roles, duplicate roles, and vacant role assignments.

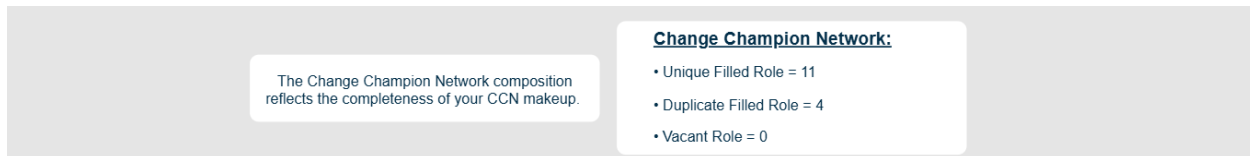


Figure 12: CCN Composition

RW Task Completed or Open Items Section

The RW Tasks – Completed or Open Items table (Figure 13) 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 or pending resubmission. This section includes:

- Project Impact
 - Direct – Agency readiness activity or information provided will be used by the Project to complete implementation or cutover activities.
 - 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.
 - 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
 - 25% - Beginning Initial Internal Meetings and Information Gathering

- 50% - In Progress
- 75% - Consolidating/Inputting Information for Submission
- 100% - Submitted
- Pending Resubmission
- Agency Submission Date
- Status Comments
- Project Verification of Completion
 - Submission Complete
 - Submission Incomplete
 - 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 Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	04/21/25	Build will not start until design is complete based on all applicable segments. Changes to IUI002 and IUI001 on 3/13/25 impacted design and build activity for 3 systems. Differences in IUI002 sample data provided and a recent question response on IU Transaction Id values impacting design and build activity for 1 system. As of Closing of this task, 2 systems and 1 new 3rd party system are still in progress using Segment IV interfaces. These will be tracked as part of task 576.	Submission Complete	

Figure 13: Readiness Workplan Tasks – Completed or Open

People, Processes, Technology, and Data Section

The People, Processes, Technology and Data section of your dashboard (Figure 14) 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 RW 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.

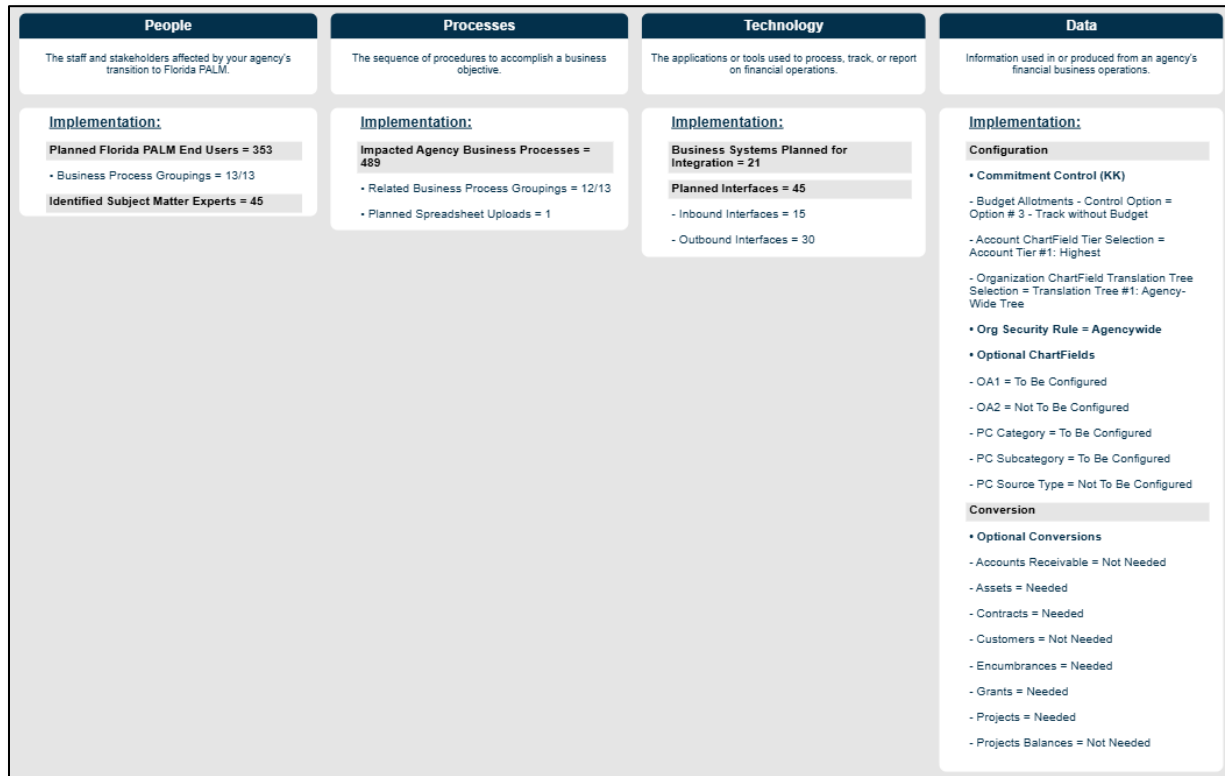


Figure 14: People, Processes, Technology, and Data

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 the “Business Process Grouping(s)” column.
Identified Subject Matter Experts	<Agency> Subject Matter Experts	Total count of rows containing data.

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.

Implementation:

Included within this section are the following counts and placeholders:

Table 2: 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 “Related Business Process Model(s)” column.
<ul style="list-style-type: none"> Related Business Process Groupings 		Total count of related business process groupings identified based on the selections in the “Related Business Process Model(s)” column.
<ul style="list-style-type: none"> Planned Spreadsheet Uploads 		Total count of the Spreadsheet Uploads selected in the “Florida PALM Spreadsheet Upload Selection(s)” column.

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.

Implementation:

Included within this section are the following counts:

Table 3: 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.
Planned Interfaces	<Agency > Implementation Interfaces & Documentation	Total count of planned interfaces for implementation in the “Florida PALM Interface Selection(s)” column.

Technology Related Counts	Source Worksheet	Calculation Description
<ul style="list-style-type: none"> Inbound Interfaces 		Total count of planned inbound interfaces selected in the "Florida PALM Interface Selection(s)" column.
<ul style="list-style-type: none"> 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.

Implementation:

Included within this section are the following counts:

Table 4: Implementation Data Detailed Counts

Data Related Counts	Source Worksheet	Calculation Description
Configuration	Configuration Workbook Inventory Folder	N/A
<ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments – Control Option Account ChartField Tier Selection Organization ChartField Translation Tree Selection 	<Agency> Allotments Budget Structure	Selections from the Allotments Budget Structure Form as submitted by the Agency Sponsor.
<ul style="list-style-type: none"> Org Security Rule 	<Agency> Org Security Rule	Agency's selection for Org Security Rule of "Agencywide" or "Agency Defined"
<ul style="list-style-type: none"> Optional ChartFields <ul style="list-style-type: none"> OA1 OA2 PC Category PC Subcategory PC Source Type 	<ul style="list-style-type: none"> <Agency> Other Accumulator 1 (OA1) <Agency> Other Accumulator 2 (OA2) <Agency> PC Category <Agency> PC Subcategory <Agency> PC Source Type 	Agency's selection to participate in configuration for optional ChartFields, as indicated by "To Be Configured" or "Not To Be Configured".
Conversion		N/A

Data Related Counts	Source Worksheet	Calculation Description
<ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable Assets Contracts Customers Encumbrances Grants Projects Projects Balances 	<Agency> Conversion Inventory & Data Readiness	Agency's selection to participate in optional conversions, as indicated by "Needed" or "Not Needed".

Agency Reported Section

The Agency Reported section (Figure 15) displays agency confirmed readiness risks, issues, and assumptions. 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 confirmed open risks or any risks that were closed within the reporting period, sorted by highest risk rating.
- Agency Issues will display any confirmed open issues or any that were closed within the reporting period, sorted by highest priority.
- Agency Assumptions will display any confirmed logged assumptions or assumptions that were removed within the reporting period, sorted by status (logged then removed).

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.													
DEMO Risks													
Risk ID	Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Impact Rating	Probability Rating	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Becomes an Issue	Reporting Period Comments or Updates
001	Open and Monitoring	04/23/25		Identity Provider (IdP)	Free bird	Increasing	Medium (2) - Moderate impact	High (3) - Likely to occur often or soon	6 (Medium/Hig	Bird wants to be free	Watch the bird for struggling	Bird will bite	
DEMO Issues													
Issue ID	Status	Date Opened	Date Closed	Priority	Issue Category	Issue Title	Risk Number	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments or Updates		
001	Open	04/02/25	04/25/25	High - Impacts the ability of the agency to meet deadlines or milestones	Business Process Change Staffing/Resource Availability	Issue Title	001	Background about Issue. example Background about Issue. exampleBackground about Issue. exampleBackground about Issue. exampleBackground about Issue. example	Action planAction planAction planAction planAction planAction planAction plan	02/07/24	Interviews scheduled		
DEMO Assumptions													
Critical Operational Elements		Assumption				Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)		Reporting Period Comments for March - April 2025			
Technology		The Florida PALM Project will be able to provide timely and complete requirements for agency business system interfaces and business processes with enough detail and time to implement the changes according to the Florida PALM schedule.				Logged	10/20/23	Agency Business Systems					

Figure 15: Agency Reported Section

Agency Sponsor Confirmation Section

The Agency Sponsor Confirmation (Figure 16) 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	DEMO Status Report Confirmation								
<p>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.</p> <p>Agency Sponsor Name: *</p> <input type="text"/> <p><input type="checkbox"/> Confirm *</p> <p><input type="button" value="Submit"/></p> <p>Privacy Notice Report Abuse</p>	<table border="1"> <thead> <tr> <th>Reporting Period</th> <th>Agency Sponsor Name:</th> <th>Confirmed By:</th> <th>Confirmation Date:</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:				
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:						

Figure 16: Agency Sponsor Confirmation Section