

Understanding your Dashboard

A Readiness Certification Dashboard (example shown below in Figure 1) has been created within your agency's Florida PALM Workbook in Smartsheet. The Dashboard provides a view of the Readiness Certification Criteria and your agency's current status for the related RW tasks. The Dashboard also serves as the tool for your Agency Sponsor to submit your agency's status for each Readiness Certification Criteria, mitigation plans for any criteria not met, and an indication of the Sponsor's confidence level regarding your agency's readiness across each of the critical operational elements and at an overall readiness confidence level.

Smartsheet Navigation:

Florida PALM Workbook for (Agency) > Agency Readiness > Agency Readiness Certification

ŀ	lelpful Links	DEMO Boadinasa Car	DEMO Beadiness Certification Dashboard					Readiness Certification #1 Confirmation					
∂ Agency Readine	ss Certification	DEMO Readiness Cer	DEMO Readiness Certification Dashboard			Confirmed By:		Confirmatio Date					
					Demo Sponsor	floridapalm@r	nyfloridacfo.com	06/20/25					
		Su	mmary										
		Overall Co	onfidence Le	vel									
	People	Processes		Technology		Data							
Confidence Level People		Confidence Level - Processes	ence Level - logy	C	onfidence Level ata	-							
Criteria ID 1.1		Criteria 2.1	Criteria	3.1	с	Criteria 4.1							
Criteria ID 1.2		Criteria 2.2	Criteria	3.2	с	riteria 4.2							
Criteria ID 1.3		Criteria 2.3	Criteria	3.3	с	Criteria 4.3							
			Criteria	3.4	Criteria 4.4								
			Criteria	3.5	Criteria 4.5								
		Ρ	eople										
		Criteria			Related RW 1	asks							
1.1 Agency identified SMEs have been assigned end user roles based on job function.				Task Name	Agency Progre	Agency Reported Task Project Ve Progress		tion of					
4 2 LIAT Dalas and D			536-A	Create Agency Specific Acceptance Testing Pla	User 100% -	100% - Submitted Submission Cor		mplete					
1.2 UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.			536-B	Create Agency Specific Acceptance Testing Pla	User 100% -	100% - Submitted Submission		mplete					
1.3 SMEs have been identified and prepared to participate in UAT.				Complete and Submit 8 Mapping Worksheet for	End User Role 100% - r UAT.	100% - Submitted							
		Deadinese Cod	ification W/	vikabaat									
ritical Operational	0.11.11.10	Readiness Cen	uncauon wo	INSTREEL									
lement	Criteria ID	Ontena	Criteria Met Confiden		CanEduat	Comments							
eople	1.1	Agency identified SMEs have been assigned end user	Yes	Very	Contident								
eople	1.2	UAT Roles and Responsibilities have been identified in agency-specific UAT Plan.	Yes										
eople	1.3	SMEs have been identified and prepared to participate in UAT.	n Yes										

Figure 1: Demo Readiness Certification Dashboard

The Dashboard is populated using agency reported data from the following resources located in your Florida PALM Workbook in Smartsheet:

- <Agency> Readiness Workplan Task Tracker
- < Agency> Readiness Certification Worksheet
- < Agency> Readiness Mitigation Worksheet



Critical Operational Elements

The Readiness Certification Dashboard is organized to provide a view of agency readiness across the four critical operational elements:

- People The staff and stakeholders affected by your agency's transition to Florida PALM
- Processes The sequence of procedures to accomplish a business objective
- Technology The applications or tools used to process, track, or report on financial operations
- Data Information used in or processed from an agency's financial business operations

Helpful Links Section

The link in the Helpful Links section of your Dashboard (Figure 2) navigates to the Agency Readiness Reporting page of the Florida PALM website, where you can find additional information about Agency Readiness Certification and criteria.

Helpful Links	

Figure 2: Helpful Links section

Readiness Certification Confirmation Section

The Readiness Certification Confirmation section (Figure 3) provides a view of the Sponsor Confirmation, including the date confirmed.

The section will populate once the Primary Agency Sponsor submits the certification confirmation. The Dashboard will update with each readiness certification, which will require a new confirmation statement. Certification due dates are identified in the Readiness Workplan (RW).

Readiness Certification #1 Confirmation							
Agency Sponsor Name:	Confirmed By:	Confirmation Date					
Demo Sponsor	floridapalm@myfloridacfo.com	06/20/25					

Figure 3: Readiness Certification Confirmation Section

Summary Section

The Summary section (Figure 4) contains five boxes. The first is the Overall Confidence Level, which displays the Agency Sponsor's overall confidence level regarding the agency's readiness. The other four boxes display the Agency Sponsor's confidence level and status of agency readiness criteria for each critical operational element. All data displayed in this section is derived from the *<Agency> Readiness Certification* worksheet.



Summary							
Overall Confidence Level							
People	Processes	Technology	Data				
Confidence Level - People	Confidence Level - Processes	Confidence Level - Technology	Confidence Level - Data				
Criteria ID 1.1	Criteria 2.1	Criteria 3.1	Criteria 4.1				
Criteria ID 1.2	Criteria 2.2	Criteria 3.2	Criteria 4.2				
Criteria ID 1.3	Criteria 2.3	Criteria 3.3	Criteria 4.3				
		Criteria 3.4	Criteria 4.4				
		Criteria 3.5	Criteria 4.5				

Figure 4: Summary Section

Summaries are conveyed using intuitive Green-Yellow-Red spectrum, where green indicates the agency has reported readiness in a positive range, yellow represents that the agency has identified gaps in expected results and presents a restrained confidence in agency readiness, and red indicates that there are significant gaps in expected results and the agency is apprehensive about their readiness. Each colored indicator is directly correlated to an agency's reported status made on their <*Agency*> *Readiness Certification* Worksheet.

Confidence levels are translated to the following colors on the Dashboard:

- 'Extremely Confident' and 'Very Confident' selections display as green
- 'Moderately Confident' and 'Becoming Confident' selections display as yellow
- 'Somewhat Concerned' or 'Highly Concerned' selections display as red

Responses of Met or Not Met, for each Readiness Certification Criteria, are displayed as the following colors:

- Criteria Met selection displays as green
- Criteria Not Met displays as red

Critical Operational Element Sections (People, Processes, Technology, Data)

Each of the critical operational elements has a designated section (Figure 5) on the dashboard. Each of these sections contain the following boxes:

- Criteria
- Related RW Tasks
- Readiness Certification Worksheet
- Mitigation Plan

Florida PALM

Department of Financial Services Agency Readiness Certification Dashboard

Data												
Criteria						Related RW Tasks						
4.1 Agency has documented reporting needs.			Task	k ID	Task Name			Agency Reported Task Progress		Project Verification of Completion		
			5	60	Submit Change Analysis Tool		100% - Submitted		Submission Complete			
4.2 Agency specific test data has been identified and documented, including source documents required for UAT scenarios.					5	71	Complete Data Cleansing Based on Mock Conversion 2		75% - Consolidating/Inputting Information for Submission			
4.3 Agency specific configurations have been confirmed.					6	57	Submit Updated Configuration Workbooks		100% - Submitted			
					6	59	Update Conversion	on Field	I Mapping	100% - Submitted		
4.4 Agency data is cleansed based on Mock Conversion 2 results.				5	74	Prepare Documentation for User Acceptance Testing		25% - Beginning Initial Internal Meetings and Information Gathering				
4.5 Agency has provided updated data mapping to support Mock Conversion 3.												
Readiness Certification Worksheet												
Critical Operati Element	tional	al Criteria ID Criteria		Criteria	Criteria Met Co		Confid	nfidence Level Comments		Comments		
Data		4.0	Overall Data R	Readiness			Becoming Confi		ning Confident	J Confident		
Data		4.1	Agency has do	ocumented reporting needs.								
Data		4.2	Agency specifi documented, in scenarios.	fic test data has been identified and including source documents required for UAT								
Data		4.3	Agency specific configurations have been confirmed.		Yes							
Data		4.4	Agency data is cleansed based on Mock Conversion 2 results.		No							
Data		4.5	Agency has pr Mock Conversi	ovided updated data mapping to support on 3.	Yes							
Mitigation Plan												
Criteria ID	iteria ID Why has the criteria not been met? What mitigating actions are being taken?			Who is responsible for supporting the mitigation?		Impact/workaround if mitigation is not completed?		Planned completion date of the mitigation steps?				
4.4 Vacancies in critical staffing resources In the process of filling 2 positions that will be primarily focused on data cleansing prior to Mock Conversion 4.			e Aç	gency	Sponsor		We understand UAT SMEs beg that is not fully complete and n before Mock C data will not be users to test.	the impact inning UAT cleansed. If naintain dat onversion 4 in good sta	to our agency's Online with dat we do not a cleansing , our agency te for our end	10/01/25 a		

Figure 5: Data Section

Criteria

No agency action is needed in this section, as it's provided for reference only.

The Criteria box provides the Readiness Certification Criteria required for that critical operational element.

Related RW Tasks

No agency action is needed in this section, as it's provided for reference only.

The Related RW Tasks box provides a view of your agency's status of the RW tasks that are related to the Readiness Certification Criteria. Each task includes the agency reported task progress and the Project's provided verification status pulled from the *<Agency> RW Task Tracker*.

Readiness Certification Worksheet

Agency action is required for this section via completion of the Readiness Certification worksheet.

The Readiness Certification Worksheet box provides the agency's responses to each readiness certification criteria for that critical operational element. Agency Sponsors must verify if each criteria were met or not and provide level of confidence of your agency's readiness for each critical



operational element and overall. The data is pulled directly from the *<Agency>* Readiness Certification worksheet.

Mitigation Plan

Conditionally, agency action is needed for this section depending on the responses in the Readiness Certification worksheet.

The Mitigation Plan box displays agency provided mitigation plans for each Readiness Certification Criteria not met. The data is pulled directly from the *Agency*> *Readiness Mitigation* worksheet.

Agency Sponsor Confirmation Section

Agency action is needed for this section via completion of the Agency Sponsor Confirmation.

The Agency Sponsor Confirmation (Figure 6) allows for easy submission of the Readiness Certification Dashboard. The confirmation should only be submitted by the <u>Primary Agency</u> <u>Sponsor</u> after the *<Agency> Readiness Certification* worksheet and *<Agency> Readiness Mitigation* worksheet (if applicable) have been completed. Upon submission, a confirmation status will appear in the Status Report Confirmation section at the top of the page.

Agency Sponsor Confirmation	Future Readiness Certification Submissions						
	Readiness Certification 2 - November 2025						
As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness certification status. I have reviewed and confirmed the accuracy of my agency's readiness certification status as reflected in this dashboard.	Agency Sponsors will provide the second update to Agency Readiness Certification (RW Task 606) to indicate the agency is ready to continue UAT and is prepared to soon begin agency-led sessions for agency end users and fully integrated UAT to test end to end processes, including agency business systems and enterprise systems.						
Agency Sponsor Name: *	Readiness Certification 3 - March 2026						
Confirm *	Agency Sponsors will provide the third update to Agency Readiness Certification (RW Task 619) providing an update of UAT progress, indicating the agency is ready to provide agency-specific training for their end users and prepare for cutover activities.						
Submit	Readiness Certification 4 - May 2026						
Privacy Notice Report Abuse	Agency Sponsors will provide final submission of the Agency Readiness Certification (RW Task 628) indicating the culmination of all testing activities and that the agency is ready to go live. This final submission of Agency Readiness Certification will be provided to the ESC for review and consideration as they prepare to vote on Stage Gate 5: Agency Readiness.						

Figure 6: Agency Sponsor Confirmation and Future Certifications Section

Future Readiness Certification Submissions Section

No agency action is needed in this section, as it's provided for reference only.

The Future Readiness Certification Submissions section (Figure 6) gives an overview of the timing and purpose of the additional certifications required before go-live.