

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

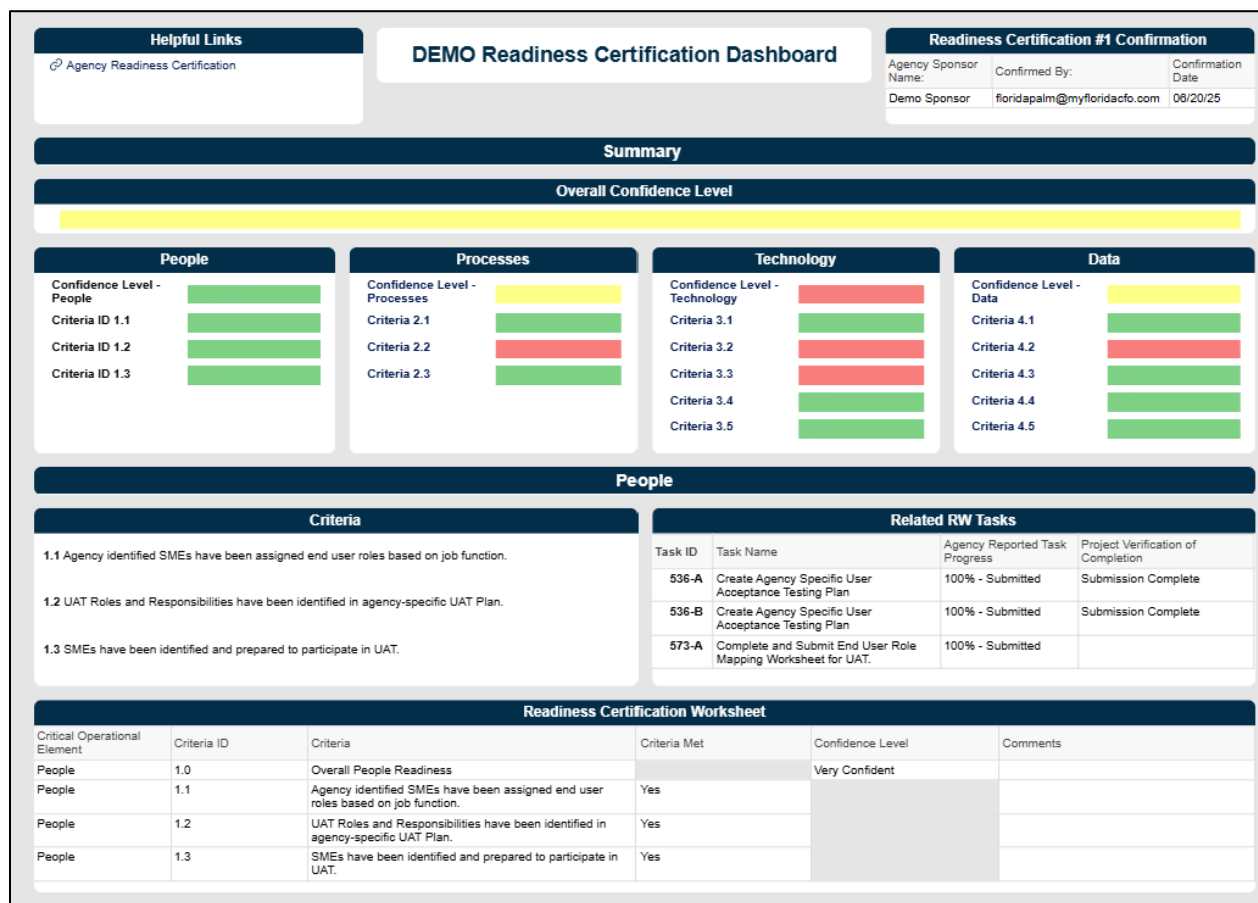


Figure 1: Demo Readiness Certification Dashboard

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.

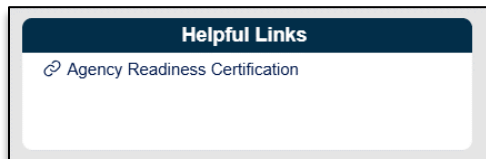


Figure 2: Helpful Links section

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.

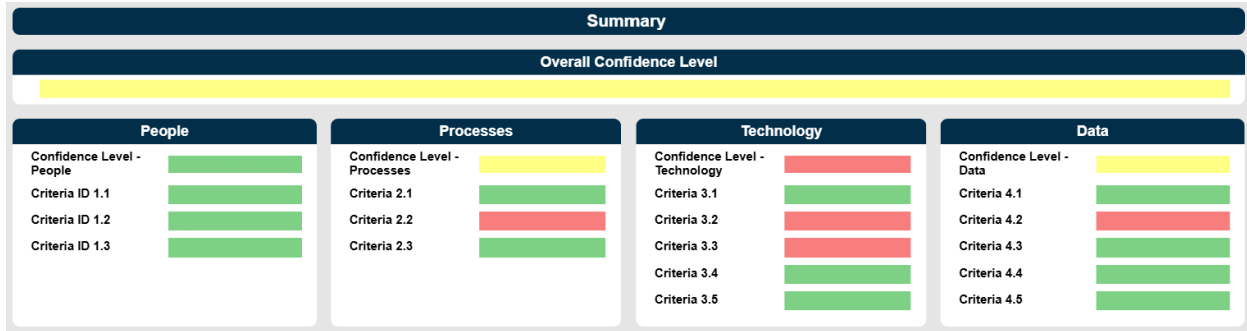


Figure 4: Summary Section

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

Data					
Criteria			Related RW Tasks		
4.1 Agency has documented reporting needs.			Task ID	Task Name	Agency Reported Task Progress
4.2 Agency specific test data has been identified and documented, including source documents required for UAT scenarios.			560	Submit Change Analysis Tool	100% - Submitted
4.3 Agency specific configurations have been confirmed.			571	Complete Data Cleansing Based on Mock Conversion 2	75% - Consolidating/Inputting Information for Submission
4.4 Agency data is cleansed based on Mock Conversion 2 results.			657	Submit Updated Configuration Workbooks	100% - Submitted
4.5 Agency has provided updated data mapping to support Mock Conversion 3.			659	Update Conversion Field Mapping	100% - Submitted
			574	Prepare Documentation for User Acceptance Testing	25% - Beginning Initial Internal Meetings and Information Gathering
Readiness Certification Worksheet					
Critical Operational Element	Criteria ID	Criteria	Criteria Met	Confidence Level	Comments
Data	4.0	Overall Data Readiness		Becoming Confident	
Data	4.1	Agency has documented reporting needs.	Yes		
Data	4.2	Agency specific test data has been identified and documented, including source documents required for UAT scenarios.	Yes		
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 provided updated data mapping to support Mock Conversion 3.	Yes		
Mitigation Plan					
Criteria 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.	Agency Sponsor	We understand the impact to our agency's UAT SMEs beginning UAT Online with data that is not fully cleansed. If we do not complete and maintain data cleansing before Mock Conversion 4, our agency data will not be in good state for our end users to test.	10/01/25

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 Primary Agency Sponsor 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

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 Sponsor Name: *

☐ Confirm *

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Future Readiness Certification Submissions

Readiness Certification 2 - November 2025

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.

Readiness Certification 3 - March 2026

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.

Readiness Certification 4 - May 2026

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.