

## Understanding Your Agency Status Report Dashboard

A <Agency> Status Report dashboard (example shown below in Figures 1 and 2) 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.

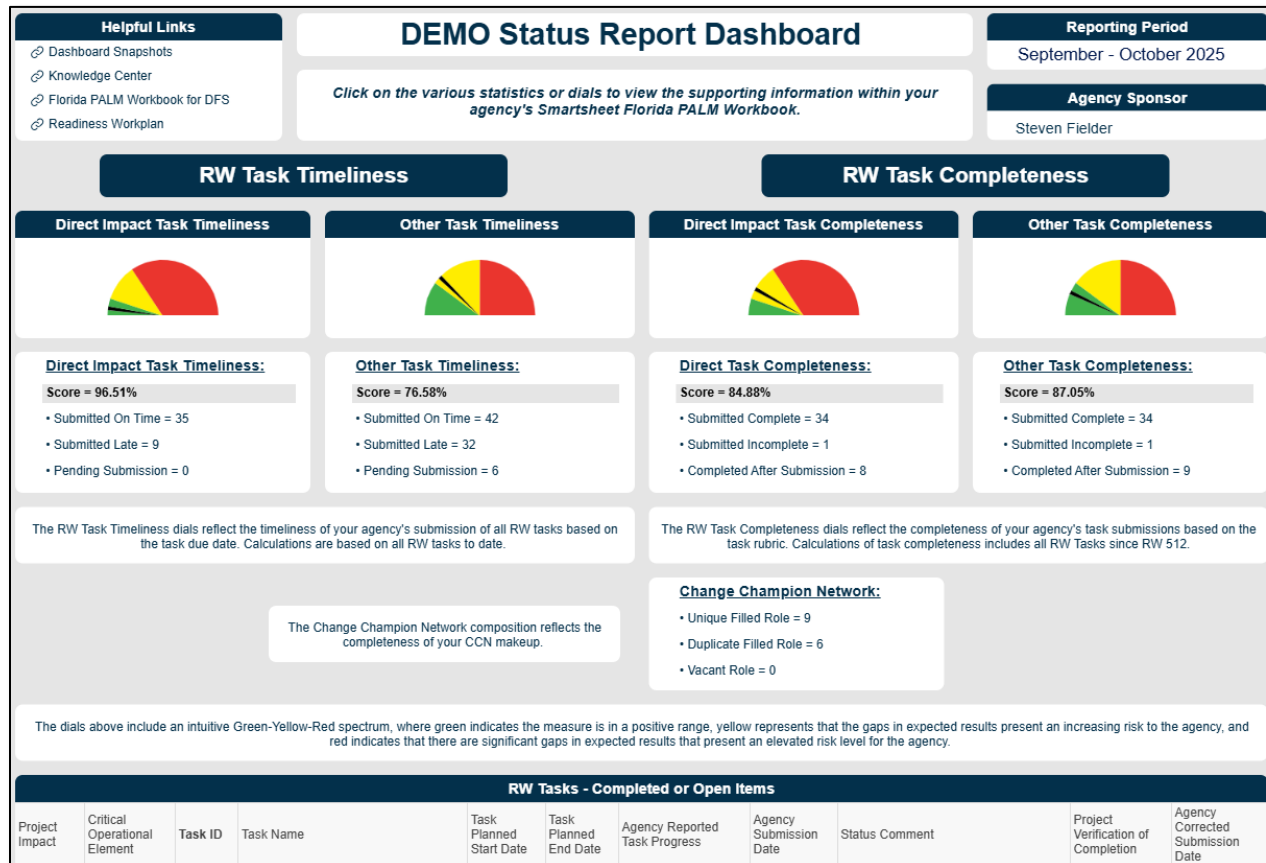


Figure 1: <Agency Acronym> Status Report Dashboard, Readiness Workplan Section

| 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                                                                                                                                                                                                                                                                                                                                            |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             |                                 |                                          |                                                |                                                |                                                |
| 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 Monitoring                                                                                                                                                                                                                                                                                                                                   | 05/06/25    |                                                                                                                                                                                                                                             | Business Process Change                                                                   | Risk Title              | Increasing  | 6 (Medium/Hig                   | Detailed Risk Background                 | Detailed Monitor/Mitigation Plan/Resolution    | Impact if Risk Becomes an Issue                | Actively working                               |
| DEMO 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                                                                                                                                                                                                                                                                                                                                                  | 09/26/25    |                                                                                                                                                                                                                                             | Critical - Impacts the ability of the agency to move forward with work without resolution | Business Process Change | Issue Title | Detailed Issue Background       | Detailed Action Plan                     | 08/28/26                                       | Still an Issue                                 |                                                |
| DEMO Assumptions                                                                                                                                                                                                                                                                                                                                      |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             |                                 |                                          |                                                |                                                |                                                |
| Critical Operational Elements                                                                                                                                                                                                                                                                                                                         | Status      | Assumption                                                                                                                                                                                                                                  |                                                                                           |                         |             | Date Logged or Removed          | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Sep. - Oct. 2025 |                                                |                                                |
| Technology                                                                                                                                                                                                                                                                                                                                            | Logged      | 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. |                                                                                           |                         |             | 09/26/25                        | Agency Business Systems                  | Still an Assumption                            |                                                |                                                |
| 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>Submit</p> |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             | Reporting Period                | Agency Sponsor Name:                     | Confirmed By:                                  | Confirmation Date:                             |                                                |
|                                                                                                                                                                                                                                                                                                                                                       |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             | July - August 2025              | Steven Fielder                           | floridapalm@myfloridacfo.com                   | 09/01/25                                       |                                                |
|                                                                                                                                                                                                                                                                                                                                                       |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             | May - June 2025                 | Steven Fielder                           | floridapalm@myfloridacfo.com                   | 07/01/25                                       |                                                |
|                                                                                                                                                                                                                                                                                                                                                       |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             | March - April 2025              | Steven Fielder                           | floridapalm@myfloridacfo.com                   | 05/01/25                                       |                                                |
|                                                                                                                                                                                                                                                                                                                                                       |             |                                                                                                                                                                                                                                             |                                                                                           |                         |             | January - February 2025         | Steven Fielder                           | floridapalm@myfloridacfo.com                   | 03/01/25                                       |                                                |

Figure 2: <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):
  - o Change Champion Network
  - o Readiness Workplan Task Tracker
  - o 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 3) 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.

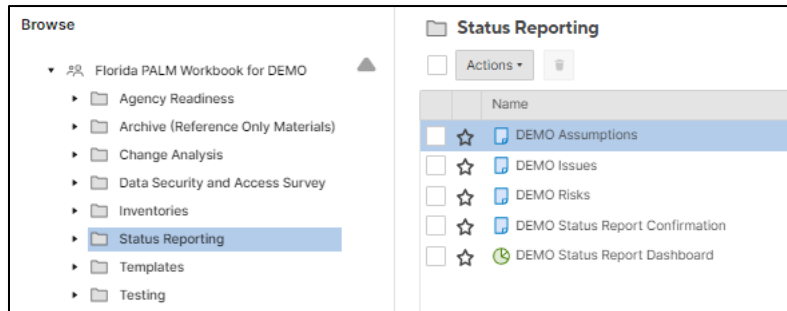


Figure 3: Florida PALM Workbook for <Agency Acronym> folder structure in Smartsheet

## Helpful Links Section

The website links listed within the Helpful Links section of your Dashboard (Figure 4) 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

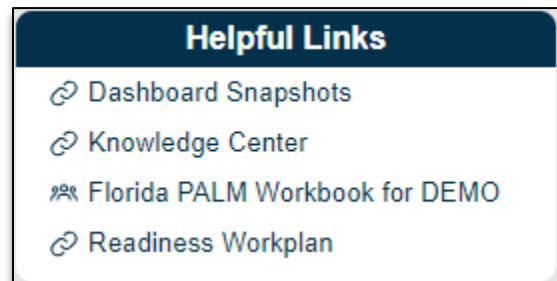


Figure 4: Helpful Links section

## Reporting Period Section

The Reporting Period section (Figure 5) 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 10<sup>th</sup> day following the close of each bimonthly reporting period. Due dates are identified in the Readiness Workplan (RW).



Figure 5: 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 'September – October 2025', to 'November – December 2025' on November 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 6) lists the Primary Agency Sponsor name identified within your agency's Change Champion Network worksheet. The Primary or Backup Agency Sponsor is responsible for submitting your agency's Bimonthly Readiness Agency Status Report.



Figure 6: Agency Sponsor section

## Agency Dials Section

The four dials located at the top of the Dashboard (Figure 7) 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%

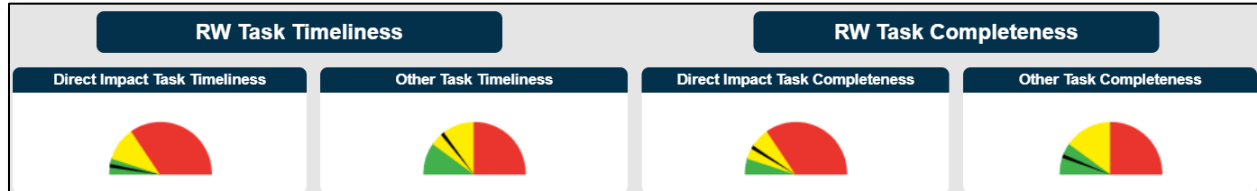


Figure 7: Agency Dials Section

## 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 (Figure 8) 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):

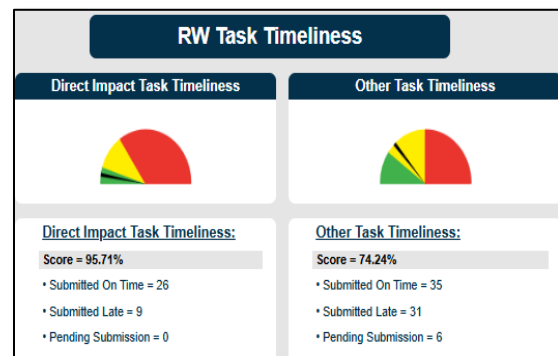


Figure 8: RW Task Timeliness

- Submitted on Time – the number of RW tasks your agency submitted by the task planned end date.
  - o 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 (Figure 9) 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.

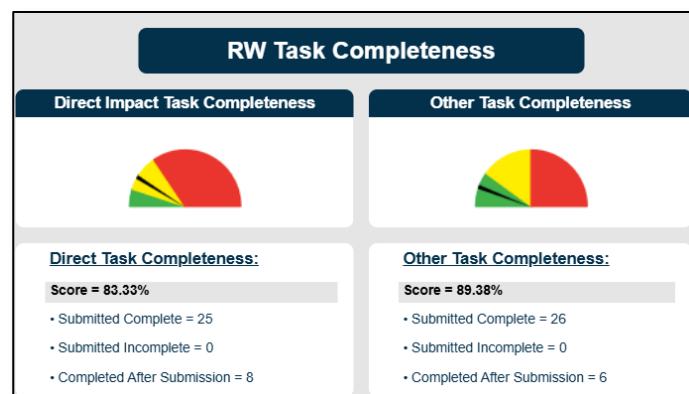


Figure 9: RW Task Completeness

### 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 September 1, 2025:
  - If the task is corrected and resubmitted between September 1 – 3 = 90%
  - If the task is corrected and resubmitted between September 4 – 6 = 80%
  - If the task is corrected and resubmitted between September 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 September 1, 2025:
  - If the task is corrected and resubmitted between September 1 – 7 = 90%
  - If the task is corrected and resubmitted between September 8 – 14 = 80%
  - If the task is corrected and resubmitted between September 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.

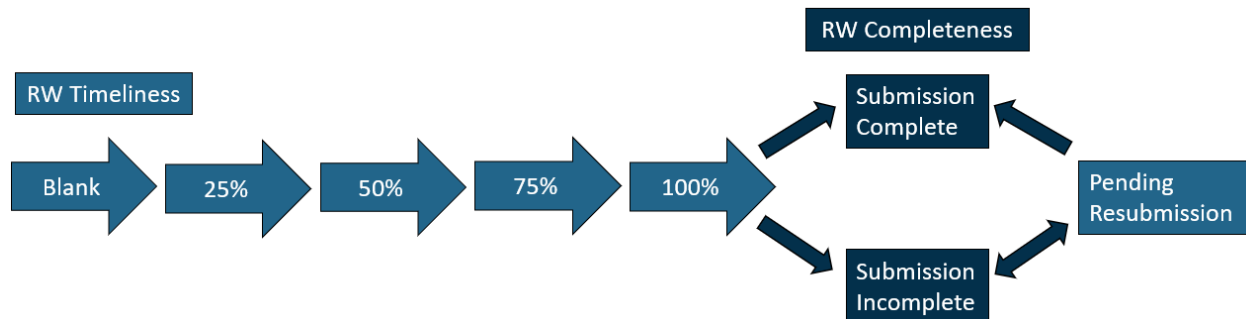


Figure 10: RW Completeness and Timeliness Process

### CCN Composition

The Change Champion Network (CCN) Composition (Figure 11) lists the count of uniquely filled roles, duplicate roles, and vacant role assignments.

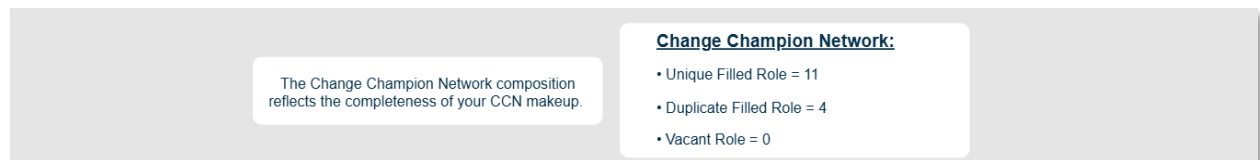


Figure 11: CCN Composition

### RW Task Completed or Open Items Section

The RW Tasks – Completed or Open Items section (Figure 12) 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
  - o 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 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 IUI 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 12: Readiness Workplan Tasks – Completed or Open

## Agency Reported Section

The Agency Reported section (Figure 13) 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                                                                                                                                                                   |             |                                                                                                                                                                                                                                              |                                                                                           |                         |             |                           |                                          |                                                |                                                |                                                |
| 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 Monitoring                                                                                                                                                          | 05/06/25    |                                                                                                                                                                                                                                              | Business Process Change                                                                   | Risk Title              | Increasing  | 6 (Medium/Hig             | Detailed Risk Background                 | Detailed Monitor/Mitigation Plan/Resolution    | Impact if Risk Becomes an Issue                | Actively working                               |
|                                                                                                                                                                              |             |                                                                                                                                                                                                                                              |                                                                                           |                         |             |                           |                                          |                                                |                                                |                                                |
| DEMO 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                                                                                                                                                                         | 09/26/25    |                                                                                                                                                                                                                                              | Critical - Impacts the ability of the agency to move forward with work without resolution | Business Process Change | Issue Title | Detailed Issue Background | Detailed Action Plan                     | 08/28/26                                       | Still an Issue                                 |                                                |
|                                                                                                                                                                              |             |                                                                                                                                                                                                                                              |                                                                                           |                         |             |                           |                                          |                                                |                                                |                                                |
| DEMO Assumptions                                                                                                                                                             |             |                                                                                                                                                                                                                                              |                                                                                           |                         |             |                           |                                          |                                                |                                                |                                                |
| Critical Operational Elements                                                                                                                                                | Status      | Assumption                                                                                                                                                                                                                                   |                                                                                           |                         |             | Date Logged or Removed    | Impacted Stakeholder(s) and/or System(s) | Reporting Period Comments for Sep. - Oct. 2025 |                                                |                                                |
| Technology                                                                                                                                                                   | Logged      | 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 cchanges according to the Florida PALM schedule. |                                                                                           |                         |             | 09/26/25                  | Agency Business Systems                  | Still an Assumption                            |                                                |                                                |
|                                                                                                                                                                              |             |                                                                                                                                                                                                                                              |                                                                                           |                         |             |                           |                                          |                                                |                                                |                                                |

Figure 13: Agency Reported Section

## Agency Sponsor Confirmation Section

The Agency Sponsor Confirmation section (Figure 14) allows for easy submission of the 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><a href="#">Privacy Notice</a>   <a href="#">Report Abuse</a></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 14: Agency Sponsor Confirmation Section