

# Bimonthly Agency Readiness Status Report

This report is a collection of Bimonthly Agency Readiness Status Reports as provided by agencies on a bimonthly basis, containing the status of the agency and enterprise remediation progress for each business system required for the Florida PALM Financials and Payroll deployment, in accordance with Proviso contained in the 2023/24 General Appropriations Act.

Reporting Period:

January – February 2024



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for AHCA

Readiness Workplan

AHCA Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Vacant

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 7

Duplicate Filled Role = 6

Vacant Role = 1

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 0.00%

Submitted Complete = 0

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflects the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 60.87%

Submitted On Time = 7

Submitted Late = 12

Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 7

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24			See Issue 001		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	12/22/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	02/09/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/13/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/28/24			
Indirect	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	02/09/24			
	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	3/11/2024 - Added one missing address	Submission Complete	03/11/24
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24	I changed an edit-share to cannot share but it was not updated when I reviewed it today.		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24					
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 30

Business Process Groupings = 12

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 67

Related Business Processes = 6

Related Reports = 31

Documentation Status:

Complete = 64 Partial = 2 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 23

Criticality:

High = 20 Med = 0 Low = 2 None = 1

Documentation Status:

Complete = 3 Partial = 15 Not Started = 0

Cataloged Interfaces = 18

Inbound Interfaces = 13

Outbound Interfaces = 5

Data

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

Current-State:

Unique FLAIR Data Elements = 82

Associated Unique Uses = 82

Continued Use - Yes = 1

Continued Use - No = 0

Associated Business Systems = 22

Cataloged Reports = 62

Criticality:

High = 59 Med = 0 Low = 0 None = 0



**Implementation:****Business Systems Planned for Integration = 23****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 10**

- Inbound Interfaces = 3

- Outbound Interfaces = 7

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**AHCA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	When SunFocus and other urgent operational events occur, resources will be shifted to focus on the operational events thereby impacting the completion of Florida PALM tasks (schedule).	Open	9 (High/High)	Production incidents and time sensitive activities will continue to interfere with the resource-tight bureau. Assume the risk and work with the PALM Project staff to identify when a deliverable will be late. Document each occurrence and continue working on Florida PALM tasks and activities.	On-going	11/02/23	Phyllis Wander
People	If Florida PALM project scope increases, the Agency's current LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	On-going	11/02/23	Phyllis Wander
People Processes	Loss of Institutional Knowledge - Matriculation of knowledgeable business process and the SunFocus Application resources will hinder the progress of the project thereby impacting the timely completion of Florida PALM tasks (schedule).	Open	6 (High/Medium)	Continue to document desk procedures and manual processes and systems as well as encourage cross-training of operational functions.	On-going	11/09/23	Phyllis Wander

**AHCA Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Technology	After requesting system documentation, the Vendor team has not provided any functional/system documentation for SunFocus to attach to Florida PALM Task 326. The task did not meet the scheduled due date of 10/27/2023.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	2/28/2024: Monitor the completion of Segment I and II updates to the documentation. Escalate	2/28/2024: Segment I updates were not included with the initial documentation. 2/23/2024: Met with the Vendor team and reviewed the documentation (in-progress). Initial documentation (Completion of Task 326) is expected before the end of the reporting period (February 29th). 2/9/2024: AHCA Management has reached out to the Vendor to address the need for system documentation.	01/15/24	Scott Ward
People Processes Technology	If the resources are not identified and on-boarded by the end of March 2024, 1) the Agency will not complete the tasks in a timely manner and 2) the Agency will not transition to Florida PALM in January 2026.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Immediate plan is to add an additional BA or Business Process Consultant to document the HR/Payroll processes and complete the tasks that were done for the Financials Wave.	3/11/2024: Initial round of interviews completed. 2/28/2024: Currently holding interviews. 2/9/2024: Resumes have been received and reviewed by the AHCA team. In the process of setting up interviews. 01/11/2024: Re-evaluated the advertisement and revised the eQuote documentation. Plan to post at the end of the week. 11/09/2023: Reviewed current resumes, but they did not have the specific skills we were seeking. Need to re-evaluate and resubmit a posting for the Staff Aug.	01/15/24	Abby Dunn/Phyllis Wander

**AHCA Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

**AHCA Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology	Weekly Change Champions Workgroup Meeting	01/24/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
People Processes Technology	Weekly Governance Meetings	01/29/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	



People Processes Technology	Weekly Change Champions Workgroup Meeting	01/31/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
People Processes Technology	Weekly Governance Meetings	02/05/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes Technology	Weekly Change Champions Workgroup Meeting	02/07/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
People Processes Technology	Weekly Change Champions Workgroup Meeting	02/14/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
People Processes Technology	Weekly Governance Meetings	02/19/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes Technology	Weekly Change Champions Workgroup Meeting	02/21/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
People Processes Technology	Weekly Governance Meetings	02/26/24	Bureau of Financial Services / Agency Business System / Agency Financial and Payroll Processes	To review highlights of weekly activities and bring risks and issues for resolution	
People Processes Technology	Weekly Change Champions Workgroup Meeting	02/28/24	Change Champions and SMEs	Planning for the transition of Florida PALM	
Technology	Florida PALM Documentation Review	02/22/24	Agency Business System	Planning for the remediation of Florida PALM	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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AHCA Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Sonya Smith	sonya.smith@ahca.myflorida.com	03/11/24
November - December 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	01/13/24
September - October 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	11/09/23
July - August 2023	Sonya Smith	sonya.smith@ahca.myflorida.com	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for APD](#)  
[Readiness Workplan](#)

APD Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Rose Salinas

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 11
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 99.57%

- Submitted On Time = 20
- Submitted Late = 0
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24	1/8 - CCN and SME's updated at today 1/22 - Noted all updates in place - however - APD Core Team Review to ID and try to eliminate the overlap 1/24 - sign off completed - review and complete in SS on 1/25		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	1/22 - Teams will be identifying and creating team lists for the FL PALM Users within their organization with user roles 2/1 - formulating plan for all roles/access/teams/level 2/14 - Users defined - listing in process 2/21 - Preparing to upload - defined	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/28 - PALM User Excel Spreadsheet received with updates for teams - finishing placing into Smartsheet by COB 2/29.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - Reviewing and updating based on Finance Team recommendations 2/21 - in progress		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - Teams individual review underway 2/21 - IT Team working 2/28 - new meeting review scheduled for 3/7		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/21 - IT Team sign off needed 2/28 - new meeting review scheduled for 3/7		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/27 - APD IT Team is working thru the Smartsheet for updates to columns/comments and status call is scheduled for 3/7 2/28 - new meeting review scheduled for 3/7		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT Team meeting with review of Smartsheet in progress 2/27 - APD IT Team is working thru the Smartsheet for updates to columns/comments and status call is scheduled for 3/7 2/28 - new meeting review scheduled for 3/7		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		2/5 - Start of review for TASK completion 2/14 - IT initiating the activities with new TD onboarding 2/27-APD IT Team is onboarding a new Technical support person to assist with focused IT support to include re-writes to scripting for interface of all APD ABS's 2/28 - new meeting review scheduled for 3/7		



N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24	2/13 - updated within Smartsheet - added Rohan/edit and share capabilities - status for the remaining is correct at this time		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24	3/8 - completed for this period		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p><u>Implementation:</u></p> <p><b>Planned Florida PALM End Users = 75</b></p> <ul style="list-style-type: none"> <li>• Business Process Groupings = 13</li> </ul> <p><b>Role Mapping = TBD</b></p> <p><b>Training = TBD</b></p>	<p><u>Current-State:</u></p> <p><b>Cataloged Business Processes = 253</b></p> <ul style="list-style-type: none"> <li>• Related Business Systems = 5</li> <li>• Related Reports = 32</li> <li>• <b>Documentation Status:</b></li> <li>- Complete = 254 Partial = 0 Not Started = 0</li> </ul> <p><u>Implementation:</u></p> <p><b>Impacted Agency Business Processes = TBD</b></p>	<p><u>Current-State:</u></p> <p><b>Cataloged Business Systems = 9</b></p> <ul style="list-style-type: none"> <li>• <b>Criticality:</b></li> <li>- High = 9 Med = 0 Low = 0 None = 0</li> <li>• <b>Documentation Status:</b></li> <li>- Complete = 8 Partial = 1 Not Started = 0</li> </ul> <p><b>Cataloged Interfaces = 78</b></p> <ul style="list-style-type: none"> <li>- Inbound Interfaces = 6</li> <li>- Outbound Interfaces = 1</li> </ul> <p><u>Implementation:</u></p> <p><b>Business Systems Planned for Integration = 9</b></p> <ul style="list-style-type: none"> <li>• <b>Segment I - Documentation Updates:</b></li> <li>- Complete = 0 Updating = 3 Evaluating = 0 Not Started = 0 Not Needed = 6</li> <li>• <b>Segment II - Documentation Updates:</b></li> <li><b>TBD</b></li> </ul> <p><b>Planned Interfaces = 18</b></p> <ul style="list-style-type: none"> <li>- Inbound Interfaces = 7</li> <li>- Outbound Interfaces = 11</li> </ul>	<p><u>Current-State:</u></p> <p><b>Unique FLAIR Data Elements = 480</b></p> <ul style="list-style-type: none"> <li>• <b>Associated Unique Uses = 1181</b></li> <li>- Continued Use - Yes = 1094</li> <li>- Continued Use - No = 57</li> <li>• <b>Associated Business Systems = 2</b></li> </ul> <p><b>Cataloged Reports = 112</b></p> <ul style="list-style-type: none"> <li>• <b>Criticality:</b></li> <li>- High = 150 Med = 18 Low = 1 None = 0</li> </ul> <p><u>Implementation:</u></p> <p><b>Configuration Workbooks = TBD</b></p> <p><b>Conversions = TBD</b></p>

### Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

APD Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	Data breach or unauthorized access in the cloud	Open	9 (High/High)	Implement strong encryption, access controls, and security protocols	Measurement: Number of security incidents - ongoing security effort	10/24/23	PALM Team/APD Project Team
People Processes	Training - Resistance to Change	Open	9 (High/High)	- Implement a robust change management plan. - Communicate the benefits of the new system. - Involve team members in decision-making.	-Teams will be attending focus group meetings 1st qtr 2024 - focus on how to embrace training to adjust to change	12/27/23	APD CCN
People Processes Technology Data	Training - Skill Gaps in the Legacy Team	Open	9 (High/High)	- Identify and prioritize training needs. - Create custom training modules. - Encourage knowledge transfer among team members.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed. within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly the same	IT Team will align to update and make required changes in the Business System arena	12/27/23	IT Team and APD Teams
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s)	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024	12/27/23	APD Teams
People	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after	- clean preparation	12/27/23	APD Financial Accounting



Processes Technology Data				migration. - Have contingency plans for reporting errors.	prior to and then checking team after - APD is in clean up mode going forward.		Team
People Processes Technology Data	Business Process Workflow - Incomplete Task Documentation	Open	6 (High/Medium)	- Implement standardized documentation procedures - 2/6 - Teams working with new Business Analyst to update and fully document to the PALM Process Documentation and narratives - 1st and 2nd qtr 2024	- Regularly review the completeness of task documentation during monthly team meetings. APD Teams to review and update all documented Business Process Workflows with team workshops thru 1st qtr of 2024	02/06/24	APD Core Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM	12/27/23	APD IT Team
People	Lack of Training and Awareness	Open	6 (High/Medium)	- Provide regular training sessions for team members on documentation best practices.	- Maintain a record of training attendance and monitor improvements in documentation quality. October 2023 - bringing awareness to the PALM Team activities with participation in the design and build sessions hosted by the PALM Team. -ongoing	10/24/23	PALM TEAM and APD Teams
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024	10/24/23	APD IT Team
People Processes	Timing in Financial accounting arena - Loss of Productivity During Transition	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping systems if possible.	-Teams will be attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule	12/27/23	APD TEams
People Processes Data	COA - use of fields difference and alignment	Open	6 (High/Medium)	- understanding the structure and organization of the new chart of accounts. This includes identifying the categories, segments, and account codes used in the new system.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reconciliation of differences between old and new	Open	6 (High/Medium)	- Identify any discrepancies between the old and new charts. This may involve accounts that no longer exist in the new chart or new accounts that have been introduced.	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Data	COA - Reassigning account codes - old to new - new to old	Open	6 (High/Medium)	- Assign account codes from the new chart to the old accounts based on the mapping. Ensure that the new account codes align with the new chart's structure. Understanding the accounting behind the accounts and aligning correctly	-APD teams will continue with focus groups for team participation and understand as a whole	12/27/23	APD Teams
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase	02/06/24	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system - 2/6 - continue with awareness/participation/information sharing	Measurement: Employee feedback and adoption rate - ongoing	02/06/24	PALM Team/APD Project Team
Processes Technology Data	Incompatibility with existing systems	Open	4 (Medium/Medium)	Perform compatibility testing, ensure seamless integration with other systems - 2/6 - IT Team reviewing Tasks/Strategy	Measurement: Number of integration issues noted: Business system's activities to be defined by IT team	02/06/24	PALM Team/APD Project Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate	01/26/24	ALL APD Finance and IT Teams



People Processes Technology Data	Lack of Stakeholder Involvement - CCN and SME's	Open	3 (High/Low)	- Engage stakeholders in the documentation process to gather necessary information.	- Document stakeholder involvement and address any issues in weekly status reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Changes in Regulations	Open	3 (High/Low)	- Establish a regulatory monitoring system and update documentation accordingly.	- Provide updates on regulatory changes in real-time and include them in monthly compliance reports. - ongoing	10/24/23	APD Core Team
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review	12/27/23	APD Core Team
People Processes Technology Data	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda	12/27/23	IT Team
People Processes	Non-compliance with data privacy regulations/APD Client	Open	1 (Low/Low)	Conduct thorough legal review, ensure adherence to applicable regulations	Measurement: Compliance audit results - ongoing	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase	10/24/23	PALM Team/APD Project Team
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	APD Grant Field	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	APD does NOT have Grants - however the grant field in FLAIR is used as an indicator - and the data in this field needs to be converted to PALM but needs to be corrected/mapped/correctly for PALM so that it does not land in the grant field. Fix before migration. Determined to use OA2 and team is focused on corrections in FLAIR at this time.	2/29 - Revenue Team is in review and walk thru exercises are in progress to determine fix prior to data migration	12/31/24	APD finance Team/APD Revenue Team/BA/PM
People Processes Technology Data	APD has limited resources and challenged with the effort to gain APD PALM Aligned support - Business Analyst and Tech Developer will or could cause a delay in completed fulfillment of Tasks at this time - with the resources we will be able to catch up and move forward.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Team is working to get the needed funds final approval and placement within the APD Budget - Amendment(s) have been required to fulfill	on-going until personnel can be hired -12/27 BA hired and Developer in process of being found -2/6 - BA start Date = 2/20 -2/6 - Tech Support pending	03/29/24	APD Sponsor and Finance Team
People Processes Technology Data	APD is the process of initiating some organizational alignment changes within the agency.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD teams are effected with any organizational change for accounting and financial alignment. The agency is keeping everyone aware so that there are no impacts as APD aligns with the new COA and system set up for PALM	Awareness is key and APD is keeping an open communication line to highlight any accounting impacts with organizational changes. 2/29 - reviewing and aligns with the new Task Talk overview - noted	06/28/24	APD Sponsor and Finance Team
People Processes Data	APD Finance G/L Team - final PALM Chart of Accounts listing provided for workbook	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD Milestone to complete a mapping exercise that will align the APD G/L (Full COA) with the newly structured COA List and Descriptions. Target Goal (First Run) by January 31, 2024 - 2/6 - new task 513 - to accomplish Workbook initiatives for PALM - in progress	This is will be an on-going APD Team will be working to align old to new - 2/6 - COA meetings to review and support Task 513 - Finance Team 2/29 - asset mgmt team is engaged for location inventory	03/29/24	APD Finance Team
People Processes Technology Data	APD Location Identifier - Asset Mgmt Team	Open	High - Impacts the ability of the agency to meet deadlines or milestones	APD uses the Location Identifier for purposes that are tied to Warrants and the delivery of warrants to the correct site location. There is a need to clean this up and a better understanding of the use in PALM is being reviewed with questions and support from the PALM team	2/29 - meetings to discuss planned for 2/29 - so that the worksheet updates can be supported by the Asset Management Team	07/01/24	APD AM Team - BA - PM - Core Team

APD Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	The vendor-directed project plan aligns with the requirements and objectives outlined in the state government regulations and legislative directives specific to APD.	Logged	09/06/23	PALM Project Team/APD Project Team	On-Going with PALM Team Readiness Plan	
People Processes Technology Data	Sufficient resources, including personnel and infrastructure, will be available to support the implementation by APD and will require additional resources as defined by the PALM project Plan for Conversion	Logged	09/06/23	PALM Project Team/APD Project Team	Working on Task 503 - In progress	



People	The state government will continue to provide the necessary cooperation and support for the project's success along with our APD Sponsor support.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going
People Processes Technology Data	The PALM vendor has expertise in implementing cloud-based financial systems and complying with state government regulations with APD looking to gain information and support from the PALM teams as needed or required.	Logged	09/06/23	PALM Project Team/APD Project Team	On-going with Amendment 8 approved - move forward with PALM Directives as defined
People Processes Technology Data	Financials, Payroll, and Data Warehouse will be implemented at one time in January 2026	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	All agencies will transition together.	Logged	09/06/23	PALM Project Team/APD Project Team	To be focused at conversion timeframe at 4th qtr. of project
People Processes Technology Data	Agencies/APD will have significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT)	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	The Florida PALM production sandbox will continue to be a copy of the current production environment and will be updated in January 2026 for this major implementation	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is outlined by PALM
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters		02/28/24	APD Project Team/APD IT Team	Accounting Alignment
People	APD Organizational Structure is fully defined and corelated to the correct org code by personnel alignment - updated by HR		02/28/24	APD Project Team/APD IT Team	Organizational Alignment
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.		02/28/24	APD Project Team/APD IT Team	

APD Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/04/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/11/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/18/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	01/25/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/01/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/08/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/15/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/22/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD Specific - CORE Team Status Update Weekly Call/email report	02/29/24	APD Core Team = Rose/Sponsor - Dee/Agency Liaison - Ramon/Advisory Council Member - Becky/Project Mgr - Hayley Bobich - Business Analyst	Weekly Call - Review status/updates	Awareness/Task Review/Updates regarding Teams/PALM Participation - adding new Business Analyst
People Processes Technology Data	APD - January 2024 - High Fives	01/23/24	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight
People Processes Technology Data	APD - February 15, 2024 - High Fives	02/16/24	APD Finance Teams as a whole	APD Communication Plan	Taking the 5 critical APD needs to know topics and providing links, knowledge, updates, insight



People Processes Technology Data	APD - HR and Finance Team review of Task 508	01/08/24	APD Finance Team/APD HR Team - review of Task 508 for HR Business Process Documentation	APD teams to understand the deliverables for the task - review and go over sample	APD HR discussion of the business process documentation and where the internal resources were and how to get the spreadsheet completed by the due date for upload by Becky.
People Processes Technology Data	APD COA preparation meeting	01/22/24	APD Teams - All	Understand the ChartFields/structure and the mapping of the G/L from FLAIR to new structure	Reviewed resources and understanding from the COA provided by PALM
People Processes Technology Data	APD Budget Team PALM Review	01/24/24	APD Budget Team/PM	Budget Team Meeting to review and discuss PALM Initiatives, Task Review. Project support review within APD.	1. Budget Team Meeting will be scheduled routinely: 4th Wed. of every month going forward: 10 am est. Meeting invite has been updated and sent. 2. Budget Team Participation for the COA/Chart of Accounts Activity – to be included in meetings
People Processes Technology Data	APD - PALM RC review	02/08/24	APD PM/PALM RC	Review open questions and status -	Non routine meeting review for monthly touchpoint preparedness
People Processes Technology Data	APD IT Team - Task Review meeting	02/14/24	APD IT Team	Review new Tasks from PALM Agency Readiness site	shared all documentation from Knowledge Center
People Processes Technology Data	APD - Overview of processes Meeting	02/20/24	APD Accounting Teams - New BA	New Business Analyst onboarding	Current State - updates and overview for APD and new BA
People Processes Technology Data	APD All Hands meeting	02/21/24	APD Accounting Teams - All	Monthly ALL Teams meeting in person	Great overview - including all regions and facilities
People Processes Technology Data	Asset Accounting and Management Team	02/22/24	APD Asset Accounting Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Regions Team	02/27/24	APD Regions Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Payroll Team	02/28/24	APD Payroll Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Contract Team	02/28/24	APD Contract Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	Facilities Team	02/29/24	APD Facilities Team - PM and BA	Monthly Meeting for team to review and discuss PALM updates/issues/new information	Team meeting
People Processes Technology Data	PM Collaboration Call - Commerce	02/28/24	APD PM - Commerce PM	Discuss progress - share updates and information	agency collaboration
People Processes Technology Data	APD Grant Field Overview	02/28/24	APD Revenue Accounting Team and BA/PM	Review the APD use of the Grants field and the need to update and change and handle prior to conversion - update in FLAIR - not a Grant	Agency updates
People Processes Technology Data	APD BA and PM - Review Weekly Status	02/29/24	APD BA/PM	Review weekly information and updates	Agency Review
People Processes Technology Data	APD Asset Management Team Workbook Task	02/22/24	APD BA/PM/AM Team	Area ID identifier - inventory overview and actions for update to deliver to the team for completion	Agency Task Review
Processes Technology Data	APD IT Team meeting - Business Systems review	01/04/24	APD - Ramon Evans/Rohan Mehta/Becky Morris	Smartsheet review for updates asked of PALM Team	Work in Smartsheet
People Processes	APD Strategy Review - Sponsor	01/16/24	APD Sponsor and Project Manager review of APD effort/team participation and align strategy	PM validate the direction APD is going with the Sponsor and review status	Agreement on the direction and alignment with teams to their responsibilities with readiness
People Processes	APD - PALM Documents updates	01/29/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD - PALM Documents updates	01/30/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD - PALM Documents updates	01/31/24	APD Core Team - APD Project Manager	Update and load to Smartsheet those documents that are specific to PALM Requests	Risks/Issues/Assumptions/Workforce Readiness Pain/Implementation Timeline
People Processes	APD Teams Calendar review	02/07/24	APD Finance Teams/APD PM	Update and complete the Calendar for teams review	Documenting for all teams - activities and events for timeline preparation
People Processes	APD PALM Workforce Readiness Plan updates	02/21/24	APD PM/PALM RC	Update Workforce Readiness plan for PALM Team per their request	Updated file attached
People Processes	APD COA - Review and plan with Finance Teams	02/14/24	APD Financial Reporting team	Alignment of the current G/L and COA to the new PALM ChartField structure - how to update	APD initiative to prepare for what should be cleaned/updated/corrected/changed

#### Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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#### APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Rose Salinas	rose.salinas@apdcare.org	03/08/24
November - December 2023	Rose Salinas	rose.salinas@apdcare.org	01/10/24
September - October 2023	Rose Salinas	rose.salinas@apdcare.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcare.org	09/11/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for CITRUS

Readiness Workplan

CITRUS Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Christine Marion

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 2

Duplicate Filled Role = 12

Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 96.09%

Submitted On Time = 17

Submitted Late = 3

Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 7

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24	Voucher print program has been replaced, no agency business system interfaces will be needed.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24	No interface needs are identified at this time.		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/23/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/09/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	03/01/24			
Indirect	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/14/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 9

Business Process Groupings = 11

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 31

Related Business Systems = 3

Related Reports = 42

Documentation Status:

Complete = 31 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 4

Criticality:

High = 4 Med = 0 Low = 0 None = 0

Documentation Status:

Complete = 4 Partial = 0 Not Started = 0

Cataloged Interfaces = 2

Inbound Interfaces = 2

Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

Associated Unique Uses = 70

Continued Use - Yes = 21

Continued Use - No = 0

Associated Business Systems = 2

Cataloged Reports = 54

Criticality:

High = 31 Med = 12 Low = 5 None = 0



**Implementation:****Business Systems Planned for Integration = 1****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 1**

- Inbound Interfaces = 0

- Outbound Interfaces = 1

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**CITRUS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Due to size of agency and small accounting staff, same person must have multiple roles or back up roles	Open	6 (Medium/High)	WE have requested a Budget Amendment to provide funding for travel, for OPS Subject Matter Expert, and possible hiring of a project manager.	Appropriation for Additional funding was granted in CATF. This trust fund does not have sufficient fund balance to support using these funds. They will be reverted.	11/01/23	C Marion
People	New IT staff with no knowledge of PALM	Open	2 (Low/Medium)	We have one IT support staff member, and he was not here for the CMS Wave of PALM, and has no knowledge of PALM.	Attended Tech Town Hall on Sept 19, and added George to future PALM team meetings. Update as of Jan 2024: There have been no training or information sessions targeted for technical support. We are unsure of the role our technical support person will play in PALM. He has very little to do with FLAIR,	09/19/23	C Marion

**CITRUS Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Citrus does not have a dedicated project manager to ensure all PALM activities are completed, Tasks are updated, and staff is provided direction.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Without additional project funding, staff will complete tasks as time allows.	Funding for PALM for Citrus has been included in Senate and House bills, pending the conference process. This funding would be available 07/01/24. We will be watching the budget process until final approval by Governor.	07/01/24	CCN
Technology Data	Citrus uses a voucher print program that was written in-house and is not documented	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Citrus will research possible voucher print programs other agencies are utilizing, and determine if there is one that meets our needs	Eform application installed on Dec 28th to replace in-house voucher print program	01/01/24	IT

**CITRUS Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	PALM sandbox will be available to all CCN members prior to go-live	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	Citrus staff has been granted access to sandbox, but only with same access as Production
People Processes Technology Data	Agencies will be given sufficient time to test and practice critical transactions before go-live in a dedicated testing environment	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	We have access to sandbox, but only with current rights (for CMS Wave). At some point, it would be great if we could go in and "explore" in the sandbox.
People Processes Technology	General Revenue Funding will be made available for Agency support of the PALM project	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	GR funding has not been made available to Citrus. CATF does not have sufficient fund balance to absorb additional costs
Processes Technology Data	Reporting will be available at go-live to support our business needs	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	No updates on Reporting at this time
People Processes Data	Data fields will be provided to support all components Citrus currently uses (such as OCA's)	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Staff continues to attend workshops, and will begin attending in person as we are able in January.
Processes Technology Data	The PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	PALM team has assured us that enterprise programs will integrate at go-live.
People Processes Technology	Citrus assumes the PALM Team will provide both in-person, on-line, and recorded training for CCN's and all accounting staff	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	This assumption will remain until UAT and/or training begins
People Processes Data	Vendor maintenance done outside of PALM in AOD	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	This assumption will remain until more information released

**CITRUS Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Discussion with OPB	01/03/24	Christine, OPB	Discuss options for receiving GR funding for FY2024-25	Discussed amended LBR submittal. OPB suggests sending document stating needs rather than submitting as an amendment, anticipate FY2024-25 to be administered funds
People Processes	PALM Team Meeting	01/04/24	Lucy, Christine, Kay, Angela, Melissa	Update on tasks due in January, plan for office coverage while Kay and Lucy are in Tally at PALM design workshops	Although we were sent a link to register for the design workshops remotely, we decided it would be good to attend in



					person this time. Executive Director Shepp dropped in on the meeting, to encourage staff and let them know she appreciated their efforts and teamwork.
People Processes	Citrus Touchpoint Meeting	01/22/24	Lucy, Kay, Christine, Melissa, George attended	see agenda for details	
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/10/24	Kay, Lucy	In-person workshops in Tally for Process and Manage Payments	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/11/24	Kay, Lucy	In-person workshops in Tally for Asset processes	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/16/24	Kay, Lucy	In-person workshops in Tally for Deposit and apply receipts	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/17/24	Kay, Lucy	In-person workshops in Tally for	Lucy and Kay attended in person
People Processes Technology	Attend Segment II Design Workshops in Tallahassee	01/18/24	Kay, Lucy	In-person workshops in Tally for enter and process journals	Lucy and Kay attended in person
Processes	Meetings to review Payroll Business Process Models	01/23/24	Lana, Christine, Kay, Lucy	review and document our questions regarding the payroll wave models	Several meetings were held with the team as noted. Notes were written up and attached in task tracker

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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CITRUS Status Report Confirmation				
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:	
January - February 2024	Christine Marion	cmarion@citrus.myflorida.com	03/08/24	
November - December 2023	Christine Marion	cmarion@citrus.myflorida.com	01/09/24	
September - October 2023	Christine Marion	cmarion@citrus.myflorida.com	11/09/23	
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23	



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for COM](#)  
[Readiness Workplan](#)

COM Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Tisha Womack

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

**Change Champion Network:**

- Unique Filled Role = 9
- Duplicate Filled Role = 3
- Vacant Role = 2

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

**RW Task Completeness:**

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

**RW Task Timeliness:**

Score = 96.09%

- Submitted On Time = 17
- Submitted Late = 3
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Meeting Participation:**

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	SME is compiling business process groupings and hopes to have complete by noon on 3/1/2024.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress		Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Dean Modling has created a cleansing plan and reviewed with Tisha Womack (Sponsor), Lemuel Toro (Agency Liaison) and myself (Project Manager) to formulate an internal plan. Clean up work has started with our Grants Management team.		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress		Had task kick-off meeting. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Had task kick-off meeting on 2/21/24. Task will be managed using Microsoft Teams. Team workspace created in Teams to include important documents, videos, and space for team communication.		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					



People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<b>Implementation:</b> <b>Planned Florida PALM End Users = 44</b> • Business Process Groupings = 12 <b>Role Mapping = TBD</b> <b>Training = TBD</b>	<b>Current-State:</b> <b>Cataloged Business Processes = 61</b> • Related Business Systems = 8 • Related Reports = 31 <b>Documentation Status:</b> - Complete = 18 Partial = 40 Not Started = 3  <b>Implementation:</b> <b>Impacted Agency Business Processes = TBD</b>	<b>Current-State:</b> <b>Cataloged Business Systems = 26</b> <b>Criticality:</b> - High = 7 Med = 18 Low = 0 None = 1 <b>Documentation Status:</b> - Complete = 4 Partial = 22 Not Started = 0 <b>Cataloged Interfaces = 0</b> - Inbound Interfaces = 0 - Outbound Interfaces = 0  <b>Implementation:</b> <b>Business Systems Planned for Integration = 23</b> <b>Segment I - Documentation Updates:</b> - Complete = 23 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 <b>Segment II - Documentation Updates:</b> TBD <b>Planned Interfaces = 14</b> - Inbound Interfaces = 1 - Outbound Interfaces = 7	<b>Current-State:</b> <b>Unique FLAIR Data Elements = 71</b> <b>Associated Unique Uses = 84</b> - Continued Use - Yes = 2 - Continued Use - No = 12 <b>Associated Business Systems = 2</b> <b>Cataloged Reports = 373</b> <b>Criticality:</b> - High = 2 Med = 0 Low = 0 None = 0  <b>Implementation:</b> <b>Configuration Workbooks = TBD</b> <b>Conversions = TBD</b>

### Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

COM Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	Delegated some day-to-day activities to staff members not directly involved with PALM. This change allows CCN team members some time to work on PALM each week.	03/08/24	Caroline (Tisha) Womack / Lemuel Toro
People	SMEs who will provide vital support to PALM project during Segment IV workshops/meetings may also be needed to complete Financial Statement and Legislative Budget Request (LBR) tasks during the May 2024 - September 2024 window.	Open	6 (Medium/High)	Identify SMEs and SME backup team members.	No updates at this time.	03/08/24	Lemuel Toro / Lisa Simpson
People	Staff turnover and retention rates negatively impact Commerce's ability to gain and retain talent beneficial to PALM project and agency	Open	4 (Medium/Medium)	Leadership efforts to recruit agency resources to support Commerce business goals and PALM initiatives as needed	Ongoing risk.	02/29/24	Caroline (Tisha) Womack / Human Resources
People	Budget Chief position not filled	Closed	3 (High/Low)	Leadership will hire new Budget Chief.	Budget Chief position filled as of February 2024	02/29/24	Caroline (Tisha) Womack

COM Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Insufficient work hours available to fully support Commerce specific PALM initiatives because existing staff are at capacity with regular hours	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Currently awaiting legislative budget amendment approval	Awaiting Legislative budget amendment approval	01/31/24	Caroline (Tisha) Womack (Sponsor)/ Lemuel Toro

COM Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	Common understanding of PALM project goals	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations	
People	Common understanding of PALM PMO expectations	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	Partner with PALM teams to ensure consistent understanding of task requirements and expectations	
People Processes Technology Data	Sufficient engagement by resources knowledgeable about Commerce business processes and technical capabilities	Logged	11/08/23	Commerce Stakeholders and Agency Business Systems	PALM specific team meetings	
People Processes Technology Data	New project manager will understand PALM project sufficiently enough to provide proper guidance within a short amount of time	Logged	11/08/23	Commerce Stakeholders	PM attends PALM Project Management Forums and other virtual/face-to-face PALM specific training opportunities	
People Processes Technology Data	Florida PALM PMO will provide timely decisions on items impacting project scope and schedule	Logged	11/08/23	Commerce Stakeholders	Attend PALM specific virtual/face-to-face meetings	
People Processes	PALM will have a reconciliation solution to identify differences between modules and general ledger at go-live	Logged	12/14/23	Commerce Stakeholders	Attend PALM meetings and collaborate with PALM technical team	



COM Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	Grant Listing for PALM Cleanup	01/31/24	Grants Management	Formulate plan of action to clean-up old grants	Plan discussed and pre-planned.
People Processes Technology Data	Task 504 & 505 Planning Review (PM & BL)	01/04/24	ABS/Interfaces; Commerce SMEs	Select/plan for ABS interfaces needed for Task 504 & 505	Reviewed Task 504 & 505 in Smartsheet. Formulated plan to engage other managers and gain feedback on interface selection for each area.
People Processes Technology Data	Review Payroll Wave Business Process Models	01/08/24	Finance & Accounting SMEs; HR Payroll SMEs	Discussed PALM Payroll BPM	Reviewed PALM payroll information with team.
People Processes Technology Data	Review Payroll Wave Business Process Models	01/19/24	Finance & Accounting SMEs; HR Payroll SMEs	Unpack task instructions to gain clarity on task completion requirements	Met to get progress of team.
People Processes Technology Data	Commerce Internal Clean Up Project Preplanning Meeting	01/23/24	Finance & Accounting Staff	Preliminary Clean Up Project planning	Plan discussed and pre-planned.
People Processes Technology Data	Contract Information File -- Lemuel's Office	02/05/24	Contracts Management	Discuss contract information needs & clean up tasks	Task is ongoing as part of Task 514 clean up.
People Processes Technology Data	Reconciliation Meeting (Task 514 Clean Up)	02/26/24	Finance & Accounting	Monitor/plan agreements with State Accounts	Lead SME met with team member to discuss task requirements. Task is ongoing as part of PALM Task 514.
People	PALM Weekly Update Meeting	02/07/24	Finance & Accounting	PALM project updates (current tasks & resources)	Reviewed PALM Project implementation timeline, knowledge center and other PALM specific resources, as well as high-level Commerce PALM task progress of current tasks.
People	PALM Tasks 512 - 519 Planning	02/08/24	Finance & Accounting	Identify functional/technical team members based on task requirements.	Met with Business Liaison to discuss preliminary task requirements.
People	PALM Manager's Meeting	02/08/24	Finance & Accounting Staff	Determine internal team resource needs to support Commerce Clean Up activities and, ultimately the PALM project.	CFO met with all managers to discuss critical needs of each F&A area based on time and resource allocation.
People	Grant Listing for PALM Cleanup -- Tisha's Office	02/15/24	Finance & Accounting Staff	Determine internal team resources needs to support Commerce Clean Up activities and, ultimately the PALM project.	Internal team assembled to assist in grant clean-up efforts in support of Task 514.
People	Task 512 - 515 Planning -- Lisa's Office	02/19/24	Finance & Accounting	Identify technical and other resources needed to complete task.	Met to identify necessary SMEs based on task requirements. Team also discussed preliminary meeting(s) dates.
People	Tasks 516 - 519 Kick Off	02/20/24	Finance & Accounting	Identify technical and other resources needed to complete task.	Reconvened to review task requirements and include additional SMEs.
People Processes	Review Payroll Wave Business Process Models FOLLOW UP	01/22/24	Payroll Management	Discuss PALM technical documents for current tasks	Discussed lessons learned as a result of Review Payroll Wave Business Process Models meeting on 1/8/2024.
People Processes	Grants Clean Up Team	02/16/24	Grants Management Team	Clean up old grants in preparation of transition to PALM	Small team of SMEs will work overtime to complete clean up of old grants. This work is in support of Task 514.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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COM Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	03/08/24
November - December 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	01/11/24
September - October 2023	Caroline (Tisha) Womack	tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DACS

Readiness Workplan

DACS Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Alan Edwards

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 14

Duplicate Filled Role = 0

Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 100%

Submitted On Time = 20

Submitted Late = 0

Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 8

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24	Internally managed risks, issues, and assumptions, which will be added to the Bimonthly status report. FDACS implementation schedule is actively reviewed and updated. 2-29-2024		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	Submitted. 3-1-2024	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/08/24	Submitted 3/8/2024		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24	Submitted on 3/11/2024		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	25% - Beginning Initial Internal Meetings and Information Gathering				

People

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

Implementation:

Planned Florida PALM End Users = 604

Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 243

Related Business Systems = 6

Related Reports = 10

Documentation Status:

Complete = 243 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 49

Criticality:

High = 27 Med = 13 Low = 6 None = 3

Documentation Status:

Complete = 48 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

Inbound Interfaces = 28

Outbound Interfaces = 14

Data

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

Current-State:

Unique FLAIR Data Elements = 70

Associated Unique Uses = 70

Continued Use - Yes = 50

Continued Use - No = 19

Associated Business Systems = 6

Cataloged Reports = 221

Criticality:

High = 85 Med = 56 Low = 17 None = 51



**Implementation:****Business Systems Planned for Integration = 16****• Segment I - Documentation Updates:**

- Complete = 3 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 12

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 20**

- Inbound Interfaces = 9  
- Outbound Interfaces = 11

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities table below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DACS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	There is a mismatch between the Interface Layout and sample data files provided by the PALM team. It means that the sample data files are inconsistent with the interface layout. As the result, many times it's not possible to develop and test the interfaces.	Open	9 (High/High)	For the purposes of testing the interface, the sample data file is manually modified to fit the interface layout so the interface process could be tested. However, it means this is no longer a true test.	Reviewed Monthly	02/20/24	Rosemarie Zubler

**DACS Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**DACS Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	Funding for staff augmentation and services will continue through implementation and Hypercare.	Logged	08/31/23	Software remediation and Chart of Accounts crosswalk transitioning from FLAIR to PALM.	Continuing to monitor
Data	Division reporting needs currently handled by Data Warehouse will be taken care of by user roles for Information Warehouse or PALM reports.	Logged	12/19/23	Division fiscals, Finance and Accounting, OPB, Purchasing, Payroll	Will monitor as FL PALM releases additional information.
Data	Contract numbers in FL PALM and agency business systems will use current values with 5 zeroes at the beginning (for 10 digit PALM COA Contract number).	Logged	12/19/23	Purchasing, Finance and Accounting, Division fiscals, OPB; AIMS	Will monitor as FL PALM releases additional information and agency develops internal Agency Business System remediation.
People	The Florida PALM team will be able to provide timely and complete requirements for the transition to Florida PALM with sufficient detail and time to implement the changes according to the Florida PALM schedule	Logged	11/13/23	FDACS PALM Readiness Team, CCN, all FDACS key stakeholders, PALM/impacted Agency Business System end users	Will monitor as FL PALM releases additional information.
Processes	Work efforts of staff augmentation resources are undertaken to collectively achieve a broader understanding of the totality of work that must be accomplished to meet all Critical Success Factors. As such, the deliverables outlined in the Operational Work Plan are critical, and the FDACS PALM Transition Readiness Team assumes that the deliverables are accurately and thoroughly defined and reflect the necessary Level of Effort to achieve all transition tasks and activities. Work efforts under the deliverables may adjust to accommodate operational variances, but the deliverables are fixed.	Logged	11/13/24	Staff Augmentation; FDACS PALM Readiness Team, CCN	Will continue to monitor.

**DACS Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Chart of Account: PALM Organization value development	01/10/24	Direct: Finance and Accounting, Indirect: All Employees	Chart of Account: PALM Organization value development	
Data	Task 514 Data Cleanup preliminary approach meeting	02/02/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisor	Discuss agency data cleanup approach	
Data	Potential PALM COA Changes	02/07/24	F&A Bureau Chief and Assistant Chief, PALM Director, Financial Management Supervisor	Discuss PALM Chart of Account methodology and FLAIR/ABS to PALM Crosswalk	
Data	Task 514 Data Cleanup Grants discussion	02/09/24	PALM Director, Grants Supervisors	Discuss Task 514 Data Cleanup approach, current data readiness, data cleanup plan, and internal timelines	
Data	Task 514 Data Cleanup Encumbrances discussion	02/09/24	PALM Director, Finance and Accounting Disbursements and Travel Supervisors, Purchasing Supervisors	Discuss Task 514 Data Cleanup approach, current data readiness, data cleanup plan, and internal timelines	
Data	Task 514 Data Cleanup Customers discussion	02/14/24	PALM Director, Finance and Accounting Revenue Supervisors	Discuss Task 514 Data Cleanup approach, current data readiness, data cleanup plan, and internal timelines	
Data	Task 514 Data Cleanup Assets and Property discussion	02/16/24	PALM Director, Finance and Accounting Property and Financial Management Supervisors	Discuss Task 514 Data Cleanup approach, current data readiness, data cleanup plan, and internal timelines	
Data	COA Methodology	02/29/24	F&A Bureau Chief, PALM Director, Admin IT	Discuss approved COA Methodology, documentation of approval, and communication to IT and SMEs	
People Processes Technology Data	Division of Administration AIMS/PALM Integration Meeting	01/23/24	Division of Administration (F&A, Admin DIO (IT), General Services/Purchasing, Professional and Organizational	Discuss future processes for AIMS (Agency Business System) transition to PALM.	



			Development)		
People Processes Technology Data	Florida PALM Advisory Council	01/24/24	Advisory Council Member, Technical Liaison, Change Managment Liaison,	Receive PALM Updates and communicate take-aways internally	
People Processes Technology Data	PALM Activities Review	01/25/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	
People Processes Technology Data	Finance and Accounting Chief Office PALM Update	01/29/24	F&A Bureau Chief and Assistant Chief, PALM Director	Discuss PALM End Users approach, questions for Readiness Coordinator, Risk 002, PALM Resources, expenditure code object analysis, PALM Management Workgroup dashboard and Calendar layout,	
People Processes Technology Data	PALM Activities Review	02/01/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	
People Processes Technology Data	Finance and Accounting Chief Office PALM Update	02/01/24	F&A Bureau Chief and Assistant Chief, PALM Director	Discuss current Task status and steps for agency completion, review Implementation schedule	
People Processes Technology Data	Review/Update Agency Readiness Activities for the upcoming Bi-monthly Agency Report	02/06/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	Review the agency readiness activities for January 2024	
People Processes Technology Data	PRT Dashboard Calendar Discussion	02/08/24	PALM Director, PRT Project Manager, OATS	To discuss the status and any needed clarification of the following: Calendar for FL PALM Tasks, PRT deliverables, and Agency-readiness activities; From a SharePoint list with a calendar view; planned start and finish dates; A link on the Power BI PALM dashboard	
People Processes Technology Data	Division of Administration Leadership PALM Update	02/15/24	Administration Director, Assistant Director, Finance and Accounting Bureau Chief, PALM Director, OPS PALM position	Discuss status of PALM Tasks, PALM Resources needed, Internal approval process	
People Processes Technology Data	FL PALM Advisory Council	02/21/24	Advisory Council Member, Technical Liaison, Change Managment Liaison,	Receive PALM Updates and communicate take-aways internally	
People Processes Technology Data	Finance and Accounting Chief PALM Update	02/22/24	Finance and Accounting Bureau Chief and Assistant Chief, PALM Director, OPS PALM Position	Review PALM Resources needed, COA Methodology, JAD Session expectations, PALM Tasks status, Review Task 515 supplemental FDACS Guidelines, configuration workbooks planning, upcoming PALM Managment Workgroup agenda items	
People Processes Technology Data	PALM Admin Leadership Meeting	02/26/24	Administration Director, Assistant Director, Finance and Accounting Bureau Chief and Assistant Bureau Chief, PALM Director, OPS PALM Position	PALM Project management weekly summary approval, CCN Town Hall attendees, AIMS Launch date decision point, COA Methodology, JAD Session expectations, Risks, Issues, Assumptions, Decision Points, Action Items, Calendar, Resources needed, Vacancies, Configurations task, PALM Task status overview	
People Processes Technology Data	Agency Sponsor Meeting	02/27/24	Leadership	Agency Sponsor PALM Update	
People Processes Technology Data	PMW Weekly Summary Reporting	01/01/24	PALM Management Workgroup [Administration (Finance and Accounting, Admin IT, Purchasing/General Services), OATS, PRT, FNW FANS Technical team, Payroll, Office of Policy and Budget, Leadership]	Provide status of PALM Tasks, Deliverables, and agency readiness tasks; Provide notice for upcoming meetings and current decision points; Report accomplishments for both business and technical side of PALM project management; Provide other project updates as needed	Every Monday
People	COA Crosswalk Requirements and Development Meeting	01/08/24	Administration, Finance & Accounting, OATS, PALM Remediation Team	The purpose of this meeting is to discuss the COA Crosswalk Requirements and Development approach.	
People	Tuesday Task Talk	01/09/24	Finance & Accounting, PRT	Review of the instructions for PALM Task 511; Communicate updates	Participate Weekly.
People	Tuesday Task Talk	01/16/24	OATS, Finance & Accounting	Review of the instructions for PALM Task 512	Participate Weekly.
People	Task 512 Communication	01/17/24	PALM Management Workgroup	Share newly released Task 512 Instructions, and Task Talk	
People	Attended Segment II Design Workshop-Grants Management/Contracts Management/System Access Controls	01/17/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
People	Attended Segment II Design Workshop-Accounts Management and Financial Reporting	01/18/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
People	Thursday Task Talk	02/01/24	OATS, Finance & Accounting	Review of the instructions for PALM Task 513	
People	Thursday Task Talk	02/08/24	OATS, Finance & Accounting, PRT	Review of the instructions for PALM Task	
People	PALM Activities Review	02/08/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	
People	FLAIR End Users to PALM End users status update	02/08/24	PALM Director, Sierra Jenkins	Discuss data entry of FLAIR End users from report and translation to PALM End users	
People	FDACS PALM Remediation Team Touchpoint with Admin Division Information Officer	02/14/24	FDACS PALM Remediation Team, OATS, and Finance & Accounting, Admin IT	The purpose of this weekly meeting is (1) Answer any PRT questions (2) Any blockers, issues, or assistance needed, (3) Review any updates	
People	PALM Activities Review	02/15/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	
People	Thursday Task Talk	02/15/24	OATS, Finance & Accounting	Review of the instructions for PALM Task	
People	PALM Remediation Project Weekly Summary Report	02/16/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team	Weekly status summary of the PALM Tasks, PALM Remediation efforts, any known Operation Issues, Risks, or Blockers, and the next week's priorities	
People	FL PALM Monthly Readiness Touchpoint Meeting	02/16/24	OATS, Admin, Finance and Accounting, FDACS PALM Remediation Team, Readiness Coordinator	The purpose of this meeting is:(1) Agency updates, (2) Project Updates, (3) Meetings & Workshops, (4) Readiness Tasks, and (5) General Discussions and Questions	
People	FDACS PALM Remediation Team Touchpoint with Admin Division Information Officer	02/21/24	FDACS PALM Remediation Team, OATS, and Finance & Accounting, Admin IT	The purpose of this weekly meeting is (1) Answer any PRT questions (2) Any blockers, issues, or assistance needed, (3) Review any updates	
People	Thursday Task Talk	02/22/24	OATS, Finance & Accounting	Review of the instructions for PALM Task	
People	PALM Activities Review	02/22/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	



People	FDACS PALM Remediation Team Touchpoint with Admin Division Information Officer	02/28/24	FDACS PALM Remediation Team, OATS, and Finance & Accounting	The purpose of this weekly meeting is (1) Answer any PRT questions (2) Any blockers, issues, or assistance needed, (3) Review any updates	
People	PALM Activities Review	02/29/24	FDACS PALM Project Manager and Finance & Accounting PALM Director	The purpose of this meeting is (1) PALM Risk status review, (2) PALM Issue status review, (3) PALM Assumptions, (4) PALM Decisions review, and any other PALM Project related items	
People	Thursday Task Talk	02/29/24	OATS, Finance & Accounting	Review of the instructions for PALM Task	
People Processes	Finance and Accounting Supervisors meeting and PALM Update	01/25/24	Finance and Accounting Supervisors	Provide overview of current task status, upcoming PALM Tasks, discuss readiness activities and vacancies	
People Processes Technology	Delivery of draft FDACS PALM Intranet site design for SharePoint	01/03/24	Directly: Change Management Liaison, OATS staff; Indirectly: All FDACS employees	Deliver initial mock-up of FDACS PALM Intranet site on SharePoint for development in test site. Intranet site will be available to all FDACS employees once completed.	Design includes introduction to FL PALM and impact to FDACS, FDACS PALM Project Management documents, FL PALM resource links, FDACS PALM contact info, with intent to add agency training once developed
People Processes Technology	PALM Quarter 3 Funds Release request	01/22/24	PALM Management Workgroup	Update and submit PALM budget documentation for release of PALM funds	
People Technology	Finance and Accounting Chief Office PALM Update	02/07/24	F&A Bureau Chief and Assistant Chief, PALM Director,	Discuss agency stakeholder engagement, AIMS remediation approach timeline	
Processes	Communication for Task 515 based on known Task 508 elements	01/03/24	F&A Supervisors, Purchasing section, Payroll Liaison, Admin Leadership, Project Manager	Distributed Task 508 Instructions and additional agency-created guidelines to supervisors and leadership involved in Task 515 to anticipate PALM elements that will be requested ahead of Segment II Design meetings.	Impacted stakeholders will attend Segment II Design and take notes on Risks, Issues, Assumptions, Readiness Activities, Change Impacts, etc.
Processes	Collaboration with DFS Proper on Task 508 additional guidelines	01/03/24	Alexandra, DFS Proper; Business Liaison, Change Management Liaison, Payroll	Complete Task 508 though inter-agency resource sharing.	Microsoft Word - Additional Guidelines template
Processes	Task 508 Payroll Process Analysis Update meeting	01/08/24	Payroll, PALM Director	Provide status update on Task 508, answer questions, provided new Task 508 Spreadsheet template	Task 508 on schedule.
Processes	Attended Segment II Design Workshop-Disbursements Management	01/10/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
Processes	Attended Segment II Design Workshop-Asset Accounting and Management	01/11/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
Processes	Attended Segment II Design Workshop-Disbursements Management	01/12/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
Processes	Attended Segment II Design Workshop-Accounts Receivables	01/16/24	Admin IT, Finance and Accounting, PALM Remediation Team Project Manager	Review Segment II Business Process Models and communicate changes internally	
Processes	Save the Date - Segment III	01/19/24	Finance and Accounting, Purchasing, and Payroll SMEs, PALM Management Workgroup	Communicate upcoming PALM Segment III Business Process Model Reviews and Design workshops.	
Processes	Task 508 Payroll Process Analysis Update meeting	01/19/24	Payroll, PALM Director	Provide status update on Task 508, answer questions, received updated Task 508 Spreadsheet for review	
Processes	Attended Segment III Design Workshop-Disbursement Management	02/12/24	Admin, Finance and Accounting	Review Segment III Business Process Models and communicate changes internally	
Processes	Attended Segment III Design Workshop-Asset Accounting and Management	02/12/24	Admin, Finance and Accounting	Review Segment III Business Process Models and communicate changes internally	
Processes	Attended Segment III Design Workshop-Revenue Accounting, Accounts Receivables, and Grants Management	02/13/24	Admin, Finance and Accounting	Review Segment III Business Process Models and communicate changes internally	
Processes	Attended Segment III Design Workshop-Account Management and Financial Reporting	02/13/24	Admin, Finance and Accounting	Review Segment III Business Process Models and communicate changes internally	
Processes	SmartSheet Training	02/14/24	PALM Director, PRT Project Manager, OPS PALM position	Training on adding/removing Smartsheet users, Smartsheet Dashboard, Data input on Smartsheets	
Processes	PALM Task 515 - Financial Management and Property	02/20/24	PALM Director, Financial Management and Property supervisors	Discuss Task 515 approach, current business process to PALM process reconciliation, Change impacts (Risks, Issues, Assumptions, Questions, Decision points, Vacancies, resources needed), weekly status updates, updating current business process documentation	
Processes	PALM Task 515 - Office of Policy and Budget	02/21/24	PALM Director, Office of Policy and Budget	Discuss Task 515 approach, current business process to PALM process reconciliation, Change impacts (Risks, Issues, Assumptions, Questions, Decision points, Vacancies, resources needed), weekly status updates, updating current business process documentation	
Processes	PALM Task 515 - Revenue and Grants	02/22/24	PALM Director, Revenue and Grants Supervisors	Discuss Task 515 approach, current business process to PALM process reconciliation, Change impacts (Risks, Issues, Assumptions, Questions, Decision points, Vacancies, resources needed), weekly status updates, updating current business process documentation	
Processes	Decision Points Discussion	02/23/24	Admin IT, PALM Director	Discuss Decision Points needed from leadership, process of tracking internally and escalation as needed	
Processes	PALM Task 515 - Disbursements: Travel, Research, Warrants and General Audit	02/26/24	PALM Director, Disbursements Supervisors	Discuss Task 515 approach, current business process to PALM process reconciliation, Change impacts (Risks, Issues, Assumptions, Questions, Decision points, Vacancies, resources needed), weekly status updates, updating current business process documentation	
Processes	PALM Task 515 - Purchasing	02/27/24	PALM Director, Purchasing Supervisors	Discuss Task 515 approach, current business process to PALM process reconciliation, Change impacts (Risks, Issues, Assumptions, Questions, Decision points, Vacancies, resources needed), weekly status updates, updating current business process documentation	
Technology	FANS to AIMS Status Meeting	01/03/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	Conducted Weekly and as needed..
Technology	Conducted FANS AIMS/PALM approach	01/03/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	Discuss FANS approach for PALM via AIMS, identify risks (UEI), planning for FANS to connect to AIMS, identify responsible/accountable parties, next steps	FNW= Division of Food, Nutrition, and Wellness, FANS = Food and Nutrition System (Agency Business System), PRT = PALM Remediation Team, OATS = Office of Agriculture Technology, AIMS = Administrative Image Management System,
Technology	REV and AIMS (ABS) Forms and Reports Analysis Preliminary Review	01/04/24	PALM Remediation Team, Admin IT, Change Management Liaison; AIMS and REV	Review the findings from the analysis of REV and AIMS forms and reports.	
Technology	PALM Management Touchpoint	01/05/24	Leadership and key	Provide agency readiness status updates, discuss AIMS, REV,	



			stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB; AIMS, REV, FANS	and FANS remediation, and review risks, issues, and assumptions. Discuss upcoming tasks and key takeaways from recent PALM meetings	
Technology	FANS to AIMS Workshop	01/08/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The agenda for this workshop is: (1) Discuss FNW current Disbursements Process involving DUNS/UEI Number to identify remediation strategy for PALM migration. (2) Understand the FANS current data in terms of integrating with AIMS. (3) Overview of the FANS Claims Process for PALM Task Documentation.	
Technology	New AIMS PALM Development Environment/Application Meeting	01/08/24	Administration, OATS, FDACS PALM Remediation Team, Finance & Accounting	The purpose of this meeting is for the FDACS PALM Remediation Team to log into the new AIMS PALM DEV Environment and as a group we will test to see if there are any issues/conflicts with Production, directory permissions, etc.	
Technology	FANS to AIMS Status Meeting	01/10/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	PALM Quarter 3 Request For Funds Review Meeting	01/12/24	OATS, PRT	Review of documentation needed for Q3 request for PALM funds	Review Quarterly.
Technology	FANS to AIMS Status Meeting	01/17/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	FANS for PALM Workshop	01/19/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	Discuss FANS approach for PALM via AIMS, identify risks (UEI), planning for FANS to connect to AIMS, identify responsible/accountable parties, next steps	
Technology	PALM Management Touchpoint	01/19/24	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB, Payroll, Admin IT, Purchasing; AIMS, REV, FANS	Provide agency readiness status updates, discuss AIMS, REV, and FANS remediation, and review risks, issues, and assumptions. Discuss upcoming tasks and key takeaways from recent PALM meetings	
Technology	Database & Application Server Environments for Remediation	01/22/24	OATS, Finance & Accounting, FDACS PALM Remediation Team	This meeting was set up to discuss the database and application server environments for remediating AIMS, REV, and other applications.	
Technology	FANS to AIMS Workshop	01/24/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose for this workshop isto get a better understanding of FANS current processes.	
Technology	FANS PALM Tasks review	01/25/24	FANS Liaison, PRT Project Manager, PALM Director	The purpose of this meeting is to review the following: Status of documentation and deliverables, Percentage completion of tasks, Summary of PALM activities for this week, Any blockers or assistance needed, Next week's goals.	
Technology	PRT Dashboard Discussion	01/29/24	PRT Project Manager, PALM Director, OATS Developer	Discuss PRT Dashboard updates for PALM Management Workgroup	
Technology	FANS to AIMS Status Meeting	01/31/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	Test PALM Development Environment for AIMS	02/01/24	PRT, Admin IT, OATS	Testing AIMS application for new PALM Development Environment - Purchase Orders, Approvals	
Technology	PALM Management Touchpoint	02/02/24	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB, Payroll, Admin IT, Purchasing; AIMS, REV, FANS	Provide agency readiness status updates, discuss AIMS, REV, and FANS remediation, and review risks, issues, and assumptions. Discuss upcoming tasks and key takeaways from recent PALM meetings	Leadership and key stakeholders from Administration, Finance and Accounting, OATS, PRT, OPB
Technology	Test PALM Development Environment for AIMS Contracts	02/02/24	Admin, FDACS PALM Remediation Team, Finance & Accounting	The purpose of this meeting is to test the AIMS Contracts for Environment Issues in the new PALM Development environment	
Technology	FANS to AIMS Status Meeting	02/07/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	FANS to AIMS Status Meeting	02/14/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	FANS Level of Effort Approach Meeting	02/15/24	PRT, OATS, Admin IT, Finance and Accounting, PALM Director, Leadership	To anticipate the FANS Technical Team's Needs, Provide a general roadmap of deliverables, templates, and timelines in one living document; Determine any assistance needed that may help with the Level of Effort determination for the proposed October 1, 2024 FANS to AIMS for FLAIR launch	
Technology	PALM Considerations Document	02/19/24	PRT, OATS, PALM Director	Review items in consideration list for remediation; Existing tool for converting FLAIR to COA codes and vice versa; Is a service needed?	
Technology	AIMS Remediation JAD session (Purchase orders)	02/20/24	PRT, Admin IT, F&A Disbursements supervisors, Purchasing Supervisors, Leadership, PALM Director section	Discuss AIMS Application Analysis Overview and Findings, Analysis Documents repository, Forms/Screens, Reports, Interfaces, Databases; Remediation of PO Process - Purchase requisition, Contract Creation, PO Administration; Remediation Approach - Requirements Gathering through Joint Application Development Sessions, Development, Test Cases, User Acceptance Testing	
Technology	Risks associated with PALM Inbound and Outbound Interfaces	02/20/24	PRT, Admin IT	Discuss risks associated with PALM Inbound and Outbound Interfaces	
Technology	PALM Remediation Development Environment	02/20/24	PRT, Admin IT, OATS	Discuss the production deployments of AIMS, CATS, REV, FA, and other applications that will happen going forward. We will discuss the process of merging the changes to PALM Remediation Development environment.	
Technology	FANS to AIMS Status Meeting	02/21/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	REV Remediation (Direct Deposits) Joint Application Development Session	02/21/24	PRT, OATS, Admin IT, Revenue Supervisors, Leadership	REV Application Analysis and Findings - Analysis Documents Repository, Forms/Screens, Reports, Interfaces, Databases; Remediation of Direct Deposits Process - Work Period, Batch, Balance Work Period; Remediation Approach - Requirements gathering through JAD sessions, development, test cases, user acceptance testing	



Technology	AIMS Remediation (PO) JAD Session	02/22/24	PRT, Admin IT, F&A Disbursements supervisors, Purchasing Supervisors, Leadership, PALM Director section	Review each screen in the Purchase Request Approval Process for remediation impact and future changes needed	
Technology	Strategic Asset Tracking System - FLAIR to PALM External meeting with Vendor	02/26/24	Property section, PALM Director, OPS PALM position, Admin IT	Discuss Strategic system for tracking inventory upcoming updates and changes for PALM	
Technology	Test Disbursements in PALM Development Environment	02/27/24	PRT, OATS	Test Disbursements in AIMS PALM Development environment; prepare AIMS PALM development environment for remediation	
Technology	FANS to AIMS Status Meeting	02/28/24	FNW FANS IT team, FNW Fiscals, Admin IT, PRT, OATS, Administration Director's Office, Finance and Accounting; FANS	The purpose of this weekly meeting is (1) FANS PALM Remediation status update ( What has been accomplished) (2) Any blockers, issues, or assistance needed, (3) Next steps ( Goals for the next week)	
Technology	Daily PRT Standups	01/01/24	PRT, Finance and Accounting, OATS, Admin IT	Conduct daily standups to provide update on technology tasks and deliverables, address risks, issues, assumptions, time exceptions, and blockers.	Work breakdown structure and deliverable progress monitoring; Project Management Liaison, Change Management Liaison; Recurring daily meeting

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DACS Status Report Confirmation				
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:	
January - February 2024	Alan Edwards	alan.edwards@fdacs.gov	03/11/24	
November - December 2023	Alan Edwards	alan.edwards@fdacs.gov	01/11/24	
September - October 2023	Alan Edwards	alan.edwards@fdacs.gov	11/09/23	
July - August 2023	Alan Edwards	alan.edwards@fdacs.gov	09/11/23	



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DBPR

Readiness Workplan

DBPR Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Tyler Russell

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 8

Duplicate Filled Role = 6

Vacant Role = 1

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 94.78%

Submitted On Time = 16

Submitted Late = 4

Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 5

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24	Report submitted 1/12/24		
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24	We do not really have any updates for this task.		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24	Updates made		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/12/24	updates made 2/12/24		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24	sponsor unavailable		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 32

Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 7

Related Business Systems = 10

Related Reports = 36

Documentation Status:

Complete = 7 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 11

Criticality:

High = 5 Med = 2 Low = 1 None = 3

Documentation Status:

Complete = 10 Partial = 0 Not Started = 1

Cataloged Interfaces = 1

Inbound Interfaces = 0

Outbound Interfaces = 1

Data

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

Current-State:

Unique FLAIR Data Elements = 84

Associated Unique Uses = 85

Continued Use - Yes = 48

Continued Use - No = 32

Associated Business Systems = 37

Cataloged Reports = 55

Criticality:

High = 20 Med = 19 Low = 15 None = 0



**Implementation:****Business Systems Planned for Integration = 1****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 13**

- Inbound Interfaces = 6

- Outbound Interfaces = 7

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DBPR Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Retirement of Accounting Systems Analyst	Open	6 (High/Medium)	Advertise position as soon as possible; hire new employee in time to overlap with retiring employee	Work in progress to advertise John Mounts' position; new Revenue/Financial Reporting manager Lyndell Francis has started - in addition to state/accounting background, he also has IT background	01/11/24	Sally Huggins
People Processes Technology Data	Timing of Segment IV review & design workshops	Open	6 (High/Medium)	Planning, planning, planning. We will need to send as many CCN and SME members as possible to make sure understanding of reviews and design is captured, but end of year finance & accounting activities take priority.	The timing and content of the Segment IV business process model reviews and design workshops is not ideal, as has been acknowledged by the project. Impacts will definitely be felt at smaller agencies, like DBPR.	03/08/24	Sally Huggins
People Processes Technology Data	Completion of tasks	Closed	4 (Medium/Medium)	Completion of upcoming project related tasks is at risk of not being completed timely due to delay in receiving administered funds requested in Operational Work Plan.	RFQ to be released, contractors submit proposal, contractor chosen, and PO issued all needs to be done before first project related deadline of 12/15/23; RFQ is in progress	01/11/24	Sally Huggins
People Processes Technology Data	Change in understanding of what project considers Agency Business System affects completion of tasks	Open	4 (Medium/Medium)	Review Agency Business System information to ensure all relevant systems are included in the	As early as Fall 2020, we were assuming everything was a business system but the guidance provided by the project at the time indicated that only systems that had a direct connection to FLAIR were considered an ABS, so we reported only very little systems. In our December 2023 Technology touchpoint, we learned that our original understanding was what the project is now considering an ABS, so we are playing catchup in identifying our AB systems.	02/29/24	Sally Huggins

**DBPR Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**DBPR Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	DBPR Project Manager and Change Manager will have enough time to complete tasks released by Florida PALM	Logged	11/08/23	All users of Florida PALM	Chosen contractor will be able to start with enough time to complete upcoming tasks
People	Replace retiring Accounting Systems Analyst	Logged	01/11/24	DBPR	New employee will be in place to overlap with John Mounts who will retire 4/29/24

**DBPR Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Segment II Design Workshops	01/10/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online
People Processes Technology Data	Segment II Design Workshops	01/11/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online
People Processes Technology Data	Segment II Design Workshops	01/12/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online



People Processes Technology Data	Segment II Design Workshops	01/16/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online
People Processes Technology Data	Segment II Design Workshops	01/17/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online
People Processes Technology Data	Segment II Design Workshops	01/18/24	John Mounts, Lyndell Francis, Sally Huggins		combination of staff either attended in person or listened online
People Processes Technology Data	Tasks 504, 505	01/12/24	Sally Huggins		completed tasks
People Processes Technology Data	January Touchpoint	01/23/24	Sally Huggins, Lyndell Francis		monthly touchpoint with readiness coordinators
People Processes Technology Data	January 2024 Advisory Council meeting	01/24/24	Sally Huggins		attended monthly advisory council meeting
People Processes Technology Data	Tasks 508 & 511	01/26/24	Sally Huggins		completed tasks
People Processes Technology Data	January 2024 ESC meeting	01/24/24	Lynn Smith		attended monthly ESC meeting
People Processes Technology Data	Task Talk	02/01/24	Sally Huggins, John Mounts, Lyndell Francis		listened to Task Talk
People Processes Technology Data	Task Talk	02/08/24	Sally Huggins, John Mounts, Lyndell Francis		listened to Task Talk
People Processes Technology Data	Segment III BPMR's	02/12/24	John Mounts		
People Processes Technology Data	Segment III BPMR's	02/13/24	John Mounts		
People Processes Technology Data	Task Talk	02/15/24	John Mounts, Sally Huggins, Lyndell Francis		
People Processes Technology Data	February Touchpoint	02/16/24	Sally Huggins, Lyndell Francis, Kris Burnside, Mindy Heindl		Monthly touchpoint with readiness coordinators
People Processes Technology Data	Task 520	02/16/24	Sally Huggins		completed task
People Processes Technology Data	Task Talk	02/22/24	Sally Huggins, Lyndell Francis, John Mounts, Kris Burnside		listened to task talk
People Processes Technology Data	Internal meeting with HR staff re: Segment IV BPMR's and Design Workshops	02/22/24	Sally Huggins, John Mounts, Lyndell Francis, Fatimah Harper, Melvin Robinson		
People Processes Technology Data	February Advisory Council	02/21/24	Sally Huggins		
People Processes Technology Data	February ESC	02/28/24	Lynn Smith		
People Processes Technology Data	Task 510	02/29/24	Sally Huggins		completed task
People Processes Technology Data	CCN Town Hall	02/29/24	Sally Huggins, Lyndell Francis		
People	Internal meeting to discuss responses to Project Manager/Change Manager RFQ	02/20/24	Sally Huggins, Lyndell Francis, John Mounts, Kris Burnside		

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name:

☐ Confirm \*

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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Tyler Russell	tyler.russell@myfloridalicense.com	03/12/24
November - December 2023	Tyler Russell	tyler.russell@myfloridalicense.com	01/12/24
September - October 2023	Tyler Russell	tyler.russell@myfloridalicense.com	11/09/23
July - August 2023	Tyler Russell	tyler.russell@myfloridalicense.com	09/13/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DCF](#)  
[Readiness Workplan](#)

DCF Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Tony Lloyd

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 6
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 0.00%

- Submitted Complete = 0
- Submitted Incomplete = 1
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 80%

- Submitted On Time = 12
- Submitted Late = 5
- Pending Submission = 3

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Data	324	Complete FLAIR Data Elements Inventory	12/09/22	03/31/23	75% - Consolidating/Inputting Information for Submission					
	Data	327	Complete Reports Inventory	04/03/23	07/28/23	50% - In Progress					
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24	DCF has completed our review of the Segment I information and have determined that there are too many open questions about the design that will be addressed in subsequent Segments to update our own design documentation.			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24	Per the DCF touchpoint in December, DCF has created entries for our future state system modules which will be constructed this fiscal year and their interface needs.			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	25% - Beginning Initial Internal Meetings and Information Gathering					
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24				
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24				
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24				
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	Pending Resubmission	03/05/24	was completed on 2/29.		Submission Incomplete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24						
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24						
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24						
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24						
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24						
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/14/24				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24				
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24						

People

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

Implementation:

Planned Florida PALM End Users = 168

- Business Process Groupings = 9

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 19

- Related Business Systems = 9
- Related Reports = 4

Documentation Status:

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 45

- Criticality:
  - High = 16 Med = 1 Low = 0 None = 21

Documentation Status:

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
- Continued Use - Yes = 0
- Continued Use - No = 0



- Complete = 5 Partial = 1 Not Started = 0

#### Implementation:

Impacted Agency Business Processes = TBD

- Complete = 4 Partial = 17 Not Started = 1

Cataloged Interfaces = 62

- Inbound Interfaces = 0

- Outbound Interfaces = 62

• Associated Business Systems = 0

Cataloged Reports = 0

• Criticality:

- High = 0 Med = 0 Low = 0 None = 0

#### Implementation:

Business Systems Planned for Integration = 5

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates: TBD

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

#### Implementation:

Configuration Workbooks = TBD

Conversions = TBD

## Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

### DCF Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Financial Leadership Distraction	Open	6 (Medium/High)	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Management Turnover - Key Personnel	Open	6 (High/Medium)	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Department Leadership Turnover	Open	4 (Medium/Medium)	Accept. Monitor political developments as they unfold and adapt, as needed.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Staff Turnover - Key Personnel	Open	4 (Medium/Medium)	Mitigate. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Sponsor Turnover	Open	3 (High/Low)	Mitigate. Ensure sponsor commitments and operational plans are well documented and rationale is well established.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Manager/Agency Liaison Turnover	Open	3 (High/Low)	Mitigate. Ensure project approach and status are well-documented.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Project Staff Turnover	Open	2 (Low/Medium)	Avoid. Ensure project staff responsibilities are well defined and documentation is up-to-date	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Management Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam
People	Operational Staff Turnover - General	Open	2 (Low/Medium)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None. Continue to Monitor Risk.	11/13/23	Matthew.Christovich@myflfam

### DCF Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Cost Allocation Not Available in PALM	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	TBD	DCF is revisiting as plans for remediating internal applications for PALM.	01/01/26	Joan Davis
Technology Data	SpeedKey functionality and ability to maintain at the agency level	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	DCF will work to get a better understanding of the speedkey functionality to maximize the use of speedkey to accurately capture encumbrance obligations, payments and minimize corrections to GL's.			
People Processes Technology Data	Remediation Efforts Delayed Due to Funding Delay	Open	High - Impacts the ability of the agency to meet deadlines or milestones	DCF will work to fast-track the implementation effort of our contractor and internal staff to create the necessary infrastructure to support further readiness and remediation activities.	The Legislature released the requested funds for PALM Integration and Remediation submitted on 7/31/23 on December 12, 2023.	06/28/24	Matthew Christovich

### DCF Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	DCF will able to timely access the available Administered funds to support PALM readiness activities.	Logged	07/17/23	DCF-Departmentwide	This assumption is currently an open issue.
People Processes Technology	DCF's Project Sponsor will support the project by establishing and maintaining a project team that will manage the ongoing readiness activities and their associated dependencies.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF executive leadership will support the project by providing resources, access to systems and stakeholders, and by supporting the organizational change management strategy created by the project team.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF's project team possesses the necessary skills and expertise in the required disciplines to ensure project success.	Logged	07/17/23	DCF-Departmentwide	None.
People	DCF's hybrid product/project management framework approach combining predictive and agile methodologies is suitable for the project's objectives	Logged	07/17/23	DCF-Departmentwide	None.



People Processes Technology Data	DCF business system owners will provide requirements for necessary system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	07/17/23	DCF-Departmentwide	None.
People	DCF project stakeholders, involved parties, and other interested individuals will be available for feedback and review of documentation to meet readiness requirements and project milestones.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	DCF's Florida PALM project team can gain access to relevant documentation, specifications, and knowledge about the legacy enterprise systems and their data structures.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes Technology Data	State of Florida legacy enterprise systems have accessible data sources that can be utilized for extracting and integrating data into the Enterprise Data Warehouse.	Logged	07/17/23	DCF-Departmentwide	None.
Technology Data	DCF's Enterprise Data Warehouse architecture and infrastructure can accommodate the additional data and effectively handle the integration process.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes	The external schedule for implementation is determined by the DFS Florida PALM project. All key milestones and transition dates are provided by the larger PALM Project.	Logged	07/17/23	DCF-Departmentwide	None.
People Processes	The Florida PALM project will provide key information identifying the functionality, business processes, and timeline of the larger project in a timely manner to facilitate planning and execution.	Logged	07/17/23	DCF-Departmentwide	None.

DCF Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Weekly PALM meeting with CCN and SMEs on Chart of Accounts	02/14/24	DCF Budget, Finance, and Accounting and IT team	To brainstorm and plan on the PALM COA structure for DCF	We started meeting once a week on 2/14/24.
People Processes Technology Data	Reorganizing DCF project team	02/14/24	DCF Budget, Finance, and Accounting and IT team	Rebase-line PALM project activities and address all outstanding readiness tasks and activities.	Working to procure an IT project manager and business project manager. Additionally, DCF is expanding involvement of key business area SMEs and staff in defining DCF's future state of business with PALM.
People Processes	Weekly PALM meetings to review progress on pending tasks and new tasks	02/14/24	Change Champions and SMEs	To meet regularly to complete past due tasks, assign tasks to SMEs to complete tasks, review completed tasks, and report completion of tasks in Smartsheet.	We are almost completed with 324,327,328.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DCF Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Chad Barrett	chad.barrett@myflfamilies.com	03/12/24
January - February 2024	Tony Lloyd	tony.lloyd@myflfamilies.com	03/08/24
November - December 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	01/11/24
September - October 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	11/15/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DEM

Readiness Workplan

DEM Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Luke Strickland

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 10

Duplicate Filled Role = 4

Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 98.26%

Submitted On Time = 19

Submitted Late = 1

Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 6

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	03/01/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 21

Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 35

Related Business Systems = 3

Related Reports = 21

Documentation Status:

Complete = 30 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 5

Criticality:

High = 5 Med = 0 Low = 0 None = 0

Documentation Status:

Complete = 2 Partial = 1 Not Started = 1

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 71

Associated Unique Uses = 71

Continued Use - Yes = 48

Continued Use - No = 0

Associated Business Systems = 22

Cataloged Reports = 41

Criticality:

High = 24 Med = 9 Low = 7 None = 1



**Implementation:**

**Business Systems Planned for Integration = 2**

- Segment I - Documentation Updates:  
- Complete = 0 Updating = 0 Evaluating = 2  
Not Started = 0 Not Needed = 0
- Segment II - Documentation Updates: TBD

**Planned Interfaces = 10**

- Inbound Interfaces = 4
- Outbound Interfaces = 6

**Implementation:**

**Configuration Workbooks = TBD**

**Conversions = TBD**

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DEM Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Challenge in filling vacant positions in Finance & Accounting	Open	9 (High/High)	Utilize other Finance employees to assist when needed	N/A	12/24/23	Karen Peyton
People	Ability to be fully devoted to the project because of unpredictable response activities related to natural disasters and other threats to the state and its citizens.	Open	4 (Medium/Medium)	Endeavor to utilize other staff members and/or employees from other agencies to assist	N/A	12/24/23	Karen Peyton
People Processes	The DEM is physically and functionally separate from the EOG. However, the two entities share the same OLO business unit. Currently warrants are picked up by the EOG for dissemination. This may create a risk related to payment management. In the review of the draft, of new warrant process, it appears that if the incorrect handling code is selected, the EOG will not be able to determine who the warrant belongs to since the BE is not printed on the warrant.	Open	4 (Medium/Medium)	The DEM and EOG have met with the PALM team to determine at what level certain codes can be defaulted to ensure that this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be canceled and the invoices re-vouchered.	The volume of invoices that are processed by DEM (especially those related to disaster activity) could possibly exacerbate this issue.	02/26/24	Karen Peyton

DEM Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DEM Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	The Division will be able to process all financial activity in order to adequately report to our grantors and all requestors to continue to assist in financial management of the Division's missions and objectives	Logged	09/06/23	FDEM	No change.	

DEM Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DEM Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Luke Strickland	luke.strickland@em.myflorida.com	03/11/24
November - December 2023	Luke Strickland	luke.strickland@em.myflorida.com	01/12/24
September - October 2023	Luke Strickland	luke.strickland@em.myflorida.com	11/09/23
July - August 2023	Luke Strickland	luke.strickland@em.myflorida.com	09/07/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DEP](#)  
[Readiness Workplan](#)

# DEP Status Report Dashboard

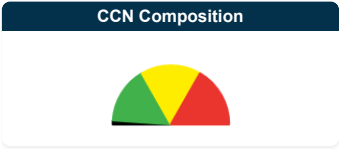
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

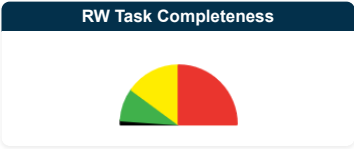
Darinda McLaughlin



The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

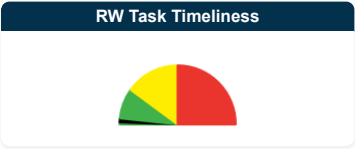
- Unique Filled Role = 23
- Duplicate Filled Role = 0
- Vacant Role = 0



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

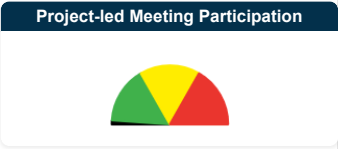
- Score = 100.00%
- Submitted Complete = 1
  - Submitted Incomplete = 0
  - Completed After Submission = 0



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

- Score = 99.57%
- Submitted On Time = 19
  - Submitted Late = 1
  - Pending Submission = 0



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Completed in Requested Format	02/28/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress		PALM has extended the date of this task to 4/12 from 3/24 - Ref Email dated 2/12/2024		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 149

- Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 248

- Related Business Systems = 23
- Related Reports = 39

Documentation Status:

- Complete = 248 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 44

Criticality:

- High = 21 Med = 10 Low = 5 None = 8

Documentation Status:

- Complete = 44 Partial = 0 Not Started = 0

Cataloged Interfaces = 67

- Inbound Interfaces = 57

- Outbound Interfaces = 10

Data

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

Current-State:

Unique FLAIR Data Elements = 261

Associated Unique Uses = 264

- Continued Use - Yes = 221

- Continued Use - No = 41

Associated Business Systems = 35

Cataloged Reports = 380

Criticality:

- High = 46 Med = 3 Low = 15 None = 31



**Implementation:****Business Systems Planned for Integration = 30****• Segment I - Documentation Updates:**

- Complete = 3 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 26

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 12**

- Inbound Interfaces = 1

- Outbound Interfaces = 11

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DEP Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	Unclear Requirements and Potentially Changing Requirements	Open	9 (High/High)	FDEP technical team would need to have sufficient knowledge of FDEP financial systems. Allow for adjustments to the implementation schedule for unplanned changes/updates to requirements.	Without finalized interface specifications, the application team may have limited visibility into the expected changes in the data formats and structures. This ambiguity can lead to misinterpretation or incorrect implementation of the new PALM interfaces. Additionally, there is the potential that previous design specifications could change as a result of subsequent discoveries in later design segments.	11/13/23	Brady Schmidt
People Processes Technology	Resources and Turnover	Open	6 (High/Medium)	Ensure job-specific processes are properly documented.	FDEP has engaged the Division/District/Office staff throughout the department to document business processes and transfer key knowledge.	11/13/23	Lydia Griffin & Steve Waters
Processes Technology Data	Increased Risk of Application Update Errors	Open	4 (Medium/Medium)	Sufficiently documented business system processes.	Rushing the update process or making assumptions without proper interface specifications and sample data can increase the risk of errors and inconsistencies. It may result in data integration issues, data loss, or inaccurate data processing, which can impact the reliability and functionality of the application.	11/13/23	Brady Schmidt

**DEP Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	SME Process & Business System Knowledge	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Catalog Desktop Procedures, Document Business System functionality and interfaces.	FDEP Project Team has begun to facilitate information gathering and identifying financial data impacts. The results will be used for future planning of PALM implementation.	07/01/25	Lydia Griffin, Steve Waters
People Processes Technology Data	Identifying changes to processes and business systems as a result of a staggered design segmentation approach which can potentially change designs after the fact is hindering the ability of key business and technical resources to reach a decision or agreement about resulting impacts to agency business processes and systems due to known "unknowns".	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Identifying key requirements now while keeping an open mind to potential changes down the road and structurally delineating future state requirements into known vs. unknown may help in building incremental build components/ requirements for agency business systems and processes.	FDEP Project team has begun to share latest PALM designs with SME's and CCN Leads to help them identify potential changes to business processes. Technical SME's are also working to identify potential changes to systems based on everything known so far.	12/31/24	Steve Waters

**DEP Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	SME Process & Business System Knowledge	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	FDEP Project Team has facilitated information gathering and identifying financial data impacts.
People Processes Technology	PALM Project Implementation Schedule	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and	In planning, the success of FDEP's implementation schedule is contingent upon the timeliness receipt of information from the PALM Project team.



Data				project management.	
People Processes Technology Data	DEP cannot complete system remediation until the following conditions are fulfilled: 1) ALL applicable PALM Design Segments related to said applications is completed. i. Interface specifications ii. Final business system design iii. Configuration Workbooks 2) DEP technical business requirements and design specifications are completed 3) DEP can only begin remediating FIN-CONVERT based on interface specifications and sample data received from PALM. 4) ALL DEP tier II and III applications to be remediated require OTIS/DEP Divisions to have completed the following: a. Supporting User Stories or process updates b. Data Mapping to PALM configuration workbooks and processes 5) Tier III applications are dependent on new design specifications for tier I and II systems.	Logged	02/14/24	Division/District/Office Business Systems remediation, processes and project management, PALM Team	Discussed at the PALM Touchpoint meeting on 2/14/2024

DEP Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	DEP Biweekly Leadership Meetings	02/29/24	DEP Sponsor, Agency Liaison, Business Liaison	Review current activities, issues, and action items to finalize planning and resolution.	These are recurring meetings during this reporting period.
Technology Data	PALM-504-Update Agency Business System Documentation for Segment I	01/12/24	Same as Critical Operational Elements columns	Review Segment I resources; update Agency Business System documentation including functional and technical requirements and test cases.	Continued work to update internal documents. Completed.
Technology Data	PALM-505-Update Florida PALM Interface Inventory for Segment I	01/12/24	Same as Critical Operational Elements columns	Review Segment I resources; identify and document interface needs for Florida PALM implementation.	Continued work to update internal documents. Completed.
Technology Data	DEP Weekly Technical and Business Meetings	02/29/24	DEP Business Liaison and Technical Leads	Weekly meeting to review issues and action items relating to the technical and business activities.	These are recurring meetings during this reporting period.
People Processes	PALM-509-Submit Bimonthly Agency Readiness Status Report	01/10/24	DEP PALM Core Team, DEP DAS CCNs, DEP F&A Mgrs	Complete PALM Task 509	Submit Bimonthly Agency Readiness Status Report. Completed.
People Processes	PALM-510-Manage Agency Specific Implementation Schedule, Risks and Issues	02/29/24	DEP PALM Core Team	Complete PALM Task 510	Manage Agency Specific Implementation Schedule, Risks and Issues. Completed..
People Processes	DEP Weekly Planning Meetings	02/29/24	DEP PALM Core Team	Review weekly progress, action items and issues, risks,decisions, assumptions as required	These are recurring meetings during this reporting period.
People Processes	DEP Quarterly CCN Network Meetings	02/29/24	DEP PALM Core Team, DEP DAS CCNs, DEP F&A Mgrs, DEP Program Area CCNs, OTIS Leads	Review PALM updates with the agency CCN network on a quarterly basis.	Meeting held on 2/6/2024.
People Processes	DEP CCN Work Session Meetings with Divisions	02/29/24	DEP PALM Core Team, DEP Program Area CCNs	Review updates with the Divisions with progress updates and crosswalk of business process work to be completed for PALM deliverables	Conducted with division CCN liaisons via in person and Teams meetings during the month of February.
Processes	Business Process Mapping	01/01/24	Division/District/Office Staff	The FDEP Office of Technology and Information Services is presenting Business Process Mapping training to the Division/District/Office Staff. This resource is planned to assist the staff with understanding "what they do today", identifying the business systems and reporting needs.	7/1-8/31/2023 - During the reporting period the OTIS staff mapped several DAS business system processes and created the presentation material. Training sessions are scheduled to occur October 2023. 9/1-10/31/2023 - business system process mapping conducted. 11/1-12/21/2023 - Continuing to map business processes. Completed.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DEP Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	03/11/24
November - December 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	01/10/24
September - October 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	11/13/23
July - August 2023	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	09/11/23



Helpful Links

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[Florida PALM Resources](#)  
[Florida PALM Workbook for DFS](#)  
[Readiness Workplan](#)

# DFS Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Scott Fennell

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 6
- Vacant Role = 1

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness:

Score = 94.35%

- Submitted On Time = 17
- Submitted Late = 2
- Pending Submission = 1

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		Design details needed from PALM Design Segments II, III, and IV in order to complete ABS design impacts. DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24	Does not include BOSP.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/27/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/22/24	Does not include Enterprise A&A. However, PALM has a list of those contacts.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		Design details needed from PALM Design Segments III and IV in order to complete ABS design impacts. DFS ABS remediation design scheduled for completion July 31, 2024. This task will remain open until design is complete.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/01/24			
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24			Build will not start until design is complete. Build scheduled from August - December 2024.		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/07/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/05/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and	03/01/24	04/30/24	25% - Beginning Initial Internal Meetings and				

People

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

Implementation:

Planned Florida PALM End Users = 375

- Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 416

- Related Business Systems = 12
- Related Reports = 43

Documentation Status:

- Complete = 416 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 68

- Criticality:
  - High = 16 Med = 5 Low = 0 None = 47
- Documentation Status:
  - Complete = 31 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 419

- Associated Unique Uses = 1301
  - Continued Use - Yes = 1064
  - Continued Use - No = 47
- Associated Business Systems = 19



**Implementation:****Impacted Agency Business Processes = TBD****Cataloged Interfaces = 121**

- Inbound Interfaces = 100  
- Outbound Interfaces = 21

**Cataloged Reports = 385**

• **Criticality:**  
- High = 252 Med = 76 Low = 38 None = 45

**Implementation:****Business Systems Planned for Integration = 20****• Segment I - Documentation Updates:**

- Complete = 0 Updating = 10 Evaluating = 0  
Not Started = 0 Not Needed = 9

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 7**

- Inbound Interfaces = 3  
- Outbound Interfaces = 4

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DFS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	<b>ENTERPRISE A&amp;A:</b> The Project timeline is very conservative regarding flexibility, and A&A's involvement is critical for project success. Our level of involvement pulls our resources in multiple directions putting a strain on our time to complete tasks. A&A change management and internal preparation for A&A preparedness activities have already started, but having adequate resources will be key to successful implementation.	Open	9 (High/High)	<ul style="list-style-type: none"><li>Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations.</li><li>Retain our critical staff that are involved in Florida PALM activities and those who are picking up added job responsibilities so that subject matter experts can dedicate time to Florida PALM activities.</li><li>Provide expectations that staff will cross-train and provide knowledge transfer to increase the depth need to continue operating with a high level of service and accuracy.</li><li>A&amp;A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY.</li></ul>	Still monitoring	10/11/23	Renne Hermeling
People	<b>ENTERPRISE A&amp;A:</b> Resource impacts due to A&A operational staff spending a significant amount of time performing Project related tasks. This pulls resources from operations, increases workloads, and causes stress and an increased chance of employee burnout.  • Project tasks may require additional time outside employees designated working hours to attend meetings, review time sensitive documents, or contribute to critical tasks. Some positions are not granted flexibility to flex time throughout the month, but they must flex it within the week. This policy limitation causes a strain on availability of resources. Allowing current staff more flexibility to flex their time beyond the work week would help with resource allocation.  • As we get closer to implementation, the number of items that will require attention will continue to increase. This will include, assisting agencies with data management, preparing enterprise data for conversion, developing cut-over and FLAIR close out plans, participating in all levels of integration and UAT testing, validating testing results, participation and validation of mock and production conversions, developing policy around new processes.	Open	9 (High/High)	<ul style="list-style-type: none"><li>Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities.</li><li>Hire additional staff (FTE or OPS) to learn current operations so that our experienced staff can continue to participate with the Florida PALM Project in design, testing, and implementation activities.</li><li>Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team.</li><li>Work with Human Resources to properly document team members who should be classified as SES staff.</li><li>Establish plans for reduction of current operational activities and prioritize responsibilities based on risk and probability. This could include posting all payments and suspending pre-audit activities, suspending Article V and Contract Management audits, suspending processing of EFT applications, as examples.</li></ul>	Still monitoring	10/11/23	Renne Hermeling
People	The loss of CCN resources would constrain current CCN staff capacity and could result in the loss of critical functional and institutional knowledge, which is imperative to the success of the Florida PALM Project.	Open	9 (High/High)	<ul style="list-style-type: none"><li>Create a knowledge base of CCN operational processes and procedures; develop training methods to facilitate knowledge transfer; and provide cross-training among CCN members where feasible.</li><li>Use of dedicated back-up CCN Liaisons will aid in the short-term continuity.</li></ul>	Monitoring	02/19/24	Alexandra Weimorts
Technology	Florida PALM design release dates for Segments III, IV, and Data Warehouse will decrease the build time for impacted agency business systems. This may impact the ability for applicable agency business systems to be ready for interface testing by January 2025.	Open	6 (Medium/High)	<ul style="list-style-type: none"><li>Develop initial agency business system future-state designs as much as possible based on Segment I and II design information made available by the Florida PALM Project. Update ABS designs as soon as Segment III, IV, and Data Warehouse design information becomes available from the Florida PALM Project.</li><li>Work with Division/Office management to allow dedicated technical and functional resources to be available for agency business systems remediation efforts when design information is released.</li></ul>	Still monitoring	10/20/23	Stacey Pollock
Processes	<b>ENTERPRISE TREASURY:</b> The consolidation of Disbursements bank accounts will cause changes in file transmissions, transaction volumes, pricing, and reconciliation processes. Bank account configurations in Florida PALM will need to be updated to reflect this change. Transaction volumes will potentially increase, which will cause an increase in monthly costs. Reconciliation processes will shift to the Division of Treasury, which will increase workload and potentially require additional positions	Open	6 (Medium/High)	<ul style="list-style-type: none"><li>Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li></ul>	Still monitoring	12/13/23	Sarah Dugan



Technology	Reduced duration for agency business system end-to-end testing with Florida PALM during UAT could impact Tier 1 agency business systems with significant changes, as well as those systems that will require downstream Tier 2 interface testing. As a result, DFS may not have enough time to successfully complete all of the testing needed for agency business systems, which in turn could impact agency readiness for go-live with Florida PALM.	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Develop remediation timelines and resources to prepare the agency business systems to be ready for the start of ABS end-to-end testing with Florida PALM.</li> <li>Work with Division/Office management to allow technical and functional resources to be available during the ABS end-to-end testing period with Florida PALM.</li> </ul>	Still monitoring	10/20/23	Stacey Pollock
Processes	<p>ENTERPRISE A&amp;A: The Statewide Cost Allocation Plan (SWCAP) process changes:</p> <ul style="list-style-type: none"> <li>Business Process Changes will impact actual agency costs that are currently reported in SWCAP</li> <li>Process to identify and report the costs reported within the plan will change.</li> <li>Significant changes to the SWCAP or incorrect reporting of SWCAP costs could result in inaccurate management decisions.</li> <li>Inadequate reporting could result in loss of Federal funding if costs are deemed ineligible.</li> </ul>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Work with agencies to reasonably identify processes that will be impacted and estimate changes to costs that will be allocated.</li> <li>Identify reporting that will be needed and work with Florida PALM project to ensure needed reports are available and tested.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
Processes	<p>ENTERPRISE A&amp;A: Planning for some critical activities has not been done. Until these plans have been developed, A&amp;A cannot adequately determine needed resources, time and effort.</p> <ul style="list-style-type: none"> <li>Cutover planning</li> <li>FLAIR retirement planning</li> <li>Stabilization period planning</li> <li>Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll</li> <li>Financial Reporting mappings and data rollout</li> </ul>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Continue to collaborate with the Florida PALM Project and seek resources through staff aug. additional FTE or contracts as needs are discovered.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
Processes	<p>ENTERPRISE TREASURY: The current Concentration Account contract ends in March of 2026. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM. The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, BAI codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. They will also need to receive and distribute new depository supplies to their locations.</p>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.</li> </ul>	Still monitoring	12/13/23	Sarah Dugan
Processes	<p>ENTERPRISE TREASURY: Discussions relating to the status of outstanding warrants at the cutover from December 2025 to January 2026 has not been finalized and could, potentially, have impacts to warrant recipients and reconciliation processes.</p>	Open	6 (High/Medium)	<ul style="list-style-type: none"> <li>Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants</li> </ul>	Still monitoring	01/25/24	Sarah Dugan
Technology	Resource impacts due to unforeseen system changes from DFS divisions, other projects, and external entities could cause delays in the ABS Remediation timeline.	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline.</li> <li>Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration.</li> </ul>	Still monitoring	10/20/23	Stacey Pollock
People	<p>ENTERPRISE A&amp;A: All bureaus within the division will have significant process changes.</p> <ul style="list-style-type: none"> <li>Insufficient preparation or reluctance to adopt and adapt to changes could result in delays; operational deficiencies; and critical operations, tools, technologies, and resources not being available.</li> <li>Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output.</li> <li>Due to the unique activities that A&amp;A performs at an enterprise level, reduced performance could have a negative impact on agencies.</li> </ul>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>Prepare staff through regular change management engagements.</li> <li>Perform knowledge transfer on why things are done so we can ensure better understanding of future processes.</li> <li>Complete thorough process analysis and mapping of each process, along with the technology, tools, and resources to future functionality can ensure that we have identified where operational changes will occur and to what extent it will be affected.</li> <li>Monitor staffs' engagement.</li> <li>Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps.</li> <li>Review organizational charts and identify succession planning or knowledge transfers for known gaps.</li> <li>A&amp;A has contracted with two People Soft experienced resources to help with implementation activities, including identifying staffing model changes and process changes.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling
People Processes Technology Data	<p>ENTERPRISE A&amp;A: A&amp;A serves all other agencies, therefore our processes are at risk from external impacts:</p> <ul style="list-style-type: none"> <li>Agencies – All A&amp;A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for implementation, this will cause significant issues for A&amp;A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&amp;A staff around go live.</li> <li>Project – There may be changes in Project directions or decisions that negative affect A&amp;A that would cause an increase of time and resources or provide confusion and lack of clarity among A&amp;A's expectations.</li> <li>Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&amp;A's operations.</li> </ul>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> <li>Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff.</li> <li>A&amp;A OFFE team make outreach with agencies to determine training needs for skills that will be needed in Florida PALM users.</li> <li>Participate with all FFMS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon.</li> <li>Assist agencies with readiness tasks such as data analysis and cleansing.</li> <li>Develop contingency plans for agencies that are not prepared for Florida PALM implementation.</li> <li>Monitor activities, changes in rules and regulations, and agencies competencies.</li> <li>Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible.</li> </ul>	Still monitoring	10/11/23	Renne Hermeling



				• A&A is seeking funding through the LBR process to contract for financial expertise that State Agencies can use to identify knowledge gaps and areas needing improvement and address those issues.			
Processes	ENTERPRISE TREASURY: Relating to CMIA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMIA reporting.	Open	4 (Medium/Medium)	• Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered.	Still monitoring	12/13/23	Sarah Dugan
Technology	Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation	Open	4 (Medium/Medium)	• Communicate the Florida PALM timelines with third-party vendors. • Provide information and advisory support to the	Monitoring	02/27/24	Stacey Pollock

DFS Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DFS Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
Technology	Based on the Florida PALM implementation timeline established through the execution of Amendment #8, the Go-Live date for the Florida PALM solution is expected to occur on January 6, 2026.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.	
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	Added as a new entry to the Assumptions Log.	
Technology	Agency business system owners will understand Florida PALM impacts to be able to provide requirements for system modifications with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	10/20/23	Agency Business Systems	Added as a new entry to the Assumptions Log.	

DFS Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates	
Data	Initiated Cross Walk of FLAIR to PALM Expenditure and Revenue Account Codes	01/22/24	DFS, OFR, OIR	Begin awareness to the new values to impacted stakeholders	Entered as new Readiness Activity	
People Processes Technology Data	Conducted DRM Managment Meeting	01/22/24	DRM Management	Meeting items included FLAIR mid-year closing, DRM OCM plan, FL PALM Task 512, Scott Fennell decision on design & build tasks for 3rd party systems, OIT timeline for 3rd party systems, Segment II design workshops information, supplier conversion, and the FL PALM Knowledge Center.	Entered as new Readiness Activity	
People Processes Technology Data	A&A SME Meeting	02/06/24	A&A's Florida PALM SMEs and Chiefs	Discuss lessons learned from Segment III FD meetings, discussed take-aways from Segment II Workshops about processes changes, identified what out reach SMEs have done within each bureau, and strategized for Segment IV FD meetings.	Entered as new Readiness Activity	
People Processes Technology Data	A&A SharePoint Update: FLAIR to PALM	02/16/24	A&A Staff	Updated A&A FLAIR to Florida PALM SharePoint page highlighting new resources, such as the Knowledge Center, for staff to use.	Entered as new Readiness Activity	
People Processes Technology Data	Developing an A&A Segment II Workshop Recap Informational Video	02/29/24	All A&A Staff, and potentially other future Florida PALM users	Working on summarizing changes and key concepts from the Segment II Workshop. Intent is to create a short informational video for A&A staff with the goal of knowledge transfer.	Entered as new Readiness Activity	
People	Created and Distributed Top 5 infographic	01/05/24	Subject Matter Experts, POCs, Department Leadership, AA staff, OFB Staff	Provide quick easy content in a format that is visually appealing and keeps stakeholders engaged and aware of happenings	Entered as new Readiness Activity	
People	FL PALM DPAF manager email	01/08/24	Public Assistance Fraud Managers (PAF)	The latest infographic and newsletter from the CCN was emailed to the managers to bring awareness to Project	Entered as new Readiness Activity	
People	Conduct Monthly Point of Contact meeting with Division/Offices	01/30/24	DFS, OFR, OIR	Share project activities status, project communication wrap-ups and allow POCs an opportunity to ask questions, make suggestions and provide feedback.	last Tuesday of the month. 1/30: POC Evolvment, Expansion: Division "Gems" needed. Discuss Small bite-size communications led by POCs, Heads-up Save the Dates, RW Tasks 512-519	
People	Created and Distributed "Will Florida PALM Affect You Flyer"	02/08/24	DFS, OFR, OIR	Shared Readiness Survey result feedback and infographic on common know impacts to start the conversation amongst peers	Entered as new Readiness Activity. Shared with Florida to add to Agency Resource Library.	
People	Created and distributed "Who are Your Change Champion Network Members" Flyer	02/08/24	DFS, OFR, OIR	Readiness Survey results showed only 5% stakeholders knew CCN and purpose. Created infographic with "structure" on one side and people/role on the other. Object to visually make connection to stakeholders to improve awareness.	Entered as new readiness Activity. Shared with Florida to add to Agency Resource Library.	
People	Conduct Monthly Point of Contact meeting with Division/Offices	02/27/24	DFS, OFR, OIR	Share project activities status, project communication wrap-ups and allow POCs an opportunity to ask questions, make suggestions and provide feedback.	RW Task Status updates. PALM Cast review	
Technology	Participated in DRM & DFS OIT ABS Pre-Design Meetings	02/01/24	DFS OIT, CCN, DRM, BVR, DRM ABS	meeting to discuss Data Warehouse vendor/supplier queries for Origami including: FLAIR EFT but no SWVF record, Substitute W-9 but no SWVF record, and Origami contact with SWVF record but not all child contacts are setup in SWVF. Discussion also included the possibility of a new vendor portal and using a script to add Origami contacts to the SWVF.	Entered as new Readiness Activity	



Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DFS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Scott Fennell	scott.fennell@myfloridacfo.com	03/05/24
November - December 2023	Scott Fennell	scott.fennell@myfloridacfo.com	01/12/24
September - October 2023	Scott Fennell	scott.fennell@myfloridacfo.com	11/13/23
July - August 2023	Steven Fielder for Scott Fennell	steven.fielder@myfloridacfo.com	09/07/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DJJ

Readiness Workplan

DJJ Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor

Heather DiGiacomo

CCN Composition



The Change Champion Network dial reflects the completeness of your CCN makeup.


Change Champion Network:

Unique Filled Role = 10

Duplicate Filled Role = 2

Vacant Role = 2

RW Task Completeness



The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:


Score = 0.00%

Submitted Complete = 0

Submitted Incomplete = 1

Completed After Submission = 0

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:


Score = 96.96%

Submitted On Time = 15

Submitted Late = 5

Pending Submission = 0

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 7

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/29/24	Our Payroll SMEs have analyzed the documents and we don't have any questions at this time. Payroll team will present their analysis study during the next Monthly touchpoint meeting.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	01/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/29/24	No changes in CCN		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	The position number detail on line 15 and 68 is complete. The position on Line 82,83,94,101 is generic and it does not have the requested information	Submission Incomplete	03/08/24
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/13/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 107

Business Process Groupings = 12

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 97

Related Business Systems = 3

Related Reports = 15

Documentation Status:

Complete = 97 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 11

Criticality:

High = 9 Med = 0 Low = 1 None = 1

Documentation Status:

Complete = 10 Partial = 0 Not Started = 0

Cataloged Interfaces = 16

Inbound Interfaces = 12

Outbound Interfaces = 4

Data

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

Current-State:

Unique FLAIR Data Elements = 76

Associated Unique Uses = 76

Continued Use - Yes = 75

Continued Use - No = 1

Associated Business Systems = 4

Cataloged Reports = 515

Criticality:

High = 131 Med = 613 Low = 2 None = 1



**Implementation:****Impacted Agency Business Processes = TBD****Implementation:****Business Systems Planned for Integration = 8****• Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 8

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 9**

- Inbound Interfaces = 5

- Outbound Interfaces = 4

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DJJ Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	CCN role vacancies. Out of the CCN 14 assigned roles, three of the primary roles and two backup roles are vacant. Duplications are due to backup role assignments and limited personnel.	Open	9 (High/High)	Positions and funds have been approved effective 10/1, to recruit and hire skilled personnel dedicated to the FL PALM project.	July - August 2023, this risk will be present until vacancies are filled or another staffing solution is presented. November - December 2023, onboarding three (3) candidates to fill CCN vacancies. January - February 2024, filled two (2) CCN roles (Change Champion Primary and Backup). March - April 2024, filled two CCN roles (Project Management Primary and Agency Liaison Primary).	03/11/24	Jay Nayana
People	External Audits present a risk for consuming time and personnel that would have been tasked toward FL PALM activities	Open	4 (Medium/Medium)	Ensure that if an external audit is assigned to a specific bureau that analysis is conducted to gauge the impact against current and upcoming tasks. Internal audits may offer some flexibility toward deadlines and resources that should be explored.	November - December 2023, this risk was not present during the reporting period. January - February 2024, this risk was not present during the reporting period.	01/29/24	Jay Nayana
People	Changes in CCN or SMEs present a risk for incomplete knowledge transfer and potential lack of authority or leadership depending on the scale of the change.	Open	2 (Medium/Low)	Ensure project information is shared throughout CCN and SME stakeholder pools in the event of a vacancy. Utilize backups whenever possible to avoid taxing individual resources.	September - October 2023, this risk is ongoing. November - December 2023, changes in CCN occurred during the period. January - February 2024, filled two CCN roles. March - April 2024, filled two (2) CCN roles. January - February 2024, filled two (2) CCN roles (Change Champion Primary and Backup). March - April 2024, filled two CCN roles (Project Management Primary and Agency Liaison Primary).	03/11/24	Jay Nayana

**DJJ Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Subject Matter Expert (SME) time constraints.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Recruit and hire skilled personnel to achieve objectives and tasks for the FL PALM project. DJJ has implemented a discretionary spending plan to augment salaries for positions within the Department, including FL PALM related positions.	July - August 2023, this issue will be on-going until the staffing issue can be resolved. September - October 2023, ongoing. November - December 2023, ongoing. January - February 2024, hired two SMEs in Finance and Accounting.	06/30/24	Jay Nayana
Processes	Processes are not well documented or not documented at all.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Interview process owners to gain a better understanding and detail each element.	July - August 2023: Status defined. September - October 2023: Working on Task 328, to document and submit confirmation of current agency fiscal and payroll processes, including the people and any agency business systems (ABS) engaged in the processes. Task due December 15.	01/29/24	Jay Nayana

**DJJ Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes Technology	FL PALM Voucher processes/systems will be able to replace current voucher system (Axiom Pro).	Logged	08/01/23	Marcia Haye, Evelyn Jacobs	Gap analysis has been scheduled, awaiting further resources to conduct analysis.
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Haye	Changes to COA have been identified and are being considered with the rest of our remediation processes.



DJJ Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period	Comments or Updates
People Processes Data	Segment II Design discussion with Budget Office	01/25/24	Agency Liaison, IT SMEs and Budget SMEs	Post workshop discussion.	January 2024	
People Processes Data	Segment II Design discussion with General services Office	01/25/24	Agency Liaison, IT SMEs and GS SMEs	Post workshop discussion.	January 2024	
People Processes Technology Data	Transaction mapping document	02/12/24	F&A and IT	Discuss and document the transaction mapping between FLAIR and PALM	February 2024	
People Processes	Segment III Business Process Models Pre Discussion	02/09/24	Agency Liaison, SMEs	Pre Discussion and material distribution	February 2024	
People Processes Technology	Segment II Design WorkShop	01/08/24	F&A and IT SMEs	Discussed the questinnaires related to the workshop	January 2024	
Processes Technology	Task 504, 505 Submission	01/12/24	IT	The task is to identify the interfaces pertaining to Segment I Design	December 2023 - January 2024	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DJJ Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Heather DiGiacomo	heather.digiacomofldjj.gov	03/11/24
November - December 2023	Heather DiGiacomo	heather.digiacomofldjj.gov	01/12/24
September - October 2023	Heather DiGiacomo	heather.digiacomofldjj.gov	11/09/23
July - August 2023	Heather DiGiacomo	heather.digiacomofldjj.gov	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DLA](#)  
[Readiness Workplan](#)

DLA Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Sabrina Donovan

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 9
- Duplicate Filled Role = 6
- Vacant Role = 4

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 90.87%

- Submitted On Time = 16
- Submitted Late = 3
- Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Continuing to gather desk procedures and consolidate responses. Business analyst compiling 03/11/2024.		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	03/11/24	HR has experienced significant vacancies, but will continue to review. Completion will be reported.Status of completion updated 02/28/2024 to 75%. Marked as 100% complete 03/11/2024.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/26/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/28/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 27

- Business Process Groupings = 12

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 35

- Related Business Systems = 0
- Related Reports = 0

Documentation Status:

- Complete = 0 Partial = 35 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 13

- Criticality:
  - High = 9 Med = 0 Low = 1 None = 3

Documentation Status:

- Complete = 10 Partial = 3 Not Started = 0

Cataloged Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
- Continued Use - Yes = 39
- Continued Use - No = 3

Associated Business Systems = 15Cataloged Reports = 176



**Implementation:****Impacted Agency Business Processes = TBD**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

**• Criticality:**

- High = 21 Med = 1 Low = 86 None = 0

**Implementation:****Business Systems Planned for Integration = 6****• Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 5  
Not Started = 0 Not Needed = 0**• Segment II - Documentation Updates: TBD****Planned Interfaces = 5**

- Inbound Interfaces = 4

- Outbound Interfaces = 1

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DLA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Technology	loss of technical CNN participant	Open	9 (High/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	Position is still vacant.	02/26/24	Sabrina Donovan
Processes Technology	Changes to project scope potentially impacts agency planned mitigation.	Open	9 (High/High)	Review BPM's for changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	Review continues	03/11/24	Sabrina Donovan
People Technology	Technical Documentation: Lack of technical knowledge and/or documentation related to business systems and interfaces being impacted by the project.	Open	4 (Medium/Medium)	Staff Aug business analyst to assist with gathering requirements.	Staff aug has been on-boarded, but is still becoming familiar with agency and the project. Additional staff aug will begin 03/25/2024.	03/11/24	Sabrina Donovan

**DLA Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Reengineer FLAIR accounting interfaces to Florida PALM.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation to review data formats and interface options to determine optimal solution.	Continuing issue.	01/31/25	Sabrina Donovan
People Processes Technology	Software Integration Issues: Planned software integration may not work as expected, leading to re-design and re-work.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation in design workshops and UAT.	Continuing issue.	01/31/25	Sabrina Donovan
Processes	Need ability to make corrections to closed reporting period	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option	new issue moved from risk-I don't think this has a resolution.	01/31/25	Darlene Faris
People	Availability of Finance & Accounting SMEs: Due to workload and competing priorities SMES may not be available. This may result in extending the overall schedule, and adding cost to the budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	When the staff aug business analyst is engaged, interviews will need to be scheduled to minimize work disruption.	Scheduling of Segment IV workshops coincides with year-end activities, resulting in reduced availability.	01/31/25	Sabrina Donovan

**DLA Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting	no change
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting	no change

**DLA Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

**Agency Sponsor Confirmation**

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

**Agency Sponsor Name: \***☐ **Confirm \*****Submit****DLA Status Report Confirmation**

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/11/24
November - December 2023	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	01/10/24
September - October 2023	John Guard	john.guard@myfloridalegal.com	11/08/23
July - August 2023	John Guard	sabrina.donovan@myfloridalegal.com	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DMA](#)  
[Readiness Workplan](#)

DMA Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Col. Adam Curry

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 2
- Vacant Role = 1

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 96.96%

- Submitted On Time = 16
- Submitted Late = 4
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 4
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/09/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/30/24	Sent payroll material to HR as a reference guide to asset with task completion. No feedback received.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	03/05/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/24/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/08/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/08/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/07/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 22

- Business Process Groupings = 10

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 24

- Related Business Systems = 4
- Related Reports = 14

Documentation Status:

- Complete = 24 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 5

- Criticality:
  - High = 2 Med = 3 Low = 0 None = 0
- Documentation Status:
  - Complete = 2 Partial = 0 Not Started = 2

Cataloged Interfaces = 1

- Inbound Interfaces = 0
- Outbound Interfaces = 1

Data

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

Current-State:

Unique FLAIR Data Elements = 94

- Associated Unique Uses = 97
  - Continued Use - Yes = 71
  - Continued Use - No = 22
- Associated Business Systems = 2

Cataloged Reports = 48

- Criticality:
  - High = 28 Med = 12 Low = 6 None = 1



**Implementation:****Business Systems Planned for Integration = 2****• Segment I - Documentation Updates:**  
- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 2**• Segment II - Documentation Updates:**  
**TBD****Planned Interfaces = 4**- Inbound Interfaces = 1  
- Outbound Interfaces = 3**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DMA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Replacing current F&A tracking system. May not be in place or compatible to perform testing with Florida PALM.	Open	9 (High/High)	Awaiting approval to move forward with project.	July/August	10/24/23	Jack McAlpine
People	Lack of Project Manager to lead tasks	Open	9 (High/High)	Funding has been received. Leadership will discuss next steps to onboarding a person.	Nov/Dec	01/09/24	Jack McAlpine
People	Awaiting hiring decision of Project Manager.	Open	9 (High/High)	Continued discussion for hiring process.	Jan/Feb	01/09/24	Tim Smith
People Processes Technology Data	Insufficient staff	Open	9 (High/High)	Continued discussion and research for proper roles and responsibilities.	Jan/Feb	01/24/24	Jack McAlpine
People	Non-participation to complete task.	Open	9 (High/High)	Continue communication.			
Technology	Replacing current F&A tracking system. May not be in place or compatible to perform testing with Florida PALM.	Open	6 (High/Medium)	Awaiting approval and research information of possible products to purchase.	Sep/Oct	10/24/23	Brian Checchia
Technology	Awaiting information about new tracking system to replace Quickbooks	Open	6 (High/Medium)	Funding. LBR request has made it into the Governor's Recommended Budget.	Nov/Dec	01/09/24	Jack McAlpine

**DMA Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Data	Non participation.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Continued communication with department supervisors.	Jan/Feb	03/17/24	Jack McAlpine
People	The agency's Purchasing & Contracting office has 1 position to fill.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for position.	Purchasing is fully staffed.	01/26/24	John Connor
People	Email sent out to CCN to encourage members to sign up for the design workshops if applicable	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Passing along information to encourage important members to attend the workshops that apply to their positions.	Jan/Feb	01/19/24	Jack McAlpine
People Processes	Budget Administrator and Finance Supervisor are in the process of training several new personnel.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To bring staff up to date with current processes within the Finance and Accounting Office.	Jan/Feb	01/31/24	Trixy Pacetti
People Processes Technology Data	Continued training of new staff members in additional to required training for budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Will resolve with time.	Jan/Feb	06/30/24	Trixy Pacetti
People	Behind on tasks	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Agency is behind on starting the tasks due on 4/12. Expecting ramp up the week of 3/4.	Jan/Feb	04/12/24	Jack McAlpine
People Processes	Leadership is beginning the process for looking for a project manager. CPT. Estes has been involved to fill some of the void for the time being	Open	Low - All impacts not listed as Critical or High	CFO and Deputy Quartermaster to discuss plan on hiring a project manager	Nov/Dec	01/31/24	Timothy Smith
Technology	Quickbooks Replacement	Open	Low - All impacts not listed as Critical or High	It appears the request for a Quickbooks database will end up being denied based on previous offers from House and Senate. The agency will plan on moving forward with Quickbooks.	Jan/Feb	06/30/24	Jack McAlpine

**DMA Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Technology	The agency has submitted an LBR for Project Manager to help manage implementation of Florida PALM and travel to Tallahassee for meetings.	Logged	09/01/23	All agency business systems	July/August
People Processes Data	The agency is expecting Florida PALM funding in the 3rd quarter of Fiscal Year 2023-24.	Logged	09/25/23	Agency stakeholder and systems processess.	Sep/Oct
People Data	The agency is still gathering information on funding for Project Manager	Logged	11/01/23	Agency stakeholder and systems processes	Nov/Dec
People Processes	The agency is current discussing the hiring process for Project Manager.	Logged	01/09/24	Agency stakeholder and systems processes	Jan/Feb
People Processes Technology Data	Project Manager is still not hired.	Logged	01/24/24	Agency stakeholder and systems processes and progression.	Jan/Feb
Processes	Changing of ARRO file format	Logged	03/05/24	Agency has concern about potential file changes that will be required from ARRO without missing any bi-weekly payrolls.	Jan/Feb



DMA Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	Continued discussion with payroll interfaces and DMAARRO	01/09/24	Informational	To ensure systems will transition properly.	Jan/Feb
People Processes Technology Data	Soliciting additional staff	01/24/24	Informational and Consultative	Focus processes	Jan/Feb
People Processes Technology Data	Email was sent to HR staff for information and feedback on Task 508.	01/30/24	Crucial information needed.	For agency specific and design.	Jan/Feb

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	COL Adam Curry	adam.m.curry.mil@army.mil	03/06/24
November - December 2023	Adam M. Curry	adam.m.curry.mil@army.mil	01/11/24
September - October 2023	Adam Curry	timothy.j.smith53.nfg@army.mil	11/08/23
July - August 2023	Timothy Smith	timothy.j.smith53.nfg@army.mil	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DMS](#)  
[Readiness Workplan](#)

DMS Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Katie Parrish

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 6
- Vacant Role = 3

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 99.13%

- Submitted On Time = 18
- Submitted Late = 2
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24	Several workshops with DMS Payroll SMEs reviewed 8 Payroll processes and the 35 associated sub-processes. Questions and input were documented in the spreadsheet attached to this row (17). Follow up from the PALM Team is requested.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24	DMS updates to CCN and SMEs is current to date, but ongoing.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	CCN end user inventory complete. Enterprise Partners end user inventory ongoing.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/15/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/06/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 87

- Business Process Groupings = 11

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 64

- Related Business Systems = 7
- Related Reports = 40

Documentation Status:

- Complete = 64 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 12

- Criticality:
  - High = 5 Med = 2 Low = 0 None = 5

Documentation Status:

- Complete = 10 Partial = 1 Not Started = 1

Cataloged Interfaces = 55

Data

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

Current-State:

Unique FLAIR Data Elements = 143

- Associated Unique Uses = 1303
- Continued Use - Yes = 205
- Continued Use - No = 43

Associated Business Systems = 5Cataloged Reports = 108



**Implementation:****Impacted Agency Business Processes = TBD**

- Inbound Interfaces = 40  
- Outbound Interfaces = 15

• **Criticality:**  
- High = 91 Med = 18 Low = 3 None = 0

**Implementation:****Business Systems Planned for Integration = 4****• Segment I - Documentation Updates:**

- Complete = 4 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 10**

- Inbound Interfaces = 2  
- Outbound Interfaces = 6

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DMS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Pulling reports from FLAIR/PALM is mandatory to complete the statutory requirement to publish the ACFR by December 31st. Multiple agencies are involved in this publication.	Open	6 (High/Medium)	Reports are available. Plan for report identification and testing.	Logged Nov 6, 2023  Reviewed again on Dec 20, 2023. No change.  Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Functionality. Will PALM deliver the functionality needed for DMS operations?	Closed	6 (High/Medium)	Develop a testing plan. Use the PALM Sandbox environment. Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees.	Logged April 26, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 2 - no change.  Reviewed again Dec 20 - no change.  Continuing to monitor.	02/22/24	Finance and Administration / Jennifer Gaines
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with "FLAIR-end" seems risky with the current change solutions. The seen and unforeseen functionality and compatibility issues at CMS Wave implementation adversely impacted and even stopped certain critical business processes for agencies.	Open	6 (High/Medium)	Mimic FLAIR functionality EXACTLY or as close to exactly as possible. Any deviations should require extensive testing and re-testing with sufficient sandbox training and focus from agencies a minimum of one year in advance of implementation. So far, agencies do not have enough appropriate staff, support, or available resources for implementation and its aftermath which is difficult to plan for with so many unknowns. Allowing for that year of testing, sandboxing, and training to allow agencies to prepare is another suggested solution for this inherent risk.	Logged April 26, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 2 - no change. Continuing to monitor.  Reviewed again Dec 20 - no change. Continuing to monitor.  Reviewed again Feb 22 - no change. Continuing to monitor.	11/02/23	Finance and Administration / Sandy Watson
People Processes Technology Data	Variable risks at this time with People First. People First is currently working on its next-generation solution and plans to issue an ITN in early 2024. The current contract expires August 2026 and the platform reaches end of life in Dec 2027. The primary risks are converging timelines, and limited information on the level of remediation necessary for PF/PALM integration.	Open	6 (High/Medium)	PALM integration will be addressed in current People First Solution and required in the next generation solution.  DMS will work in good faith to request and dedicate appropriate resources to ensure effective coordination of efforts between People First and PALM and will plan for contingencies within the requirements of the next generation solution.	Logged April 22, 2023.  Reviewed again September 6, 2023.  Reviewed again Nov 2 - no change.  Updated Dec 15, 2023.  Continuing to monitor.	12/15/23	People First / Stephen Eaton
People Processes Technology Data	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Open	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format.	Logged Nov 6, 2023  Reviewed again Dec 20, 2023 and updated mitigation.  Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Medium)	Roll out sandbox test capabilities as sections are completed for Agencies to test.  Sandbox environment is not secure for testing - PALM needs to work on true test environment.  Sandbox status has not changed. PALM is addressing this risk.	Logged April 21, 2023. Reviewed again September 6, 2023.  Reviewed again Nov 3, 2023. Mitigation notes updated.  Reviewed again Dec 15, 2023. No change. Continuing to monitor.  Reviewed again Feb 2 2024. No change. Continuing to monitor.	11/03/23	Division of State Group Insurance / Jason Ottinger
People Processes Technology	Make sure all business and IT and HRM liaisons are included in the appropriate technical sessions for capturing accurate business needs within these areas that will be using and/or interfacing with PALM.	Closed	4 (Medium/Medium)	Weekly follow up with PALM staff to ensure recommended Business and Technical liaisons are up to date prior to these critical PALM sessions.  Communications and technical meeting attendance for SMEs and Business Analysts have improved.	Logged Nov 2, 2023.  Reviewed again Dec 15, 2023. No change. Continuing to monitor.  Reviewed again Feb 2, 2024. Closed.	02/02/24	Division of State Group Insurance / Jason Ottinger
People Processes	Timeline. Competing deadlines immediately prior to go-live. Fiscal accountants and other users will be trying to learn PALM as well as changes to	Open	4 (Medium/Medium)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.	11/06/23	STMS / Kurt Bonhamer



	departmental and enterprise systems affected by PALM implementation, at the same time. The STMS Team, as well as other system owners, may need to make late changes while also trying to train end users.				Reviewed again Dec 20. No change. Continuing to monitor.  Reviewed again Feb 29, 2024. Continuing to monitor.		
People Processes Technology Data	Retirement benefits payments must be supported by PALM to allow for timely release of funds. This would create a loss of earnings for the trust funds if transfer is delayed.	Open	3 (High/Low)	Programming needs to be completed to allow for flexibility so funds can be released timely.  Need more details on how this will work in PALM.	Logged Nov 6, 2023  Reviewed again on Dec 20, 2023. No change.  Reviewed again on Feb 9, 2024. No change.	11/07/23	Division of Retirement / Megan Biederman
People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Dec 20 - no change.  Reviewed again Feb 29, 2024. Continuing to monitor.	11/06/23	STMS / Matt Giglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed.  Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023.  Reviewed again Nov 6, 2023 - no change.  Reviewed again Feb 29, 2024. Continuing to monitor.	11/06/23	STMS / Matt Giglio

DMS Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	The Florida PALM Team has decided to not provide a webservice/real time interface for budget pre-check or vouchers. This does not match up to current FLAIR functionality and presents a significant risk in increasing payment cycle time, which has direct impact on agencies' ability to meet prompt payment requirements.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The recommended proposed solution is for the Florida PALM team to provide a budget pre-check and voucher webservice/real time interface, in addition to the Combo Edit Check and Encumbrance webservice they have already offered.	Interface: There are also impacts to emergency operations invoice payment in the event a vendor needs to be paid quickly to secure emergency supplies or services during Emergency Operations Center (EOC) activation.	01/01/24	State Purchasing / Tyler Brown
People Processes Technology Data	Promised piece of \$20M administered funds not being provided. System remediation and FLAIR clean up can not move forward without funding.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Release of funds to agencies is the proposed solution. New LBRs are currently in development.  Waiting for session completion for 2024 or signature of the GAA.	Resources: Funding is a major factor to the success or failure of this effort.  Reviewed again on Dec 20, 2023. No change.  Reviewed again Feb 22, 2024. No change.  Continuing to monitor.	07/01/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct.  Reviewed again on Feb 9, 2024. No change.	12/01/25	Florida Retirement System / Megan.Biederman

DMS Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live.  Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger  All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division.  Reviewed again on Dec 27. No change.  Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox.	

DMS Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/04/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	FRS PALM Solution Review	01/04/24	Project Management Liaisons, SMEs, Production Support, OIT,	Review current PALM capabilities to date.	Recurring meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review Planning	01/04/24	SMEs	Planning for review sessions to complete PALM Task 508: Review Payroll Wave Business Process Models	One-on-one to plan review sessions and determine who needs to participate.
People Processes Technology	PALM Project Work Session: OIT	01/05/24	OIT SMEs	Discuss OIT role in the PALM project.	One-on-one with OIT SME to determine who needs to participate and at what level.



Data					
People Processes Technology Data	PALM Work Session: FRS Payroll Process Review	01/10/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Work group meeting with FRS to address Task 508: Review Payroll Wave Business Process Models
People Processes Technology Data	PALM Interfaces and ABS Review with OIT	01/11/24	OIT SMEs	Review and update Interfaces and ABS for DMS PALM Tasks 504 and 505 due Jan 12.	OIT Work Group Meeting with Production Support SMEs.
People Processes Technology Data	PALM Interface Reporting	01/12/24	OIT SMEs	Review and update Interfaces and ABS for DMS PALM Tasks 504 and 505 due Jan 12.	OIT Work Group Meeting with Production Support SMEs.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/12/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Work Session: FRS Payroll Process Review	01/12/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	FRS Payroll Review work group meeting.
People Processes Technology Data	PALM Project Discussion	01/17/24	Agency Sponsor, Agency Liaisons	Purpose: Discuss Florida PALM project impact on DMS.	Brief DMS PALM Sponsor. Collect information and documentation.
People Processes Technology Data	PALM Project Brief	01/17/24	Agency Sponsor, Agency Project Manager, Agency Liaison	Purpose: Discuss Florida PALM project impact on DMS.	Brief DMS PALM Sponsor on information collected from Agency Liaisons: specific needs or requests, specific concerns / questions, specific project goals, etc.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/19/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/22/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: FRS Payroll Process Review	01/22/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	FRS Payroll Review work group meeting.
People Processes Technology Data	PALM Project Work Session: Payroll Process Review	01/23/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Task 508: Review Payroll Wave Business Process Models	Payroll Review work group meeting. Confirm all input and questions for PALM.
People Processes Technology Data	FRS/KPMG Bi-weekly Status Meeting	01/23/24	Business Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Project Work Session	01/25/24	Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	Internal DMS Monthly PALM Connect	01/25/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review PALM project status: share updates and input on the project status from each Liaison's area. This includes the CCN and Enterprise partners.	Recurring monthly meeting to brief the Agency Sponsor and address PALM project status.
People Processes Technology Data	PALM Project Brief	01/29/24	OIT SMEs	Review current PALM Project status from OIT perspective.	Collected OIT input on agency project charter and work plan.
People Processes Technology Data	PALM Project Work Session	02/01/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM Tasks Review	02/02/24	OIT SMEs, Agency Liaisons	Review upcoming PALM Tasks and determine level of OIT involvement needed to complete the work.	OIT targeted review of the PALM project tasks.
People Processes Technology Data	FRS/KPMG Bi-weekly status meeting	02/06/24	Business Liaisons, Project Management Liaisons	Status update of all projects being worked on during the engagement between the Division of Retirement and KPMG, including PALM.	Recurring bi-weekly status meeting.
People Processes Technology Data	PALM Risk Identification	02/07/24	Agency Liaisons, SMEs, OIT, Production Support	To identify risk associated with PALM in regards to the Division of Retirement.	Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	PALM Project Work Session	02/08/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	FRS PALM Risks Review	02/09/24	FRS Liaison	Review and update PALM Project Risks, Issues and Assumptions.	FRS one-on-one meeting with Agency Liaison.
People Processes Technology Data	PALM Project Work Session	02/15/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM End Users Updates	02/16/24	Agency Liaisons	Review and address Task 512 - Identify Future PALM End Users.	DGSI one-on-one with Agency Liaison.
People Processes Technology Data	PALM Project Work Session	02/22/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review and complete PALM Readiness Work Plan tasks. Organize efforts. Determine collaborators and SMEs. Develop timelines.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	Review PALM Task 513: Configuration Workbooks	02/23/24	Agency Liaisons	Purpose: Review task materials and begin planning for Completing Configuration Workbooks for Segments I and II. Determine meeting cadence and attendees, etc.	FMS one-on-one with Agency Liaison.
People Processes Technology Data	Internal DMS Monthly PALM Connect	02/28/24	Agency Sponsor, Agency Liaisons, Production Support, SMEs	Review PALM project status: share updates and input on the project status from each Liaison's area. This includes the CCN and Enterprise partners.	Recurring monthly meeting to brief the Agency Sponsor and address PALM project status.
Processes Technology	PALM Demo on Divestments	02/19/24	Agency and Business Liaisons, OIT SMEs, Production Support	Review disinvestments procedures in FL PALM.	Live demo for OIT in PALM. Activity to show OIT SMEs how accounts use the disinvestment function in FL PALM. Demonstrate error checking.



Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DMS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Katie Parrish	katie.parrish@dms.fl.gov	03/06/24
November - December 2023	Katie Parrish	katie.parrish@dms.fl.gov	01/11/24
September - October 2023	Katie Parrish	katie.parrish@dms.fl.gov	11/08/23
July - August 2023	Katie Parrish	evelyn.harrison@dms.fl.gov	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOAH](#)  
[Readiness Workplan](#)

DOAH Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Megan Silver

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 98.26%

- Submitted On Time = 18
- Submitted Late = 2
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/23/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/24/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/23/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	02/14/24			
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	100% - Submitted	02/14/24			
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/08/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 11

- Business Process Groupings = 11

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 25

- Related Business Systems = 0
- Related Reports = 18

Documentation Status:

- Complete = 25 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 2

- Criticality:
  - High = 2 Med = 0 Low = 0 None = 0
- Documentation Status:
  - Complete = 0 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 73

- Associated Unique Uses = 143
- Continued Use - Yes = 49
- Continued Use - No = 39

Associated Business Systems = 0

Cataloged Reports = 52

- Criticality:
  - High = 11 Med = 25 Low = 17 None = 0



**Implementation:**

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:  
- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0

• Segment II - Documentation Updates:  
TBD

Planned Interfaces = 0

- Inbound Interfaces = 0  
- Outbound Interfaces = 0

**Implementation:**

Configuration Workbooks = TBD

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOAH Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Due to the staff's previous experience with system implementation, the staff's level of engagement regarding transitioning to new financial system may be low or non-existent.	Open	6 (High/Medium)	Agency Liaison will integrate PALM awareness through emails, meeting discussions and providing updates regarding PALM during management staff meetings. Agency Liaison will provide staff with PALM resources to become familiar with the system.	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff are actively participating in completing PALM tasks. CNN Members and SMEs are participating in the Segment III meetings.	07/05/23	Patricia Kenyon
People	Due to the limited number of positions, staff may not be fully trained / confident to perform their accounting functions in PALM on Go Live Date.	Open	3 (High/Low)	DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided. SMEs have participated in Segment III meetings and will continue to participate in Segment IV meetings.	Agency Liaison has integrated PALM awareness discussion during staff meetings. Accounting staff members are actively participating in completing PALM tasks.	07/05/23	Patricia Kenyon

DOAH Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Accountant III position is vacant who performs PALM functions.	Closed	Low - All impacts not listed as Critical or High	Fill the vacant position. Have the current back-up Accountant perform functions.	Accountant II was promoted to the Accountant III position. We also have identified and have a start date for the new Accountant II.	01/26/24	Patricia Kenyon

DOAH Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	Staff will be able to function in PALM on Go Live Date	Logged	09/08/23	Budget, HR and Accounting staff	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. CCN Members and end users participated in Segment III Business Process Models Meeting. Accounting Staff will begin reviewing the PALM tasks to ensure engagement is maintained.	

DOAH Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

DOAH Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Megan S. Silver	megan.silver@doah.state.fl.us	03/11/24
November - December 2023	Megan S. Silver	megan.silver@doah.state.fl.us	01/10/24
September - October 2023	Megan S. Silver	megan.silver@doah.state.fl.us	11/09/23
July - August 2023	Megan S. Silver	megan.silver@doah.state.fl.us	09/11/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for DOE

Readiness Workplan

DOE Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor


Suzanne Pridgeon

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

• Unique Filled Role = 7

• Duplicate Filled Role = 5

• Vacant Role = 2

RW Task Completeness:

Score = 100.00%

• Submitted Complete = 1

• Submitted Incomplete = 0

• Completed After Submission = 0

RW Task Timeliness:

Score = 90%

• Submitted On Time = 15

• Submitted Late = 3

• Pending Submission = 2

Meeting Participation:

• Meetings Attended = 8

• Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	50% - In Progress		DOE is in the process of adding PALM specific resources and will be working diligently to complete the task.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	50% - In Progress		DOE is in the process of adding PALM specific resources and will be working diligently to complete the task.		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/28/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24	The Change Management Liaison will be selected in the next few weeks.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 88

• Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 30

• Related Business Systems = 5

• Related Reports = 0

• Documentation Status:

- Complete = 30 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 26

• Criticality:

- High = 23 Med = 0 Low = 0 None = 1

• Documentation Status:

- Complete = 7 Partial = 1 Not Started = 9

Cataloged Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 443

• Associated Unique Uses = 574

- Continued Use - Yes = 124

- Continued Use - No = 3

• Associated Business Systems = 6

Cataloged Reports = 83



**Implementation:****Impacted Agency Business Processes = TBD**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

**• Criticality:**

- High = 82 Med = 13 Low = 1 None = 0

**Implementation:****Business Systems Planned for Integration = 9****• Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 6  
Not Started = 0 Not Needed = 0**• Segment II - Documentation Updates: TBD****Planned Interfaces = 4**

- Inbound Interfaces = 1

- Outbound Interfaces = 3

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DOE Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Data	Due to BA not being in place, process documentation for Task 328 maybe late due to the lack of personal.	Open	4 (Medium/Medium)	DOE Executive staff is working to add BA to PALM team. DOE will continue to work the process and submitted what is completed at the due date. If not completely completed at the due date, DOE will continue to work the processes and update PALM until task is complete.	Task has been submitted to PALM. Additional documentation will be added.	09/21/23	DOE PALM Team
People	Employee Retention - Staff leaving the Agency for retirement or other opportunities can create a delay with collection of data and/or processes.	Open	4 (Medium/Medium)	DOE will refill positions as quickly as possible to stop any delays.	No Change	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team [anyone working on PALM]). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	New Risk	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk	02/14/24	DOE
People Processes Technology Data	Vocational Rehab and Division of Blind Services leaving the Agency -AWARE systems	Closed	4 (Medium/Medium)	No Response	Pending	02/14/24	DOE
Technology	System Capabilities - Several individuals have mentioned outdated systems within the DOE, this could cause a limitation of data from PALM.	Open	3 (High/Low)	DOE to Remediation existing systems to be compatible with Florida PALM	Testing will discover any deficiencies.	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	New risk	01/12/24	DIT and Aware technical teams
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are discovered, DOE will revisit the task.	07/13/23	DOE PALM Team
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	New risk	01/30/24	AWARE Team

**DOE Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Processes Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team [anyone working on PALM]). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Agency is working to complete the late task and hiring resources.	Technical BA is schedule to start on 02/01/2024	02/01/24	DOE IT
People Processes Technology Data	Task 504 and 505 not completed by PALM schedule deadline.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Add additional resource to the project and more communication with the project teams.	Technical BA started on 02/26/2024 with the DTI team.	04/01/24	DOE Executives

**DOE Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	System AS-IS documentation will be completed and be readily available by 10/27/2023	Logged	07/08/23	22 Agencies Business Systems, Comptrollers and budget office.	Closed
Data	Reports is fully documented and available as of 07/31/2023	Logged	07/08/23	Comptroller Office	Reports submitted to the FL PALM on 07/28/2023 and will continue to be updated.
Technology	Technical Systems with be updated to be compatible with PALM.	Logged	07/08/23	Comptroller, DOE IT and Agency department users.	No Change
Technology	Florida PALM will provide system designed for DOE to meet the project needs	Logged	08/01/23	Comptroller, DOE IT and Agency department users.	Schedule PALM simulations schedule for 08/2023 and 09/2023



DOE Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Data	Task 513 configuration workbook	02/28/24	PM and Deputy Comptroller	Strategy conversation	
People Processes Technology Data	VR AWARE	01/12/24	AWARE End-users, AWARE technical Team, and PM	504 and 505	
People Processes Technology Data	DBS AWARE	01/23/24	AWARE End-users, AWARE technical Team, and PM	504 and 506	
People Processes Technology Data	PALM status meeting	02/23/24	Payroll, Deputy Comptroller and PM	All PALM actions	
People Technology Data	DTI weekly status update	02/07/24	BA, BA Manager and PM	DTI Progress on PALM	
People Technology Data	DTI weekly status update	02/14/24	BA, BA Manager and PM	DTI Progress on PALM	
People Technology Data	AWARE DBS to PALM status/interface discussions	02/07/24	AWARE DBS technical team, DBS Business, PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Technology Data	AWARE DBS to PALM status/interface discussions	02/14/24	AWARE DBS technical team, DBS Business, PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Technology Data	AWARE DBS to PALM status/interface discussions	02/21/24	AWARE DBS technical team, DBS Business, Comptroller	Discuss PALM functionality, needs and interfaces. To provide status updates.	
People Technology Data	AWARE DBS to PALM status/interface discussions	02/28/24	AWARE DBS technical team, DBS Business, Comptroller and PM	Discuss PALM functionality, needs and interfaces. To provide status updates.	
Processes Technology Data	Segment III files and interfaces	02/27/24	All of DOE PALM Stakeholders	Discuss the changes of Segment III files.	
Technology Data	Meeting with AWARE system team	01/04/24	AWARE technical Staff, Deputy Comptroller and PM	PALM task 504 and 505	
Technology Data	Outbound payments encumbrances and payments	02/08/24	Comptrollers office, DBS IT, VR IT and DTI	PALM outbound files to DOE	
Technology Data	DTI weekly status update	02/21/24	BA, BA Manager, Comptroller, Deputy Comptroller and PM	DTI Progress on PALM	
Technology Data	DTI weekly status update	02/28/24	BA, BA Manager, Comptroller, Deputy Comptroller and PM	DTI Progress on PALM	
People	Agency created survey to capture PALM end-users, FLAIR experience, FL PALM exposure and SME interest.	01/18/24	Survey was sent to Budget, Board of Governor, Comptrollers', Human Resources and Procurement	Capture end-users and jump start the change management process.	
People	Create a distribution list for future PALM users	01/28/24	Survey was sent to Budget, Board of Governor, Comptrollers', Human Resources and Procurement	Affective to way to communicate with all stakeholders.	
People Processes	DOE payroll department	01/08/24	Payroll, Deputy Comptroller and PM	Task 508	
People Processes	Payroll Process	01/23/24	Payroll Department	Task 508	
People Processes	Payroll Process	01/25/24	Payroll Department	Task 508	
People Processes	Payroll Process	01/26/24	Payroll Department	Task 508	
People Processes Technology	AWARE Files and Interface Meeting for segment 1	01/30/24	AWARE Technical and Business units	To discuss changes from previous discussions to the current file layouts	
People Processes Technology	Segment 2 files and Interface Meeting	01/31/24	Comptrollers office and all technical teams.	Discussion for newly released segment 2 files	
Technology	DEL to FLAIR to PALM meeting	02/12/24	DEL technical staff and PM	To discuss DEL current function and the change to PALM	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Matt Kirkland	matt.kirkland@fldoe.org	03/08/24
November - December 2023	Matt Kirkland	matt.kirkland@fldoe.org	01/10/24
September - October 2023	Matt Kirkland	matt.kirkland@fldoe.org	11/08/23
July - August 2023	Matt Kirkland	matt.kirkland@fldoe.org	09/08/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOEAP](#)  
[Readiness Workplan](#)

DOEA Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Vacant

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

- Unique Filled Role = 1
- Duplicate Filled Role = 11
- Vacant Role = 1

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness:

Score = 53.48%

- Submitted On Time = 5
- Submitted Late = 7
- Pending Submission = 8

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	326	Update Current State Agency Business System Inventory and Documentation	03/13/23	10/27/23	50% - In Progress				
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Loaded various procedures to correct sheet, working on filling in the details and adding other processes		
	N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23					
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23					
	N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23					
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23					
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	02/13/24	As discussed in January touchpoint		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	02/13/24	As discussed in January touchpoint		
	N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23					
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	50% - In Progress		HR was sent documentation to review.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/16/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24					
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	02/13/24	CCN has not changed.		
	Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24	Will have to update as vacancies fill and training within takes place.	Submission Complete
	Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering			
	N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering			
	N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering	Working on updating and identifying the business processes		
	N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress			
	Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering			
	Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress			
	N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24				
	N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24	No new users. Deleted duplicate accounts from email changes.	
	N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	50% - In Progress		Working on reflecting current risks and issues. Staffing shortages within previous weeks caused for delay.	
	N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24				

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 produced from an agency's financial business operations.



Implementation:

Planned Florida PALM End Users = 27

• Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Current-State:

Cataloged Business Processes = 16

• Related Business Systems = 5

• Related Reports = 4

• Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Current-State:

Cataloged Business Systems = 4

• Criticality:

- High = 0 Med = 0 Low = 0 None = 1

• Documentation Status:

- Complete = 0 Partial = 1 Not Started = 0

Cataloged Interfaces = 7

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Implementation:

Business Systems Planned for Integration = 0

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates: TBD

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Current-State:

Unique FLAIR Data Elements = 70

• Associated Unique Uses = 75

- Continued Use - Yes = 49

- Continued Use - No = 0

• Associated Business Systems = 6

Cataloged Reports = 37

• Criticality:

- High = 9 Med = 3 Low = 7 None = 17

Implementation:

Configuration Workbooks = TBD

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOEA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	no change to previous items	Open	6 (High/Medium)	Limited resources continue to create issues	ongoing	01/16/24	Glenn Elmer
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	4 (Medium/Medium)	Review processes, look to a business system that could automate current manual processes. Could be easier to integrate the business system to Palm.	Business system has been selected and undergoing customization.	12/01/23	Glenn Elmer
Technology	lack of internal business system could result in an additional workload on an already limited staff.	Open	4 (Medium/Medium)	currently evaluating potential business systems to implement	System selected. Customization currently underway.	12/01/23	Glenn Elmer
People	current staff not as proficient in new technology. Could result in a slower implementation.	Open	4 (Medium/Medium)	As vacancies occur, targeting candidates with increased technological skills.	ongoing	12/01/23	Glenn Elmer

DOEA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Current business system is manual input. is and will continue to be a workflow issue.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	currently evaluation existing systems in other agencies. hope to be able to secure one with minimal configuration needs.	System has been selected and is currently undergoing customization	12/31/23	Glenn Elmer
People	staffing level limitations result in difficulties in meeting Palm activity deadlines.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	requested Palm funding to secure a dedicated OPS position for Palm readiness activities. Request supposedly submitted but not privy to when submission occurred.	Only \$40,000 secured. Does not provide sufficient funding to begin to address needs. Delays will result in	12/01/23	Glenn Elmer
People	Staff limitations still exist	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue to identify options. Solution has not been identified.	Issue remains	07/01/24	Glenn Elmer

DOEA Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOEA Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Glenn Elmer (CFO position)	elmere@elderaffairs.org	03/13/24
November - December 2023	Curtis Barker	elmere@elderaffairs.org	01/16/24
September - October 2023	Curtis Barker	elmere@elderaffairs.org	11/15/23
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DOH](#)  
[Readiness Workplan](#)

DOH Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor

Robert Herron

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 9
- Vacant Role = 0

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness




The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 99.57%

- Submitted On Time = 19
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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	
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/10/24				
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/10/24				
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	11/20/23	Reviewed the Payroll process and workflow with HR on October 9, 2023			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24				
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/22/24	Added a new Risk and Assumption			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/10/24	Reviewed and Updated			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/20/24	Initially DOH added 13230 users, we had no Business Process Groupings for 12773 users, these are our EIC users. Per suggestion from the PALM Project RC we have removed EIC users and have now submitted 457 users with Business Process Groupings.	Submission Complete		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/14/24				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24	Submitted on 03/07		03/11/24	
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24						

People

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

Implementation:

Planned Florida PALM End Users = 457

- Business Process Groupings = 12

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 62

- Related Business Systems = 10
- Related Reports = 27

Documentation Status:

- Complete = 62 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 58

- Criticality:
  - High = 58 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 58 Partial = 0 Not Started = 0

Cataloged Interfaces = 39

Data

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

Current-State:

Unique FLAIR Data Elements = 629

- Associated Unique Uses = 646
  - Continued Use - Yes = 0
  - Continued Use - No = 0

Associated Business Systems = 1Cataloged Reports = 653



**Implementation:****Impacted Agency Business Processes = TBD**

- Inbound Interfaces = 21  
- Outbound Interfaces = 15

**• Criticality:**

- High = 947 Med = 0 Low = 0 None = 0

**Implementation:****Business Systems Planned for Integration = 50****• Segment I - Documentation Updates:**

- Complete = 50 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 10**

- Inbound Interfaces = 5  
- Outbound Interfaces = 5

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DOH Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Lack of Testing Environment: Subject matter experts can determine the processes needed, document those processes, and train staff within a sandbox environment prior to go live. Subject matter experts can also start working through processes and identify gaps for the staff and determine additional training requirements.	Open	9 (High/High)	DOH has raised this risk to PALM Project. The delivery of test environment is scheduled in April 2025. Upon delivery of this we will remove the risk.	N/A	02/14/22	PALM & DOH
Processes Technology	Awaiting confirmation and finalized requirements, process flows, configurations, and interfaces so DOH can calculate work effort on remediation and develop project timelines for completion of necessary tasks.	Open	9 (High/High)	Pre-design and design activities based on calculated assumptions.	N/A	02/14/22	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in June-July 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Open	9 (High/High)	Pre-design and design activities based on assumptions. Our most complex business operations are based on Payroll design and requirements. This gives us on 12 months to remediate some of Department's key applications.	N/A	07/19/23	PALM & DOH
Processes	Agency is unable to determine how the Trial Balance, Schedule of Allotment Balances, year-end closing processes and Schedule I processes will be completed with the Account field which combines the current FLAIR General Ledger Code and Object Code.	Open	9 (High/High)	DOH would like to review the envisioned example of a Trial Balance and speed key. DOH would like to see the account field values and an explanation of how the account field enables us to record the current level of information.	N/A	08/11/23	PALM & DOH
Processes	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	N/A	08/16/23	PALM & DOH
Technology	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Open	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	N/A	08/21/23	PALM & DOH
Processes	DOH currently uses multiple RDS and existing reports in preparation of Federal Grant Reporting. DOH is concerned how the agency will generate Grant Reporting within PALM.	Open	9 (High/High)	Review and understanding of Grant Reporting functionality within PALM	N/A	08/23/23	PALM & DOH
Processes	PALM eliminating the IBI field for DOH	Open	9 (High/High)	Department recognizes and has addressed this risk with the PALM Project team. Department is waiting for further guidance from the PALM project team.	N/A	02/14/22	PALM & DOH
People Processes Technology	The training timeframe given will not be enough time for us to create and launch agency specific trainings. End users won't have time to take them before go live either.	Open	9 (High/High)	We have to be trained by PALM, train our trainers or area SMEs, and build agency specific trainings (on top of the trainings we'll have to update due to the impacts of PALM)	N/A	09/25/23	PALM & DOH
Technology	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	N/A	02/14/22	PALM & DOH
Processes	With the implementation of PALM there will be many enterprise processes that are overseen by one agency that will impact all agencies. One example of this is DFS. DFS oversees areas such as Vendor Relations, Auditing, Financial Statements and New Account Codes. DFS will solely establish processes that will impact the successful implementation of PALM at the agency level based on these processes in relation to PALM being provided prior to implementation.	Open	6 (High/Medium)	DFS publishes the processes well in advance for DOH has time to adapt and modify current processes.	N/A	10/18/23	PALM & DOH
People Processes	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and	Open	6 (High/Medium)	DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH	2/21/2024	02/21/24	PALM & DOH



	a struggle to learn a new system and deal with the influx in sampled trips being returned.						
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in November or December 2025 when PRP is to process in January 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between July-Dec 2025 when we go to PALM Jan 2026? • If only the balances are rolling over to PALM, then what about the voucher details?  This is specific for Payroll Reallocation, but this will be true for all Vouchers.	Open	4 (Medium/Medium)	DOH needs to know how this will work in PALM	N/A	10/18/23	PALM & DOH

DOH Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOH Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	PALM will provide solution and remediation of enterprise applications i.e., STMS, PeopleFirst, etc.	Logged	06/28/23	All DOH systems	PALM Project has identified all impacted enterprise applications.	
People Processes Technology Data	PALM will maintain the project "On schedule"	Logged	06/28/23	All DOH systems	DOH PALM team relies on PALM Project schedule and plans deliverables and tasks accordingly. Resource allocation is also heavily based on PALM schedule.	
People Processes	Enterprise entities like AG/IG's office, or Agencies like DMS, DFS will not add changes or new processes at Go-Live or during PALM HyperCare period	Logged	02/14/24	DOH staff	DOH PALM team has addressed this with the RC in our Readiness Meeting	

DOH Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates	
People Processes Technology Data	Discuss PALM Project Concerns	02/09/24	PM and Key Stakeholders	Address concerns of potential risks/issues	None	
People Processes Technology Data	DOH PALM_CORTNE Meeting	02/14/24	PM, BA, Technical Lead, EAS, & CORTNE Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for Approved Operating Budget application was addressed.	
People Processes Technology Data	DOH PALM_CORTNE Meeting	02/16/24	PM, BA, Technical Lead, EAS, & CORTNE Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for Approved Operating Budget application was addressed. (Continued discussion)	
People Processes Technology Data	Agency Readiness Tasks Review	02/21/24	PM, Technical Lead, BA, and Developers	Overview of the next PALM Agency Readiness Tasks due over the next few months.	None	
People Processes Technology Data	Technical Solution FDD Session: MIPS	02/22/24	PM, BA, Technical Lead, EAS, & MIPS Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for MIPS application was addressed.	
People Processes Technology Data	Technical Solution FDD Session: RIMS	02/26/24	PM, BA, Technical Lead, EAS, & RIMS Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for RIMS application was addressed.	
People Processes Technology Data	Technical Solution FDD Session: VPS	02/26/24	PM, BA, Technical Lead, EAS, & CMS Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for VPS application was addressed.	
People Processes Technology Data	Technical Solution FDD Session: EH Database	02/28/24	PM, BA, Technical Lead, EAS, & Environmental Health Team	Create understanding between ABS teams and DOH PALM team regarding Technical Solution for Remediation	Questions regarding and technical solution for EH Database application was addressed.	
Processes Data	Business Processes and APIs	01/08/24	Technical Lead, Developers	Help PALM team understand Business Processes and API's.	High level discussion of interfaces of Segment I & II that where released by PALM	
Processes Technology Data	Disbursements As-Is Meeting	01/05/24	BA, Technical Lead, and Developers	Help PALM team understand the daily processes used by DOH Disbursements team	BA created and presented powerpoint presentation of high level processes	
Processes Technology Data	FIS Requirements Review	02/02/24	BA, Technical Lead, and Developers	Finalize draft of FIS Requirements written by BA and Developer before presenting to client	FIS Requirements were reviewed and finalized by PALM Team	
Technology Data	Data Mapping Session (FDW)	02/21/24	PM, Technical Lead, BA, EAS, and Developers	Work on data mapping for PALM output to FDW application	None	
Technology Data	Data Mapping Session (Input Files)	02/23/24	PM, Technical Lead, BA, and EAS	Work on data mapping for PALM input files	None	
Technology Data	Data Mapping Session (Input Files)	02/24/24	PM, Technical Lead, BA, and EAS	Work on data mapping for PALM input files	None	
Technology Data	Data Mapping Session (FDW)	02/28/24	PM, Technical Lead, BA, EAS, and Developers	Work on data mapping for PALM output to FDW application	None	
People Processes	DOH PALM HyperCare Team Discussion	02/06/24	PM and Key Stakeholders	Develop a HyperCare Plan for DOH after implementation	None	
People Processes	DOH Core Meeting	02/07/24	Key Stakeholders and PM	<ul style="list-style-type: none"> <li>• Monitor progress against project plan</li> <li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li> <li>• Advise on project planning and implementation strategies</li> <li>• Make strategic decisions related to project deliverables prioritization and approvals</li> <li>• Review and suggest solutions for issues critical to project success</li> <li>• Assist in resolving project conflicts</li> <li>• Assist and guide on resource allocation</li> </ul>	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.	



People Processes	DOH Core Meeting	02/14/24	Key Stakeholders and PM	<ul style="list-style-type: none"><li>• Monitor progress against project plan</li><li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li><li>• Advise on project planning and implementation strategies</li><li>• Make strategic decisions related to project deliverables prioritization and approvals</li><li>• Review and suggest solutions for issues critical to project success</li><li>• Assist in resolving project conflicts</li></ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Core Meeting	02/21/24	Key Stakeholders and PM	<ul style="list-style-type: none"><li>• Monitor progress against project plan</li><li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li><li>• Advise on project planning and implementation strategies</li><li>• Make strategic decisions related to project deliverables prioritization and approvals</li><li>• Review and suggest solutions for issues critical to project success</li><li>• Assist in resolving project conflicts</li></ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.
People Processes	DOH Core Meeting	02/28/24	Key Stakeholders and PM	<ul style="list-style-type: none"><li>• Monitor progress against project plan</li><li>• Review and approves changes to project plans (resources, scope, goals, cost estimates)</li><li>• Advise on project planning and implementation strategies</li><li>• Make strategic decisions related to project deliverables prioritization and approvals</li><li>• Review and suggest solutions for issues critical to project success</li><li>• Assist in resolving project conflicts</li></ul> Assist and guide on resource allocation	Every core meeting has an Agenda. PM reviews PALM tasks, gives Project team updates and sets activities and tasks for the coming weeks.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DOH Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Robert Herron	robert.herron@flhealth.gov	03/07/24
November - December 2023	Robert Herron	robert.herron@flhealth.gov	01/08/24
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23



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[Florida PALM Resources](#)  
[Florida PALM Workbook for DOL](#)  
[Readiness Workplan](#)

DOL Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Becky Ajhar

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 5
- Vacant Role = 2

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 99.57%

- Submitted On Time = 19
- Submitted Late = 1
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/19/24			
Indirect	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24			
	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/29/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/12/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/07/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 25

- Business Process Groupings = 12

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 49

- Related Business Systems = 3
- Related Reports = 5

Documentation Status:

- Complete = 91 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 7

- Criticality:
  - High = 7 Med = 0 Low = 0 None = 0
- Documentation Status:
  - Complete = 7 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 28

- Outbound Interfaces = 2

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
- Continued Use - Yes = 29
- Continued Use - No = 0

Associated Business Systems = 0

Cataloged Reports = 76

- Criticality:
  - High = 0 Med = 0 Low = 0 None = 0



**Implementation:**

**Business Systems Planned for Integration = 6**

**Segment I - Documentation Updates:**  
- Complete = 1 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 5

**Segment II - Documentation Updates:**  
TBD

**Planned Interfaces = 16**

- Inbound Interfaces = 7

- Outbound Interfaces = 8

**Implementation:**

**Configuration Workbooks = TBD**

**Conversions = TBD**

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOL Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	Dual reporting in two separate systems FLAIR and PALM GO-LIVE for the financial fiscal year	Open	6 (High/Medium)	Need to ensure clear understanding of cross-walking new and old chart of accounts structures. Maintaining the data integrity for financial reporting	PALM is not going to utilize dual reporting, current understanding is FLAIR will be cut off and we will move to PALM without overlap	01/22/24	Stella Bargas
Technology Data	The Florida Lottery's new Claims and Payment system is scheduled to go live on July 27, 2024. This implementation may impact PALM training activities. The data for the current system and the upcoming system is provided by the same company, reducing the risk of significant changes. However, preparations should be made in case any adjustments to the supplied data are necessary.	Open	3 (Low/High)	Initiating a proactive strategy for the upcoming launch of the Florida Lottery's new Claims and Payment system. Focus on early communication, training for PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data	Ongoing	09/07/23	Chris Rorison

DOL Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOL Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People Processes Technology Data	Florida PALM will design and be able to record DOL manual payments currently handled outside of FLAIR today. 30.5 Manage Payments 30.5.1 Record Manual Payments	Logged	12/11/23	Disbursements	FLAIR screenshots of recording retailer incentives for manual payments	
People Processes	Florida PALM Payroll Processing will be able to process refunds on Insurance Benefits (overpayments)	Logged	01/25/24	People First		
People Processes Data	Florida PALM will provide final approved Chart of Accounts and Descriptions	Removed	01/08/24	Agency and ABS systems		

DOL Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates	
People Processes	Palm task review meetings - Lottery team	01/08/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Discuss Tasks 504, 505, 508. Review progress to complete task 509. Assess risks and issues, review existing risks, discuss implementation progress for Task 510		
People Processes	Palm task review meetings - Lottery team	01/22/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Review Tasks 508 and 511 for submission, update on new task 512 Review current risks and discuss/update implementation schedule (task 510)		
People Processes	Palm task review meetings - Lottery team	02/05/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Review new task 520 and review progress for tasks 512, 514, 515, 516, 517, 518, 519		
People Processes	Palm task review meetings - Lottery team	02/19/24	Chris Rorison, Meghan Gregg, Stella Bargas, Debbie Martin, Melissa Ging, Cindie Mckenzie	Update and review current tasks (512, 514, 515, 516, 517, 518, 519)		

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

DOL Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Rebecca Ajhar	ajharb@flalottery.com	03/08/24
November - December 2023	Rebecca Ajhar	ajharb@flalottery.com	01/14/24
September - October 2023	Rebecca Ajhar	ajharb@flalottery.com	11/09/23
July - August 2023	Rebecca Ajhar	ajharb@flalottery.com	09/08/23



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[Readiness Workplan](#)

DOR Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor


Clark Rogers

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

- Unique Filled Role = 10
- Duplicate Filled Role = 6
- Vacant Role = 0

RW Task Completeness:

Score = 100%

- Submitted Complete = 0
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness:

Score = 90.43%

- Submitted On Time = 18
- Submitted Late = 2
- Pending Submission = 0

Meeting Participation:

- Meetings Attended = 9
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	75% - Consolidating/Inputting Information for Submission				
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 23

- Business Process Groupings = 11

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 222

- Related Business Systems = 8
- Related Reports = 43

Documentation Status:

- Complete = 203 Partial = 4 Not Started = 15

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 32

- Criticality:
- High = 31 Med = 1 Low = 0 None = 0

Documentation Status:

- Complete = 32 Partial = 0 Not Started = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 439

- Associated Unique Uses = 838
- Continued Use - Yes = 392
- Continued Use - No = 0

Associated Business Systems = 9



**Implementation:****Impacted Agency Business Processes = TBD****Cataloged Interfaces = 30**

- Inbound Interfaces = 17  
- Outbound Interfaces = 13

**Cataloged Reports = 205****• Criticality:**

- High = 218 Med = 16 Low = 16 None = 0

**Implementation:****Business Systems Planned for Integration = 26****• Segment I - Documentation Updates:**

- Complete = 23 Updating = 1 Evaluating = 0  
Not Started = 0 Not Needed = 0

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 26**

- Inbound Interfaces = 14  
- Outbound Interfaces = 10

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DOR Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Legislation enacted in the 2024 legislative session that creates new taxes or modifies existing taxes may impact GTA's ability to complete remediation to SUNTAX on 2024/2025 due to staff augmentation resources being involved in system modifications to implement new legislation.	Open	6 (High/Medium)	Request funding to contract for additional GTA staff augmentation resources in FY23/24, FY24/25 and FY25/26.	A budget amendment was submitted for staff augmentation resources for Florida PALM agency business system remediation. Additional staff augmentation resources may be needed for system modifications to implement new legislation. Funding was received for FY23/24.	11/02/23	Laura Dukes, Budget Officer; Lisa Morgan, GTA Budget Liaison
Processes Data	DOR collects and distributes funds to 16 other state agencies. We are going to request that they provide the business unit specific ChartField values needed to effect those collections and distributions within PALM. Due to individual agency readiness activities, data from one or more of those agencies may not be available and could result in DOR not being able to collect and distribute their funds to them.	Open	6 (High/Medium)	Coordinate with other agencies to gather, confirm and validate ChartField data.	Discussed with DOR's Readiness Coordinator and other Florida PALM project staff during November 2023 Touchpoint meeting.	11/02/23	Steve Welch, GTA PMO
People	Natural Gas project #006277 for GTA has an implementation date of January 2026, same time as PALM financials wave implementation date, and could create a resource issue.	Open	4 (Medium/Medium)	Plan efficiently with the resources provided.	Continue monitoring risk. We plan to kick-off this project Fall 2024 to ensure we have sufficient time for all projects. Updated risk owner and backup.	11/02/23	Catherine Barber, GTA; Andrea Hunter, GTA, Backup Owner
People	The GTA E-services project may be conducted at the same time agency business system remediation is conducted.	Open	4 (Medium/Medium)	Plan efficiently with the resources provided. This project will begin in July 2024. Staff augmentation resources to support Florida PALM activities have been requested for FY24/25.	Continue monitoring risk.	10/17/23	David Potter, GTA - BTO
Processes Data	The current Payroll BPMs do not address the processing and payment of out-of-state payroll taxes. DOR processes out-of-state payroll taxes for nine states and two additional municipalities. If the Florida PALM Payroll BPMs do not address out-of-state payroll processing, the likelihood of withholding incorrect state income taxes from employees, making incorrect payments on their behalf and reporting state and local income tax withholding on employee W2 forms is increased.	Closed	4 (Medium/Medium)	1) Request that out-of-state payroll tax processing be addressed in Florida PALM. 2) Ensure that adequate review procedures and monitoring take place if out-of-state payroll tax processing is not addressed in Florida PALM.	Closed. Per Project Director, OOS payroll tax processing will be addressed as an Optional Service.	02/23/24	Jill Reynolds, EXE-OFM; Lucinda Harris (backup), EXE-OFM

**DOR Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes	DOR-GTA receives wages from DMS (DOR Batch Job ZUD105) from all state agencies to process Quarterly filing requirements for Re-employment tax. The ORG Codes are listed on each Location for each State Agency and the individual employee is linked to that specific location by the org code.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	2/29/24: Request that this information be sent from DMS as is done currently.	Issue opened February 2024	05/31/24	Wynette Davis

**DOR Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	The current PALM Chart of Accounts (COA) structure will not be changed.	Logged	07/01/23	All agency business systems	DOR will begin agency business system remediation in FY23/24.
People	Administered funds will be available for use in procuring staff augmentation resources for agency business system remediation.	Logged	07/13/23	All agency business systems	During July, DOR submitted a budget amendment requesting funds for staff augmentation to perform project management and IT consulting activities for agency business system remediation and pre-remediation evaluation activities. Funds were approved and released for FY23/24.
People Processes	DOR-GTA receives wages from DMS (DOR Batch Job ZUD105) from all state agencies to process Quarterly filing requirements for Re-employment tax. The ORG Codes are listed on each Location for each State Agency and the individual employee is linked to that specific location by the org code.	Logged	02/27/24	General Tax Administration	Need to continue to receive this file from DMS in order to process RT collections for Commerce.
Data	New organizations codes from the configuration workbooks will	Logged	03/08/24	All agencies, all agency	Needed before UAT so that the new organization codes may be



	be loaded by the Florida PALM Project Team into all enterprise business systems.			business systems.	utilized in UAT to validate agency business system remediations.
Processes	If out-of-state payroll taxes are not addressed in Florida PALM Payroll BPMs, the existing process of using miscellaneous deduction codes and external state's payroll tax websites to process out-of-state payroll taxes will be available.	Removed	02/23/24	Office of Financial Management/Office of Workforce Management	Per meeting with Project Director, OOS payroll tax processing will be addressed as an Optional Service.
Processes Technology	People First will be successfully and timely remediated to support Florida PALM Payroll business processes, and FLAIR PYRL will be retired.	Removed	02/23/24	Office of Financial Management, Office of Workforce Management, People First, and FLAIR PYRL	Removed due to pending legislation requiring DMS to retain the current vendor for five more years.

DOR Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Conducted DOR Florida PALM Town Hall for current FLAIR users, their supervisors and support staff	02/22/24	Current FLAIR users, their supervisors and support staff	Inform potential PALM users and their supervisors of ongoing and future PALM implementation activities, implementation timelines, and introduction of CCN members.	Initial change management activity.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*



☐ Confirm \*

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DOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Clark Rogers	shannon.segers@floridarevenue.com	03/08/24
November - December 2023	Clark Rogers	shannon.segers@floridarevenue.com	01/11/24
September - October 2023	Clark Rogers	shannon.segers@floridarevenue.com	11/09/23
July - August 2023	Clark Rogers	shannon.segers@floridarevenue.com	09/11/23



<b>Helpful Links</b> <a href="#">Dashboard Snapshots</a> <a href="#">Florida PALM Resources</a> <a href="#">Florida PALM Workbook for DOS</a> <a href="#">Readiness Workplan</a>		<h1>DOS Status Report Dashboard</h1> <p><i>Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.</i></p>		<b>Reporting Period</b> January - February 2024
<b>CCN Composition</b> 		<b>RW Task Completeness</b> 		<b>Agency Sponsor</b> Jennifer Kennedy
The Change Champion Network dial reflects the completeness of your CCN makeup.		The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.		The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.
<b>Change Champion Network:</b> <ul style="list-style-type: none"> <li>Unique Filled Role = 9</li> <li>Duplicate Filled Role = 5</li> <li>Vacant Role = 0</li> </ul>		<b>RW Task Completeness:</b> <div>Score = 100.00%</div> <ul style="list-style-type: none"> <li>Submitted Complete = 1</li> <li>Submitted Incomplete = 0</li> <li>Completed After Submission = 0</li> </ul>		<b>Meeting Participation:</b> <ul style="list-style-type: none"> <li>Meetings Attended = 8</li> <li>Meetings Missed = 0</li> </ul>
<b>RW Task Timeliness:</b> <div>Score = 71.3%</div> <ul style="list-style-type: none"> <li>Submitted On Time = 8</li> <li>Submitted Late = 8</li> <li>Pending Submission = 4</li> </ul>				

The dials above 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.

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	500	Create Agency Specific Project Charter	10/02/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	02/15/24	The Department does not currently have a dedicated Project Manager and are using existing staff to assist with the creation of these documents. The Department has initiated a solicitation to acquire a dedicated Project Manager and anticipates onboarding near the beginning of March.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/26/24	No current agency business system needs.		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24					
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/20/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					



N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/15/24	All contacts updated.	
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/08/24		03/08/24
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<u>Implementation:</u> <b>Planned Florida PALM End Users = 15</b> • Business Process Groupings = 10 <b>Role Mapping = TBD</b> <b>Training = TBD</b>	<u>Current-State:</u> <b>Cataloged Business Processes = 10</b> • Related Business Systems = 1 • Related Reports = 21 • <b>Documentation Status:</b> - Complete = 7 Partial = 2 Not Started = 1  <u>Implementation:</u> <b>Impacted Agency Business Processes = TBD</b>	<u>Current-State:</u> <b>Cataloged Business Systems = 3</b> • <b>Criticality:</b> - High = 1 Med = 0 Low = 0 None = 1 • <b>Documentation Status:</b> - Complete = 0 Partial = 0 Not Started = 0 <b>Cataloged Interfaces = 0</b> - Inbound Interfaces = 0 - Outbound Interfaces = 0  <u>Implementation:</u> <b>Business Systems Planned for Integration = 0</b> • <b>Segment I - Documentation Updates:</b> - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 0 • <b>Segment II - Documentation Updates:</b> TBD <b>Planned Interfaces = 0</b> - Inbound Interfaces = 0 - Outbound Interfaces = 0	<u>Current-State:</u> <b>Unique FLAIR Data Elements = 67</b> • <b>Associated Unique Uses = 138</b> - Continued Use - Yes = 0 - Continued Use - No = 0 • <b>Associated Business Systems = 2</b> <b>Cataloged Reports = 241</b> • <b>Criticality:</b> - High = 0 Med = 0 Low = 1 None = 0  <u>Implementation:</u> <b>Configuration Workbooks = TBD</b> <b>Conversions = TBD</b>

### Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

DOS Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Current staff have little knowledge of the details of current Access Database being used to extract transaction data.	Open	6 (Medium/High)	Department currently exploring options for hiring staff with extensive Access experience to fill knowledge gaps.	The Department has received Administered funds for the purposes of preparations for Florida PALM. These funds are intended to be used for hiring a project manager and consultant to assist with agency efforts. The Department is currently in the solicitation process to hire contracted Project Manager. The Department has received twelve proposals in response to the Collaborative Requisition and is currently review each proposal. The anticipated start date for the staff aug agreement is 4/1/24.	03/08/24	Antonio Murphy

DOS Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

DOS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

DOS Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates



Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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DOS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	03/08/24
November - December 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	01/12/24
September - October 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	11/09/23
July - August 2023	Jennifer Kennedy	antonio.murphy@dos.myflorida.com	09/08/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for DVA](#)  
[Readiness Workplan](#)

DVA Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

AI Carter

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 13
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 95.65%

- Submitted On Time = 17
- Submitted Late = 3
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	12/14/23			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/09/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24					
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/09/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/29/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24					
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 61

- Business Process Groupings = 12

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 100

- Related Business Systems = 2
- Related Reports = 39

Documentation Status:

- Complete = 20 Partial = 59 Not Started = 2

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 9

- Criticality:
  - High = 8 Med = 1 Low = 0 None = 0

Documentation Status:

- Complete = 0 Partial = 9 Not Started = 0

Cataloged Interfaces = 3

- Inbound Interfaces = 3
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
- Continued Use - Yes = 48
- Continued Use - No = 0

Associated Business Systems = 0Cataloged Reports = 49

- Criticality:
  - High = 41 Med = 3 Low = 5 None = 0



**Implementation:****Business Systems Planned for Integration = 9****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 3**

- Inbound Interfaces = 3

- Outbound Interfaces = 0

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**DVA Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	Setup and Integration Staffing	Open	9 (High/High)	Agency is seeking to hire contract personnel to support the setup and integration of FLORIDA PALM within the Agencies overall structure. This is an unfunded mandate and the Agency critically needs these assets to support a successful transition of this system. The Agency submitted a Legislative Budget Request to secure funding mitigate this shortfall.	No subject matter expertise in local area. Agency is challenged to hire its internal staffing shortages. 8 March: Received solicitation documents from DBPR and will use them to develop solicitations for Agency.	03/08/24	Al Carter, Chief of Staff
Processes Technology	PeopleFirst Payroll integration may be impacted as we are unclear how this interface will work.	Open	6 (Medium/High)	Monitor PeopleFirst updates to ensure we can adapt to any new dependencies that may evolve.	No change.	02/29/24	Al Carter, Chief of Staff
People Processes Technology Data	Resources and Functionality. Full implementation simultaneously with FLAIR-end is a risky proposition given the unknown compatibility issues with other systems and business processes our Agency employs to conduct its day-to-day operations.	Open	6 (High/Medium)	Mimic FLAIR functionality exactly or as close to this standard as possible. If there are deviations from FLAIR functionality, there should be extensive retesting and training, hopefully a year ahead of implementation. Agencies are limited in staff, support and available resources for the implementation and the execution following implementation. Allowing some lead time prior to implementation to prepare may reduce inherent risks.	In progress.	02/29/24	Agency Fiscal, Finance & Accounting, and Billing
People	Contracting and Procurement	Open	4 (Medium/Medium)	Our Agency is unique and may require system remediation as a product of implementation as our processes and procedures change as federal, state, and local statutes, laws, and administrative codes change. FDVA may have to redesign or retrofit existing business processes and designs. This could impact the Agency meeting its deliverables to its clients and impact the overall implementation of the project statewide.	Continuous process. Agency continues to work with FLAIR, MATRIXCARE and the like to determine if PALM will seamlessly transition these programs in part of totally based on our Agency day-to-day requirements..	02/29/24	Al Carter, Chief of Staff
People Processes	Agency size and small administrative staff has a few people having multiple roles.	Open	4 (Medium/Medium)	Staff will have to be flexible and OPS personnel may be required to augment existing staff to get project implemented.	Information Technology staff working to hire personnel to work the PALM infrastructure transition while simultaneously working its telephony and network infrastructure project. 8 Mar 2024: Agency is undertaking a telephone and infrastructure upgrade simultaneously as we work through PALM integration matters, making it difficult to focus limited Information Technology resources.	03/08/24	Dr. Teresa Stillwell/Romelle Dials
People Technology	IT staff has limited knowledge of the FLORIDA PALM system and will take time to get trained up, especially given their existing Agency requirements.	Open	4 (Medium/Medium)	We will have to grow IT Staff experience as we move through the implementation process.	Ongoing. Internal staff working to learn PALM nuances on top of revamping the Agencies telephone and network infrastructure statewide, with only 9 IT personnel.	02/29/24	Al Carter, Chief of Staff
Processes Data	FLAIR and FLORIDA PALM data will be different in its representation which may cause challenges when performing data analysis functions.	Open	4 (Medium/Medium)	Staff will incur extra time and possible productivity lag when trying to crosswalk and translate data.	No change	02/29/24	Al Carter, Chief of Staff
People Processes	Staff Turnover. Agency staff turnover while decreasing, still remains over 16% in the Administrative areas mostly impacted by FL PALM.	Open	4 (Medium/Medium)	We continue to put out job announcements and canvas local colleges and universities. The respective candidates respond that State salaries are too low. We don't have to sufficient Agency budget to increase salaries to support our existing requirements, not to mention this increased workload. Reaching out to other Agencies to see what their strategies are, beyond contracting personnel.	Reached out to DoH on 7 March 2024 to determine what options they are using beyond contracting and to gain insights into the strategies they used to remediate infrastructure shortfalls..	03/07/24	Al Carter, Chief of Staff - Coordinator



DVA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Personnel to support the implementation of FLORIDA PALM within the Agencies processes	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request resources via the Legislative Budget Request process.	Legislative budget requests are granted at the end of the Legislative Session which occurs during the first week of May, but if approve, are effective 1 July of the next fiscal year.	08/30/24	Al Carter, Chief of Staff

DVA Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
People	Funding will be approved/provided by the Florida Legislature to secure personnel needed to support the Agencies PALM transition.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	Requested in Agency LBR as of August 15, 2023	
Technology	Sufficient contract personnel will be available to support the Agency as it undergoes its PALM integration.	Logged	09/18/23	FDVA and the overall Statewide PALM project implementation	TBD after funding is secured.	
People Processes Data	FDVA Executive leadership, including Project Sponsor, will support the project by providing resources, access to systems and stakeholders and by supported the organizational change management strategy created by the project team.	Logged	09/18/23	Agency wide		
People Processes Technology Data	FDVA project stakeholders, involved parties, project team, and other involved parties will be available to provide support, feedback, and review of material to meet readiness requirements and project milestones.	Logged	09/18/23	Agency wide		
People Processes Technology Data	The State level Florida PALM project team will provide key information identifying the functionality, business processes, and timeline of the larger project, in a timely manner, to facilitate timely planning and execution.	Logged	09/18/23	State and Agency implementation team.		

DVA Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Alfred D. Carter	al.carter@fdva.fl.gov	03/07/24
November - December 2023	Alfred D. Carter	al.carter@fdva.fl.gov	01/09/24
September - October 2023	Alfred D. Carter	al.carter@fdva.fl.gov	11/15/23
July - August 2023	Alfred D. Carter	al.carter@fdva.fl.gov	09/18/23
July - August 2023	Linda Rizzo	linda.rizzo@fdva.fl.gov	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for EOG](#)  
[Readiness Workplan](#)

EOG Status Report Dashboard

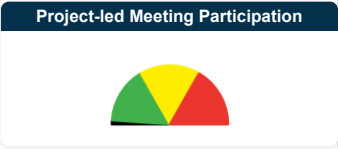
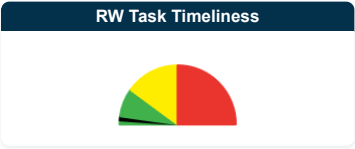
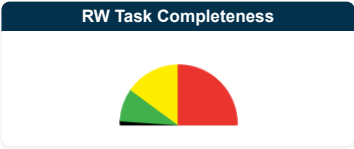
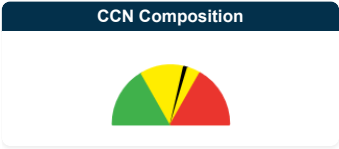
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Dawn Hanson



The Change Champion Network dial reflects the completeness of your CCN makeup.

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

Unique Filled Role = 3

Duplicate Filled Role = 12

Vacant Role = 0

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness:

Score = 98.26%

Submitted On Time = 19

Submitted Late = 1

Pending Submission = 0

Meeting Participation:

Meetings Attended = 6

Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	11/29/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	11/29/23			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/28/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/09/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	01/23/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/05/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 8

Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 151

Related Business Systems = 1

Related Reports = 41

Documentation Status:

Complete = 150 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 1

Criticality:

High = 0 Med = 0 Low = 0 None = 1

Documentation Status:

Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

Associated Unique Uses = 77

Continued Use - Yes = 30

Continued Use - No = 26

Associated Business Systems = 1

Cataloged Reports = 146

Criticality:

High = 39 Med = 39 Low = 62 None = 6



**Implementation:****Business Systems Planned for Integration = 1****• Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 1**• Segment II - Documentation Updates: TBD****Planned Interfaces = 0**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**EOG Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes	The EOG has limited staff and technical/training resources.	Open	9 (High/High)	Discussed with FL Palm limited staffing resources and need for in person training.	No change.	10/31/23	Kelley Sasso
People Processes Technology Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Risks exist surrounding data management, reporting, payments, transaction differentiation, and incorrect updates based on assumptions of shared/not shared data in DEM business systems.	Open	9 (High/High)	The EOG and DEM have met with FL PALM to outline concerns and have requested additional meetings regarding pending inquiries.	No change.	10/31/23	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process.	No change.	10/31/23	Kelley Sasso
People Processes	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources.	Open	4 (Medium/Medium)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant.	Open	4 (Medium/Medium)	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered.	No change.	01/23/24	Kelley Sasso
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	No change.	10/31/23	Kelley Sasso
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need.	No change.	10/31/23	Kelley Sasso
Technology	Staff are already able to access PALM; therefore, we do not anticipate any technological risk related to accesses/access control.	Open	1 (Low/Low)	No risks determined at this time.	No change.	10/31/23	Kelley Sasso
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso

**EOG Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**EOG Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	EOG assumes that FL PALM will provide adequate in-person training and will assist in workflows where there is insufficient staff for approvals.	Logged	10/31/23	All Administrative Services.	Updated to consolidate this assumptions for all 4 critical operational elements. Removed duplicative assumptions.
People Processes Technology Data	EOG assumes that while processor roles cannot approve his/her own transactions, the processor can also be assigned an approver role, so that in all cases, staff can function as backup processors or approvers.	Logged	01/23/24	All Administrative Services.	Discussed with D. Thomas on 1/19/2024.



EOG Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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EOG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/05/24
November - December 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	01/11/24
September - October 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	11/07/23
July - August 2023	Dawn Hanson	dawn.hanson@eog.myflorida.com	09/06/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FCOR](#)  
[Readiness Workplan](#)

FCOR Status Report Dashboard

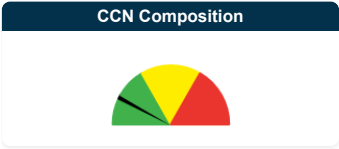
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

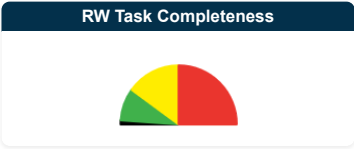
Gina Giacomo



The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

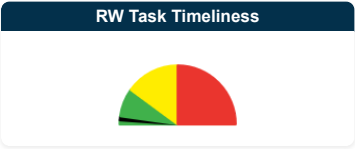


The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

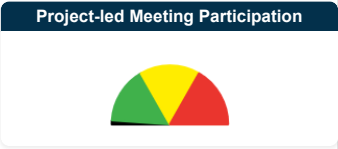


The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 98.26%

- Submitted On Time = 19
- Submitted Late = 1
- Pending Submission = 0



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24	FCOR doesn't have any ABS systems to update documentation.		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24	Since we handle for FCOR, please see FDC response.		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/03/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/27/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24	Agency SAMs Smartsheet is blank, because FDC handles FCORs SAM function. Added the FDC staff twice and someone deleted them.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/28/24	We just updated a few more end users, and we should be able to close this TASK by Deadline (2/28)	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	02/27/24	FCOR doesn't have any ABS systems to update documentation.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/07/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 14

- Business Process Groupings = 6

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 11

- Related Business Systems = 0
- Related Reports = 12

Documentation Status:

- Complete = 11 Partial = 0 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 0

- Criticality:
- High = 0 Med = 0 Low = 0 None = 0

Documentation Status:

- Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 72

- Associated Unique Uses = 221
- Continued Use - Yes = 183
- Continued Use - No = 10

Associated Business Systems = 4

Cataloged Reports = 17

- Criticality:
- High = 8 Med = 8 Low = 1 None = 0



**Implementation:****Impacted Agency Business Processes = TBD****Implementation:****Business Systems Planned for Integration = 0****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 0**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**FCOR Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Data Analysis (Analyzing the patterns involved in data for the downstream system which the agency is currently working) which would impact remediation of the system by the deadline.	Open	9 (High/High)	Might Impact TASK 519, might not meet deadline (6/28).Need more information regarding Data fields involved in PALM to get a good understanding.	The current interfaces with PALM might not give a good insight regarding the Data fields.	02/21/24	David Eskin

**FCOR Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Closed	Critical - Impacts the ability of the agency to move forward with work without resolution	To access the available Administered Funds to support the PALM Project and readiness activities	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	FDC OIT
People Processes	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	David Eskin, FDC Finance and Accounting/Systems Reporting
People Processes	Lack of Clear Instructions and Frequent Changes in Task Guidance	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance	TBD	01/06/26	Erica Starling, Financial Administrator

**FCOR Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	Org Codes Inactivation	02/27/24	FLAIR Users	To inactivate the org codes which are no longer in use	
People	FL PALM Discussion on the Staff Augmentation positions	01/12/24	Agency Liaisons, Backup Agency Sponsor, and OIT	To get clear direction on the staff aug positions and who will assign work	
People	CCN PALM Monthly Standing Meeting	01/22/24	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Task 511 Review	01/25/24	Agency Liasons	To discuss the completion of this task	
People	PALM Project Touch Base	01/29/24	Project Manager, Business Analyst, Agency Liaisons and Backup Agency Sponsor	Meet and greet to talk through everything now that we have an assigned Project Manager.	
People	Project Management Tasks	01/31/24	Project Manager & Agency Sponsors	Meeting to discuss the completion of task since we had a new Project Manager and Business Analyst	
People	Project Manager Weekly Standup Meeting	02/06/24	Project Manager & Agency Liaisons	Meeting for Project Manager to let us know where we are in the project	
People	KPMG Palm Support Kick-off Meeting	02/06/24	Project Manager, Backup Project Sponsor, Agency Liaisons, Change Management Liaison and Business Analyst	Kick-off meeting with KPMG to start the process of mapping our business processes and doing a GAP analysis to include detailing how FDC/FCOR should address the gaps	
People	PALM Task Meeting	02/07/24	Agency Liaison and the Business Analyst	Meeting to discuss the upcoming task and what each should be working on	
People	PALM Task Meeting	02/08/24	Agency Liaison and the Business Analyst	Daily check in on all task	
People	PALM Task Meeting	02/13/24	Agency Liaison, Project Manager and Business Analysts	Daily check in on all task	
People	PALM Task Meeting	02/14/24	Agency Liaison and Business Analysts	Daily check in on all task	
People	KPMG Meeting	02/15/24	Agency Liaison and Project Manager of KPMG	FDC & FCOR Files questions	
People	PALM Task Meeting	02/20/24	Agency Liaisons and Financial Reporting SME	Discuss Task 513	
People	KPMG Weekly Meeting	02/21/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	PALM Task Meeting	02/22/24	Agency Liaisons, Business Analyst and Facilities SMEs	Discuss Task 513 dealing with FDC/FCOR Location Definition	
People	PALM Task Meeting	02/26/24	Agency Liaisons	Discuss Task 513 dealing with FDC/FCOR Location Definition	
People	PALM Task Meeting	02/27/24	Agency Liaisons and Property SMEs	Discuss Task 513 dealing with FDC/FCOR Location Definition	
People	KPMG Weekly Meeting	02/28/24	Agency Liaisons, Business	Weekly status meeting to provide a status of the	



		Analysts, Project Manager of KPMG and additional KPMG staff	project	
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FCOR Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities	Logged	07/31/23	All agency business systems and CCN roles	FDC's Organizational Change Management (OCM) Lead was onboarded and started working from 02/26/2024.
People Processes Technology	FCOR's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FCOR will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating as needed.
People Processes Technology	FCOR will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating as needed.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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FCOR Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Gina Giacomo	ginagiacom@fcor.state.fl.us	03/08/24
November - December 2023	Gina Giacomo	karencarter@fcor.state.fl.us	01/03/24
September - October 2023	Gina Giacomo	ginagiacom@fcor.state.fl.us	11/13/23
July - August 2023	Gina Giacomo	mary.quinsey@fdc.myflorida.com	09/08/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FDC](#)  
[Readiness Workplan](#)

FDC Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Mark Tallent

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 2
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 93.91%

- Submitted On Time = 18
- Submitted Late = 1
- Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 9
- Meetings Missed = 0

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		We are waiting for several team members to submit their updates. Once this is complete, we can provide KPMG the necessary documentation to start TASK515. We will update to 50% Once we receive the documentation and updates on TASK 328. Currently Manvith has already corresponded with Leonor , and Catherine, is still generating the updates for that task. We are anticipating to be Green by March 8th, and 100pct complete. After assessing the progress we had to downgrade to 50pct, due to amount is still required to complete. (3/01)		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/04/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/03/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/26/24	Almost 100%. Pending to confirm any other issues or risks need to add from David Eskin. We have closed other risk, as we have new contract hires on board for PALM. We added one more risk with Mr David Eskin regard Data Analysis (He took ownership of that) (2/21)		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/26/24	We are waiting on another week to reconfirm any additional new associates added on. Then we will Mark it as 100% complete by Feb 27th , (2/21). Added the people we needed to add as END Users 2/26	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are waiting updates for Leonor for the AR, AM, and GL (2/22). We received the received prepopulated location codes (updated by PALM 2/21), and will require process and require to redistribute the data according. Waiting from Mary for confirmation (Asset Management) (3/1)		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress		Pending update from certain department reps Diana Swain and Leonor Skogland , that are handling data cleansing process.(2/21). Updated AMC001, ARC001, POC001, Waiting for GMC001. We've updated the current data cleansing process, Assets, Revenues, Grants, General Ledgers. We need to Unlock the first 3 Columns. Approx. 33pct complete (See worksheet) (2/29)		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		We are meeting with KPMG to discuss further change management requirement. We require TASK 328 to be completed, Manvith already emailed the personal to complete. (2/21). System Access Control , Payroll Management and Disbursement Management business grouping documentation complete. Waiting for Financial Reporting , Revenue, Accounts Receivable and Grants documentation to be Received. (03/11)		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		This ties into TASK 518		



Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	50% - In Progress		This is connected to TASK 514, and requirements for Data Cleansing. (Leonora Skoglund is waiting for a response to a question she had about conversion ARC001: Customer Conversion. On 02/16/24). Ms Mary will check up with Ms Leonor about what the real percentage is complete in terms of data cleansing, there might require a lot more than scene 2/26		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Meeting with David Eskin regarding these decisions, Meeting completed. Some empty section of dashboard, as there is no interface listed to us. Once we get clarification about the interfaces, we can approach this. We received our updates on that Interfaces from David Eskin (2/21) We are about 100% complete (2/21). Ms.Mary will Ask the question during our Touchpoint Meeting on Tuesday with Vince about the interfaces (2/26)		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24			Pending/More likely not going to meet the deadline based on the amount of remediation efforts, and David Eskin even reconfirmed it during last PALM Monthly Touchpoint meeting with Vince (3/1)		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/07/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/07/24	Bimonthly Agency Readiness Status Report Submitted with the Approval of Agency Sponsor.		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

The dials above 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.

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<u>Implementation:</u> <b>Planned Florida PALM End Users = 126</b> • Business Process Groupings = 13 <b>Role Mapping = TBD</b> <b>Training = TBD</b>	<u>Current-State:</u> <b>Cataloged Business Processes = 266</b> • Related Business Systems = 13 • Related Reports = 58 • <b>Documentation Status:</b> - Complete = 147 Partial = 88 Not Started = 31  <u>Implementation:</u> <b>Impacted Agency Business Processes = TBD</b>	<u>Current-State:</u> <b>Cataloged Business Systems = 26</b> • <b>Criticality:</b> - High = 10 Med = 5 Low = 5 None = 6 • <b>Documentation Status:</b> - Complete = 13 Partial = 8 Not Started = 5 <b>Cataloged Interfaces = 33</b> - Inbound Interfaces = 30 - Outbound Interfaces = 3  <u>Implementation:</u> <b>Business Systems Planned for Integration = 12</b> • <b>Segment I - Documentation Updates:</b> - Complete = 0 Updating = 0 Evaluating = 0 Not Started = 6 Not Needed = 6 • <b>Segment II - Documentation Updates:</b> TBD <b>Planned Interfaces = 12</b> - Inbound Interfaces = 1 - Outbound Interfaces = 11	<u>Current-State:</u> <b>Unique FLAIR Data Elements = 73</b> • <b>Associated Unique Uses = 222</b> - Continued Use - Yes = 183 - Continued Use - No = 10 • <b>Associated Business Systems = 2</b> <b>Cataloged Reports = 234</b> • <b>Criticality:</b> - High = 211 Med = 11 Low = 2 None = 11  <u>Implementation:</u> <b>Configuration Workbooks = TBD</b> <b>Conversions = TBD</b>

### Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FDC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Data Analysis, and the downstream task (will make 1st year difficult) remediation of the data.	Open	9 (High/High)	Impact TASK 519, might not meet deadline (6/28). Need more data info (Data fields) involved with PALM to get a good understanding.	PALM Interfaces are not a useful approach.	02/22/24	David Eskin
People Processes Technology	1077 - Funding for PM staff augmentation	Closed	6 (High/Medium)	Funding request approved by OPB – hiring currently in process. We have already hired 3 BA's and 1 PM and a DA. A BA and a DA is about to be onboarded shortly (Updated) 2/20/24	Funding request approved by OPB – hiring currently in process --- Funding has already occurred, and team has been hired	02/20/24	Greg Prescott, OIT
People Processes Technology Data	BARS (Budget and Account Reporting System)	Open	6 (High/Medium)	Required more information implementation of NEW BARS System	Cost and Time analysis to design and implement a system with the current timeline of PALM	02/16/24	OIT

FDC Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual	Owner / Coordinator



Elements					Comments or Updates	Resolution Date	Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Closed	Critical - Impacts the ability of the agency to move forward with work without resolution	To access the available Administered Funds to support the PALM Project and readiness activities	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	OIT
People Processes Technology	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup	The Planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date – January 2026.	06/30/25	David Eskin, Finance and Accounting/Systems Reporting
Technology Data	We may have some basic Functional and Technical Documentation on BARS (Requirements), but not enough info build a new system	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Accessing the Requirement specification from The Development team of BARS, to assist the impact in order to move the implementation of the new BARS System. Awaiting a meeting with PALM Technical Team.	Management is currently discussing this solution plan	08/30/24	Erica Starling, Financial Administrator
People Processes	Lack of Clear Instructions and Frequent Changes in Task Guidance	Open	High - Impacts the ability of the agency to meet deadlines or milestones	To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance	TBD	01/06/26	Erica Starling, Financial Administrator

#### FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	FDC's Organizational Change Management (OCM) Lead was onboarded and started working 02/26/2024.
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating, as needed.
People Processes Technology	FDC will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Currently still working on Task 328.
People Processes Technology	FDC Change Champion Network will assess the impact of Identify Change Impacts and Update Agency Current State Business Process.	Logged	02/16/24	All agency business systems and CCN roles	Should start working on TASK 515

#### FDC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	AMC001 - Asset & Property Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Org Code clean-up complete and being monitored. There are 3 Org codes reported in the Asset Management File not active in the COA. Requested activation of codes to the Financial Reporting Section.  Projects: The Financial Reporting Section has begun deactivating all projects capitalized by Hurricanes Michael and Irma. Additionally, those projects capitalized in fiscal years 21-22, 22-23, and 23-24 will be deactivated. Pending identification of the rest of capital projects to be inactivated. The agency has projects since the 1980s that are not inactive.  Use fund (GF-SF-FID, BE, and State Program): clean-up have been identified.  Building Number: Currently working on identify the missing building numbers.  Location: Property currently working to update the missing locations.
Data	ARC001 - Customers Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Account Receivables: There are items from prior years that need to be addressed. All accounts receivables are handled outside the AR module.
Data	GMC001 - Grants Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Grants: It was identified the list of grants that need inactivation.
Data	POC001 - Open Encumbrances Conversion	02/16/24	FLAIR, MFMP Users	Data Cleansing and conversion required for the file.	FDC maintains a clean encumbrance file by fiscal year, so no clean-up needed on old data; with the exception of Fixed Cap Projects, encumbrances are only set up for the current fiscal year.
Data	Criminal Justice OCA Data Conversion	02/27/24	FLAIR Users	Data Cleansing and conversion required for the file.	Criminal Justice OCA Data Conversion 02/27/2024 FLAIR Data Cleansing and conversion required for the file. The task is to analyze the OCA data in the last three fiscal years and it indicates that Criminal Justice has 103 OCA's. Of these, 58 were used consistently in fiscal years 21-22, 22-23 and 23-24. The additional 45 OCA codes have not been used since FY20-21 or earlier.  Part of this task is to remove those codes that are no longer needed.
People	FL PALM Discussion on the Staff Augmentation positions	01/12/24	Agency Liaisons, Backup Agency Sponsor, and OIT	To get clear direction on the staff aug positions and who will assign work	
People	CCN PALM Monthly Standing Meeting	01/22/24	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Task 511 Review	01/25/24	Agency Liaisons	To discuss the completion of this task	
People	PALM Project Touch Base	01/29/24	Project Manager, Business Analyst, Agency Liaisons and Backup Agency Sponsor	Meet and greet to talk through everything now that we have an assigned Project Manager.	
People	Project Management Tasks	01/31/24	Project Manager & Agency Sponsors	Meeting to discuss the completion of tasks since we had a new Project Manager and Business Analyst	
People	Project Manager Weekly Standup Meeting	02/06/24	Project Manager & Agency Liaisons	Meeting for Project Manager to let us know where we are in the project	
People	KPMG Palm Support Kick-off Meeting	02/06/24	Project Manager, Backup Project Sponsor, Agency Liaisons, Change Management Liaison and Business Analyst	Kick-off meeting with KPMG to start the process of mapping our business processes and doing a GAP analysis to include detailing how FDC/FCOR should address the gaps	
People	PALM Task Meeting	02/07/24	Agency Liaison and the	Meeting to discuss the upcoming tasks and what	



			Business Analyst	each should be working on	
People	PALM Task Meeting	02/08/24	Agency Liaison and the Business Analyst	Daily check in on all tasks	
People	PALM Task Meeting	02/13/24	Agency Liaison, Project Manager and Business Analysts	Daily check in on all tasks	
People	BARS Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts, DMS Contacts and OIT	Met with DMS via Microsoft Teams to discuss our agency business system (BARS) to see if they are going to remediate their ABS or create a new one, which is similar to our BARS	
People	BARS Internal Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts and OIT	Discussion on our possible options for our ABS system (BARS)	
People	PALM Task Meeting	02/14/24	Agency Liaison and Business Analysts	Daily check in on all tasks	
People	KPMG Weekly Meeting	02/15/24	Agency Liaison and Project Manager of KPMG and additional KPMG staff	FDC Files questions	
People	CCN PALM Monthly Standing Meeting	02/16/24	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	PALM Task Meeting	02/16/24	Agency Liaison, Project Manager and Business Analysts	Discuss Task 515	
People	PALM Task Meeting	02/20/24	Agency Liaisons and Financial Reporting SME	Discuss Task 513	
People	KPMG Weekly Meeting	02/21/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
People	PALM Task Meeting	02/21/24	Agency Liaison, Project Manager, Business Analysts and Systems SME	Discuss Task 518 to start the interface selection for the task.	
People	PALM Task Meeting	02/22/24	Agency Liaisons, Business Analyst and Facilities SMEs	Discuss Task 513 dealing with FDC Location Definition	
People	Inter-Agency Property Forum	02/22/24	Primary Change Management Liaison and Property SMEs	All agencies gathered to discuss upcoming tasks and to exchange ideas	
People	PALM Task Meeting	02/26/24	Agency Liaisons	Discuss Task 513 dealing with FDC Location Definition	
People	PALM Task Meeting	02/26/24	Agency Liaison and Business Analysts	Daily check in on all tasks	
People	PALM Task Meeting	02/27/24	Agency Liaisons and Property SMEs	Discuss Task 513 dealing with FDC Location Definition	
People	Agency Business System Vendor Meeting	02/27/24	Agency Liaisons, Business Analyst and Property SMEs	Meeting with the Asset Management Tracking System vendor to discuss remediation of the bar scanning system	
People	Property Management Forum Review	02/28/24	Back Agency Sponsor, Agency Liaisons, Business Analyst and Property SMEs	Discuss Task 513 and what was learned at the Property Forum meeting held	
People	KPMG Weekly Meeting	02/28/24	Agency Liaisons, Business Analysts, Project Manager of KPMG and additional KPMG staff	Weekly status meeting to provide a status of the project	
Technology	BARS Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts, DMS Contacts and OIT	Met with DMS via Microsoft Teams to discuss our agency business system (BARS) to see if they are going to remediate their ABS or create a new one, which is similar to our BARS	
Technology	BARS Internal Discussion	02/14/24	Agency Liaison, Project Manager, Business Analysts and OIT	Discussion on our possible options for our ABS system (BARS)	
Technology	Agency Business System Vendor Meeting	02/27/24	Agency Liaisons, Business Analyst and Property SMEs	Discussion with Agency Business System Vendor with regards to Strategic Asset Tracking System for remediation of the bar scanning system	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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FDC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/24
November - December 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	01/03/24
September - October 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	11/08/23
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23



Helpful Links

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[Florida PALM Workbook for FDLE](#)  
[Readiness Workplan](#)

FDLE Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor

Charlotte Fraser

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 9
- Vacant Role = 1

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness




The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 100%

- Submitted On Time = 20
- Submitted Late = 0
- Pending Submission = 0

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 8
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24	Following the Segment II meetings, we will be scheduling internal meetings with SMEs to go through each narrative and flow individually.		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24	We have started process for advertising/interviewing/hiring for Program Manager, Project Manager, Oracle EBS Functional Lead, and Oracle EBS Technical Lead. Currently working on physical hardware replacement, hardware Operating System upgrade from RHEL6 to RHEL7, and Oracle EBS application upgrade from R12.2.9 to R12.2.12. These all are pre-requisites before we can initiate code changes related to PALM.		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24	Production Support Contacts - IDP SME (backup) is left vacant because it's the helpdesk, not a specific person.		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	03/01/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/12/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	25% - Beginning Initial Internal Meetings and Information Gathering		Assigning and analyzing information for the task.		
People			Processes			Technology			Data	
The staff and stakeholders affected by your agency's transition to Florida PALM.			The sequence of procedures to accomplish a business objective.			The applications or tools used to process, track, or report on financial operations.			Information used in or produced from an agency's financial business operations.	



**Implementation:****Planned Florida PALM End Users = 39**

• Business Process Groupings = 13

**Role Mapping = TBD****Training = TBD****Current-State:****Cataloged Business Processes = 279**

• Related Business Systems = 15

• Related Reports = 57

• **Documentation Status:**

- Complete = 199 Partial = 44 Not Started = 38

**Implementation:****Impacted Agency Business Processes = TBD****Current-State:****Cataloged Business Systems = 21**• **Criticality:**

- High = 14 Med = 0 Low = 0 None = 7

• **Documentation Status:**

- Complete = 2 Partial = 10 Not Started = 7

**Cataloged Interfaces = 46**

- Inbound Interfaces = 24

- Outbound Interfaces = 22

**Implementation:****Business Systems Planned for Integration = 16**• **Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 3  
Not Started = 0 Not Needed = 13• **Segment II - Documentation Updates:**  
**TBD****Planned Interfaces = 4**

- Inbound Interfaces = 4

- Outbound Interfaces = 0

**Current-State:****Unique FLAIR Data Elements = 73**• **Associated Unique Uses = 193**

- Continued Use - Yes = 68

- Continued Use - No = 108

• **Associated Business Systems = 11****Cataloged Reports = 123**• **Criticality:**

- High = 97 Med = 14 Low = 45 None = 22

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**FDLE Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Technology	The new "Account" COA field will be replacing the GL and Object codes. Specifications for how to crosswalk GL and object codes to account in PALM needed for system remediation.	Open	6 (High/Medium)	Once information is relayed from PALM, we will have to analyze how this will affect remediation of RAMS.	Review and crosswalk Accounts provided for Revenue and Expenditure	10/31/23	Terri Speed / Ajay Katta
Data	That we will be unable to do life-to-date tracking and trend analysis for data that is in both FLAIR and PALM.	Open	4 (Medium/Medium)	Develop crosswalk methodology if the new Data Warehouse will not provide this capability.	None	07/01/23	Mike Moore
Technology	Development and Test instances of affected agency business systems are not available.	Open	3 (High/Low)	Agency will provide development and test instances for all affected agency business systems.	Monitoring	07/01/23	Andrew Gutsch
People	If funding is not approved, we will be unable to hire/retain additional technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire/retain staff required to complete the project.	Awaiting close of FY 24/25 legislative session.	08/01/23	Becky Bezemek / Charlotte Fraser
Technology Data	FDLE uses Object code for various purposes. PALM is replacing this with Account. As a result it will be challenging to reconcile RAMS with PALM and get details at transaction type level.	Open	3 (High/Low)	New chart of accounts and transaction types have to be setup to fulfill PALM and FDLE accounting requirements.	Analyzing PALM account codes provided to determine if additional fields need to be utilized.	10/31/23	Terri Speed / Andrew Gutsch
Processes Technology Data	New hardware, hardware OS and EBS application upgrade will not be completed as planned	Open	3 (High/Low)	Coordinating with multiple teams and testing extensively on all the new instances to ensure upgrade project is completed.	Oracle EBS system (RAMS) hardware and software upgrade is work in progress	02/29/24	Andrew Gutsch
People Processes Technology	Current systems have high visibility and are available to end customers 24/7. There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	2 (Medium/Low)	Project Manager will identify cutover schedule for all affected applications and provide detailed plans much before PALM go-live date.	Pending Project Manager being hired	10/31/23	Andrew Gutsch
People	New consultants and existing team do not have much knowledge of PALM and its impact.	Open	2 (Medium/Low)	Project Manager will need a plan to update everyone on PALM technical and functional features based on which teams can prepare.	Pending Project Manager being hired	10/31/23	Andrew Gutsch

**FDLE Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**FDLE Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will be approved for funding to support readiness activities.	Logged	07/01/23	Office of Information and Technology Systems Office of Financial Management Agency business systems	Pending FY 24/25 Legislative Session
Technology Data	PALM will not change the identified Chart of Accounts structure between now and go-live.	Logged	07/01/23	Agency business systems	Monitor information as provided by PALM.
Data	PALM will provide similar functionality as ABS Open Reports which is used for querying FLAIR and PYRL data so that we can retire those applications.	Logged	09/01/23	Office of Financial Management Office of Policy and Planning All divisional/regional business liaisons Management	Monitor information as provided by PALM.
People Processes Technology Data	PALM will provide significant time to test and practice specific transactions before go-live in a dedicated testing environment (UAT).	Logged	10/31/23	All agency business systems	Monitor information as provided by PALM.

**FDLE Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
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People Technology Data	January's FDLE/PALM Readiness Touchpoint Meeting	01/25/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Six members attended for one hour and thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 514, 515, 516, 517, 518, and 519.	02/01/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 514, 515, 516, 517, 518, and 519.	02/08/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Three members attended for thirty minutes.
People Technology Data	Thursday Task Talk - RW Task 513, 514, 515, 516, 517, 518, and 519.	02/22/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Five members attended for thirty minutes.
People Technology Data	February's FDLE/PALM Readiness Touchpoint Meeting	02/27/24	Office of Financial Management Office of Information Technology Services	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN), Subject Matter Experts (SME), and our Readiness Coordinator, Kim York.	Seven members attended for one hour.
People Technology Data	Change Champion Network Town Hall	02/29/24	Office of Financial Management Office of Information Technology Services	To provide an opportunity for the Change Champion Networks and Project team to collaborate.	Six members attended for three hours.
People Technology Data	Thursday Task Talk - RW Task 513, 514, 515, 516, 517, 518, and 519.	02/29/24	Office of Financial Management Office of Information Technology Services	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Seven members attended for thirty minutes.
People	Interviews for ITS ERP Team Lead	01/04/24	Office of Financial Management Office of Information Technology Services	Interview contractors for ITS RAMS Functional consultant for PALM Project	3 members, 6 interviews, total of 9 hours for 1/4, 1/8, 2/7, 2/8, and 2/9.
People	Weekly Internal PALM Meeting	01/23/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Advisory Council	01/24/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Three members attended for two hours.
People	Weekly Internal PALM Meeting	01/30/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Weekly Internal PALM Meeting	02/06/24	Office of Financial Management	Project Manager and Agency Liaison discuss updates for tasks, segments, BPMs, etc.	Two members attended for thirty minutes.
People	Weekly Internal PALM Meeting	02/12/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Onboard PALM Program Manager	02/15/24	Office of Financial Management	Meet with new PALM Program Manager to discuss project duties, expectations, and roles	Three members for one hour.
People	Weekly Internal PALM Meeting	02/20/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People	Advisory Council	02/21/24	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council.	Four members attended for two hours.
People	Initial COA Configuration Meeting	02/27/24	Office of Financial Management Office of Planning and Budget	To discuss required changes to Org Code and OCA and how this will affect reporting and current configuration methodology (task 513 - Complete Configuration Workbooks for Segments I and II).	Six members attended for one hour.
People	Interviews for PALM Project Manager	02/27/24	Office of Financial Management Office of Information Technology Services	Interview contractors for ITS PALM Project Manager position	3 members, 5 interviews, total of 7.5 hours for 2/27 and 2/28.
People	PALM Project Management Meeting	02/28/24	Office of Financial Management Office of Information Technology Services	To discuss roles and duties to be distributed between the Program Manager and IT Project Manager	Three members for 1 hour.
People	Weekly Internal PALM Meeting	02/29/24	Office of Financial Management	Project Manager and Agency Liaisons discuss updates for tasks, segments, BPMs, etc.	Three members attended for thirty minutes.
People Processes	Payroll Meeting - BPMs Review 100.1 - Set Up and Maintain Positions 100.2 - Set Up and Maintain Employees	01/04/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Five members attended for one hour.
People Processes	Disbursements Management - Segment II Design Workshops	01/10/24	Office of Financial Management	Review BPMs, interface layouts, and reports to process/manage payments.	Two members attended for eight hours.
People Processes	Asset Accounting and Management - Segment II Design Workshops	01/11/24	Office of General Services	Review BPMs, interface layouts, and reports to acquire and set up assets / set up and maintain asset controls.	Two members attended for eight hours.
People Processes	Payroll Meeting - BPMs Review 100.3 - On Cycle Payroll Run 100.4 - Off Cycle Payroll Run	01/11/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Two members attended for eight hours.
People Processes	Disbursements Management - Segment II Design Workshops	01/12/24	Office of Financial Management	Review BPMs, interface layouts, and reports to establish and maintain encumbrances.	Two members attended for eight hours.
People Processes	Contracts & Grants Management System Access & Controls - Segment II Design Workshops	01/17/24	Office of Financial Management	Review BPMs, interface layouts, and reports to create and maintain contracts/grants and interface error handling process.	Two members attended for eight hours.
People Processes	Account Management and Financial Reporting - Segment II Design Workshops	01/18/24	Office of Financial Management	Review BPMs, interface layouts, and reports to enter and process journals.	Two members attended for eight hours.
People Processes	Payroll Meeting - BPMs Review 100.5 - Ad Hoc Payroll 100.6 - Payroll Adjustments 100.7 - Payroll Accounting Distributions 100.8 - End of Period Processing	01/24/24	Office of Financial Management	SMEs reviewed/discussed the BPMs to understand what occurs during each step of the flow.	Three members attended for one hour.
People Processes	Disbursements Management - Segment III Financial Wave BPM Review	02/12/24	Office of Financial Management	Review BPMs, interface layouts, and reports to set up/maintain suppliers and enterprise process vouchers (pcard).	Four members attended for three hours and thirty minutes. Two members watched virtually.
People Processes	Asset Accounting and Management - Segment III Financial Wave BPM Review	02/12/24	Office of General Services	Review BPMs, interface layouts, and reports to deploy and maintain assets.	Three members attended for three hours and thirty minutes.
People Processes	Account Management and Financial Reporting - Segment III Financial Wave BPM Review	02/13/24	Office of Financial Management	Review BPMs, interface layouts, and reports to perform month end close.	Four members attended for three hours and thirty minutes. One member watched virtually.
People Processes	Thursday Task Talk RW Task 513 - Complete Configuration Workbooks for Segments I and II	02/15/24	Office of Financial Management	Discuss the instructions and review the spreadsheets to ensure the task is done correctly.	Five members attended for thirty minutes.
People Processes Technology	Account Receivables - Segment II Design Workshops	01/16/24	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports to deposit and apply receipts.	Two members attended for eight hours.
People Processes Technology	Revenue Accounting / Accounts Receivables / Grants Management - Segment III Financial Wave BPM Review	02/13/24	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports to set up/maintain customers, enter/maintain receivables, AR deposits, and monitor CMIA.	Four members attended for three hours and thirty minutes. Four members watched virtually.



Technology	Upgrade of Oracle EBS Application and Hardware Meeting	02/29/24	Office of Information Technology Services	To upgrade - --> Oracle EBS application from R12.2.9 to R12.2.12. --> Hardware OS from RHEL7 to RHEL8 -->Replace existing Hardware	Upgrade of application and hardware will enable FDLE to work on latest version of application for all PALM related software customizations and also ensure work is done on supported hardware with necessary licenses.
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Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/11/24
November - December 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	01/12/24
September - October 2023	Mike Moore	mikemoore@fdle.state.fl.us	11/13/23
July - August 2023	Charlotte Fraser	charlottefraser@fdle.state.fl.us	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FDOT](#)  
[Readiness Workplan](#)

FDOT Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Lisa Saliba

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 27
- Duplicate Filled Role = 0
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100%

- Submitted Complete = 0
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 82.17%

- Submitted On Time = 12
- Submitted Late = 7
- Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	75% - Consolidating/Inputting Information for Submission		Looking to complete by 2/29/24		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	02/01/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	02/01/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	02/22/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24	Being completed 1/12/24		
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/29/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	75% - Consolidating/Inputting Information for Submission		Looking to complete by 3/8		
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/08/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 0

- Business Process Groupings = 0

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 54

- Related Business Systems = 36
- Related Reports = 43

Documentation Status:

- Complete = 13 Partial = 31 Not Started = 0

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 289

Criticality:

- High = 131 Med = 35 Low = 15 None = 7

Documentation Status:

- Complete = 19 Partial = 175 Not Started = 1

Data

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

Current-State:

Unique FLAIR Data Elements = 92

- Associated Unique Uses = 92
- Continued Use - Yes = 18
- Continued Use - No = 1

Associated Business Systems = 3



**Implementation:****Impacted Agency Business Processes = TBD****Cataloged Interfaces = 119**

- Inbound Interfaces = 47  
- Outbound Interfaces = 15

**Cataloged Reports = 215****• Criticality:**

- High = 87 Med = 72 Low = 33 None = 23

**Implementation:****Business Systems Planned for Integration = 209****• Segment I - Documentation Updates:**

- Complete = 0 Updating = 11 Evaluating = 0  
Not Started = 0 Not Needed = 2

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 14**

- Inbound Interfaces = 7  
- Outbound Interfaces = 7

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**FDOT Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Impacted asset inventory inconsistencies cause problems in planning remediation efforts.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Data	The new "Account" CoA field will be replacing the GL and Object codes. FDOT needs the specifications for how to cross walk GL and object codes to account in PALM. Delay in this information delays our ability to remediate our systems.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Major schedule changes in PALM solution would impact our remediation efforts.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Delay or loss of planned funding for the program	Open	9 (High/High)	Acceptance	No comment this period	11/01/23	Brian Boyd
Technology	Timeliness of PALM Nightly Batch Files and Data Warehouse Updates	Open	9 (High/High)	Avoidance	No comment this period	11/01/23	Brian Boyd
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FDOT is unable to accurately define impacts to our systems without complete specifications on the interfaces for supplier functionality, commitment control module, and project grants module.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Technology	Vendor specifications are incomplete. FDOT TVI uses TIN and Seq # for vendors; Supplier is the new name for vendor and Traveler is new name for sub vendors. FDOT needs additional specifications on vendor functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Technology	MFMP revisions and impact on TVI is unknown. FDOT needs additional specifications on MFMP changed functionality to determine TVI remediation requirements.	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Delay of budget release on LBR funds preventing change orders for staff augmentation purchase orders.	Open	9 (High/High)	Acceptance	No comment this period	11/01/23	Brian Boyd
Processes	Scope changes in PALM solution	Open	9 (High/High)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes Technology	Capability to upload Excel Spreadsheets to PALM will be replacing existing FLAIR emulator scripting processes.	Open	9 (High/High)	Mitigation	No comment this period	02/20/24	Brian Boyd
Processes Data	Could we encumber against previous year budgets when we change the supplier on an encumbrance	Closed	9 (High/High)	Resolved	Robert Hicks stated we could, therefore Resolved.	02/15/24	Brian Boyd
Data	If project category is included on a voucher, does it need project category to match on the distribution line of a purchase order (encumbrance)?	Open	9 (High/High)	Mitigation	Identified this period	03/07/24	Brian Boyd
Data	PALM has provided incomplete information for Object code impacts expansion option. Lots of places in code. What do we replace with ?	Open	9 (High/High)	Mitigation	Identified this period	03/07/24	Brian Tippel
Processes	Issues not resolved in a timely manner	Open	6 (High/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
People	Limited qualified staff availability for requirements gathering, application remediation, remediation testing, and other critical activities	Open	6 (High/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes Data	Need revenue, expenditure, and balance sheet account code mappings for inter and intra agency funds transfer to begin data conversion preparation.	Open	6 (High/Medium)	Mitigation	Identified this period	03/07/24	Brian Boyd
Processes Data	The concept of splitting up the new PALM Accounting system into reviewable Segments is not reasonably workable with many ABS's since systems were architected from broader financial/functional perspectives. This may cause delay in remediation completion of systems as they wait for future segments to provide answers/guidance towards full remediation.	Open	6 (High/Medium)	Mitigation	Identified this period. Attempting to conduct partial remediation where able, but additional efforts identified when systems need to be revisited at future segment intervals.	03/07/24	Brian Boyd
Processes	Scope and schedule alignment of individual department remediation efforts with FPST.	Open	4 (Medium/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd
Processes	Inconsistent processes and standards across FDOT business units could impact efforts to perform remediation for PALM impacts	Open	4 (Medium/Medium)	Mitigation	No comment this period	11/01/23	Brian Boyd

**FDOT Issues**



Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Interface layouts contain errors.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Notify PALM and work to gain clarity and accuracy on interface layouts.	Contact_Sequence_Num	03/05/24	Brian Tippel
Data	Interface schema relationship details not provided in layouts, samples, or knowledge center.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Reaching out to PALM technical staff to gain guidance on entity relationship diagrams.	Identified this period	03/07/24	Mark Rissingner

FDOT Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
Processes	The Florida PALM Project implementation will replace current FLAIR functionality only and will not encompass the agency specific financial planning and analysis requirements of FDOT.	Logged	06/30/23	FDOT Florida PALM End Users FDOT Application Owners	Readiness Workplans will be provided by Florida PALM over the three years of the implementation process to provide guidance on the tasks and activities that are needed for the Financials and Payroll implementation waves.	
Processes	The Readiness Workplan activities direct/guide the FPST Program work and tracks the progress of department specific tasks.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	Changes in the scope and/or schedule of RW activities impact the FPST Program activities.	
Technology	The Florida PALM detail schedule specific to sequencing of design activities for PeopleSoft module functionality and interface designs will be available in July 2023.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	As of 1/1/24, we are still waiting for a detailed schedule. The recently provided Agency Implementation Roadmap and updates to the Readiness Workplan lack the necessary detail.	
Processes	FPST work efforts meeting the FDOT guidelines for project classification will be managed as projects and follow the established project management standards mandated by 60GG-1, F.A.C.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	No comment this period	
Processes	FPST work efforts classified as operations and maintenance (O&M) will follow the established standards for O&M activities.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers FDOT Application Services Section Managers	No comment this period	
People	Adequate staffing, equipment, software, and hardware are primary drivers of the department's FPST Program activities.	Logged	06/30/23	Executive FPST Program Sponsors Chief Information Officer	No comment this period	
Processes	Sufficient recurring Legislative Budget Request (LBR) funding will be released to complete FPST efforts.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	Funding received December, 2023	
People	Due to the overallocation of FDOT key subject-matter resources, hiring consultants and other resources to augment the FPST Program is essential for the department's continuity of operations and successful transition to the Florida PALM solution.	Logged	06/30/23	Executive FPST Program Sponsors	No comment this period	
Processes	Additional appropriation is required to successfully complete required remediation efforts to align with the Florida PALM January 2026 implementation date for the Financial and Payroll Waves.	Logged	06/30/23	Executive FPST Program Sponsors FDOT Florida PALM Agency Liaisons FPST Program Managers	No comment this period	
Processes	FDOT has extensive dependencies on Solution Design deliverables from the Florida PALM Project.	Logged	06/30/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	The current Florida PALM schedule has several to-be-determined schedule placeholders. FDOT needs schedule detail specific to the Florida PALM solution modules to accurately map dependencies and activities for remediation efforts.	
Processes	Staff resources are assigned to multiple workstreams and may have limited availability for FPST activities. Scheduling and resourcing for the FPST Program must take into consideration the department's annual operational schedule to minimize interference with development and delivery of the Work Program and required activities for the state and federal fiscal year-end closings.	Logged	06/30/23	Executive FPST Program Sponsors	No comment this period	
Technology	Expansion Options being replaced by Speed Keys will require interface and design guidance with adequate availability for review and integration.	Logged	11/01/23	FDOT Florida PALM Agency Liaisons FPST Program Managers	No comment this period	
People Technology	Excel spreadsheet uploads will be easily entered into PALM by business users.	Logged	02/20/24	FDOT End Users	Capability will need to be tested and training, if workable, provided.	
People Processes Technology Data	Employees will not need PALM logins to access W2s and Paystubs or to update W4 information.	Logged	03/07/24	Everyone	Payroll concern	

FDOT Agency-Specific Readiness Activities						
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates	
Data	Continued analysis of the current use of Expansion Option and Expansion Set by the Department's computing assets to transition to the Florida PALM Speed Charts and Speed Types (a.k.a. Accounting Tags) functionality.	01/15/24	Florida PALM End Users	Reduce the number of Speed Chart and Speed Types that will be required in the Florida PALM solution.	Speed Key analysis and preparation continued	
Data	RW Task 505: Update Florida PALM Interface Inventory for Segment I	01/12/24	FDOT Florida PALM System Transition Team	Review Segment I resources; identify and document interface needs for Florida PALM implementation.	Completed 2/1/24	
Data	RW Task 514 - Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	FDOT Florida PALM System Transition Team	Review Segment I and Segment II resources for change impacts to agency data and evaluate current state data readiness. Create an agency data cleansing plan and complete data cleansing activities.	In progress - Reimagining the way we plan to use OCA1/OCA2 in PALM	
Data	RW Task 513 - Complete Configuration Workbooks for Segments I and II	02/12/24	FDOT Florida PALM System Transition Team	Confirm agency-specific configurations for Segments I and II	In progress - concern that if workbooks are not available for full entry they may not be completed on time, this task had a two week delayed start and additional delays in having sheets ready, yet deadline unchanged.	
People Processes Technology Data	Technology Transformation Weekly Status Review Meetings	01/15/24	FDOT Florida PALM System Transition Team	Weekly, half-hour sessions to review Transformation status report for the PALM remediation support effort.	Continued weekly through reporting period	



People Processes Technology Data	FDOT Change Champion Network Meeting	01/03/24	FDOT Florida PALM System Transition Team, Subject Matter Experts, Florida PALM End Users	A meeting with Change Champion networkers to discuss I. Welcome – Review CCN Roles and Purpose II. Review PALM Project Timeline a. Program Planning and Approach i. System Design b. Remediation Approach i. Status Tracking Dashboard c. Training d. End User Testing e. Go-Live Plan f. Post Go-Live Support III. Program Communication Plan IV. Change Management Plan a. Central Office b. Districts and Turnpike V. Future Quarterly Meetings	Next meeting 4/5/24
People Processes Technology Data	Payroll Distribution analysis workgroups	01/03/24	FDOT Florida PALM System Transition Team, SMEs	Analysis of PPS Payroll system for current state, PALM impacts, and to-be state. 01/03/24-02/29/24.	
People Processes Technology Data	FPST Internal Workgroup Meetings	01/04/24	FDOT Florida PALM System Transition Team	Weekly workgroup meetings are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness. Held on 1/18/24, 1/25/24, 2/1/24, 2/8/24, 2/15/24, 2/22/24.	
People Processes Technology Data	Weekly Status Review Meetings with Vendor	01/04/24	FDOT Florida PALM System Transition Team	Weekly, half-hour sessions to review North Highland's Technology Transformation status report for the PALM remediation support effort.	Held weekly. 1/11/24, 1/25/24, 2/1/24, 2/8/24, 2/15/24, 2/22/24 2/29/24.
People Processes Technology Data	FPST RW Update Meetings	01/05/24	FDOT Florida PALM System Transition Team	Discuss the RW for Florida PALM and assign accordingly. 1/5/24,2/9/24,2/16/24	
People Processes Technology Data	Resource Planning and Statement of Work (SOW) drafting for hiring resources for FPST.	01/05/24	FDOT Florida PALM System Transition Team	Resource Planning and Statement of Work (SOW) drafting for hiring resources for FPST.	Continued for FPST Staff Aug hires.
People Processes Technology Data	PALM Segment II Design Workshops	01/09/24	FDOT Florida PALM System Transition Team	01/09-01/18/24. Disbursements management, Asset Accounting and management, Accounts receivable, Grants management/contracts management/system access controls, account management and financial reporting.	
People Processes Technology Data	FDOT January Readiness Touchpoint Agenda Meeting	01/22/24	Florida PALM, FDOT Florida PALM System Transition Team	This meeting is to discuss the need to add any agenda items to the PALM Touchpoint meeting agenda below	
People Processes Technology Data	Internal FDOT PALM Touchpoint Agenda Review Meeting	01/22/24	FDOT Florida PALM System Transition Team	Review the agenda and discuss what changes the team would like to make prior to meeting with PALM.	Monthly meetings: 1/22, 2/23
People Processes Technology Data	FDOT/FL PALM Touchpoint	01/23/24	FDOT Florida PALM System Transition Team	This is a recurring monthly Florida PALM Readiness touchpoint meeting between your agency's Change Champion Network (CCN) and your Readiness Coordinator, Felicia Hall	
People Processes Technology Data	PALM Webfocus/FOCUS Working Session	01/23/24	FDOT Florida PALM System Transition Team	Adding this recurring working session to the calendar for the next 6 weeks as we continue to prepare an inventory, categorization, repository, and remediation for the impacted PALM WebFOCUS/FOCUS assets. 2/6/24, 2/13/24, 2/20/24, 2/27/24	
People Processes Technology Data	EDMS-PALM Impact analysis and meeting	02/09/24	FDOT Florida PALM System Transition Team, SME's	Analysis of EDMS system and PALM impact. meeting to discuss and analysis.	
People Processes Technology Data	PALM Segment III Design Workshops	02/12/24	FDOT Florida PALM System Transition Team	02/12-02/13 Disbursements management, Asset Accounting and management, Accounts receivable, Grants management/contracts management/system access controls, account management and financial reporting.	
People Processes Technology Data	FPST-RW 516 workgroup meeting	02/14/24	FDOT Florida PALM System Transition Team	Discuss the RW and assign tasks.	
People Processes Technology Data	Payroll Analysis Stand Up	02/22/24	FDOT Florida PALM System Transition Team, SME's		
People Technology Data	Application Services System Remediation Stand Up	01/23/24	FDOT Florida PALM System Transition Team	A weekly meeting series to check in on the status and roadblocks for the GEN code analysis and remediation.	
Processes Data	RW Task 517 - Update Florida PALM Conversion Inventory for Segment II	01/29/24	FDOT Florida PALM System Transition Team	Review Segment II resources; identify and document conversion needs for Florida PALM implementation.	In progress.
Processes Technology Data	FDOT Interfaces Mapping Session Meeting with vendor	01/16/24	FDOT Florida PALM System Transition Team, Florida PALM End Users	Discuss mapping of interfaces and how we will document them via user stories.	Conducted twice weekly Tuesdays and Thursdays through reporting period
Processes Technology Data	Landing Zone internal workgroups and implementations	01/03/24	FDOT Florida PALM System Transition Team, SMEs	Landing Zone internal workgroups and implementations	01/03/24-02/29/24.
Processes Technology Data	RW Task 519 - Remediate Agency Business Systems based on Segment I	01/29/24	FDOT Florida PALM System Transition Team	Complete agency business system internal build and unit testing activities based on agency business system documentation updates for Segment I.	In progress - The concept of splitting up the new PALM Accounting system into reviewable Segments is not reasonably workable with many ABS's since systems were architected from broader financial perspectives. This may cause delay in remediation completion of systems as they wait for future segments to provide answers/guidance towards full remediation.
Processes Technology Data	SpeedKey Design Discussion	02/06/24	FDOT Florida PALM System Transition Team	Discussion on the design of the 10 character SpeedKey name, and how they will be used in applications.	
Technology Data	RW Task 504: Update Agency Business System Documentation for Segment I	01/12/24	FDOT Florida PALM System Transition Team	Update Agency Business System Documentation for Segment I	Completed 2/1/24
Technology Data	RW Task 518 - Update Florida PALM Interface Inventory for Segment II	01/29/24	FDOT Florida PALM System Transition Team	Review Segment II resources; identify and document interface needs for Florida PALM implementation.	In progress.
Technology Data	Implementation of Account COA in test server environment	02/29/24	FDOT Florida PALM System Transition Team	Implementation of Account COA in test server ZUNIT01 environment	
People	FPST Resourcing Meeting	01/04/24	FDOT Florida PALM System Transition Team	Internal OIT meeting to discuss resources needed within Application Services.	
People	FPST Infrastructure Support Resource Meeting	01/08/24	FDOT Florida PALM System Transition Team	Discuss plans for resources.	



People	Weekly OOC - BSSO Staff Meeting	01/15/24	FDOT FPST Team FDOT PALM End Users	Provide status update on readiness task and remediation status	Met weekly during reporting period
People	Quarterly FPST Resourcing Meeting	01/22/24	FDOT Florida PALM System Transition Team	A quarterly meeting to discuss resourcing needs and projections for the Florida PALM System Transition program.	
People	Monthly FDOT/Florida PALM Readiness Touchpoint Meetings	01/23/24	FDOT Florida PALM System Transition Team	Review and discuss Florida PALM implementation activities	Monthly meetings: 1/23, 2/28
People	SOW Drafting and Hiring Activities for Additional FPST resources	02/01/24	FDOT Florida PALM System Transition Team	SOW Drafting and Hiring Activities for Additional FPST resources	
People	PALM Budget Planning Meeting for FY 24 and FY 25	02/07/24	FDOT Florida PALM System Transition Team	PALM Budget/ resource Planning Meeting for FY 24 and FY 25	
People	RW Task 520 - Update Authorized Smartsheet Users	02/08/24	FDOT Florida PALM System Transition Team	Review, update and confirm authorized users' access to all Florida PALM Smartsheet resources.	Completed
People	FPST Spend Plan activities	02/20/24	FDOT Florida PALM System Transition Team	Spend plan for OIT FPST resources.	
People	OOC Remediation Counts Updates	02/29/24	FDOT Florida PALM System Transition Team	Review and update OOC Status for Assets and Objects in the scope of PALM remediation	Completed PALM remediation status for OOC assets.
People Processes	Florida PALM -Change Champion Network Meeting	01/03/24	FDOT Florida PALM System Transition Team	Review Change Champion roles, PALM timeline, PALM program plan.	
People Processes	RW Task 510: Resource planning and SOW Planning Internal OIT Meeting	01/08/24	FDOT Florida PALM System Transition Team	Meeting in support of completing RW Task 510.	
People Processes	Weekly PALM Planning and Stand-Up Meeting	01/08/24	FDOT Florida PALM System Transition Team	Weekly meeting series to discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	Met 1/8/24-2/26/24.
People Processes	PALM Initial Communications meeting	01/31/24	FDOT Florida PALM System Transition Team	Review high level communication to be sent to stakeholders, and a communication to districts to identify and update technology assets in Compass system.	
People Processes	PALM Resource Revision Meeting	02/06/24	FDOT Florida PALM System Transition Team	Review resources for FY 24.	
People Processes Technology	Continue bi-weekly meeting series for Florida PALM RW Tasks Update.	01/05/24	FDOT Florida PALM System Transition Team	Bi-weekly meeting with OOCand OIT program and project managers to assign and review efforts for RW task completion.	2/9, 2/16, 3/6
People Processes Technology	PALM Thursday Task Talk	02/01/24	Florida PALM, FDOT Florida PALM System Transition Team	PALM RW task talks moved to Thursdays. Attended 2/8/24, 2/15/24, 2/22/24.	
People Processes Technology	Florida PALM FDOT Touchpoint Agenda Meeting	02/23/24	FDOT Florida PALM System Transition Team	prepare for PALM touchpoint meeting.	
People Processes Technology	Florida PALM/FDOT touchpoint meeting	02/28/24	FDOT Florida PALM System Transition Team, Florida PALM		
People Processes Technology	Change Champion Network Townhall meeting	02/29/24	FDOT Florida PALM System Transition Team, Florida PALM		
Processes	PALM Tuesday Task Talk	01/17/24	FDOT Florida PALM System Transition Team	PALM gives guidance on readiness workplan tasks. 1/17/24, 1/25/24,	
Processes	RW Task 515 - Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	FDOT Florida PALM System Transition Team	Review Segment I and II resources; identify changes to people, process, technology, and data and update current state business process documentation.	In progress.
Processes	RW Task 326: (Update Current-State Agency Business System Inventory and Documentation); Continued with the analysis of current inventory to update and validate systems owners and users, review the information being captured, identify interface data being used, and determine the role of each system within the Department.	02/01/24	Florida PALM team, FDOT Florida PALM System Transition team	Provide Current State Agency Business Systems Inventory to PALM project.	Completed 2/1, continuing to update documentation as needed
Processes	RW Task 508: Review Payroll Wave Business Process Models	02/22/24	FDOT Florida PALM System Transition Team	Share and review business process models for the Payroll Wave.	Completed
Processes	RW Task 327: (Complete Report Inventory); Continued with the current-state analysis of reviewing reports to identify the agency's essential reports used with the business processes.	02/27/24	Florida PALM team, FDOT Florida PALM System Transition team	Provide Report Inventory to PALM project.	Continued report analysis as we enter remediation changes.
Processes	RW Task 328: Document Current Agency Business Processes	01/05/24	FDOT Florida PALM System Transition Team, Florida PALM end users	Identifying Business Processes, documentation, and workflows through meeting with Business Owners and defining process details.	Completed 1/5, continuing to update process documentation as needed
Processes Technology	Demo for Automated Test Solution for FPST	01/24/24	FDOT Florida PALM System Transition Team	A meeting with Nagarro representatives to review how the vendor can help streamline testing for the Florida PALM. Agenda topics include procurement, automated testing, services offered.	
Processes Technology	RW Task 516 - Update Agency Business System Documentation for Segment II	01/29/24	FDOT Florida PALM System Transition Team	Review Segment II resources; update agency business system documentation including functional requirements, technical requirements, and test cases.	In progress.
Technology	GEN Installation and upgrade Activities	01/03/24	Subject Matter experts, Florida PALM System Transition Team	GEN installation activities	1/3/24-2/29/24.
Technology	Continued the analysis, planning, and development efforts for the Department's Electronic Estimate Disbursement (EED) system.	01/15/24	Multiple	Assess business continuity risks with the current architecture, identify major system dependencies, and inform the assessment of future state solutions to modernize EED.	
Technology	Continued the Florida PALM Impact Analysis Phase for Office of Comptroller (OOC) owned computing assets	01/15/24	Multiple	Ensure OOC systems continue to function after PALM implementation.	Regular meetings and efforts to continue analysis, focus on reports
Technology	Continued the impact analysis and remediation of the Office of Work Program and Budget (OWPB) owned computing assets.	01/15/24	Multiple	Ensure OWPB systems continue to function after PALM implementation.	Regular meetings and efforts to continue analysis
Technology	Launch Pad planning and development	02/14/24	FDOT Florida PALM System Transition Team, Florida PALM end users	Location for data packages to be collected and sent to PALM Inbound interfaces.	Began planning and development efforts.



Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit


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FDOT Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	03/11/24
November - December 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	01/12/24
September - October 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	11/12/23
July - August 2023	Lisa Saliba	<a href="mailto:lisa.saliba@dot.state.fl.us">lisa.saliba@dot.state.fl.us</a>	09/07/23



**Helpful Links**


- 🔗 [Dashboard Snapshots](#)
- 🔗 [Florida PALM Resources](#)
- 🔗 [Florida PALM Workbook for FGCC](#)
- 🔗 [Readiness Workplan](#)

- ### CCN Composition
- 
- A semi-circular chart representing the composition of CCN. The chart is divided into three colored segments: green (left), yellow (top), and red (right). A thin black line separates the yellow segment from the red segment.

**FGCC Status Report Dashboard**

*Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.*

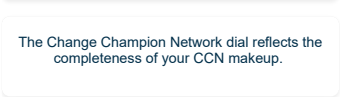
### RW Task Completeness



<b>Reporting Period</b>
January - February 2024
<b>Agency Sponsor</b>
Lisa Mustain

**Agency Sponsor**  
Lisa Mustain

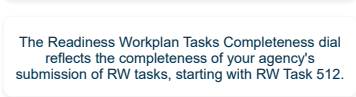
### CCN Composition



### Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 5
- Vacant Role = 5

- The dials above include an intuitive Green-Yellow-



**RW Task Completeness:**

**Score = 0.00%**

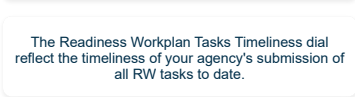
- Submitted Complete = 0
- Submitted Incomplete = 1
- Completed After Submission = 0

- Completed After Submission = 0

ed spectrum, where green indicates the measure is in a p  
red indicates that there are significant gaps in expected

- RW Tasks - Comp

**RW Task Timeliness**



**RW Task Timeliness:**

**Score = 94.78%**

- Submitted On Time = 18
- Submitted Late = 2
- Pending Submission = 0

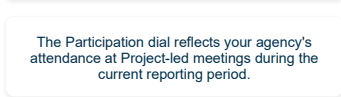
- Pending Submission = 0

negative range, yellow represents that the gaps in expected results that present an elevated risk level for the agency.

- | Closed or Open Items |  |  |
|----------------------|--|--|
|----------------------|--|--|

### Project-led Meeting Participation

A semi-circular chart divided into three colored segments: green, yellow, and red. The green segment is on the left, the yellow segment is in the middle, and the red segment is on the right. The segments are separated by thin black lines.



**Meeting Participation:**

- Meetings Attended = 6
- Meetings Missed = 0

- results present an increasing risk to the agency, and

RW Tasks - Completed or Open Items					

RW Tasks - Completed or Open Items					

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

## People

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

**Implementation:**

- Planned Florida PALM End Users = 14**
  - Business Process Groupings = 12
- Role Mapping = TBD**
- Training = TBD**

**Processes**

The sequence of procedures to accomplish a business objective.

**Current State:**

**Cataloged Business Processes = 25**

- Related Business Systems = 6
- Related Reports = 14
- **Documentation Status:**
  - Complete = 24 Partial = 0 Not Started = 0

**Impacted Agency Business Processes = TBD**

**Technology**

The applications or tools used to process, track, or report on financial operations.

- **Current-State:**
  - **Cataloged Business Systems = 6**
  - **Criticality:**
    - High = 6 Med = 0 Low = 0 None = 0
  - **Documentation Status:**
    - Complete = 5 Partial = 0 Not Started = 1
  - **Cataloged Interfaces = 0**
    - Inbound Interfaces = 0
    - Outbound Interfaces = 0

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

## Current-State:

- Unique FLAIR Data Elements = 70
- Associated Unique Uses = 70
- Continued Use - Yes = 48
- Continued Use - No = 17
- Associated Business Systems = 4
- Cataloged Reports = 63
- Criticality:
  - High = 56 Med = 3 Low = 6 None = 2



Implementation:

Business Systems Planned for Integration = 1

Segment I - Documentation Updates:

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

Segment II - Documentation Updates: TBD

Planned Interfaces = 1

- Inbound Interfaces = 1

- Outbound Interfaces = 0

Implementation:

Configuration Workbooks = TBD

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FGCC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	FGCC is exploring options to acquire a new licensing systems and this system will likely not be complete in time to perform testing with Florida PALM.	Open	6 (High/Medium)	FGCC currently is requesting in FY 24-25, 10 million dollars to provide a licensing solution that will take the place of Versa Regulation. The Palm project and this new application will need to coordinate heavily.	Monthly.	09/11/23	Lisa Mustain, Director of Administration

FGCC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FGCC lacks the appropriate staffing levels to fully support readiness activities.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	FGCC has requested Administered Funds.	FGCC is recruiting additional staffing.	04/01/24	Brice Kayiranga, Chief of Financial Support Services

FGCC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FGCC will be able to access the available Administered Funds to support readiness activities.	Logged	02/29/24	All agency business systems.	12/14/2023 Update: Appropriation received.  02/29/2024 Update: FGCC is actively recruiting a Project Manager for the implementation of Florida PALM at FGCC.  03/12/2024 Update: FGCC conducted interviews for the Project Manager position during the week of March 8th.
Technology	FGCC will have a replacement for Versa Regulation by PALM go live	Logged	11/13/23	Revenue Management	Ongoing.
Technology	DBPR will continue to update and keep FGCC abreast on any modifications or remediations, if any, of Versa Regulation.	Logged	01/10/24	Revenue Management	Ongoing.

FGCC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

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FGCC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Lisa Mustain	brice.kayiranga@flgaming.gov	03/12/24
November - December 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	01/12/24
September - October 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	12/07/23
July - August 2023	Lisa Mustain	lisa.mustain@flgaming.gov	09/11/23



Helpful Links

Dashboard Snapshots

Florida PALM Resources

Florida PALM Workbook for FLHSMV

Readiness Workplan

FLHSMV Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Steve Burch

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

Unique Filled Role = 12

Duplicate Filled Role = 6

Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

Submitted Complete = 1

Submitted Incomplete = 0

Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 92.61%

Submitted On Time = 18

Submitted Late = 1

Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

Meetings Attended = 6

Meetings Missed = 0

The dials above 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.

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Due to the importance of other tasks, and the agency's operational work priorities, this task may not be completed by HSMV.		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	12/07/23			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	12/07/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/23/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/26/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/27/24	Completed.	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/15/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24	Sponsor confirmation was submitted on 3/8/2024, however, we forgot to update the task tracker to mark this task completed by the due date.		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 51

Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 149

Related Business Systems = 4

Related Reports = 53

Documentation Status:

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 6

Criticality:

High = 4 Med = 2 Low = 0 None = 0

Documentation Status:

Data

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

Current-State:

Unique FLAIR Data Elements = 92

Associated Unique Uses = 155

Continued Use - Yes = 85

Continued Use - No = 4



- Complete = 51 Partial = 20 Not Started = 59

#### Implementation:

Impacted Agency Business Processes = TBD

- Complete = 4 Partial = 2 Not Started = 0

Cataloged Interfaces = 5

- Inbound Interfaces = 3

- Outbound Interfaces = 2

• Associated Business Systems = 3

Cataloged Reports = 165

• Criticality:

- High = 94 Med = 18 Low = 49 None = 23

#### Implementation:

Business Systems Planned for Integration = 2

• Segment I - Documentation Updates:

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

• Segment II - Documentation Updates: TBD

Planned Interfaces = 3

- Inbound Interfaces = 1

- Outbound Interfaces = 2

#### Implementation:

Configuration Workbooks = TBD

Conversions = TBD

## Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

### FLHSMV Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Technology	Lack of backup developer for FAME	Open	6 (High/Medium)	Identify and train a backup developer in the event that the current developer leaves the agency.	New risk	01/12/24	Mike Alexander / Fred Patton
Processes Technology	Chartfield Mapping impacts current processes and business systems. COA values will need to be mapped correctly for a successful project implementation.	Closed	4 (Medium/Medium)	Review current FLAIR chartfield values, and identify current agency needs. Map current chartfield values to the correct FL PALM COA value/structure. Record impacts to business processes and agency business systems.	Received COA expense values from Florida PALM to begin mapping for agency business systems	01/12/24	Mike Alexander / Stephanie Cabrera
Technology	HSMV processes large volume of data through its FAME application (Revenue Distribution, WEX, Goodyear, PRIDE, etc.). It is imperative that the interfaces work properly when designed.	Open	3 (High/Low)	HSMV has been working with the Florida PALM team to identify which interface files should be used to send and obtain data between FAME and Florida PALM. HSMV has mapped its current FLAIR interface file to the Florida PALM interface file. HSMV will begin building a new interface file in early 2024 in preparation for interface testing in late 2024.	No change	09/01/23	Steve Burch / Mike Alexander / Nate Seabrooks
Technology	HSMV uses a mainframe application to process Hireback payroll outside of People First. HSMV needs to have the ability to process payments to multiple FHP Troopers for Hireback jobs worked at different hourly rates.	Open	3 (High/Low)	HSMV has met with Florida PALM staff to understand how Hireback pay will be processed. Florida PALM is looking at creating an interface that will be used by HSMV. HSMV is waiting to see the Payroll Business Processes to better understand how Hireback will work.	No change	09/01/23	Mike Alexander / Aquila Franklin

### FLHSMV Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FLHSMV has a large number of key vacancies within the Bureau of Accounting. Due to difficulties in filling these positions, FLHSMV will need to move duties performed by vacant positions to other employees reducing the amount of time that can be committed to complete Florida PALM Tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	HSMV will attempt to fill these positions.	Received approval to fill 5 vacancies. Anticipate 3 new vacancies prior to June 30 due to staff retirements.	07/01/24	Steve Burch / Mike Alexander

### FLHSMV Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	Florida PALM will provide similar functionality as FLAIR@HSMV	Logged	08/31/23	All Accounting and Budgeting areas of HSMV	HSMV relies heavily on FLAIR@HSMV to query FLAIR data on a daily basis. Without a process to easily query data, it will have a significant impact on HSMV staff.
People Technology	Departmental technical resources will be available to update internal databases and reports for distributions from FRVIS to FAME for the new PALM Account codes.	Logged	08/31/23	Selected State Agencies, Not for Profit and, local governmental entities.	No Change
Processes	Vouchers will not be produced or required by DFS for auditing purposes.	Logged	10/31/23	Accounts Payable Section	State Agencies are required to produce vouchers for DFS audit and retain for documenting purposes.

### FLHSMV Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People	Review new Florida PALM tasks	02/09/24	Accounting and Budget staff	Review new Florida PALM tasks due in April and discuss parties responsible for completing tasks	
People Processes	Segment II wrap-up meeting	01/26/24	Accounting and Budget staff	Discuss impacts from Segment II process models on agency processes	
Processes Technology	API002 for FAME application	02/20/24	Disbursements staff	Review crosswalk map for current status to API002 for FAME application	

### Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

### FLHSMV Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Steve Burch	steveburch@flhsmv.gov	03/08/24
November - December 2023	Steve Burch	steveburch@flhsmv.gov	01/12/24
September - October 2023	Steve Burch	steveburch@flhsmv.gov	11/07/23
July - August 2023	Steve Burch	steveburch@flhsmv.gov	09/08/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FSDB](#)  
[Readiness Workplan](#)

FSDB Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor

Tracie Snow

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness




The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 97.83%

- Submitted On Time = 18
- Submitted Late = 2
- Pending Submission = 0

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 7
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	11/14/23	NA- We do not use interfaces to FLAIR and will not need them for PALM		
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	11/14/23	NA - We do not use interfaces to FLAIR and will not need them in PALM		
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/25/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/19/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/09/24	No changes from before		
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/19/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	05/10/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24			Agency sponsor will review upon return from vacation		
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 11

- Business Process Groupings = 13

Role Mapping = TBD

Training = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 7

- Related Business Systems = 1
- Related Reports = 65

Documentation Status:

- Complete = 7 Partial = 0 Not Started = 0

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 1

- Criticality:
  - High = 0 Med = 0 Low = 0 None = 1
- Documentation Status:
  - Complete = 0 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
  - Continued Use - Yes = 47
  - Continued Use - No = 1
- Associated Business Systems = 1

Cataloged Reports = 64

- Criticality:
  - High = 42 Med = 24 Low = 0 None = 0

Implementation:

Configuration Workbooks = TBD



Implementation:

Business Systems Planned for Integration = 0

Segment I - Documentation Updates:  
- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0

Segment II - Documentation Updates:  
TBD

Planned Interfaces = 0

Inbound Interfaces = 0

Outbound Interfaces = 0

Conversions = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FSDB Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	Loss of FLAIR EO field	Open	4 (Medium/Medium)	Mitigation seems unlikely since PALM will not have an equivalent EO field that we used for grant reporting. Some off system method of tracking data for reporting will be needed.	NA	01/30/24	J wester
Processes	Loss of On Demand payments	Open	4 (Medium/Medium)	It is unknown what can take the place of on demand payments.	NA	01/30/24	J wester

FSDB Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

FSDB Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	

FSDB Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

FSDB Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Tracie C. Snow	snowt@fsdbk12.org	03/18/24
November - December 2023	Tracie C. Snow	snowt@fsdbk12.org	01/10/24
September - October 2023	John Wester for Tracie Snow	westerj@fsdbk12.org	11/14/23
September - October 2023	Tracie C. Snow	snowt@fsdbk12.org	11/14/23
July - August 2023	Tracie C. Snow	snowt@fsdbk12.org	09/07/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for FWC](#)  
[Readiness Workplan](#)

FWC Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Jessica Crawford

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 11
- Vacant Role = 0

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 2
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 95.65%

- Submitted On Time = 19
- Submitted Late = 0
- Pending Submission = 1

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 8
- Meetings Missed = 0

The dials above 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.

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress				
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/12/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/24/24	FWC submitted questions to project team on 1/24/2024		
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/08/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/27/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/09/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/22/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	50% - In Progress				
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	50% - In Progress				
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress				
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	02/23/24		Submission Complete	
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	50% - In Progress				
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/12/24	No modifications were needed at this time		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/06/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24	50% - In Progress				

People

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

Implementation:

Planned Florida PALM End Users = 945

- Business Process Groupings = 5

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 247

- Related Business Systems = 5
- Related Reports = 5

Documentation Status:

- Complete = 123 Partial = 0 Not Started = 124

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 18

- Criticality:
  - High = 11 Med = 6 Low = 0 None = 1
- Documentation Status:
  - Complete = 18 Partial = 0 Not Started = 0

Cataloged Interfaces = 8

- Inbound Interfaces = 8
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 113

- Associated Unique Uses = 750
  - Continued Use - Yes = 700
  - Continued Use - No = 0
- Associated Business Systems = 34

Cataloged Reports = 41

- Criticality:
  - High = 32 Med = 8 Low = 1 None = 2



**Implementation:****Impacted Agency Business Processes = TBD****Implementation:****Business Systems Planned for Integration = 7****• Segment I - Documentation Updates:**

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

**• Segment II - Documentation Updates: TBD****Planned Interfaces = 2**

- Inbound Interfaces = 0

- Outbound Interfaces = 2

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**FWC Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	PALM interfaces are not fully designed/documented, and currently defined interfaces are subject to change. FWC is unable to accurately define impacts to our systems without complete specifications on the interfaces.	Open	9 (High/High)	1. FWC Analysis and design is being based on calculated assumptions	No change	11/06/23	Laurie Kershaw
People	Limited subject matter expert (SME) availability	Open	6 (Medium/High)	1. Identify any planned schedule issues 2. Obtain and include backup resources in activities	No change	11/06/23	Laurie Kershaw
People	Team Attrition	Open	6 (Medium/High)	1. Ensure sufficient cross training in all project activities 2. Establish and enforce adequate documentation standards	No change	11/06/23	Laurie Kershaw
People	Resistance to change	Open	4 (Medium/Medium)	1. Include impacted stakeholders early in the process 2. Educate the reason for the change and impact	No change	11/06/23	Laurie Kershaw

**FWC Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

**FWC Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	FWC will be able to access the available Administered funds	Logged	07/03/23	All agency business systems	FWC received approval to access the requested amount of the administered funds

**FWC Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Technology	Assemble Poster and Foam board	02/07/24	Florida PALM users	Assemble Poster and Foam board	Complete
People Processes Technology	Deliver/Send Fully Assembled Posters	02/08/24	Florida PALM users	Deliver/Send Fully Assembled Posters	Complete
People Processes Technology	Post Agency Implementation Roadmaps Posters	02/29/24	Florida PALM users	Post Agency Implementation Roadmaps Posters	Complete
People Processes Technology	Submit Documentation	01/11/24	Florida PALM users	Submit Documentation	Complete
People Processes Technology	Update Smartsheet	01/05/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Sign Smartsheet	01/10/24	Florida PALM users	Sign Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	01/11/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	<b>Complete Task 510 Manage Agency Specific Implementation Schedule, Risks and Issues</b>	02/29/24	Florida PALM users	Complete Task 510 Manage Agency Specific Implementation Schedule, Risks and Issues	Complete
People Processes Technology	Update Smartsheet	02/28/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	02/29/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Complete Workforce Chart	02/09/24	Florida PALM users	Complete Workforce Chart	Complete
People Processes Technology	Create Survey in SharePoint	02/23/24	Florida PALM users	Create Survey in SharePoint	Complete
People Processes Technology	Create email and communication drafts	02/21/24	Florida PALM users	Create email and communication drafts	Complete
People Processes Technology	Review and finalize email and communication drafts	02/23/24	Florida PALM users	Review and finalize email and communication drafts	Complete
People Processes Technology	<b>Complete Task 511 Update CCN and Contacts</b>	01/08/24	Florida PALM users	<b>Complete Task 511 Update CCN and Contacts</b>	Complete



People Processes Technology	Update Smartsheet	01/09/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	<b>Complete Task 512 Identify Future Florida PALM End Users</b>	02/22/24	Florida PALM users	<b>Complete Task 512 Identify Future Florida PALM End Users</b>	Complete
People Processes Technology	Run FLAIR report	01/29/24	Florida PALM users	Run FLAIR report	Complete
People Processes Technology	Identify fringe systems and associated users	02/14/24	Florida PALM users	Identify fringe systems and associated users	Complete
People Processes Technology	Update the Florida PALM End User template	02/09/24	Florida PALM users	Update the Florida PALM End User template	Complete
People Processes Technology	Update Smartsheet	02/21/24	Florida PALM users	Update Smartsheet	Complete
People Processes Technology	Mark task complete in Smartsheet	02/22/24	Florida PALM users	Mark task complete in Smartsheet	Complete
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task requirements	02/14/24	Florida PALM users	Meeting to review task requirements	Complete
People Processes Technology	Meeting to discuss workbook updates	02/28/24	Florida PALM users	Meeting to discuss workbook updates	Completed
People Processes Technology	Meeting to discuss workbook updates	02/23/24	Florida PALM users	Meeting to discuss workbook updates	Complete
People Processes Technology	Update FWC Local Funds workbook	02/26/24	Florida PALM users	Update FWC Local Funds workbook	Complete
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task	02/16/24	Florida PALM users	Meeting to review task	Complete
People Processes Technology	AMC001 - Asset & Property Conversion	02/16/24	Florida PALM users	AMC001 - Asset & Property Conversion	In Process
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task	02/14/24	Florida PALM users	Meeting to review task	Complete
People Processes Technology	Meeting to identify business processes	02/16/24	Florida PALM users	Meeting to identify business processes	Not Started
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task	02/14/24	Florida PALM users	Meeting to review task	Complete
People Processes Technology	Meeting to identify subtasks	02/16/24	Florida PALM users	Meeting to identify subtasks	Complete
People Processes Technology	Meeting to Update Grant Cost Sheets	02/21/24	Florida PALM users	Meeting to Update Grant Cost Sheets	Complete
People Processes Technology	Meeting to Update Financial Mgmt Tracking	02/23/24	Florida PALM users	Meeting to Update Financial Mgmt Tracking	Completed
People Processes Technology	Receive response from Florida PALM team	02/29/24	Florida PALM users	Receive response from Florida PALM team	Completed
People Processes Technology	Meeting to Update Property Pending/Asset Control	02/23/24	Florida PALM users	Meeting to Update Property Pending/Asset Control	Completed
People Processes Technology	<b>Complete Task 517 Update Florida PALM Conversion Inventory for Segment II</b>	02/16/24	Florida PALM users	Complete Task 517 Update Florida PALM Conversion Inventory for Segment II	Complete
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task	02/14/24	Florida PALM users	Meeting to review task	Complete
People Processes Technology	Meeting to identify subtasks	02/16/24	Florida PALM users	Meeting to identify subtasks	Complete
People Processes Technology	Mark task complete in Smartsheet	01/30/24	Florida PALM users	Mark task complete in Smartsheet	Completed
People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
People Processes Technology	Meeting to review task	02/14/24	Florida PALM users	Meeting to review task	Complete
People Processes Technology	Meeting to Update Grant Cost Sheets	02/21/24	Florida PALM users	Meeting to Update Grant Cost Sheets	Complete
People Processes Technology	Meeting to Update Financial Mgmt Tracking	02/23/24	Florida PALM users	Meeting to Update Financial Mgmt Tracking	Complete
People Processes Technology	Meeting to Update Property Pending/Asset Control	02/23/24	Florida PALM users	Meeting to Update Property Pending/Asset Control	Complete



People Processes Technology	Task Assigned	01/29/24	Florida PALM users	Task Assigned	Complete
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Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Jessica Crawford	jessica.crawford@myfwc.com	03/06/24
November - December 2023	Jessica Crawford	jessica.crawford@myfwc.com	01/08/24
September - October 2023	Jessica Crawford	jessica.crawford@myfwc.com	11/08/23
July - August 2023	Jessica Crawford	laurie.kershaw@myfwc.com	09/08/23



CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

**Change Champion Network:**

- Unique Filled Role = 6
- Duplicate Filled Role = 6
- Vacant Role = 2

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

**RW Task Completeness:**

Score = 100%

- Submitted Complete = 0
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

**RW Task Timeliness:**

Score = 76.09%

- Submitted On Time = 12
- Submitted Late = 4
- Pending Submission = 4

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Meeting Participation:**

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		03-07-2024; The Technical Writers are working; the Agency is considering hiring more writers to speed up the process		
	N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	50% - In Progress		Will have a meeting the week of April 1 to create a plan to finish the Implementation Plan.		
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	75% - Consolidating/Inputting Information for Submission				
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	75% - Consolidating/Inputting Information for Submission				
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/11/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	50% - In Progress		Agency will resolve Implementation Plan issues starting the first week of April.		
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/08/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	50% - In Progress				
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	Pending Resubmission		Will discuss with JROs during March workshop. Will give them a deadline of 03/29/2024 to submit end users		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24			Technical Writers will assist; will be delayed as Task 328 is not complete.		
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	100% - Submitted	03/07/24	There were no Segment II activities which affect our Interface Inventory		
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24	100% - Submitted	03/07/24	There we no Segment II activities which affect our Interface Inventory		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/16/24	Agency reviewed; no changes at this time; will re-evaluate in the future		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/11/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

**Implementation:**

Planned Florida PALM End Users = 34

- Business Process Groupings = 12

Processes

The sequence of procedures to accomplish a business objective.

**Current-State:**

Cataloged Business Processes = 96

- Related Business Systems = 2

Technology

The applications or tools used to process, track, or report on financial operations.

**Current-State:**

Cataloged Business Systems = 10

- Criticality:

Data

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

**Current-State:**

Unique FLAIR Data Elements = 97

- Associated Unique Uses = 97



Role Mapping = TBD	• Related Reports = 21	- High = 8 Med = 1 Low = 0 None = 1	- Continued Use - Yes = 68
Training = TBD	• Documentation Status:	• Documentation Status:	- Continued Use - No = 1
	- Complete = 0 Partial = 29 Not Started = 36	- Complete = 7 Partial = 0 Not Started = 1	• Associated Business Systems = 5
	Implementation:	Cataloged Interfaces = 5	Cataloged Reports = 142
	Impacted Agency Business Processes = TBD	- Inbound Interfaces = 4	• Criticality:
		- Outbound Interfaces = 1	- High = 57 Med = 63 Low = 26 None = 1
		Implementation:	Implementation:
		Business Systems Planned for Integration = 9	Configuration Workbooks = TBD
		• Segment I - Documentation Updates:	Conversions = TBD
		- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 7	
		• Segment II - Documentation Updates: TBD	
		Planned Interfaces = 6	
		- Inbound Interfaces = 3	
		- Outbound Interfaces = 3	

## Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

JAC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	The access to data must be segregated by each Judicial-Related Office (JRO) to ensure that JROs can only see their information. This is critical to protect indigent defendants' rights and the defense's trial strategies.	Open	9 (High/High)	Transfer: The agency has been discussing mitigation options with the PALM team.	We had an excellent meeting with the Florida PALM team on 02/19/2024. We believe they understand our concerns and will work toward a resolution.	02/19/24	Rip Colvin, Executive Director
People	Low acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	Mitigate: The agency is preparing a change management plan. Additionally, the agency has started a series of meetings to involve the JROs and keep them informed of the project progress and current status.	The JAC is going to meet with most JROs in March 2024. These meetings began on March 6, 2024..	03/02/24	Rip Colvin, Executive Director
People Processes Technology Data	Funding insufficient for project costs	Open	6 (High/Medium)	Mitigate: The agency will continue to look at projected costs and request needed funding	The legislature granted our FY 2024-2025 request in the GAA. We hope that this funding will be sufficient.	03/02/24	Rip Colvin, Executive Director
People	Availability of staff to work on the project/Limited qualified staff	Open	6 (High/Medium)	Mitigate: The agency is looking at ways to supplement current staff.	We on-boarded Technical Writers on February 5. We are looking at adding a Data Analyst, Assistant Program Management Liaison, OPS and other resources to support the agency's efforts	03/02/24	JAC Executive Steering Committee
Processes Technology	Delays in PALM information will create delays in remediating our processes	Open	6 (High/Medium)	Accept: The agency will continue to monitor information received	No new comments	03/02/24	JAC Executive Steering Committee
Data	Data may not be sufficiently cleansed at go-live due to the JACs inability to adjust FLAIR records which are no longer active in FLAIR. DFS manages these records, and there is not guidance on how DFS will eliminate these records prior to go-live.	Open	4 (Medium/Medium)	Transfer: The agency will continue to discuss this issue with DFS staff and react to their guidance	We continue to remind the PALM team of the importance of this issue; updated owner	03/02/24	Nona McCall
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	Mitigate: The agency is initiating discussions with internal partners to create a new org code structure with a goal of implementing on July 1, 2025	The JAC is going to propose an org structure and then meet with all JROs in March 2024. We will discuss other elements as well during these meetings. We plan on meeting the April 12 deadline for Agency Configuration	03/02/24	Dina Kamen
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	3 (High/Low)	Avoid: The agency needs to engage the business system vendor to discuss new chartfields once the agency has additional technical information	The JAC has formed a PALM/BOMS Advisory Council. This Council will be the go-between for this effort. The first meeting is scheduled for April 9, 2024	03/02/24	JAC Executive Steering Committee
Processes	PALM fails to integrate properly with other state-owned systems such as PeopleFirst, STMS, and PCard Works	Open	3 (High/Low)	Accept: The agency will continue to monitor information being received from the PALM team and other agencies.	No new comments	03/02/24	Nona McCall
People Processes	Replacement or major upgrade of PeopleFirst involving the same team members as the PALM Project	Open	3 (High/Low)	Mitigate: The agency will review all available information regarding this potential new contract and then plan accordingly.	No new comments	03/02/24	Jamie Johnson
Data	Data may not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	Avoid: The agency is preparing a plan for Data Cleansing	We are hoping to create and plan and hire a OPS employee to work on this project in April	03/02/24	Nona McCall
Processes	Downtime during transition	Open	2 (Medium/Low)	Mitigate: The agency will create a plan to minimize this risk such as front loading work in December 2025.	No new comments	03/02/24	Dina Kamen and Jamie Johnson

JAC Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator



JAC Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will have sufficient funding in FY 2023-2024 and receive funds via the LBR process for FY 2024-2025.	Logged	09/01/23	All processes and systems	The FY 2024-25 amended LBR request was included in the GAA. We are hopefully that this amount will be sufficient to cover FY 2024-25 costs.
People Processes Technology	Program governance will provide timely decisions and issue resolution	Logged	11/13/23	All stakeholders	The agency continues to monitor those decisions for which we need more information
People Processes Technology Data	Project teams will have access to the appropriate management, staff and related Program stakeholders (internal and external) and other resources as required and as needed without delay	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project. Additionally, the agency is looking into acquiring contracted or OPS staff to assist with the workload
People Processes Technology Data	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project.

JAC Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
People Processes Data	Met with Agency Sponsor to discuss proposals for a Road Trip, a BOMS Advisory Council and Staffing	02/12/24	Most agency fiscal employees	Seek approval to create a Council and plan a series of meetings throughout the state	Met with a stakeholder on February 9 for insight
People Processes Technology Data	Meeting with Agency Sponsor to discuss PALM Status and Concerns	01/05/24	All JAC employees	To brief the Sponsor, address concerns and get direction	
People Processes Technology Data	Planning meetings for Tampa trip.	01/05/24	JRO employees and CCN	To be prepared for meeting with 4 JROs on January 24 and 25.	Meetings also occurred on 01/18/2024 and 01/19/2024
People Processes Technology Data	Meeting with 4 JROs in Tampa.	01/24/24	JRO employees and CCN	To learn more about how this 4 JROs use FLAIR and BOMS	Meeting continued on January 25
People Processes Technology Data	Technical Writers began working	01/30/24	Most JAC employees	Get Technical Writers up to speed on the PALM project, and JAC activities	Daily Meetings continued until February 8
People Processes Technology Data	JAC Executive Steering Committee meeting to discuss the status of past-due tasks	02/16/24	All agency employees	To determine the status of tasks and plan for getting caught up	
People Processes Technology Data	Meet with consultant to discuss JAC direction related to the PALM project	02/20/24	CCN/All agency employees	Improve JAC outputs and direction	Also met 02/28 and researched and downloaded multiple resources from site.
People Processes Technology Data	Met with Readiness Coordinator	02/21/24	All agency fiscal employees	Discuss progress of the project	
People Processes Technology Data	Met with Agency Sponsor	02/28/24	CCN	To get direction on various issues	
Processes Data	Met with a team of 9 members of the PALM project	02/19/24	All agency employees	Discuss our unique concerns regarding segregation of data	
People	Meeting to discuss PALM staff	02/20/24			
People	Met to discuss Road trip	02/22/24	All agency fiscal employees	Plan Road Trip	
People Processes	Initiated a Authorization for a consultant to get expert advice	01/26/24	All JAC employees/Project Management Liaison	Create a business relationship whereby the JAC can get expert advice and access to research and templates	
People Processes	JAC met to discuss the Technical writer project	01/30/24	Most JAC employees	Help JAC employees understand the role of the Technical Writers and the role of JAC employees in this project	Make up meeting on February 7
Processes	Interviewed candidates for the Technical Writer positions	01/10/24	All JAC employees	To be able to hire Technical Writers to assist with completing Task 328	Interviews also occurred on 01/16
Processes	Met with Technical Writers	02/09/24	Selected agency fiscal employees	Information transfer from SME to Technical Writers	Occurred almost every day from February 9 through February 29.
Technology	Met with Department of Health	02/23/24	All agency fiscal employees	Discuss how the Department of Health handled selected Tasks	
Technology	Meeting to discuss whether LaserFiche can provide additional information after transition	02/27/24	All agency fiscal employees	To determine LaserFiche capabilities	

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

JAC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/11/24
November - December 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	01/11/24
September - October 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	11/13/23
July - August 2023	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	09/11/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for LEG](#)  
[Readiness Workplan](#)

LEG Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Lisa Swindle

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 10
- Vacant Role = 0

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness:

Score = 90%

- Submitted On Time = 13
- Submitted Late = 7
- Pending Submission = 0

Meeting Participation:

- Meetings Attended = 6
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/23/24			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/23/24			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/23/24			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/12/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/26/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/23/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/23/24	Subject to Change depending on Reports distribution and scheduling details, and personnel changes. Details in SmartSheet "Leg -Identify Future FL PALM End Users"	Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Will not be able to complete AM configuration worksheets due to Solaris requirement. We do not have Solaris access and our locations are not in Solaris.		
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/15/24	Made two updates: Technical Lead Catina York OLITS and Laura Brown, General Services (Property) from "Editor Cannot Share" Access to "Editor Can Share" Access so they can add team members to SmartSheets as needed.		
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/04/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 54

- Business Process Groupings = 10

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 119

- Related Business Systems = 13
- Related Reports = 24

Documentation Status:

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 16

- Criticality:
  - High = 10 Med = 1 Low = 1 None = 1

Documentation Status:

Data

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

Current-State:

Unique FLAIR Data Elements = 105

- Associated Unique Uses = 106
- Continued Use - Yes = 14
- Continued Use - No = 0



- Complete = 119 Partial = 0 Not Started = 0

**Implementation:**

**Impacted Agency Business Processes = TBD**

- Complete = 12 Partial = 1 Not Started = 0

**Cataloged Interfaces = 9**

- Inbound Interfaces = 3

- Outbound Interfaces = 5

**Implementation:**

**Business Systems Planned for Integration = 7**

**• Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 4

**• Segment II - Documentation Updates: TBD**

**Planned Interfaces = 5**

- Inbound Interfaces = 3

- Outbound Interfaces = 2

**• Associated Business Systems = 13**

**Cataloged Reports = 77**

**• Criticality:**

- High = 42 Med = 23 Low = 6 None = 0

**Implementation:**

**Configuration Workbooks = TBD**

**Conversions = TBD**

## Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

### LEG Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator

### LEG Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not possess, if not mitigated, could have a significant impact on operations either within our external to the F & A office.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live. Within 30 days of Go-Live, within 180 days of Go-Live, or later. None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hire F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

### LEG Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates

### LEG Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates



Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

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LEG Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Lisa Swindle	mentillo.mike@leg.state.fl.us	03/04/24
November - December 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	01/12/24
September - October 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	11/09/23
July - August 2023	Lisa Swindle	swindle.lisa@leg.state.fl.us	09/01/23



Helpful Links

[Dashboard Snapshots](#)  
[Florida PALM Resources](#)  
[Florida PALM Workbook for PSC](#)  
[Readiness Workplan](#)

PSC Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

January - February 2024

Agency Sponsor

Apryl Lynn

CCN Composition

The Change Champion Network dial reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 9
- Vacant Role = 2

RW Task Completeness

The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Completeness:

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

RW Task Timeliness

The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

RW Task Timeliness:

Score = 92.17%

- Submitted On Time = 12
- Submitted Late = 8
- Pending Submission = 0

Project-led Meeting Participation

The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

Meeting Participation:

- Meetings Attended = 1
- Meetings Missed = 1

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	12/27/23			
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	12/27/23			
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	12/27/23			
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/10/24			
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	02/28/24			
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/22/24			
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/14/24		Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24					
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24					
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24					
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24			
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/12/24			
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24					

People

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

Implementation:

Planned Florida PALM End Users = 9

- Business Process Groupings = 10

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

Current-State:

Cataloged Business Processes = 13

- Related Business Systems = 0
- Related Reports = 1

Documentation Status:

- Complete = 11 Partial = 0 Not Started = 2

Implementation:

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

Current-State:

Cataloged Business Systems = 5

- Criticality:
  - High = 0 Med = 1 Low = 0 None = 4
- Documentation Status:
  - Complete = 0 Partial = 2 Not Started = 0

Cataloged Interfaces = 1

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Data

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

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
- Continued Use - Yes = 11
- Continued Use - No = 37

Associated Business Systems = 3Cataloged Reports = 10

- Criticality:
  - High = 6 Med = 2 Low = 2 None = 0



**Implementation:**

**Business Systems Planned for Integration = 0**

**Segment I - Documentation Updates:**  
- Complete = 0 Updating = 0 Evaluating = 0  
Not Started = 0 Not Needed = 0

**Segment II - Documentation Updates:**  
TBD

**Planned Interfaces = 0**

- Inbound Interfaces = 0

- Outbound Interfaces = 0

**Implementation:**

**Configuration Workbooks = TBD**

**Conversions = TBD**

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

PSC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Training and understanding how to work in FL PALM	Open	4 (Medium/Medium)	Will determine as we get closer to the finished product.	January	01/22/24	Katisha Mobley
Technology	Updating any agency business systems that we enter FLAIR data into	Open	4 (Medium/Medium)	Will determine as we get closer to the finished product.	January	01/22/24	Katisha Mobley

PSC Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator

PSC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	

PSC Agency-Specific Readiness Activities					
Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: \*

☐ Confirm \*

Submit

PSC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Apryl Lynn	alynn@psc.state.fl.us	03/11/24
November - December 2023	Apryl Lynn	alynn@psc.state.fl.us	12/27/23
September - October 2023	Apryl Lynn	alynn@psc.state.fl.us	11/20/23
September - October 2023	Katisha Mobley	kmobley@psc.state.fl.us	11/13/23
July - August 2023	Katisha Mobley	kmobley@psc.state.fl.us	09/11/23

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[Florida PALM Workbook for SCS](#)  
[Readiness Workplan](#)

SCS Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.


Reporting Period

January - February 2024

Agency Sponsor


Eric Maclure

CCN Composition




The Change Champion Network dial reflects the completeness of your CCN makeup.

RW Task Completeness




The Readiness Workplan Tasks Completeness dial reflects the completeness of your agency's submission of RW tasks, starting with RW Task 512.

RW Task Timeliness



The Readiness Workplan Tasks Timeliness dial reflect the timeliness of your agency's submission of all RW tasks to date.

Project-led Meeting Participation



The Participation dial reflects your agency's attendance at Project-led meetings during the current reporting period.

**Change Champion Network:**

- Unique Filled Role = 11
- Duplicate Filled Role = 2
- Vacant Role = 2

**RW Task Completeness:**

Score = 100.00%

- Submitted Complete = 1
- Submitted Incomplete = 0
- Completed After Submission = 0

**RW Task Timeliness:**

Score = 95.22%

- Submitted On Time = 15
- Submitted Late = 5
- Pending Submission = 0

**Meeting Participation:**

- Meetings Attended = 5
- Meetings Missed = 0

The dials above 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.

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
	Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24				
	Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Submitted	01/11/24				
	Processes	508	Review Payroll Wave Business Process Models	11/06/23	01/26/24	100% - Submitted	01/26/24				
	N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Submitted	01/08/24				
	N/A	510	Manage Agency Specific Implementation Schedule, Risks and Issues	12/28/23	02/29/24	100% - Submitted	03/08/24				
	People	511	Update CCN and Contacts	01/08/24	01/26/24	100% - Submitted	01/25/24				
Indirect	People	512	Identify Future Florida PALM End Users	01/16/24	03/01/24	100% - Submitted	02/29/24			Submission Complete	
Direct	Data	513	Complete Configuration Workbooks for Segments I and II	02/12/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24						
Indirect	Technology	517	Update Florida PALM Conversion Inventory for Segment II	01/29/24	04/12/24	25% - Beginning Initial Internal Meetings and Information Gathering					
Indirect	Technology	518	Update Florida PALM Interface Inventory for Segment II	01/29/24	04/12/24						
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24						
N/A	People	520	Update Authorized Smartsheet Users	02/05/24	02/16/24	100% - Submitted	02/13/24				
N/A	N/A	521	Submit Bimonthly Agency Readiness Status Report	03/01/24	03/11/24	100% - Submitted	03/06/24				
N/A	N/A	522	Manage Agency Specific Implementation Schedule, Risks and Issues	03/01/24	04/30/24						

People

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

**Implementation:**

Planned Florida PALM End Users = 115

- Business Process Groupings = 13

Role Mapping = TBDTraining = TBD

Processes

The sequence of procedures to accomplish a business objective.

**Current-State:**

Cataloged Business Processes = 33

- Related Business Systems = 5
- Related Reports = 31

Documentation Status:

- Complete = 32 Partial = 0 Not Started = 0

**Implementation:**

Impacted Agency Business Processes = TBD

Technology

The applications or tools used to process, track, or report on financial operations.

**Current-State:**

Cataloged Business Systems = 5

- Criticality:
  - High = 3 Med = 2 Low = 0 None = 0
- Documentation Status:
  - Complete = 5 Partial = 0 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Data

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

**Current-State:**

Unique FLAIR Data Elements = 72

- Associated Unique Uses = 72
  - Continued Use - Yes = 48
  - Continued Use - No = 0
- Associated Business Systems = 6

Cataloged Reports = 48

- Criticality:
  - High = 3 Med = 27 Low = 6 None = 9



**Implementation:****Business Systems Planned for Integration = 4****• Segment I - Documentation Updates:**- Complete = 0 Updating = 0 Evaluating = 2  
Not Started = 0 Not Needed = 0**• Segment II - Documentation Updates: TBD****Planned Interfaces = 8**

- Inbound Interfaces = 4

- Outbound Interfaces = 3

**Implementation:****Configuration Workbooks = TBD****Conversions = TBD****Agency Reported**

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

**SCS Risks**

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Additional/adequate human resources for accounting roles	Open	6 (Medium/High)	Prepare LBR to request additional funding or FTE. Cross train employees to assume different work responsibilities.	This was discussed during our last touchpoint meeting 12/12/23	12/12/23	Finance & Accounting Chief and Budget Chief
Technology Data	Data conversion integrity	Open	6 (High/Medium)	Working with PALM to see what resources will be provided to the agencies.	This was discussed during our 12/12/23 Touch Point meeting that we need assistance to convert our ORG Code listings.	12/13/23	F&A, OIT and HR
Technology	Purchasing of new services	Open	4 (Medium/Medium)	Looking for the appropriate products and services	Funding was received and resources are being identified to prioritize spending.	12/15/23	OIT/Technical Liaison
Processes	Proper documentation of current processes and procedures.	Open	2 (Medium/Low)	In the process of updating and documenting all our processes.	Processes were updated to complete FL PALM TASK 328	11/30/23	SCS
People	Ongoing Communication about project	Open	1 (Low/Low)	Working on a communication plan.	Planned bi-monthly SCS communication beginning 2024. Intranet updates. As PALM implementation comes closer, we will create a mass communication SCS campaign.		Finance & Accounting

**SCS Issues**

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Data conversion with our ORG Code Listing to COA	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	As soon as possible, we will begin the conversion process from FLAIR Accounts to COA	This was discussed with Readiness coordinator to see what recourse	12/12/23	Finance & Accounting
Processes Data	SCS does not utilize HRIS for timesheet reporting, this apart of the payroll life cycle in PALM	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Request our attendance and reporting software (ARS) to interface with PALM for reporting time and attendance			
Processes Data	HRIS payroll reports not utilized to send data to PALM	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Request payroll reports for SCS to be generated - LWOP, missing timesheet reports, over and under payment report			
Processes	Entering OPS paper timesheets, Shift and On-call payments into People First manually in the Alternate Time Entry screen	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Request approval for OPS employees be allowed to use the HRIS system to submit timesheets.			
Processes	LWOP entered as Unpaid hours in Alternate Time Entry screen when notified timely	Open	High - Impacts the ability of the agency to meet deadlines or milestones				

**SCS Assumptions**

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	Additional One-Time Payment function in HRIS will function the same	Logged		Separating, retiring, DROP entry, Overtime recipients	

**SCS Agency-Specific Readiness Activities**

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates

**Agency Sponsor Confirmation**

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

**Agency Sponsor Name: \***☐ **Confirm \*****Submit****SCS Status Report Confirmation**

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2024	Eric W. Maclure, Interim	macluree@fcourts.org	03/06/24
November - December 2023	Eric W. Maclure, Interim	macluree@fcourts.org	12/28/23
September - October 2023	Eric W. Maclure, Interim	macluree@fcourts.org	11/13/23
July - August 2023	Carlington Brown	brownd@fcourts.org	09/12/23