

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:

September – October 2023

Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for AHCA
- Readiness Workplan

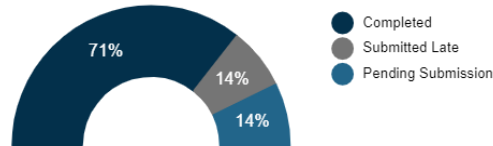
AHCA Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Vacant

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

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 1
- Pending Submission = 1

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 6
- Vacant Role = 1



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 2 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 20

- Criticality:
 - High = 18 Med = 0 Low = 2 None = 0
- Documentation Status:
 - Complete = 2 Partial = 14 Not Started = 0

Cataloged Interfaces = 18

- Inbound Interfaces = 13
- Outbound Interfaces = 5

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 63

- Associated Unique Uses = 63
 - Continued Use - Yes = 1
 - Continued Use - No = 0
- Associated Business Systems = 22
- Cataloged Reports = 47
- Criticality:
 - High = 45 Med = 0 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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 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 Processes Data	If the resources are not identified and onboarded in a timely manner 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.	Closed	6 (High/Medium)	Current Augmented Staff will take upon the added responsibility of documenting the functional and technical specifications and mapping the chart of accounts and will spend less time making needed application changes to incorporate current manual processes.	Changed to an issue	10/24/23	Management
People	Florida PALM project scope increases, the Agency's current LBR funding requests are inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature	New	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	Escalate	On-going issue	01/15/24	Scott Ward
People Processes Technology	If the resources are not identified and onboarded in a timely manner 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 to document the HR/Payroll processes and complete the tasks that were done for the Financials Wave	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

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 Data	Weekly Governance Meetings	9/25, 10/2, 10/9, 10/23	Bureau of Financial Services (SunFocus)	To review highlighting of weekly activities and bring risks and issues for resolution	
People Processes Technology Data	Weekly Project Team Planning Meeting	9/6, 9/13, 9/20, 9/27, 10/11, 10/18, 10/25	Project Team	Planning for the transition of Florida PALM	
People	Weekly Change Champions Workgroup Meeting	9/6, 9/13, 9/20, 9/27, 10/11, 10/18, 10/25	Change Champions and SMEs	To review status of tasks; Working session if need be	

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:
September - October 202	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

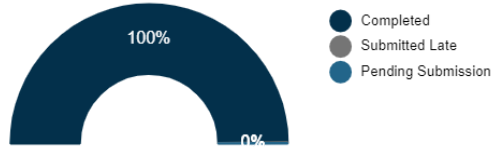
APD Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Rose Salinas

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

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 6
- Duplicate Filled Role = 9
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0
 - Partial = 0
 - Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

- Criticality:
 - High = 9
 - Med = 0
 - Low = 0
 - None = 0
- Documentation Status:
 - Complete = 3
 - Partial = 6
 - Not Started = 0

Cataloged Interfaces = 78

- Inbound Interfaces = 6
- Outbound Interfaces = 1

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 480

- Associated Unique Uses = 1181
 - Continued Use - Yes = 1094
 - Continued Use - No = 57
- Associated Business Systems = 2
- Cataloged Reports = 112
- Criticality:
 - High = 150
 - Med = 18
 - Low = 1
 - None = 0

Implementation:

- Conversions = TBD
- Configurations = 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.

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	12/15/26	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	12/15/26	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 Technology Data	Business Process Workflow - Incomplete Task Documentation	Open	6 (High/Medium)	- Implement standardized documentation procedures	- Regularly review the completeness of task documentation during monthly team meetings.	10/24/23	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.	10/24/23	APD IT Team
People Processes Technology Data	Business Process Workflow - Process Duplication	Open	6 (High/Medium)	- Regularly review and update process documentation to identify duplication	- Report process duplication findings in the monthly process improvement meetings.	10/24/23	APD Core 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.	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.	10/24/23	APD IT Team
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	Measurement: Reconciliation issue	12/15/26	APD Finance Team
People Processes	Resistance to change among employees	Open	4 (Medium/Medium)	Conduct change management training, communicate benefits of the new system	Measurement: Employee feedback and adoption rate	10/24/23	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	Measurement: Number of integration issues	10/24/23	PALM Team/APD Project Team
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.	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.	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.	10/24/23	APD Core 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	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	10/24/23	PALM Team/APD Project Team

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 Data	APD Finance G/L Team - questioning when there will be a final approved full PALM Chart of Accounts listing provided	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	This is will be an on-going	01/31/24	APD Finance Team
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	01/01/24	APD Sponsor and Finance 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

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 Data	PALM Workshop Participation	8/14, 8/15	APD Finance teams for Module: Disbursements and Financials/Budget/Cash Control	APD Team members attending to get an understanding of the overview and discussion around design and build elements for the PALM platform and where changes or additions are being added	APD Team members participated - primary and secondary (2 from each Finance area) so that exposure and understanding was provided for the PALM efforts currently in process
People Processes Technology Data	PALM Advisory Council Meeting	8/16	APD participation in PALM Hosted Advisory Counsel meeting	Be a part of the communication dissemination - understand where APD fits in and what is happening by keeping up to date	Attended by either or both Ramon or Becky to represent any significant information understanding and sharing with the PALM roll out objectives and actions
People Processes Technology Data	APD - Readiness - Status update Task 331	9/6 - 9/11	APD Finance Teams/PALM Teams	APD reporting on efforts to manage the project activities and objectives	APD will meet the bi-monthly requirement - but will update as activities/issues/update/completions are done.Sept report submitted 9/11
People Processes Technology Data	Weekly APD Core Team Status Report	9/7/23 9/14/23 9/21/23 9/28/23 10/5/23 10/12/23 10/19/23 11/2/23	APD PALM Core Team	Keep Sponsor - Rose Salinas and Primary Core Team - Dee Warren and Ramon Evans fully up to date on APD Finance Team Activities	Providing APD Key Stake holders/Core Team members updated with status so that they are able to talk to any PALM topic and where APD is in the Project process
People Processes Technology Data	High Fives	9/5/23 10/2/23 10/17/23 11/2	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	Tuesday Task Talks	9/26/23 10/10/23 10/17/23 10/24 10/31 11/7	APD Core/CCN	APD Task Understanding	Attending the PALM hosted call regarding new Tasks
People Processes Technology Data	Business Process Open Forum	9/28 10/5 10/12 10/19 10/26 11/2 11/8	APD Finance Teams as a whole	Workflow/Process status/motivator/Q&A	ALL APD Teams joining via teams call to review status - effort - activity and updates with PM 11/8 - is a joint meeting with the PALM team for their Touchpoint review and our included teams on site at APD
People Processes Technology Data	Advisory Council Meeting	9/20 & 10/18	APD PALM Core Team	PALM Council participation	Ramon and Becky back each other up to be in attendance for every meeting
People Processes Technology Data	PALM Task 328 - Business Process	9/11/23	APD Teams	Agency Capture of Task Processes for Business Modeling - Mapping	re-kickoff and continuous effort to keep teams motivated On-Going
People Processes Technology Data	PALM Task 331 - Status Reporting	9/11/23	PALM Team and APD Teams	Bi-Monthly Status Reporting	Rose completed the approval and initial report was submitted on time
People Processes Technology Data	PALM Task 500 - APD Agency Charter/Scope	10/2/23	APD PM and Core Team	APD Scope/Charter under PALM Project	Becky is revising the initial Scope/Charter - PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new readiness impact and formalize
People Processes Technology Data	APD Core Team Weekly Status Meeting	9/7/23 9/14/23 9/21/23 9/28/23 10/5/23 10/12/23 10/26/23 11/2/23 11/9/23	APD Core Team	Weekly meeting/teams call to review the updates and status of activity with the PALM Project	Becky provides status prior to the call to review all activities that are current for that week on the PALM Project efforts
People Processes Technology Data	APD/PALM Monthly Touchpoint - September	9/13/23	APD CCN & SMES with PALM RC	Monthly Touchpoint to review Agency Readiness and engagement	September Teams call/Virtual - attended by CCN and SME's
People Processes Technology Data	APD/PALM Monthly Touchpoint - October	10/11/23	APD Core Team/CCN/SMEs	Monthly Touchpoint to review Agency Readiness and engagement	October - Meeting updates shared via email updates - no meeting required for the team this month. Scheduling next month (November on site)
People Processes Technology Data	APD/PALM Monthly Touchpoint - November	11/8/23	APD Core Team/CCN/SMEs	Monthly Touchpoint to review Agency Readiness and engagement	November - Meeting onsite and blended with the Business Process Forum audience (CCN's and SME's plus additional team members.
People Processes Technology Data	APD Team in person Work Process Overview	9/18/23	APD Finance Teams	ALL Teams Meeting - In Person - Business Process walk thru - overview - discussion	Becky presented the form - the objective - the how to and continued to work to kickstart the effort by the APD teams members to get their processes documented as best they can
People Processes Technology Data	PALM Payroll Session - Webinar Design Session 1	9/18/23	APD Payroll Team	PALM Hosted Design Session overview	Dee/Ashlie/Ramon/Becky/Amanda/Nicole
People Processes Technology Data	PALM Technical Town Hall	9/19/23	APD IT Team	PALM Hosted Design Session overview	Chappella/Rohan/Ramon/Becky Attending
People Processes Technology Data	PALM Payroll Session - Webinar Design Session 2	9/19/23	APD Payroll Team	PALM Hosted Design Session overview	Dee/Ashlie/Ramon/Becky/Amanda/Nicole
People Processes Technology Data	APD Sponsor Meeting/Discussion	9/20/23	APD Sponsor and APD PM	PALM Project - updates and Business Req review - informal - in person	Rose/Becky
People Processes Technology Data	APD - ABC Business System COA review	9/20/23	APD IT and APD Core Team	Review the ABC Business Systems alignments and overview of the PALM COA Structure	Ramon/Becky/Lee - reviewing the COA gave Lee a direction for what PALM requirements would be needed as the ABC upgrades are made
People Processes Technology Data	APD Regions/Facilities/DDDP SME Engagement Emails	9/20/23 9/25/23 9/26/23	APD CCN/SME Teams	Fully Engaged SPD Regional Offices/Facilities/DDDP	Emails with information and requests to update communication efforts with primary and secondary from each team. Schedule teams call and engagement opportunities.
People Processes Technology Data	PALM Design Sessions - COA 10.1	10/3/23	APD CCN/SME and PALM Team	PALM Hosted Design Session overview	Ramon, Becky, Chappella, Rohan, Shaquan, Ebony, Charly
People	PALM Design Sessions - Vouchers	10/4/23	APD CCN/SME and PALM	PALM Hosted Design Session overview	Ramon, Beckv, Chappella, Rohan, Robert

People Processes Technology Data	30.3		Team		
People Processes Technology Data	PALM A/P Survey Review	10/2/23	APD A/P and DFS	Complete Accounts Payable Survey	Becky and Sue T. completed an submitted on time
People Processes Technology Data	PALM Allotments Survey Review	10/5/23	APD A/P and DFS	Complete Allotments/budget Survey	Becky and Ebony completed an submitted on time
People Processes Technology Data	PALM Emails for Regions/Facilities DDDP	10/10	APD Finance Teams	Survey to identify the Primary and Secondary Accounting personnel and add to PALM overview and go forward plan	Becky emails to regions/facilities and DDP
People Processes Technology Data	PALM Agency Collaboration	10/19	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky and Tulani met and talked to all things PALM
People Processes Technology Data	PALM Agency Collaboration - shared documents	10/23	APD and Department of Commerce	New PM for Commerce and mentoring to bring up to speed on PALM Project successes - sharing APD tactics	Becky shared the High Fives/Contact lists/power point presentations to help bring Tulani into the fold with way to help her department catch up to PALM initiatives
People Processes Technology Data	PALM RC call - catch up	10/18	PALM and APD	PALM Catch up and Smartsheet Status clarifications	Becky and Jordan - review some correct documentation methods using Smartsheet for status input
People Processes Technology Data	October Advisory Council Meeting	10/18	PALM and APD	Advisory council of agencies to the PALM Team	Ramon in attendance for latest updates and review of project efforts from PALM
People Processes Technology Data	Task 326 - Business System - APD IT Team final review	10/17	APD IT	APD IT Team awareness and review of the Business System updates required	Team - Input from all areas of APD IT to add and review that all has been captured to sign off on the Task and close it - Task 326
People Processes Technology Data	APD Facility - Tacachale Accounting Review Call	10/18	APD SME and PM	Facilities accounting practices focus	discussion and overview of the efforts from the facility perspective and in conjunction with their payroll activities
People Processes Technology Data	Budget Team - Small Team internal review	10/24	Budget Team In Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Disbursement Team	10/24	Disbursement Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Financials Team	10/25	Financials Team in Person	Business Process Workflow documentation	Review and discuss in round table the activities to be successful in Business Process Workflow documentation
People Processes Technology Data	Task 504	10/30	Business System Documentation Seg I - APD IT Team	Update Agency Business System Documentation for Segment I. This includes functional requirements, technical requirements, and test cases from reviewing Segment I resources.	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 505	10/30	Florida PALM Interface Inventory for Segment I	Update Florida PALM Interface Inventory for Segment I. Identify and document interface needs for Florida PALM implementation by reviewing Segment I resources	APD IT Team is engaged to review - Rohan is managing - review on bi-weekly IT Team call.
People Processes Technology Data	Task 507	11/8	APD = All Finance Teams	Manage Agency-specific Implementation Schedule, Risks and Issues	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize
People Processes Technology Data	PALM Touchpoint and Business Process Forum Meeting	11/8	- All APD Finance Teams	In Person meeting with PALM RC's and also to bring the APD Teams into a focused PALM initiative/environment	PALM Monthly Touchpoint meetings will be critical to information dissemination
Technology Data	PALM Task 326 - Business Systems Inventory	10/17/23	APD IT Team	Business System Inventory	Completed 10/17 Updated new column requirements with Rohan - and set to review with IT team Status marked completed for status report.
People	SME Team updates	8/31	APD CCN and SME Teams	Identify the primary and secondary contacts with each remote location - regions/facilities/DDDP	Updated with new input to the SME team. APD initiative to always provide a primary and secondary to each role within the finance team structure
People	Bi-Weekly Hi-Fives - Information message to the APD teams	7/6, 7/24/, 8/7, 8/21, 9/5	APD Teams/CCN/SME's	Provide updates and information regarding the progress and motivation for the PALM Project as it moves forward	Bi-weekly information email sent to the teams for review and information sharing
People	APD - OWP for Additional Project Team Support	8/31/23 10/25/23 11/2/23	APD PALM Project Team/all	Prepare requirements for additional team members to join the APD Project Team = 1)Business Analyst 2)Tech Developer	8/31 - Target onboarding in October 2023 10/25 - Reg has been approved/funds pending budget amendment/then posting - target slides to November 2023 11/2 - funding approved - budget amendment in process - can move forward with getting candidates
People	Task 506	11/8	APD Sponsor - CCN's SME's and PALM	11/8 Target for handoff to Rose Salinas for approval	On Track to Approve Prior to due date - 11/13
People Processes	PALM Task 501- APD Implementation Schedule	10/9/23	APD PM and Core Team	APD Timeline under PALM Project	Becky is revising the initial timeline in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new timelines and scheduled events - living documentation - and formalize
People Processes	PALM Task 502 - APD Risk Matrix	10/9/23	APD PM and Core Team	APD Risk Matrix under PALM Project	Becky is revising the initial RM in the PID Documentation for the APD project and will review in the portfolio on 12/4 with Core Team - 50% completed - just updates needing to add new risk components and expand - original was based on implementation date and post conversion - living documentation - and formalize
People Processes	PALM Task 503 - APD Workforce Readiness	10/16/23	APD PM and Core Team	APD Workforce needs under PALM Project	Staffing needs and requirements review - ongoing with APD Core team - Reg is in play for new Business Analyst and Tech Developer Defining the team support for all Business Modules - aligning teams with scheduling/overview sessions/training preparation/current PALM Alignment exercises. On-Going
People Processes	APD Workflow form Update to Team	9/14/23	APD Finance Teams	Weekly Forum for Business Process Discussion	Reviewed the form provided thru Smartsheet
People Processes	APD Workflow readiness walk thru CCN & SMEs	9/14/23	APD Finance Teams	Forum additional Information overview on readiness	Review the new PALM Task log - provided 157 new tasks - where located - how to access/target the CCN and SME's so that there are aware and buy in to the new initiatives as

					to ensure the release of any of the new inmates as they are released to the teams.
People Processes	APD PM Collaboration lead with Commerce	10/19	APD PM and Commerce PM	Overview and mentoring for PALM Project initiation for new Commerce PM	Sharing of information/documents/overview of PALM engagement - mentoring
People Technology	APD Smartsheet Use	8/31	APD Finance and IT Teams	APD has determined that the use of Smartsheet will enhance the productivity within the Finance and IT teams and will add value to the efforts to align with PALM and the project requirements as well as establish good internal communication and collaboration going forward	Currently APD is onboarding and learning the basic use of the application as it is rolled out to the Finance teams. it will be better used as the Business Analyst and Tech Developer come on board to manage multi projects internally
Processes	Business Process exercise Step 4	9/1	APD Finance Teams	APD Step 1 - Finance Team Responsibility defined with job listing and team organization defined - in process	Starting at top down - APD to define Team/Module Purpose/Responsibility/Objective/Requirements
Processes	Legacy Historical Process Manual Review	8/2 - present	APD Finance Team/APD PALM Team	Use and understanding of the existing APD Finance Manual with separation for PALM Alignment into teams and defining for use in Business Process Updates	Using the APD Manual to review and assist Teams with new effort to update/create new/analyze existing practices
Technology	Business System Review - Task 326	9/6 - 9/15	APD IT Team	Final Review on the inventory in Smartsheet	This Task is considered completed and will be submitted after review with IT Primary by 9/15 - 2 open questions remaining for IConnect and Inventory 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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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Rose Salinas	rose.salinas@apdcares.org	11/13/23
July - August 2023	Rose Salinas	rose.salinas@apdcares.org	09/11/23

Helpful Links

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

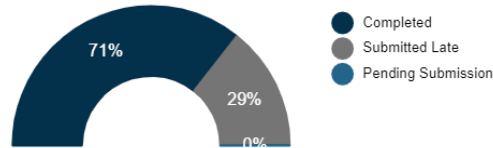
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

CITRUS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Christine Marion

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 2
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 10
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 28

- Related Business Systems = 2
- Related Reports = 28
- Documentation Status:
 - Complete = 0 Partial = 25 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

- Criticality:
 - High = 2 Med = 0 Low = 0 None = 0
- Documentation Status:
 - Complete = 1 Partial = 1 Not Started = 0

Cataloged Interfaces = 1

- Inbound Interfaces = 1
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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 had hoped to request additional appropriation to hire OPS/contract help during the project. However, the process for making these requests has not been identified to us.	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	The majority of PALM meetings have moved to "in-person" meetings in Tallahassee. Due to staffing and budget issues, travel to Tallahassee (a ten hour round trip) precludes us from sending staff to these meetings.	Open	6 (Medium/High)	It is difficult to get new staff up to speed. We are reviewing previously recorded meetings as time allows. I think this will be a significant issue as we get closer to go-live.	This will continue to be an issue, as long as meetings are not virtual.	11/08/23	C Marion
People	All new accounting staff. Staff members previously on PALM team have left the agency.	Open	4 (Medium/Medium)	We have assigned previous roles to new staff, but there will be a learning curve.	Staff is being trained and are being brought in to the PALM meetings. Regular meetings have been established to review RW tasks and assign tasks.	11/08/23	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	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

CITRUS Assumptions

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

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

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:
September - October 202	Christine Marion	cmarion@citrus.myflorida.com	11/09/23
July - August 2023	Christine Marion	cmarion@citrus.myflorida.com	09/07/23

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Helpful Links

- Dashboard Snapshots
- Florida PALM Resources
- Florida PALM Workbook for COM
- Readiness Workplan

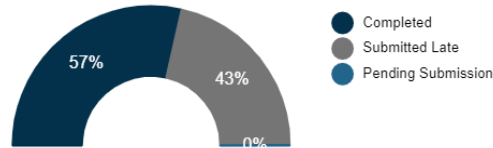
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

COM Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Tisha Womack

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 4
- Submitted Late = 3
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 11
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 74

- Related Business Systems = 4
- Related Reports = 8
- Documentation Status:
 - Complete = 33 Partial = 33 Not Started = 8

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

- Criticality:
 - High = 7 Med = 18 Low = 0 None = 1
- Documentation Status:
 - Complete = 4 Partial = 22 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 71

- Associated Unique Uses = 84
- Continued Use - Yes = 2
- Continued Use - No = 12
- Associated Business Systems = 2

Cataloged Reports = 373

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

Implementation:

- Conversions = TBD
- Configurations = 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.

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	SME Workload	Open	9 (High/High)	Currently we are awaiting legislative budget amendment approval to procure support resources	No updates at this time	11/09/23	Caroline (Tisha) Womack / Lemuel Toro
Processes	The current schedule for review of Payroll Wave Business Models allows insufficient time for comprehensive agency review.	Open	6 (Medium/High)	At present all we can do is await the publication of the meeting materials.	No updates at this time	09/13/23	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)	Vacant positions posted on state employment site to recruit agency resources to support Commerce business goals and PALM initiatives as needed	No updates at this time	11/09/23	Caroline (Tisha) Womack / Human Resources

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	12/31/23	Caroline (Tisha) Womack / 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

				Agency Business Systems	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

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	COM Budget Process Discussion with PALM	11/08/2023	Budget Team	Provide current and new COM Budget team members awareness of Florida PALM Budget design.	

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:
September - October 2023	Caroline (Tisha) Womack	Caroline.tulani.honablew@commerce.fl.gov	11/13/23
July - August 2023	Tisha Womack	lisa.simpson@deo.myflorida.com	09/13/23

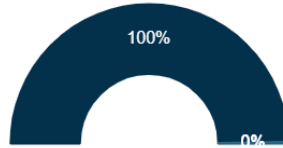
Helpful Links

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

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

DACS Status Report Dashboard

Readiness Workplan Tasks



- Completed
- Submitted Late
- Pending Submission

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

Reporting Period

September - October 2023

Agency Sponsor

Alan Edwards

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 0
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 82

- Related Business Systems = 4
- Related Reports = 4
- Documentation Status:
 - Complete = 0 Partial = 82 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 46

- Criticality:
 - High = 26 Med = 13 Low = 6 None = 1
- Documentation Status:
 - Complete = 46 Partial = 0 Not Started = 0

Cataloged Interfaces = 42

- Inbound Interfaces = 28
- Outbound Interfaces = 14

Implementation:

- Interfaces = TBD

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 = 198
- Criticality:
 - High = 84 Med = 56 Low = 17 None = 51

Implementation:

- Conversions = TBD
- Configurations = 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 Data	Divisions' use of existing budget codes for various purposes could increase the complexity of cross-walking/converting to the PALM data structure.	Open	9 (High/High)	Identify opportunities for standardization to discuss with divisions during engagements related to remediation and data cleansing. Began the PALM Task 116 early. Expecting an 18-month duration for the analysis.	Ongoing		Jim Lewandowski
Data	The FLAIR data and Florida PALM data will represent substantially different information and may cause a gap in trend analysis.	Open	9 (High/High)	Detailed data crosswalks will be imperative to closing potential data translation gaps.	Ongoing		Jim Lewandowski
Technology	Division applications may require more remediation than the project team can accomplish prior to the transition to PALM.	Open	6 (Medium/High)	Begin the analysis of the Divisions earlier than planned and prioritize the Divisions that are the most likely to be impacted by PALM. Establish a communications plan with Divisions that were identified as a priority and adjust the plan as the analysis progresses using an iterative approach.	Ongoing		PPMO
Technology	Unknown changes to the PeopleFirst Payroll component.	Open	6 (High/Medium)	Monitor People First updates and the Florida PALM team to be involved in the analysis and dependencies.	Ongoing		Jim Lewandowski
People	Increased vacancies with the Finance and Accounting staff as PALM approaches due to employee concerns about adapting to new processes/technology, job security, and performance.	Open	6 (High/Medium)	Increase focus on people readiness and change management. Increase communication and training to build confidence in employees' abilities to successfully launch as an agency.	Ongoing		Nicole Jacobik
Processes Technology	Short turnaround time of Florida PALM tasks (the time between the notification and description of the task and the expected task completion date) could result in the inability to	Open	4 (Medium/Medium)	Continue to monitor Florida PALM notifications and participate with Florida PALM at every opportunity.	Ongoing		Jim Lewandowski

	meet stated due dates.						
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DACS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	The PALM Remediation Team has four contract vacancies	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	RFOs are drafted and provided to vendors, and interviews will be scheduled.		10/24/23	Khadija Harris
Technology	Test Database for PALM remediation is insufficient to support extensive testing activities	Closed	High - Impacts the ability of the agency to meet deadlines or milestones	Two of the planned contract services that are currently vacant, for a DBA and for Support Services, will be assigned to work on the Test Database and other environmental preparations		10/10/23	Khadija Harris
Technology	PALM Schedule for Functional Design - leaves 1 year for major remediation	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Stay current on Florida PALM RW tasks, stay informed with Florida PALM updates, and remediate as much as possible in advance.		12/31/25	Florida PALM

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.	

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	FLAIR Data Cleanup	Ongoing	Enterprise wide	To ensure clean records for current use and for conversion to PALM	Ongoing
Data	FLAIR Structure Moving Forward Meeting	9/21/2023	Business Liaisons, Technical Liaison, and SME	Meeting to discuss FLAIR coding structure (Org codes, etc.) and plan for simplifying accounting codes pre-PALM launch.	
Data	FLAIR Data Cleanup Planning	9/26/2023	Business Liaisons, SME, Project Management Liaison	Discuss planning activities involved in Data Cleanup. Approach, responsible parties, etc.	
Data	REV System Overview	9/29/2023	REV, FLAIR	Meeting to discuss REV system (Agency Business System) current functionality and future needs	
Data	AIMS Application Overview	9/29/2023	AIMS, FLAIR	Meeting to discuss AIMS system (Agency Business System) current functionality and future needs	
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/19/2023	Division of Plant Industry Division of Food Safety Division of Agricultural Environmental Services Division of Florida Forest Service	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/20/2023	Office of Agriculture Technology Services	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/23/2023	Division of Licensing	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/24/2023	Division of Marketing Division of Animal Industry	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/26/2023	Division of Fruit and Vegetable	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/30/2023	Division of Aquaculture Office of Energy Division of Food, Nutrition, and Wellness	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
Data	FLAIR to PALM Chart of Accounts – Division engagement	10/31/2023	Office of Agricultural Law Enforcement Division of Consumer Services	Relayed COA changes and facilitated buy-in from Division fiscal liaisons and Assistant Directors, and other key division stakeholders. Highlighted simplifying Org codes and identifying gaps in division reporting needs.	Led by F&A, met with each division individually
People	Participated in PALM Change Management and Training Liaison Forum	10/26/2023	Direct: Change Management/Training Liaison Indirect: Agency-wide	Facilitate agency collaboration. Provide tools for agency change management and training plan implementation.	Addressed people-related issues, risks, and assumptions. Discussed strategies for overcoming resistance to change and embracing the PALM journey. Brainstormed communication and training format, frequency, and content (statewide and agency-specific)
People	OATS, F&A, Admin, and PRT Touchpoint	9/1/2023	Office of Agricultural Technology Services, Finance and Accounting, Administration IT, and FDACS Staff Augmentation (PRT - PALM Remediation Team)	Status reporting and reviewing risks/issues/assumptions and removing blockers	
People	PALM Dashboard/Bimonthly review	9/6/2023 9/7/2023 9/8/2023	PRT, F&A, OATS	Internal review of Bimonthly Status report/PALM Dashboard	
People	PALMcast Guest Speaker	9/22/2023	FDACS, Enterprise-wide	Discussed FDACS' approach to Organizational Change Management	PALMcast will be used in FDACS people-readiness communications and to facilitate stakeholder buy-in agency-wide
People	Participated in Project Management Liaison Forum	10/26/2023	Direct: Project Management Liaison Indirect: Agency-wide	Facilitate agency collaboration; Provide tools for agency project management	Addressed the need for Stakeholder engagement and communication. Discussed strategies for gaining stakeholders support and collaboration.
People	Request for Resourcing Meeting	9/28/2023	OATS, F&A, and Administration Leadership, Admin DIO, F&A Liaison	Meeting to discuss additional resource (people) needs for FL PALM project to meet PALM task deadlines	
People	FASM – Florida Administration Services	9/29/2023	Enterprise-wide	Business Liaison presented as guest speaker on progress with the PALM Project and FDACS approach.	
Processes	Process Review	Ongoing	Enterprise-wide	Ensure processes are as effective and efficient as possible for translation to PALM as appropriate	Disbursements Processes were reviewed on 10/10/23 Revenue and Grants Processes were reviewed on 10/12/23 Personnel Processes were reviewed on 10/23/23 Property Division's processes were reviewed on 11/2/23 Financial Management's processes were reviewed on 11/3/23

Processes	Monthly Supervisors Meeting	9/1/2023 9/28/2023	Finance and Accounting Supervisors	PALM Status updates, highlighted Task 328	
Processes	AIMS/PALM Integration Meeting	9/15/2023 10/13/2023	Division of Administration (F&A, Admin DIO (IT), General Services/Purchasing, Professional and Organizational Development)	Discuss future processes for AIMS (Agency Business System) transition to PALM.	
Processes	PALM Task 328 - Disbursements	10/10/2023	Finance and Accounting Disbursements Unit; Change Management Liaison	Met with General Audit and Travel/Voucher sections to discuss Task 328 progress.	
Processes	PALM Task 328 – Revenue and Grants	10/12/2023	Finance and Accounting Revenue and Grants Management Unit, Change Management Liaison	Met with Revenue and Grants sections to discuss Task 328 progress and approach	
Processes	Advisory Council Meeting	9/20/2023 10/18/2023	Enterprise-wide	Discussed Bimonthly status report, readiness workplan, Segment I Design workshops, project costing module, and brought back key takeaways to agency stakeholders	
Processes	PALM Task 328 – Personnel	10/23/2023	Personnel, Change Management Liaison, F&A Assistant Bureau Chief	Met with Personnel to discuss Task 328 progress and approach	(Payroll processes)
Technology	Support Services	9/29/2023- 6/30/2024	PALM Remediation	PALM Remediation support for Oracle applications if vendor assistance is needed	Oracle Support hours purchased to be used as needed
Technology	AIMS and REV Analysis Approach	9/21/2023	AIMS, REV	Discuss ABS approaches for AIMS and REV between staff aug team (PRT), F&A, and high-level OATS	
Technology	PALM Management Touchpoint	9/22/2023 10/27/2023	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	REV system COA field analysis	10/12/2023	REV	Discussed REV (ABS) with Subject Matter Experts in ongoing FLAIR to PALM Chart of Account Analysis	Finance and Accounting Revenue Section, PALM Remediation Team, Admin DIO, OATS
Technology	AIMS Chart of Account Fields	10/12/2023	AIMS – Purchases application	Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA.	F&A, Purchasing, Admin DIO, PRT, OATS
Technology	PALM – Current State Overview/ Deep Dive	10/13/2023	AIMS, REV, FANS	Analyze current agency readiness activities and project timeline from an IT perspective	F&A, PRT, OATS, Admin DIO
Technology	Project Schedule Review	10/17/2023	AIMS, REV, FANS	Meeting to discuss project schedule implementation and timeline, key deliverables, and responsible stakeholders	F&A, PRT, Admin DIO
Technology	PALM Interface – Capture of Information	10/24/2023	AIMS, REV	Discussing process for capturing PALM interface information and related fields for remediation, document templates, folders, and retention	F&A, PRT, Admin DIO
Technology	AIMS Chart of Account Fields	10/24/2023	AIMS – Purchases, Contracts applications	Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA.	F&A, Purchasing, Admin DIO, PRT, OATS
Technology	AIMS Chart of Account Fields	10/31/2023	AIMS – Receiving, Research, Bids, Travel Applications	Discussion between end user subject matter experts and PALM Remediation team to increase understanding in workflows and identification of FLAIR to PALM COA	F&A, Purchasing, Admin DIO, PRT, OATS

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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DACS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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](#)

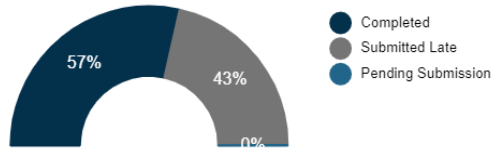
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DBPR Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Tyler Russell

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 4
- Submitted Late = 3
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 3
- Vacant Role = 4



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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 Processes Technology Data	Completion of tasks	Open	9 (High/High)	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.		

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	Agency's Operational Work Plan will be approved and funds to implement work plan will be available	Logged	09/11/23	All users of Florida PALM	Administered funds were just released during week of 10/30/23
People Processes Technology Data	DBPR RFQ to hire Project Manager and Change Manager will be completed	Logged	11/08/23	All users of Florida PALM	RFQ will be released now that administered funds have been released
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

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	Operational Work Plan	7/31/23	All stakeholders and systems	Submission of Operational Work Plan to the Office of Policy & Budget	
People Processes Technology Data	Segment I Business Process Model Review Financials Wave 30.3 Enter & Process Vouchers	8/14/23	All Disbursements Management users	Participated in business process model reviews for Disbursements Management	John Mounts & Sally Huggins attended
People Processes Technology Data	Segment I BPMR AMFR/Budget Mgmt/Cash Control Financials Wave 10.1 Set Up & Maintain Chart of Accounts & 20.1 Enter & Process Budget Journals	8/15/23	All Financial Reporting, Budget Management & Cash Control users	Participated in business process model reviews for Budget Managemen	John Mounts & Sally Huggins attended
People Processes Technology Data	Tuesday Task Talk	8/29/23	Tyler Russell, Lynn Smith, Sally Huggins	Listened to Tuesday Task Talk related to Task 331	Sally Huggins listened to the webinar on 9/8/23
People Processes Technology Data	Task 328 - Reports Inventory	7/28/23	All Users	Completed Task 328 Reports Inventory	
People Processes Technology Data	Task 198 - Provide Agency Update for Project Status Reporting	7/10/23	Sally Huggins	Completed June 2023 Agency Status Report	
People Processes Technology Data	Task Talk	9/14/23	All potential users; all systems	Readiness Workplan release & walkthru	John Mounts & Sally Huggins listened to webinar
People Processes Technology Data	Business Process Model Review	9/18/23	Payroll; John Mounts	Participated in Payroll wave Business Process Model Review	John Mounts attended at DOR
People Processes Technology Data	Technical Town Hall	9/18/23	John Mounts	Technical Town Hall	John Mounts attended at DOR
People Processes Technology Data	Business Process Model Review	9/19/23	Payroll; John Mounts	Participated in Day 2 of Payroll wave BPMR	John Mounts attended at DOR
People Processes Technology Data	Tuesday Task Talk	9/26/23	All potential users; all systems	webinar for Task 326	Sally Huggins listened to webinar
People Processes Technology Data	Task Talk	10/2/23	All potential users; all systems	Task Talk addendum	Sally Huggins listened to webinar
People Processes Technology Data	Design Workshop	10/3/23	Chart of Accounts maintainers; budget processors	Segment I Design Workshop Chart of Accounts and Budget Journals	Sally Huggins, John Mounts & Mindy Heidi attended
People Processes Technology Data	Design Workshop	10/4/23	Disbursements Management	Segment I Design Workshop Enter & Process Vouchers	Sally Huggins, John Mounts, Mindy Heindl and Kris Burnside attended
People Processes Technology Data	Tuesday Task Talk	10/10/23	All users	Task talk for tasks 501 & 502	John Mounts listened to webinar
People Processes Technology Data	Tuesday Task Talk	10/17/23	All users	Task talk for task 503	Sally Huggins & John Mounts listened to webinar
People Processes Technology Data	Monthly Touchpoint	10/20/23	Sally Huggins, John Mounts	October 2023 Touchpoint with Readiness Coordinators	
People Processes Technology Data	Task 326	10/27/23	Sally Huggins	Completed Task 326	
People	Florida PALM Advisory Council	7/19/2023	Sally Huggins	Attended monthly meeting as member of the Advisory Council	
People	Monthly Touchpoint	7/21/23	Sally Huggins	Monthly touchpoint with Florida PALM readiness coordinator	
People	Executive Steering Committee	7/26/23	Lynn Smith	Attended monthly meeting as member of the ESC	
People	Florida PALM Advisory Council	8/16/23	Sally Huggins	Attended monthly meeting as member of the Advisory Council	
People	Monthly Touchpoint	8/18/23	Tyler Russell, Chief of Staff; Sally Huggins; Mindy Heindl	Monthly touchpoint with Florida PALM readiness coordinator	

People	Executive Steering Committee	8/23/23	Lynn Smith	Attended monthly meeting as member of the ESC	
People	Touchpoint	9/15/23	Sally Huggins, Mindy Heindl	September 2023 Touchpoint with Readiness Coordinators	
People	Executive Steering Committee	9/27/23	Lynn Smith	monthly ESC meeting	
People	Advisory Council	10/18/23	Sally Huggins	Attended October Advisory Council meeting	
People	Executive Steering Committee	10/25/23	Lynn Smith	Attended October 2023 ESC 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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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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](#)

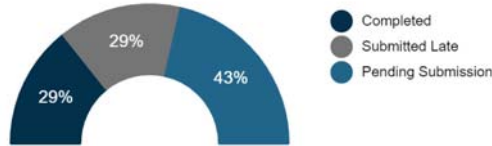
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DCF Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Tony Lloyd

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 2
- Submitted Late = 2
- Pending Submission = 3

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 12
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 33

- Criticality:
 - High = 7 Med = 1 Low = 0 None = 12
- Documentation Status:
 - Complete = 4 Partial = 15 Not Started = 1

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
 - Continued Use - Yes = 0
 - Continued Use - No = 0
- Associated Business Systems = 0
- Cataloged Reports = 0
- Criticality:
 - High = 0 Med = 0 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	DCF will construct a cost-allocation model building system called BASECAMP and build a processor to take PALM transactions and re-allocate them as our business needs.	DCF has submitted our OWP for FY23-34. DCF has begun designing BASECAMP.	01/01/26	Matthew Christovich
People Processes Technology Data	FY23-24 Funding Not Secured	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	DCF has submitted an OWP by the required deadline. Currently, there is no ETA for a decision regarding Florida PALM funding.	The Legislature has not released the requested funds for PALM Integration and Remediation submitted on 7/31/23.	11/24/23	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 be 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 executive and management leadership have a clear understanding of the benefits and limitations of low-code development and are supportive of its implementation.	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
Technology Data	Submit Operational Work Plan (OWP) to OPB	7/31/23	DCF Department-wide.	To request funding to create the necessary data connections between State of Florida enterprise data that will support the Department's overall PALM implementation strategy.	As of 9/11, OPB has not approved the requested \$750,000.00.
Technology Data	Draft RFQ for Data Integration	7/31/23 - 7/15/23	DCF Office of Administrative Services and Office of Information Technology Services	To solicit work from a qualified contractor to provide Data Integration Services for DCF to incorporate enterprise data into the DCF Enterprise Data Warehouse (EDW).	As of 9/11, OPB has not approved the requested \$750,000.00.
People Processes	Conduct Department Re-Kickoff	8/11/23	DCF Financial Leadership and Supervisors	To inform the DCF Financial Leadership and Supervisors of all key information related to the Florida PALM restart. The following items were discussed: Timelines, Responsibilities, and Strategic Approaches.	

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.

DCF Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	11/15/23
July - August 2023	Tony Lloyd	tony.lloyd@myflfamilies.com	09/12/23

Agency Sponsor Name: *

☐ Confirm *



Helpful Links

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

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

DEM Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Luke Strickland

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 10
- Meetings Missed = 3



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

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

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 13

- **Criticality:**
- High = 10 Med = 0 Low = 0 None = 3
- **Documentation Status:**
- Complete = 7 Partial = 1 Not Started = 3

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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 Processes Technology Data	N/A	Closed	1 (Low/Low)	N/A	N/A	11/08/23	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
People Processes Technology Data	N/A	Closed	Low - All impacts not listed as Critical or High	N/A	N/A	11/08/23	Karen Peyton

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
Data	Analysis of current financial data for preparation of future migration	ongoing	FDEM/Finance	To make all necessary adjustments to financial data to prepare for future migration	No Change
People	Sharing and reviewing reference material related to the project	ongoing	FDEM	To educate all DEM staff who will interact with the system	No Change
Technology	Reviewing current and possible application integration	ongoing	FDEM/IT	To plan and prepare for future PALM integration	No Change

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

DEM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

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Helpful Links

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

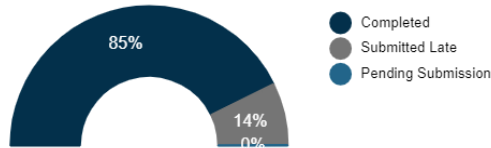
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DEP Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Darinda McLaughlin

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

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The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 9
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0
 - Partial = 0
 - Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 44

- Criticality:
 - High = 20
 - Med = 10
 - Low = 5
 - None = 9
- Documentation Status:
 - Complete = 13
 - Partial = 31
 - Not Started = 0

Cataloged Interfaces = 67

- Inbound Interfaces = 57
- Outbound Interfaces = 10

Implementation:

- Interfaces = TBD

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 = 371
- Criticality:
 - High = 46
 - Med = 3
 - Low = 15
 - None = 31

Implementation:

- Conversions = TBD
- Configurations = 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 Data	Agency Engagement	Closed	6 (High/Medium)	FDEP PALM Project Team and expanding the FDEP CCN to the program staff.	FDEP's ability to engage is impacted by several factors, including funding, staff/resource retention, insufficient planning, or other unanticipated events.	08/31/23	Lydia Griffin & Steve Waters

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	PALM Project Implementation	Open	Low - All impacts not listed as Critical or High	Development of FDEP Communication plan	The success of the communication plan is critical to keeping PALM current and relevant until go-live to all stakeholders and impacted future users of PALM and FMIS systems.	01/31/24	Lydia Griffin, 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	FY 23/24 Budget and Funding	Logged	07/01/23	Division/District/Office Business Systems remediation and project management.	9/11/2023-FDEP has submitted our Spending Plan and Operational Work Plan for FY23/24. We are currently funded for Q1 with revert and reappropriated funds from FY 22/23. 11/13/2023-FDEP has been approved for additional funding from the Administered Funds and FY 22/23 revert and reappropriated funds to continue our remediation assessment efforts for the remainder of fiscal year.
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 Data	PALM Project Implementation Schedule	Logged	11/13/23	Division/District/Office Business Systems remediation, processes and project management.	In planning, the success of FDEP's implementation schedule is contingent upon the timeliness receipt of information from the PALM Project team.

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
Data	Property/Asset Analysis	Ongoing	Division/District/Office Staff	Identify depreciated assets, in an effort to clean-up property records.	7/1-8/31/2023 - During the reporting period an analysis was performed to list depreciated assets for consideration of write-off. 9/1-10/31/2023 - continuing to gather data for write-off.
Data	Other Document Number Field (ODN)	9/30/2023	Division/District/Office Staff	Review the current use of the FLAIR field, in consideration for the proposed use of the PALM field OA2.	7/1-8/31/2023 - The FDEP PALM Project Team reviewed the data and field use for the past 3 fiscal years. The results of their analysis and a recommendation will be presented to the Agency Sponsor and Agency Liaison for PALM implementation consideration. 9/1-9/30/2023 - upon review of the information gathered, FDEP is continuing to finalize the proposed use of OA2.
Data	Data Management Cleanup	Ongoing	Division/District/Office Staff	List and prioritize data cleanup needs, and development of a schedule.	7/1-8/31/2023 - During the reporting period we created an itemized list of FLAIR fields requiring data cleansing. Progress was made to delete, inactivate or update fields as needed. 9/1-10/31/2023 - performed analysis on organization codes, project numbers, and OCAs.
Data	Revenue Object Code Transition Plan	Ongoing	Division/District/Office Staff	Create a transition plan in anticipation of the revenue object code standardization and impacted Tier 2 and Tier 3 business systems.	7/1-8/31/2023 - identified impacted business systems, staff, and a need to develop a transition plan; to include possible implementation prior to PALM go-live. 9/1-10/31/2023 - continuing to gather information from Tier 3 business systems and the usage of revenue object codes.
People Processes Data	FDEP CCN Kickoff Meeting	8/22/2023	Division/District/Office Staff and Business Systems	The Division of Administrative Services hosted this kick-off meeting to discuss expectations for Program Area CCN roles, readiness workplan tasks, project timeline and the department implementation strategy.	The meeting was a success with 113 staff members participating in-person or virtually. FDEP PALM Readiness Coordinator was also in attendance to assist with questions from the audience.
People Processes Data	FDEP CCN Sharepoint site	8/11/2023	Division/District/Office Staff and Business Systems	Dedicated sharepoint site to share information and collect information related to readiness tasks from Program Area CCN staff.	The sharepoint site content will assist to track progress, allow users to see how other programs are gathering data, and a central resource for on-boarding/briefing new staff to the FDEP PALM Project activities.
People Processes Data	Division/District/Office Interviews	8/1/2023-12/31/2023	Division/District/Office Staff and Business Systems	The FDEP Project Team to interview all Division/District/Office Business and Technical Liaison, gathering information on business systems and processes with financial data impacts.	The Project Team drafted the schedule, survey questions for information gathering, and action item checklist. Planned updates and completion of RW 324, RW 326 and RW328.
People Processes Data	Division/District/Office Survey	8/1/2023-12/31/2023	Division/District/Office Staff and Business Systems	Survey will gather information on business systems and processes with financial data impacts within the Division/District/Office.	Planned updates and completion of RW 324, RW 326 and RW328.
People Processes Data	PALM Advisory Council Meetings	7/19/2023, 8/16/2023	Advisory Council Member	Discuss agenda topics, review presented material, and offer feedback as needed.	Attendees include FDEP Advisory Council Member, FDEP Project Team Lead, and Project Management Liaison.

People Processes Data	PALM Readiness Task #328 data gathering work session from all divisions.	9/25 - 12/15/2023	Division/District/Office Staff and Business Systems 1) Seven work sessions Sept 25 - 29 2) Six work sessions Oct 2 - 6 3) Dept of Admin Services work session on Oct 6	DEP Data Tracker was created to capture the following: 1. Create an inventory of Current State Business Processes and User Roles, Desktop Procedures, and/or Job Aids 2. Document business processes via workflows and or narratives plus supporting user stories/process tasks. 3. Identify and record the changes needed to #1 and #2 based on Florida PALM business process adoption, which will constitute the testing and training needs for operational readiness.	Fifteen DEP divisions are actively engaged and contributing content
People Processes Data	Two DEP Division Town Hall meetings held to aid in completing PALM Task #328	10/31/2023	All DEP divisions and listed agency business systems PALM-326 and business processes in PALM #328	Complete the information for: 1. Create an inventory of Current State Business Processes and User Roles, Desktop Procedures, and/or Job Aids 2. Document business processes via workflows and or narratives plus supporting user stories/process tasks. 3. Identify and record the changes needed to #1 and #2 based on Florida PALM business process adoption, which will constitute the testing and training needs for operational readiness.	None
People Processes Technology Data	FDEP PALM Project Team	8/1/2023	Division/District/Office Staff and Business Systems	FDEP PALM Project Team	Organized a dedicated PALM Project Team to assist in coordinating with administrative services, technical, and program area staff in the analysis, design, and development of updated procedures, policies, and business systems to support the agency's implementation of the State's enterprise-wide financial management solution.
People Processes Technology Data	PALM Readiness Task #328	Ongoing	Division/District/Office Staff and Business Systems	Continue gathering information to document the Agency Business System Processes.	7/1-8/31/2023 - continued updates to the task. 9/1-10/31/2023-data gathering continues.
People Processes Technology Data	COMPLETED tasks for PALM 331 July and August 2023 Bimonthly Agency Status Report	9/11/2023	Division of Administrative Services and OTIS Staff	Complete readiness report to populate PALM Readiness Dashboard	None
People Processes Technology Data	Two Sprint Teams have been created to complete work for PALM Project: 1) Technology and Data 2) Process and People	9/25 - 6/30/2024	All DEP divisions and listed agency business systems PALM-326	Complete work associated with: 1) Readiness Work Plan Tasks 2) Ops Work Plan Task	None
People Processes Technology Data	First draft completed for PALM-500-Create Agency Specific Project Charter	8/1- 12/15/2023	Same as Critical Operational Elements columns	Create or update an agency-specific Florida PALM Project Charter identifying your agency's objectives, scope, stakeholders and responsibilities	None
People Processes Technology Data	Started PALM-501-Create Agency Specific Implementation Schedule	9/1- 12/15/2023	Same as Critical Operational Elements columns	Review the Readiness Workplan and Project timeline; develop an implementation timeline that includes agency specific tasks to successfully implement Florida PALM at your agency.	None
People Processes Technology Data	Started PALM-502-Create Agency Specific Risks and Issues Management Plan	9/1- 12/15/2023	Same as Critical Operational Elements columns	Create or update a plan to identify and manage agency specific risks and issues for Florida PALM implementation.	None
People Processes Technology Data	Started PALM-503-Create Workforce Readiness Plan	9/1- 12/15/2023	Same as Critical Operational Elements columns	Create a plan to identify and engage impacted stakeholders within your agency workforce including a communication strategy, knowledge transfer needs, and workforce attrition planning.	None
People Processes Technology Data	Continue to Manage Agency Specific Implementation Schedule, Risks and Issues, PALM-507	Ongoing	Same as Critical Operational Elements columns	Actively manage your agency's project activities including iterative updates to agency- specific project schedule and manage agency-unique risks and issues.	None
Technology Data	Started PALM-504-Update Agency Business System Documentation for Segment I	Ongoing	Same as Critical Operational Elements columns	Review Segment I resources; update Agency Business System documentation including functional and technical requirements and test cases.	None
Technology Data	Started PALM-505-Update Florida PALM Interface Inventory for Segment I	Ongoing	Same as Critical Operational Elements columns	Review Segment I resources; identify and document interface needs for Florida PALM implementation.	None
People	PALM Stakeholder Engagement meeting	5/25/2023	Division/District/Office Leadership	Project Timeline, Implementation Approach, COA changes and Change Management structure for the Division/District/Office Program Unit.	Requested each Division/District/Office identify individuals that will actively support the CCN responsibilities, while working in collaboration with the Division of Administrative Services (DAS) and Office of Technology and Information Services (OTIS) staff on future readiness tasks.
People	FDEP PALM Resource Webpage	8/22/2023	Division/District/Office Staff and Business Systems	Dedicated agency resource webpage to share PALM Project information and FDEP CCN Contacts.	Resource webpage is critical to the communication plan of the department. During the reporting period, the resource page was updated to include current PALM information and the FDEP presentation materials.
People	FDEP Checkpoint Meetings	7/18/2023, 7/26/2023, 8/2/2023, 8/9/2023, 8/16/2023, 8/23/2023	FDEP Core CCN Members (Agency Sponsor, Agency Liaison, Business Liaison, and Project Management Liaison)	Weekly meeting to discuss readiness activities, tasks progress and deadlines, and roundtable discussion on PALM Project team conducted meetings/trainings/communications.	This is a standing meeting and expanded (as needed) to include Division of Administrative Services Leadership and OTIS staff.
People Processes Technology	Started review for PALM-508-Review Payroll Wave Business Process Models	9/1- 1/26/2024	Same as Critical Operational Elements columns	Share and review standardized business process models for the Payroll Wave.	None
Processes	Procedure Catalog	6/1/2023- 8/31/2023	Division/District/Office Staff	Inventory the Finance and Accounting (F&A) Desktop Procedures.	During the reporting period, procedures were archived that were no longer needed, and owners assigned to coordinate document revisions and updates.
Processes	Business Process Mapping	Ongoing	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.
Processes Technology	ADM Sprint Meeting	6/13/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #166, period of June 14, 2023 - June 30, 2023
Processes Technology	ADM Sprint Meeting	7/5/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #167, period of July 6, 2023 - July 21, 2023
Processes Technology	ADM Sprint Meeting	7/25/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #168, period of July 26 2023 - August 11, 2023
Processes Technology	ADM Sprint Meeting	8/15/2023	Division of Administrative Services and OTIS Staff	PALM System Interface Support - Planning, Review, and Retrospective discussion of new, completed and backlogged user stories.	ADM Sprint #169, period of June 14, 2023 - June 30, 2023
Processes Technology	OTIS Technical Team Progress for PALM Readiness Task #326. Work completed per AMS Sprint 169, 170, and 171	9/25 - 12/15/2023	Division of Administrative Services and OTIS Staff	Complete Agency Business System workflows for all DAS systems	Workflow Status FIN-ABTS = Done FIN-AR COLLECTIONS = Done FIN-GMS = Done FIN-PROJECT REVIEW = Done FIN-RECON = Done FIN-YES = Done FIN-CONVERT = Done

					FIN-CONVERT = Done FIN-PRA = Done FIN-RATERPT = Done FIN-TAX = Done FIN-BUDGET PROJECTIONS = Not needed(retired) FIN-CRA RECONCILER = In-Progress FIN-MAINTENANCE = In-Progress FIN-FITS = To Do FIN-HUB/REPORTS = To Do CRA = To Do PEAS = To Do
Processes Technology	OTIS Technical Team Progress for PALM Readiness Task #326 Work completed per AMS Sprint 169, 170, and 171	9/25 - 12/15/2023	Division of Administrative Services and OTIS Staff	Complete Agency Business System workflow narratives for all DAS systems	Workflow Narrative Status FIN-CONVERT = Done FIN-PRA = Done FIN-RATERPT = Done FIN-TAX = Done FIN-GMS = In-Progress FIN-PROJECT REVIEW = In-Progress FIN-YES = In-Progress FIN-ABTS = Not needed(retired) FIN-AR COLLECTIONS = Not needed(retired) FIN-RECON = Not needed(retired) FIN-BUDGET PROJECTIONS = Not needed(retired) FIN-CRA RECONCILER = To Do FIN-MAINTENANCE = To Do FIN-FITS = To Do FIN-HUB/REPORTS = To Do CRA = To Do PEAS = To Do
Technology	PALM Readiness Task #326	Ongoing	Division/District/Office Staff and Business Systems	Review and update inventory list of current agency business systems.	7/1-8/31/2023 - continued updates to the task. 9/1-10/31/2023-data gathering continues.
Technology	PALM Readiness Task #327	Ongoing	Division/District/Office Staff and Business Systems	Review and Update Source and Frequency in ADM Reports inventory list.	7/1-8/31/2023 - continued updates to the task. 9/1-10/31/2023-data gathering continues.
Technology	PALM Grant Chart field Assessment	Ongoing	Division/District/Office Staff and Business Systems	Review and update Grant COA design documents.	7/1-8/31/2023 - continued updates to the Grant COA design documents. 9/1-10/31/2023-data gathering on grant field usage and grant manager responsibilities.
Technology	PALM Readiness Task #324	Ongoing	Division/District/Office Staff and Business Systems	Continuing effort to identify and document FLAIR data elements in database.	7/1-8/31/2023 - continued updates to the task. 9/1-10/31/2023-data gathering continues with Division/District/Office program staff and reevaluating remediation needs.
Technology	Application Linkage	8/31/2023	Division/District/Office Staff and Business Systems	Update Application linkage diagram.	7/1-8/31/2023 - Completed for CRA based on new findings.
Technology	Application Flow Diagrams	Ongoing	Division/District/Office Staff and Business Systems	Process flow diagrams for designated business systems.	7/1-8/31/2023 - During the reporting period diagrams were completed for FIN-Tax, FIN-PRA, FIN-ARCollections, FIN-ABTS, FIN-Recon, FIN-Yes, FIN-RateRpt, FIN-Convert, and FIN-Budget Projections. 9/1-10/31/2023 - During the reporting period diagrams were completed for FIN-GMS and FIN-Project Review. Begin Analysis for FIN-Maintenance & FIN-CRAREconciler.
Technology	PALM Impact Analysis - Tier 3 Systems	8/31/2023	Division/District/Office Staff and Business Systems	PALM impact analysis meetings.	7/1-8/31/2023 - Completed for LMS and SUPRS.
Technology	PALM System Interface Support	8/31/2023	Division/District/Office Staff and Business Systems	Code Analysis	7/1-8/31/2023 - Begin FIN - Convert JAVA/PLSQL code analysis for FLAIR files import. Also, continue PALM POC PHP and PL/SQL code for GMI005, importing data into FIN DB using FIN-Convert
Technology	COMPLETED tasks for PALM-326-Update Current State Agency Business System Inventory and Documentation	10/26/2023	All DEP divisions and listed agency business systems PALM-326	This document identifies all of the agency business systems that needs to be remediated to support PALM Go-Live and will be retired.	None

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

DEP Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

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

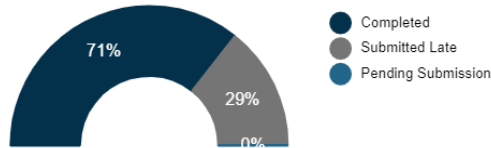
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DFS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Scott Fennell

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 2
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 10
- Duplicate Filled Role = 7
- Vacant Role = 1



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 77

- Criticality:
 - High = 17 Med = 5 Low = 0 None = 0
- Documentation Status:
 - Complete = 32 Partial = 0 Not Started = 0

Cataloged Interfaces = 121

- Inbound Interfaces = 100
- Outbound Interfaces = 21

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 419

- Associated Unique Uses = 1301
 - Continued Use - Yes = 1064
 - Continued Use - No = 47
- Associated Business Systems = 19
- Cataloged Reports = 383
- Criticality:
 - High = 252 Med = 76 Low = 38 None = 45

Implementation:

- Conversions = TBD
- Configurations = 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 Processes	Delayed access to Administered Funds that have been identified and requested to support Functional Readiness activities issued by PALM may impact scheduled onboarding of PM and OCM and task completions. CCN does not have a PM and OCM resource which could impact readiness tasks; Specifically, 1) the Agency could struggle to complete the tasks in a timely manner 2) Task may lack quality and CCN might miss something because lack the training/KSA to know what to look out for; 3) the Agency may likely struggle to transition to Florida PALM in January 2026 without the identified resources.	Open	9 (High/High)	<ul style="list-style-type: none"> Current CCN will attempt to manage the readiness activities as a project and do best on identifying change impact strategies to fulfill the obligations to be meet the project deadlines. CCN could use standardized PM templates and established procedures. Until we have dedicated resources to complete the readiness tasks. 	Entered as new risk	10/31/23	Alexandra Weimorts
People	ENTERPRISE A&A: 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"> Recruit knowledgeable and skilled staff, not entry level positions, to help with preparedness activities and management of daily operations. 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. 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. 	Entered as new risk	10/11/23	Renne Hermeling

				<ul style="list-style-type: none"> A&A is seeking additional FTE through the LBR process with intent to onboard and train within the 2025 FY. 			
People	<p>ENTERPRISE A&A: 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.</p> <ul style="list-style-type: none"> 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"> Contract with staff aug who can help with data analysis, developing testing scenarios, perform testing functions, support cut-over, support FLAIR retirement activities. 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. Consider providing current staff with Special Pay Increase to acknowledge the increased job responsibilities and retain these critical members of the team. Work with Human Resources to properly document team members who should be classified as SES staff. 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. 	Entered as new risk	10/11/23	Renne Hermeling
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"> 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. 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. 	Entered as a new risk.	10/20/23	Stacey Pollock
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"> 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. 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. If needed, request additional time from the Florida PALM Project for ABS end-to-end testing. 	Entered as a new risk.	10/20/23	Stacey Pollock
Processes	<p>ENTERPRISE A&A: The Statewide Cost Allocation Plan (SWCAP) process changes:</p> <ul style="list-style-type: none"> Business Process Changes will impact actual agency costs that are currently reported in SWCAP Process to identify and report the costs reported within the plan will change. Significant changes to the SWCAP or incorrect reporting of SWCAP costs could result in inaccurate management decisions. Inadequate reporting could result in loss of Federal funding if costs are deemed ineligible. 	Open	6 (High/Medium)	<ul style="list-style-type: none"> Work with agencies to reasonably identify processes that will be impacted and estimate changes to costs that will be allocated. Identify reporting that will be needed and work with Florida PALM project to ensure needed reports are available and tested. 	Entered as new risk	10/11/23	Renne Hermeling
Processes	<p>ENTERPRISE A&A: Planning for some critical activities has not been done. Until these plans have been developed, A&A cannot adequately determine needed resources, time and effort.</p> <ul style="list-style-type: none"> Cutover planning FLAIR retirement planning Stabilization period planning Specialized knowledge that may be needed for new processes, such as processing States' taxes from payroll Financial Reporting mappings and data rollout 	Open	6 (High/Medium)	<ul style="list-style-type: none"> Continue to collaborate with the Florida PALM Project and seek resources through staff aug, additional FTE or contracts as needs are discovered. 	Entered as new risk	10/11/23	Renne Hermeling
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"> Work closely with the ABS functional and technical owners to coordinate the timeline of changes with the Florida PALM timeline. Work closely with the ABS functional and technical owners on design strategies related to Florida PALM integration. 	Entered as a new risk.	10/20/23	Stacey Pollock
People	<p>ENTERPRISE A&A: All bureaus within the division will have significant process changes.</p> <ul style="list-style-type: none"> 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. Performance issues at implementation if staff are not able to adapt and produce results at the current, expected level of output. Due to the unique activities that A&A performs at an enterprise level, reduced performance could have a negative impact on agencies. 	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> Prepare staff through regular change management engagements. Perform knowledge transfer on why things are done so we can ensure better understanding of future processes. 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. Monitor staffs' engagement. Analyze current skill sets and mentor or provide training needed to acquire the proper skills and address skill gaps. Review organizational charts and identify succession planning or knowledge transfers for known gaps. A&A has contracted with two People Soft experienced resources to help with implementation activities, including identifying staffing model changes and process changes. 	Entered as new risk	10/11/23	Renne Hermeling
People Processes Technology Data	<p>ENTERPRISE A&A: A&A serves all other agencies, therefore our processes are at risk from external impacts:</p> <ul style="list-style-type: none"> Agencies – All A&A processes are 	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> Continue to work closely with the Florida PALM Project to identify areas where significant training will be needed for agency staff. A&A OFFE team make outreach with agencies to 	Entered as new risk	10/11/23	Renne Hermeling

	<p>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&A to be able to continue operations at an acceptable level and could cause more significant increase in work or rework for A&A staff around go live.</p> <p>• Project – There may be changes in Project directions or decisions that negative affect A&A that would cause an increase of time and resources or provide confusion and lack of clarity among A&A's expectations.</p> <p>• Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&A's operations.</p>			<p>determine training needs for skills that will be needed in Florida PALM users.</p> <p>• Participate with all FFMS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon.</p> <p>• Assist agencies with readiness tasks such as data analysis and cleansing.</p> <p>• Develop contingency plans for agencies that are not prepared for Florida PALM implementation.</p> <p>• Monitor activities, changes in rules and regulations, and agencies competencies.</p> <p>• Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible.</p> <p>• 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.</p>			
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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
People Processes Technology Data	Established standing weekly CCN meetings	9/19/2022	DFS, OFR, OIR	Share project activities status, project communication wrap-ups and allow CCN members an opportunity to ask questions, make suggestions and provide feedback. Prepare recurring agenda in SmartSheet and use to capture minutes and actions.	Every Monday
People Processes Technology Data	Printed and provided cardstock & foamboard Agency Implementation Road Maps to all Divisions to place in common areas	10/22/23	DFS, OFR, OIR	Bring awareness to the divisions of all the concurrent activities occurring to reach January 2026	Entered as a new Readiness Activity
People Processes Technology Data	DRM conducted Invoice Received Date Requirement Meeting	ongoing	Division of Risk Management, Bureau Chiefs, SME and Trainiers	Understanding of requirements for ABS design	Entered as a new Readiness Activity Meeting to discuss three-date stamp requirements in ABS.
People Processes Technology Data	Conducted FL PALM DRM SMEs Meeting	ongoing	Division of Risk Managment, SMEs and ABS	Business and Technical SMEs collaborate on DRM action items.	Entered as a new Readiness Activity 09/20 meeting to review Technical Town Hall information with business and technical SMEs and start list of DRM action items.
People	Distributed Agency-wide Readiness Survey	8/28/2023 10/30/23	DFS, OFR, OIR	To gauge awareness, readiness that will allow CCN to monitor and target communications and trainings	CCN started 8/11/23. Responses due 10/16 10/30: 893 completed. Sent to roughly 2,500+- employees
People	Established Monthly Point of Contact meeting with Division/Offices	8/29/2023, 9/26/23, 10/31/23	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. 8/29, POC Roles, Readiness Survey Segment 1 workshops, 9/26 Division specific activities. 10/10, Understand POC role and expectations for PALM Success.
People	Created a CCN Sharepoint Page where Point of Contacts and Subject Matter experts can easily access readiness materials, log RAIL and division/office activities	9/1/2023	DFS, OFR, OIR	Centralized location, allows for organization and easy of access.	Entered as a new Readiness Activity
People	Created a Sharepoint RAIL and readiness activities log for POC to input division specific items	9/19/2023	DFS, OFR, OIR	Centralized location, allows for organization and easy of access. Allows easy collection of activities that can be reviewed and considered for the ESC Bi-monthly report.	Entered as a new Readiness Activity
People	Created a DFS CCN Logo that distinguished the agency PALM CCN from the Project Change Champion Network, Journey to Success with Florida PALM	5/2021	DFS, OFR, OIR	By branding the CCN allows us to be separate yet part of PALM.	Entered as a new Readiness Activity
People	Conducted Division of Risk Management Meetings on Florida PALM	9/13/23	Division of Risk Management; 79 DRM employees	In person meetings with PowerPoint presentation on 09/12-09/13 to explain the FL PALM project and implementation schedule. Explained potential impacts for the Division. Watched the FL PALM Overview video provided by the Project. Navigated the FL PALM website. Explained the roles of the POCs and CCN. Emailed information covered during the meetings with links to Division staff.	Completed. Entered as a new Readiness Activity
People	Conducted Division of Risk Management Meetings to DRM Leadership on Florida PALM Activities	9/7/2023, 9/27/23, 10/10/23	Division of Risk Management; Division and Bureau Leadership	Share project activities status, project communication wrap-ups and allow DRM leaders an opportunity to ask questions, make suggestions and provide feedback.	Entered as a new Readiness Activity On 09/07 held meeting to provide update from 08/29 POC meeting information. Management decided for DRM POCs to conduct FL PALM meetings with all Division staff in preparation for the CCN Readiness survey. On 09/27 held meeting to update management on Technical

					Town Hall information. On 10/10 held meeting to update management on Segment 1 Design Workshops.
People Processes	Printed and provided cardstock Design Workshop by Segment and Preparing for workshop tri-fold to all Division SMEs to have available and can easily reference	10/22/23	DFS, OFR, OIR	Bring awareness to the divisions of all the BPM Segment releases occurring to reach July 2024	Entered as a new Readiness Activity
People Processes	Created recurring and conducted Unclaimed Property meeting with Division staff	ongoing	Division of Unclaimed Property Division leadership and staff	Bring awareness on PALM Financials, Payroll and Warehouse implementation	Entered as a new Readiness Activity 10/21/23 Provide information and awareness on PALM project implementation meetings, tasks, and deadlines.
People Processes	Created recurring and conducted Office of Insurance Regulation (OIR) stakeholders	ongoing	Office of Insurance Regulation Leadership and process Stakeholders	Bring awareness on PALM Financials, Payroll and Warehouse implementation	Entered as a new Readiness Activity Provide information and awareness on PALM project implementation meetings, tasks, and deadlines.
Processes	Participated in 1099 Discussion with DRM & FL PALM EPA for segment 4 planning	10/9/23	Division of Risk Management, SMEs	Understand business need for consideration in design scope inclusion or hold.	Entered as a new Readiness Activity The intent of this meeting is for the Florida PALM EPA Team to discuss 1099 reporting with DFS Risk Management. The Florida PALM EPA Team is aware that BRM has mentioned that they handle some 1099 reporting internally because of the limited functionality available within FLAIR and that there has been an expressed interest in having Florida PALM handle this 1099 reporting in the future. Decision is to discuss after go-live and new contract is signed that identifies scope.

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

DFS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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](#)

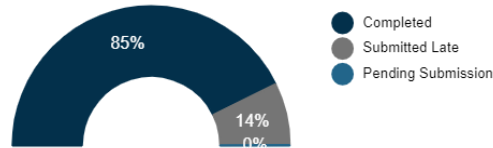
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DJJ Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Heather DiGiacomo

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 4

- Related Business Systems = 1
- Related Reports = 0
- Documentation Status:
 - Complete = 2
 - Partial = 2
 - Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 10

- Criticality:
 - High = 8
 - Med = 0
 - Low = 1
 - None = 1
- Documentation Status:
 - Complete = 9
 - Partial = 0
 - Not Started = 0

Cataloged Interfaces = 15

- Inbound Interfaces = 12
- Outbound Interfaces = 3

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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.		Alexander Afé
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.	October 2023, this risk is ongoing		Alexander Afé

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.		Alexander Afé
Processes	Processes are not well documented or not documented at all.	Open	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		Alexander Afé

					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.		
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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	Task 328 Review and Brainstorming Session	8/10/23	All SMEs and members of the CCN	Gain a better understanding of the task and ways to execute it within our Agency. Obtain questions that can be forwarded to RC/FL PALM.	July-August '23
People Processes	Segment I Roundtable Business Process Maps	8/31/23	F&A and Budget SMEs	Discuss and share knowledge/insights on the process overviews given at the Financial Wave segments. (Meeting had to be rescheduled due to storm)	August '23
People Processes	Payroll Wave SME Recap	9/20/23	All SMEs	Discuss the payroll process models showcased during Sept 18 and 19 among all department subject matter experts	September '23
People Processes	Task 328 Check-In	9/22/23	All SMEs	Review progress of Task 328 among department chiefs and SMEs. Discuss successful approaches and potential pitfalls.	September '23
People Processes	Segment I Solution Design Roundtable + Misc Topics	10/19/23	All SMEs	Discussion over Segment I design session paired along with discussion about Segment II and the October Tasks	October '23
People Processes	FL PALM November Tasks Review and Discussion	11/8/23	All SMEs	Discuss the latest tasks released by the project, and check-in on already established tasks.	November '23

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

DJJ Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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](#)

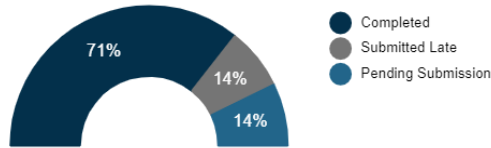
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DLA Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Sabrina Donovan

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 1
- Pending Submission = 1

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 6
- Vacant Role = 4



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

Participation:

- Meetings Attended = 12
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
 - Continued Use - Yes = 39
 - Continued Use - No = 3
- Associated Business Systems = 15
- Cataloged Reports = 176
- Criticality:
 - High = 21 Med = 1 Low = 86 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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
Processes	Need ability to make corrections to closed reporting period	Open	9 (High/High)	need a solution option	no change	10/05/23	Darlene Faris
People	Ability to complete tasks completely and timely	Open	9 (High/High)	Initiating solicitation for staff augmentation to assist with business analysis and project management	RFP for business analyst posted 11/03/2023, RFP for project manager posted 11/06/2023	11/06/23	Sabrina Donovan
People	loss of key CNN participant	Open	6 (Medium/High)	fill vacancy as quickly as possible with an individual with similar skills and experience	vacancy has been filled as of 10/27/2023	09/07/23	Darlene Faris

DLA Issues

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

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	
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANEXT,	

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
People	workgroup to assign tasks and discuss processes	08/09/2023 - completion	primarily Finance & Accounting	to ensure tasks are completed appropriately and timely	
People	initiating RFQ's for staff augmentation for project management for the agency	11/03/2023 - completion	CCN staff, agency business system owners outside of Finance & Accounting	assist with project management tasks, and ensure assignments are completed timely	

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:
September - October 2023	John Guard	john.guard@myfloridalegal.com	11/08/23
July - August 2023	John Guard	sabrina.donovan@myfloridalegal.com	09/11/23

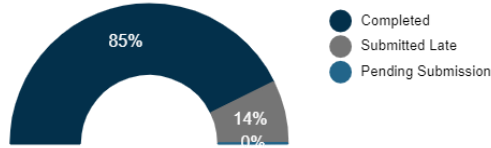
Helpful Links

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

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

DMA Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Col. Adam Curry

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 5
- Vacant Role = 2



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

Participation:

- Meetings Attended = 11
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 9

- Criticality:
 - High = 6 Med = 3 Low = 0 None = 0
- Documentation Status:
 - Complete = 2 Partial = 0 Not Started = 2

Cataloged Interfaces = 4

- Inbound Interfaces = 0
- Outbound Interfaces = 4

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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	07/01/24	Jack McAlpine
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	07/01/24	Brian Checchia

DMA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	The agency F&A has 3 key staff resigned or accepted other positions.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	July/August	10/06/23	Trixy Pacetti
People	The agency Purchasing Office has two (2) vacancies.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	July/August	10/06/23	John Connor
People	The agency F&A has 2 Accountant positions to be fill. Recent termination and re-advertisement.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for replacements.	Sep/Oct	12/01/23	Trixy Pacetti
People	The F&A current accountant supervisor is on medical leave.	Open	High - Impacts the ability of the agency to meet	Once supervisor returns interviews can be conducted.	Sep/Oct	12/01/23	Trixy Pacetti

			deadlines or milestones				
People	The agency's Purchasing & Contracting office has 1 position to fill.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	The agency is actively recruiting for position.	Sep/Oct	12/01/23	John Connor

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

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 Data	HR and Accounting Service Analyst attended Segment 1 Design Workshop meeting (audio live)	10/3 & 4/23	Informational.	To ensure are unique processes are met.	Sep/Oct
People Processes Data	Agency Liaison listen to Segment 1 Design Workshop audio meeting.	10/5/23	Informational.	Awareness.	Sep/Oct
People Processes Technology Data	Follow-up meeting with DMA and DFS staff from Readiness Touchpoint meeting on 09/28/23	10/05/23	Possible additional process for our agency S.A.D. and FSG payroll.	To further discuss in depth process of Payroll for S.A.D. and FSG payroll.	Sep/Oct
People Processes Technology Data	Agency Liaison listen to recorded Tuesday Task Talk 501,502	10/11/23	Informational	To provide better understanding current task instructions.	Sep/Oct
People Processes Technology Data	Agency Liaison listen to recorded Tuesday Task Talk 503.	10/25/23	Information	To provide better understanding of task to be completed.	Sep/Oct
People	Tuesday Task Talk	9/6/23	Stay-Up-To-Date and familiarization in Smartsheet.	To provide training and understanding of upcoming task.	Jul/Aug
People	Updated CCN	9/6/23	Stay up to date.	To receive important information and updates from Florida PALM.	Jul/Aug
People Processes	Sent emails to agency sponsor.	9/8/23	Give access to dashboard.	To ensure agency sponsor is aware of DMA status within The Florida PALM and Smartsheet.	Jul/Aug

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

DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 202	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](#)

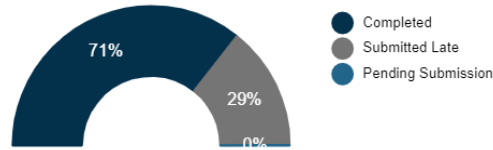
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DMS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Katie Parrish

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 2
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 4

- Related Business Systems = 4
- Related Reports = 5
- Documentation Status:
 - Complete = 3 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

- Inbound Interfaces = 40
- Outbound Interfaces = 15

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 143

- Associated Unique Uses = 1303
- Continued Use - Yes = 205
- Continued Use - No = 43
- Associated Business Systems = 5
- Cataloged Reports = 106
- Criticality:
 - High = 91 Med = 16 Low = 3 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	Resources. Year-end close out, certified forward and financial statements are forthcoming. There will be limited resources to perform Florida Palm tasks during year end, from June to September 30th.	Closed	9 (High/High)	Postpone tasks completion deadline dates to after September 30, 2023. Year end close out complete. PALM tasks in progress.	Logged April 26, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2.	11/02/23	Financial Management Services / Kedra Lewis
Technology Data	Functionality. Failure to utilize latest and most efficient data transfer methods.	Open	6 (Medium/High)	Evaluate effort required to create Encumbrance API vs Voucher API and determine if creating one provides enough of a foundation to justify creating the second API. 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 / Matt Giglio
People Processes Technology Data	Variable risk/issues at this time with People First. People First is currently working on its next-generation platform efforts with our HR BPO with an est release date of June 30th and will start working on its ITN with an early 2024 release. The end of the contract is August 2026 with the end of current life support Dec 2027. The main risk/issue is several folds with launching two major state ERP systems at the same time, converging timelines, and not	Open	6 (High/Medium)	Uncertain at this time until business requirements and remediation level efforts are scoped out and resource and project plans are developed. Very high-level solution with information known right now: 1) PF would require to stand up a separate remediation team. This team would be focused and solely dedicated to working directly with NGA and PALM. This would be a specialty project team just dedicated to	Logged April 22, 2023. Reviewed again September 6, 2023. Reviewed again Nov 2 - no change.	11/02/23	People First / Tomy Mollas

	<p>same time, converging timelines, and not enough information on the level of remediation needed for PF/PALM. Once a scope and business requirements are developed - a resource plan will need to be developed to determine the lift which in turn determines the ask from a funding standpoint. It will take time to stand up the teams to tackle this effort.</p> <p>*another risk is for all vendors to be able to work together freely on solutionizing and remediating work. This is a risk because several of the vendors are known competitors with each other regarding ERP solutions and PF will have a competitive ITN next year. PF/PALM working on multi-party NDA to hopefully resolve this issue.</p>			<p>would be a specialty project team just dedicated to working on this with a high velocity - quick sprint reviews.</p> <p>*In addition to the special project team listed above, PF would need additional FTEs on the core unit because historical knowledge and expertise on system/state functionality would be needed to help bridge the gap - we would need to backfill current FTEs to backfill current position to maintain current system use.</p> <p>A dedicated Project Manager will be in place to head up the mediation team. This is in progress.</p>			
People Processes Technology Data	Functionality. Will PALM deliver the functionality needed for DMS operations?	Open	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.	<p>Logged April 26, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2 - no change.</p>	11/02/23	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.	<p>Logged April 26, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2 - no change.</p>	11/02/23	Finance and Administration / Sandy Watson
People Processes	Timeline and Resources. There are multiple overlapping Palm tasks with due dates that utilize the same personnel resources as statutorily required tasks during year end.	Closed	6 (High/Medium)	Complete the tasks early or ask for a later due date. Most PALM tasks completed early - some still in progress. Year end required tasks complete.	<p>Logged April 27, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2, 2023.</p>	11/02/23	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.	Closed	6 (High/Medium)	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 - the remaining aspect is testing and training in advance.	Logged incorrectly as a Risk when it is a known issue.	11/07/23	Division of Retirement / Megan Biederman
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, 2026	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)	<p>Roll out sandbox test capabilities as sections are completed for Agencies to test.</p> <p>Sandbox environment is not secure for testing - PALM needs to work on true test environment.</p>	<p>Logged April 21, 2023. Reviewed again September 6, 2023. Reviewed again Nov 3, 2023. Mitigation notes updated.</p>	11/03/23	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 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.	Open	4 (Medium/Medium)	<p>Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule.</p> <p>Meetings with PALM have been initiated. Still early in the process.</p>	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023 - no change.</p>	11/06/23	STMS / Kurt Bonhamer
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.	Open	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.	Logged Nov 2, 2023.	11/06/23	Division of State Group Insurance / Jason Ottinger
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)	Unknown solution at this time.	Logged Nov 6, 2025	11/07/23	Division of Retirement / Megan Biederman
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.	Logged Nov 6, 2024	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)	<p>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.</p> <p>Meetings with PALM have been initiated. Still early in the process.</p>	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023 - no change.</p>	11/06/23	STMS / Matt Giglio
Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	<p>Provide information about when and where flat file data will be provided and how it will be accessed.</p> <p>Meetings with PALM have been initiated. Still early in the process.</p>	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023 - no change.</p>	11/06/23	STMS / Matt Giglio
Technology Data	Functionality. Inability to design user interface to accommodate Speed Keys instead of Expansion Options	Open	2 (Medium/Low)	<p>Provide information about the Speed Key interface, as well as training about how agencies will be using it in PALM. Provide training about how Speed Keys will be used by travelers to communicate billing information to Fiscal Accountants.</p> <p>Meetings with PALM have been initiated. Still early in the process.</p>	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023 - no change.</p>	11/06/23	STMS / Matt Giglio
Processes Technology Data	Interface. Insufficient information about what the Combo Edit Check API will verify and what STMS must be prepared to verify.	Open	2 (Medium/Low)	<p>Provide details about what the Combo Edit Check will verify and what needs to be verified outside of that check.</p> <p>Meetings with PALM have been initiated. Still early in the process.</p>	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023 - no change.</p>	11/06/23	STMS / Matt Giglio
Data	Interface. Inability to make informed design decisions about API versus Flat File.	Closed	1 (Low/Low)	Provide more information about flat files required to create vouchers, update voucher status, and update voucher payment status. Provide information about time required to process inbound vouchers in PALM and then return status updates. Then provide information about these processes if using an API to determine value provided	<p>Logged Sept 8, 2023.</p> <p>Reviewed again Nov 6, 2023.</p>	11/06/23	STMS / Matt Giglio

				determine value provided.			
				Meetings with PALM have been initiated. Still early in the process. PALM removed most API options.			

DMS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Certain webservices that allow for live data between MFMP, STMS, and PALM will not be active in PALM like they are in FLAIR.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	No known solution at this time except for PALM to change their design.	Functionality: This is a step backwards in functionality from the 50-year-old system to the new solution.	01/01/24	State Purchasing / Gerard Steele
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.	Resources: Funding is a major factor to the success or failure of this effort.	07/01/24	Finance and Administration / Eric Thiele
People Processes Technology Data	Exchange of unique identifier that can be passed back and forth during the EFT process to ensure a specific member is identified. (RP240, RP501, RP503, RP504, and RP505)	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Functionality: Could use a SSN or Member ID, build a web service.	Internal meetings in progress to address this issue.	01/30/24	Florida Retirement System / Megan.Biederman
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 BOSF, as well as the information transferred between IRIS and PALM is correct.	01/30/24	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	State Group Insurance / Jason Ottinger	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.

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	Retirement/KPMG Bi-weekly status meeting	Sept 5, Oct 3, Oct 17, and Oct 31, 2023	Change Management Liaisons, PM Liaisons, SMEs, Agency Sponsor, CCN, Production Support / OIT / Technical	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 Reporting Task 331	Sept 7, 2023	Agency Sponsor, Agency Liaison / Project Manager	To review new bi-monthly reporting procedures and dashboard.	Internal briefing on bi-monthly reporting tasks and associated metrics.
People Processes Technology Data	PALM Reporting Task 331	Sept 8, 2023	People First Liaison, Agency Liaison / Project Manager	To review new bi-monthly reporting procedures and dashboard.	Internal briefing on bi-monthly reporting tasks and associated metrics.
People Processes Technology Data	PALM Reporting Task 331	Sept 11, 2023	F&A Liaison, Agency Liaison / Project Manager	To review new bi-monthly reporting procedures and dashboard.	Internal briefing on bi-monthly reporting tasks and associated metrics.
People Processes Technology Data	PALM Task 326 Work Session: Interfaces	Sept 14, 26, 21, and Oct 12 and 19	Agency Liaisons, Production Support, SMEs	Activities to prepare for interfacing with Florida PALM. Review and complete PALM Smartsheet fields.	Recurring weekly work group meeting to address PALM tasks.
People Processes Technology Data	PALM Meetings Review	Sept 20, 2023	Retirement Liaison, Agency Liaison / Project Manager	To ensure the correct persons are getting to the correct meetings.	Assist Retirement Liaison by reviewing meetings posted on the PALM website and determining if representatives from Retirement should be attending and if so, the kinds of representatives needed.
People Processes Technology Data	PALM Task 328 Brief	Sept 22, 2023	Retirement Liaison, Agency Liaison / Project Manager	To review Task 328 details and determine level of effort and SMEs for Retirement.	Assist Retirement with Task 328 and how to interact with their vendor to get the proper documentation.
People Processes Technology Data	PALM Risk Identification	Sept 22, 25, and Oct 27, 2023	Retirement Liaisons, Project Manager, CCN, SMEs, F&A, Production Support / OIT / Technical	To identify and document risks associated with PALM in regards to the Division of Retirement.	Open discussion regarding risk for everyone involved with PALM.
People Processes Technology Data	PALM Task 326 Brief	Sept 25, 2023	Retirement Liaison, Agency Liaison / Project Manager	To review Task 326 details and determine level of effort and SMEs for Retirement.	Assist Retirement with Task 326 and how to interact with their vendor to get the proper documentation.
People Processes Technology Data	DMS Project Management Summit	Sept 7, 21, 27, 29, and Oct 2, 5, 9, 12, 16, 19, 26, and 27, 2023	Agency Liaison / Project Manager, CIO, DivTel, FLDS, Training, OIT, Communications	Final planning meetings.	Address details re: agenda, location, set up, key note speaker, activities, communications, registration, reminders, and tracking metrics.

		ZUZ3			
People Processes Technology Data	Task 326 Documentation: CSAB (Communications Services Accounting and Billing) - MFN1 and MFN2 billing	Oct 10, 2023	Agency Liaison / Project Manager, Business Systems Contact for Divtel	Complete documentation for Task 326.	Determine level of effort and type of documentation.
People Processes Technology Data	Task 326 Documentation: IRIS	Oct 13, 2023	Retirement Liaisons, Project Manager, Change Management, CCN, SMEs, F&A, Production Support / OIT / Technical	Complete documentation for Task 326.	Discuss remaining part of Task 326.
People Processes Technology Data	Task 326 Documentation: TRIRIGA	Oct 17, 2023	Agency Liaison / Project Manager, Business Systems Contact for REDM	Complete documentation for Task 326.	Determine level of effort and type of documentation.
People Processes Technology Data	Task 326 Documentation: Budget and Accounting Reporting System (BARS), Daily Cash & Budget Report, Financial Reporting Tool: Microsoft Access (DMS FLAIR Transaction History), FLAIR Payroll Reconciliation System (Microsoft Access), MIP (Accounts Receivable System), PC Batch Upload, Strategic Asset Tracking System, Axiom Pro, and FleetWave	Oct 19, 25, 26 and 27 2023	Agency Liaison / Project Manager, Business Systems Contact F&A / FMS, OIT / Production	Complete documentation for Task 326.	Determine level of effort and type of documentation.
People Processes Technology Data	Retirement Interface Review	Oct 26, 2023	Retirement Liaisons, Project Manager, Change Management, CCN, SMEs, F&A, Production Support / OIT / Technical	Review Interfaces to discuss at next Readiness Touchpoint Meeting	Take away from Readiness Touchpoint Meeting with PALM - reached out post meeting for clarification.
Processes Data	STMS and MFMP web services alignment	Sept 7, 2023	STMS and MFMP Liaisons, SMEs	STMS and MFMP initial discussion to align on goals for web services.	One Time. Success.
Processes Data	PALM caused UI requirements	Sept 20, 2023	STMS and MFMP Liaisons, SMEs	STMS Team internal UI design discussion	One of many. Success.
Processes Data	MFMP Internal webservices discussion	Sept 26, 2024	MFMP Liaisons, SMEs	Align team on need, history, context and goals for web services. Matt and Riley.	One Time. Success.
Processes Data	STMS and MFMP monthly touchpoint planning	Sept 27, 2024	STMS and MFMP Liaisons, SMEs	STMS and MFMP discussion to align on goals for monthly touchpoint meetings with PALM	One of many. Success.
Processes Data	STMS cutover planning	Sept 28, 2025	STMS Liaisons, SMEs	Brainstorm ideas and possible issues with the process of cutting over from FLAIR to PALM	One of many. Success.
Processes Data	STMS cutover planning continued. PALM interfaces and meetings approach.	Oct 11, 2024	STMS Liaisons, SMEs	Brainstorm ideas and possible issues with the process of cutting over from FLAIR to PALM. Discuss approach for reviewing interfaces, documenting questions and setting expectations for learning the details and applying them to system design.	One of many. Success.
Processes Data	Internal review of STMS Touchpoint	Oct 26, 2024	STMS Liaisons, SMEs	Discuss approach for reviewing interfaces, documenting questions	One Time. Success.
People Processes	PALM Project Management Liaison Briefing	Sept 25, 2023	Agency Liaison / Project Manager, Project Management Liaison Back Up	Brief PM Back Up on PALM PM duties .	Reviewed Liaison Responsibilities sheet, and demonstrated DMS PALM Liaison duties and recurring activities.
People Processes	Internal DMS Monthly PALM Connect	Sept 26, 2023	Agency Sponsor, Agency Liaison / Project Manager, Agency CCN and Liaisons	Review upcoming events and deadlines for PALM.	Share updates from Sponsor, Business, Retirement, People First, STMS, MFMP, Security, OIT, Training, and Advisory Council.
People Processes	PALM Task 328: Business Processes Discussions	Sept 26, and Oct 2, 5, 10, and 11, 2023	Retirement Liaisons, Project Manager, Change Management, CCN, SMEs, F&A, Production Support / OIT / Technical	In-depth discussions regarding Task 328 to determine and document Retirement Business Processes: Cash Management, Disbursements, Payroll, Budget, Financial Reporting, Revenue, and Reconciliation.	SMEs provided input for mapping.
People Processes	DMS PALM Charter Discussion	Sept 27, 2023	Agency Sponsor, Production Sponsor / CIO	Review and develop charter / OWP for PALM.	Begin data and information compilation in advance of upcoming PALM PM tasks.
People Processes	DMS Project Management Summit Event	Oct 30, 2023	Agency Liaison / Project Manager, Agency Sponsor, CCN, 5 Project and Contract Managers from each DMS Division	The purpose: --To encourage cross-agency collaboration and think tank activities. -- To promote a shared project culture and continue the improvement of solutions, processes, and products across DMS.	Pre and Post Event surveys went out. Total Attendees: 56 (includes 5 presenters) Over half of the attendees are a part of the PALM Project. A Lessons Learned Meeting is scheduled for Nov 14.

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

DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 202	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](#)

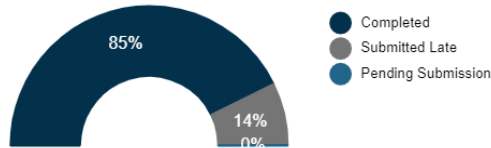
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DOAH Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Megan Silver

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 11
- Meetings Missed = 2



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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.	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.	Agency Liaison has integrated PALM awareness discussion during staff meetings.	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	Staff member (Acct. III) retiring who performs PALM functions currently transferring knowledge to new staff member	Closed	Low - All impacts not listed as Critical or High	Have retiring staff member train new staff member prior to leaving DOAH.	New staff member has been hired for the position and one-on-one training has begun. Update on 11/7/2023: New staff Member has been trained and functioning in PALM.	10/31/23	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.

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
People	Provide updates related to PALM during weekly staff meetings	Weekly	Accounting Staff	To provide an opportunity for staff's awareness of the progress of PALM implementation	During this rating period updates and new information was provided to staff based on the recent PALM Business Process Modules Workshops
People	Provide PALM communications/meeting notifications through email	Upon receipt from PALM Team	Budget, HR and Accounting Staff	To provide staff with PALM activities information to keep their engagement level up	During this reporting period PALM communications such as the newsletter, links to the PALM website, and information regarding upcoming and tasks were provided to staff
People	Provide updates related to PALM implementation activities at bi-weekly meeting	Bi-Weekly	Management Staff	To provide management with updates regarding DOAH's activities related to PALM Implementation	During this rating period information regarding upcoming tasks and meetings were provided to management

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:
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

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Helpful Links

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

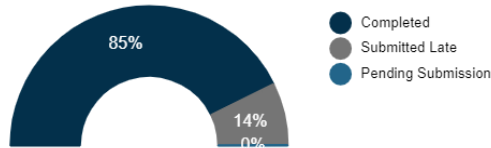
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DOE Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Suzanne Pridgeon

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 12
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 9

- Related Business Systems = 3
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 9 Not Started = 0

Implementation:

- Role Mapping = TBD

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

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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

Implementation:

- Conversions = TBD
- Configurations = 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.	No Change	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.	No Change	10/27/23	Project Manager
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	No Change	07/04/23	DOE IT
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	No Change	07/13/23	DOE PALM 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	Lead payroll staffer retired without notice	Open	High - Impacts the ability of the agency to meet deadlines or milestones	DOE is searching for the replacement. Someone with state payroll experience.	No Change	10/03/23	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
Data	Documentation of TR10, TR20, TR21, TR22 and TR30	09/19/2023		Documentation of current state	
People Processes Data	Contract Payment Process meeting	09/12/2023	GOC I and Accountant IV, Project Manager and Deputy Comptroller	To document the workflow and process for contract payments.	
People Processes Data	Grants process mapping	10/06/2023	Project Manager, Deputy Comptroller and Grant Supervisor	Map out the workflow and process for grants	
People Processes Technology Data	PALM Files Meeting	10/27/2023	Project Manager, Comptroller, Deputy Comptroller, BA, BA Manager and Policy Coordinator	Discuss the release Files from PALM	
People	DOE CCN Meeting	09/12/2023	DOE CCN Team	Communicate the Status of the project within DOE, discuss any upcoming task, address any risk or issues, and any other PALM related topics	
People	DOE CCN Meeting	09/26/2023	DOE CCN Team	Communicate the Status of the project within DOE, discuss any upcoming task, address any risk or issues, and any other PALM related topics	
People	Status Meeting	10/06/2023	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	DOE CCN Meeting	10/10/2023	DOE CCN Team	Communicate the Status of the project within DOE, discuss any upcoming task, address any risk or issues, and any other PALM related topics	
People	Status Meeting	10/20/2023	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	DOE CCN Meeting	10/24/2023	DOE CCN Team along with PALM coordinators	Communicate the Status of the project within DOE, discuss any upcoming task, address any risk or issues, and any other PALM related topics	
People	Status Meeting	10/27/2023	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	Status Meeting	11/01/2023	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People	PALM Payroll Meeting	11/02/2023	PALM team, Comptroller, Deputy Comptroller, DOE Payroll and DOE HR	Discuss of Budget entity	
People	Status Meeting	11/03/2023	Project Manager, Comptroller and Deputy Comptroller	Provide Project progress and status.	
People Processes	Non MFMP Payment processing meeting	09/13/2023		To Document the workflow and process of the Non MFMP payments	
People Processes	Blind Services Process Mapping	10/11/2023	Project Manager, Deputy Comptroller and Supervisor of Blind services	Map out the workflow and process for BS	
People Processes	VR Process Mapping	10/25/2023	Project Manager, Deputy Comptroller, Aware technical support and Supervisor of VR	Map out the workflow and process for VR and Aware	
People Processes	Federal Grants Process Mapping	10/31/2023	Project Manager, Deputy Comptroller and Supervisor of Federal Grants	Map out the workflow and process for Federal Grants and FLAGS Systems	
People Processes	Change control meeting with DEL	11/01/2023	Project Manager, Change control Liaison and DEL Supervisors	Review Current state process.	
People Processes Technology	PALM file for Aware System	11/03/2023	Project Manager, Comptroller and Deputy Comptroller, AWARE end users (supervisors) and AWARE Technical team	Discuss the release Files from PALM	
People Technology	DIT meeting	10/17/2023	Project Manager, BA, BA Manager and Policy Coordinator	To gain buy in from DIT	
People Technology	PECO System Meeting	10/25/2023	Project Manager, Deputy Comptroller, Systems owners, and Technical owners	Determine the relationship PECO has to FLAIR.	

Agency Sponsor Confirmation

DOE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Matt Kirkland	matt.kirkland@fldoe.org	11/08/23
July - August 2023	Matt Kirkland	matt.kirkland@fldoe.org	09/08/23

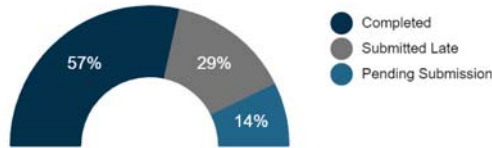
Helpful Links

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

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

DOEA Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Curtis Barker

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 4
- Submitted Late = 2
- Pending Submission = 1

People

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

Processes

The sequence of procedures to accomplish a business objective.

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

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

The dials below 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.

Change Champion Network:

- Unique Filled Role = 1
- Duplicate Filled Role = 13
- Vacant Role = 0



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

Participation:

- Meetings Attended = 9
- Meetings Missed = 4



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0
 - Partial = 0
 - Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 10

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

Cataloged Interfaces = 7

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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
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.		
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.		
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		

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	
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.	No official update as of 11/15/23		

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
Technology	currently evaluating existing business systems in other agencies to determine the availability of a state owned system that would fit DOEA's needs.	ongoing	DOEA F&A, Program Areas, ACMS,	A business system to replace some of the manual processes that currently exist within DOEA. goal is to alleviate existing workload caused by inefficient manual processes and allow for a smoother transition into a new state accounting system.	Have selected an existing business system to implement in our agency. Still working through final data migration connections. Hope to go live by 1/1/2024

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 *

Submit

DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Curtis Barker	elmere@elderaffairs.org	11/15/23
July - August 2023	Curtis Barker	elmere@elderaffairs.org	09/11/23

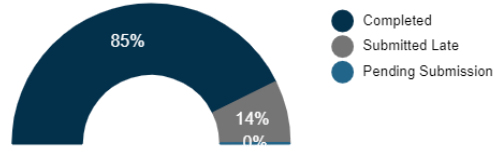
Helpful Links

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

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

DOH Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Robert Herron

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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

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Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 57

- Related Business Systems = 10
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 58

- Criticality:
 - High = 58 Med = 0 Low = 0 None = 0
- Documentation Status:
 - Complete = 37 Partial = 17 Not Started = 4

Cataloged Interfaces = 39

- Inbound Interfaces = 21
- Outbound Interfaces = 15

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 629

- Associated Unique Uses = 646
 - Continued Use - Yes = 0
 - Continued Use - No = 0
- Associated Business Systems = 1
- Cataloged Reports = 653
- Criticality:
 - High = 947 Med = 0 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation	N/A	08/16/23	PALM & DOH

	organization codes and they have to route through their team for an approval process as well.			Service Level Expectation.			
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 IVW, 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
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.

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	MIPS Cadence Meeting	Bi-Weekly	Child and Nutrition Payment System	To document As-Is sections of the Functional Design Document	Team provided guidance to complete the As-Is for the MIPS applications
People Processes Technology Data	Enviromental Health DB System Meeting	Bi-Weekly	Enviromental health System	To document As-Is sections of the Functional Design Document	Team provided guidance to complete the As-Is for the MIPS applications
People Processes Technology Data	RIMS Cadence Meeting	Bi-Weekly	Rehabilitation Information & Management System (Brain and Spinal Column Injury Program)	To document As-Is sections of the Functional Design Document	Completed the As-IS Sections of FDDs
People Processes Technology Data	CMS	Bi-Weekly	Children Medical System	To document As-Is sections of the Functional Design Document	Team provided guidance to complete the As-Is for the MIPS applications
People Processes Technology Data	HR and Cherwell Cadence Meeting	Bi-Weekly	Cherwell System & People DB	To document As-Is sections of the Functional Design Document	Completed the As-IS Sections of FDDs
Technology Data	Finance and Accounting	Bi-Weekly	6 Impacted applications plus Payroll application	To document As-Is sections of the Functional Design Document	Each application has a Functional Design Document that will be completed for every application.
Technology Data	DDD Meeting	Monthly	5 Applications	All 5 impacted applications have completed Section 4 and 5 of As-Is applications	All 5 impacted applications have completed Section 4 and 5 of As-Is applications
Technology Data	FIRS Cadence Meeting	Twice a week	6 Modules	To document As-Is sections of the Functional Design Document	As-Is for 4 modules of FIRS is complete
Technology Data	AFAM Activities	Bi-Weekly	AFAM Activities – AFAM has 64 documented processes that need remediation	To document all technical activities that are not within applications for e.g., batch jobs, reports published on SharePoint etc.	64 processes team has discussed and documented 40 processes
Technology Data	Reports Data	Bi-Weekly	AFAM Activities – AFAM has 64 documented processes	To understand all impacted report data for	Approximately 200 plus reports from RDS FLAIR

			that need remediation		
Technology Data	Tracker Utility	Bi-Weekly	All impacted systems	One stop to access the remediation status of all applications for PALM transition	11 Groups or bureaus and 64 applications will be tracked in this utility
Technology Data	Disbursement As-Is meetings	Twice a week	Stakeholders	Completed collecting the As-Is documentation for Disbursements	This is currently in review for sign-off for users.
People	Project Management Liaison Meeting	10/26/23	Project Manager	To collaborate and learn from other Agency PMs strategies and tools	PALM Collaboration Meeting at DCF
People	Change Management & Training Liaison Forum	10/26/24	Training Liaison	To collaborate and understand how other agencies will handle training	PALM Collaboration Meeting at DCF
People	DOH PALM Core Team Meeting	Every Wednesday	Project Stakeholders	<ul style="list-style-type: none">• Monitor progress against project plan• Review and approves changes to project plans (resources, scope, goals, cost estimates)• Advise on project planning and implementation strategies• Make strategic decisions related to project deliverables prioritization and approvals• Review and suggest solutions for issues critical to project success• Assist in resolving project conflicts Assist and guide on resource allocation	Core Meeting to give guidance and direction to the Project Manager
People	PALM Executive Steering Committee	Once a month	Executive Stakeholders	<ul style="list-style-type: none">• Advise on project strategy and guidance• Make strategic decisions related to project deliverables prioritization and approvals• Review and suggest solutions for issues critical to project success• Assist in resolving project conflicts	ESC Meeting to communicate decisions and Project status.
People	Advisory Council Meeting	Monthly or as scheduled	Stakeholder	To participate and advice the PALM Project team	PALM Advisory Meeting
People	DOH Readiness Touchpoint Meeting	Monthly or as scheduled	Executive Stakeholders	To meet the PALM Readiness team for PALM Project updates	Touchpoint meeting with Readiness Co-ordinator
People Processes	Task 326 Meetings	Weekly	DOH PALM Project Team	To complete Task 326	Task submitted
People Processes	Payroll Wave Business Process Models Review Meeting	09/18/23 & 09/19/23	DOH PALM Project Team & SMEs	To learn and understand the Payroll Wave Business Process Model	
People Processes Technology	Review Payroll Process	10/09/2023	Payroll team	To proactively work with payroll and HR team to update them of PALM business process and upcoming design sessions	The HR team is aware of upcoming changes.
People Processes Technology	Technical Hall Meeting	09/18/2023	DOH PALM Project Team	Collaborate and learn technical next steps	
People Processes Technology	Design Meetings	10/03/23 & 10/04/23	DOH PALM Project Team & SMEs	Design Session for Segment I	
People Processes Technology	FDW Planning and Kick Off Design meeting	Weekly	DOH PALM Project Team 7 DOH OIT	To plan FDW data loads and design	
Processes	County Health Department Meeting	Bi-weekly	CONMAN Application	To get business users and CHD's ready for PALM changes	To complete the As-Is documentation for CONMAN business 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 *

Submit

DOH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Robert Herron	robert.herron@flhealth.gov	11/09/23
July - August 2023	Robert Herron	robert.herron@flhealth.gov	09/06/23

Helpful Links

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

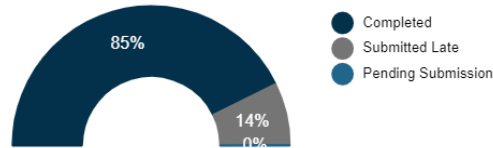
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DOL Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Becky Ajhar

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 34

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 26 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 7

- Criticality:
 - High = 7 Med = 0 Low = 0 None = 0
- Documentation Status:
 - Complete = 1 Partial = 6 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 28
- Outbound Interfaces = 2

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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
						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

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	Paln task review meetings - Letter	01/5, 01/18	Chris Rorison, Meghan	Review new task objectives, ensure progress of	

People	Pair task review meetings - Lottery team	9/5, 9/10, 10/2, 10/16, 10/30	Chris Hanson, Meghan Gregg, Stella Bargas, Debbie Martin, Cindie Mckenzie	Review new task objectives, sync on progress of ongoing tasks, discuss risks, issues, or concerns that have surfaced.	
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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

DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Rebecca Ajhar	ajharb@flalottery.com	11/09/23
July - August 2023	Rebecca Ajhar	ajharb@flalottery.com	09/08/23

Helpful Links

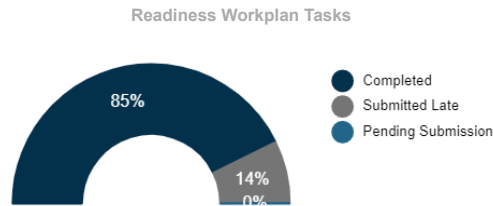
- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for DOR](#)
- [Readiness Workplan](#)

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

DOR Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Clark Rogers



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 183

- Related Business Systems = 8
- Related Reports = 43
- Documentation Status:
 - Complete = 171 Partial = 2 Not Started = 8

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 30

- Criticality:
 - High = 29 Med = 1 Low = 0 None = 0
- Documentation Status:
 - Complete = 30 Partial = 0 Not Started = 0

Cataloged Interfaces = 30

- Inbound Interfaces = 17
- Outbound Interfaces = 13

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 439

- Associated Unique Uses = 838
 - Continued Use - Yes = 392
 - Continued Use - No = 0
- Associated Business Systems = 9
- Cataloged Reports = 182
- Criticality:
 - High = 218 Med = 16 Low = 16 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	11/02/23	Catherine Barber, GTA; Andrea Hunter, GTA, Backup Owner

	date, and would create a resource issue.				ensure we have sufficient time for all projects. Updated risk owner and backup.		
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

DOR Issues

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

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.

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
Data	Continued data clean-up activities to purge discontinued/obsolete funds and budget entities.	Ongoing	FLAIR and PALM, all agency users.	To remove obsolete/discontinued funds and budget entities from FLAIR prior to migration to PALM.	Current action item on track to be complete by 12/31/24. Will coordinate activities through DFS OIT.
Data	Continued discussions regarding DOR Chart of Accounts structure for organization codes, OA1 and OA2 values.	Ongoing	All agency FLAIR/PALM users, all agency business systems that utilize FLAIR/PALM data	To establish agency-defined ChartField values	Ongoing process. Organization values and OA1 values have been established. OA2 values still being defined.
Processes	Updated the DOR PALM Project Tracking Book.	Ongoing	Business process owners in each program and the Information Services Program (ISP)	Maintain Action Items, Key Decisions, Risk Register, Issue Log, etc. in the Project Tracking Book	Ongoing process, will continue to maintain until all PALM implementation activities are completed.
Technology	Conducted a review of SAP Hana implementation guidelines.	7/17/23	CAMS, SUNTAX	Ensure that Hana implementation occurs after Financial and Payroll Go-Live.	Confirmed Hana migration will occur in FY26/27.

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

DOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Clark Rogers	shannon.segers@floridarevenue.com	11/09/23
July - August 2023	Clark Rogers	shannon.segers@floridarevenue.com	09/11/23

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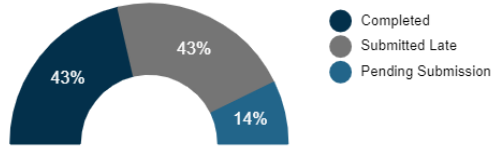
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DOS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Jennifer Kennedy

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 3
- Submitted Late = 3
- Pending Submission = 1

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 8
- Duplicate Filled Role = 4
- Vacant Role = 2



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

Participation:

- Meetings Attended = 4
- Meetings Missed = 9



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

- Criticality:
 - High = 1 Med = 0 Low = 0 None = 1
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 2

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 67

- Associated Unique Uses = 138
 - Continued Use - Yes = 0
 - Continued Use - No = 0
- Associated Business Systems = 2
- Cataloged Reports = 241
- Criticality:
 - High = 0 Med = 0 Low = 1 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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.

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.	09/08/23	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
People	Held meeting with current grants staff to discuss what data elements are essential for state and federal reporting.	7/25/2023	Department grants staff	To ensure in the event of a change to current data elements, all expectations are continuously being met.	

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

DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

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- [Florida PALM Resources](#)
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- [Readiness Workplan](#)

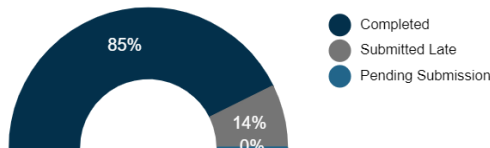
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

DVA Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
AI Carter

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 12
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 4

- Related Business Systems = 0
- Related Reports = 5
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 2

- 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

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
 - Continued Use - Yes = 48
 - Continued Use - No = 0
- Associated Business Systems = 0
- Cataloged Reports = 48
- Criticality:
 - High = 41 Med = 2 Low = 5 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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.			
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.			
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.			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 retool 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.			
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.			
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.			
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.			
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)				

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
People Processes Technology Data	FDVA Readiness Touchpoint	14 Sep	EDSS, ADMIN, Long Term Care	Review of PALM implementation activities.	
People Processes Technology Data	Segment 1 Design Workshops	3-4 October 2023	Admin (Fiscal and Finance and Accounting)		
People Processes Technology Data	FDVA PALM IMPLEMENTATION CHARTER	5 October 2023	Agency wide	Complete draft of FDVA PALM Implementation Charter ahead of suspense	Draft out for review by Board of Directors, Implementation Team and Executive Leadership
	PALM Schedule	23 October 2023	Agency wide	Incorporate PALM Schedule into Implementation Charter	Reviewing State PALM schedule and pairing it down to Agency specific tasks and milestones.

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:
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](#)

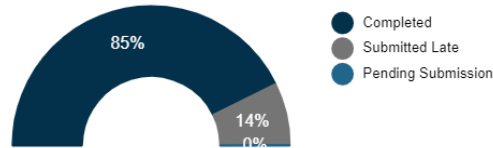
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

EOG Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Dawn Hanson

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 3
- Duplicate Filled Role = 12
- Vacant Role = 0



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

Participation:

- Meetings Attended = 8
- Meetings Missed = 5



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 151

- Related Business Systems = 0
- Related Reports = 39
- Documentation Status:
 - Complete = 24 Partial = 14 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

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

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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.	New.	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.	New.	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.	New.	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.	New.	10/31/23	Kelley Sasso
Processes	The EOG uses a purchased software that	Open	4	The EOG will discuss this issue with any providers as	New.	10/31/23	Kelley Sasso

Technology Data	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 does not properly interface due to EOG specific item numbering.			(Medium/Medium/Low) appropriate.			
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.	Updated/clarified wording and critical operational elements.	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.	New.	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.	New.	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.	Updated/clarified wording.	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.	Updated/clarified wording.	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
People Processes Technology Data	The EOG currently has no pending issues.	Closed	Low - All impacts not listed as Critical or High	The EOG currently has no pending issues.	Removed duplicate issues.	10/31/23	Kelley Sasso

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.

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
Data	EOG understands the data it needs to complete workflows and processes and is actively participating in FL PALM design tasks.	ongoing	All Administrative Services and IT		
People Processes Technology Data	Met with FL PALM regarding Division of Emergency Management reporting and processes.	ongoing	All Administrative Services and Division of Emergency Management Administrative Services	To determine the proper reporting and handling of DEM data and transactions.	
People	EOG is actively participating in all FL PALM meetings.	ongoing	All Administrative Services and IT		
People Processes	Shared Business Process Inventory and Reports with staff for input	ongoing	All Administrative Services	Create a single location for all desktop procedures and reports as required to complete PALM Tasks.	
People Processes	Emailed/shared summaries of payroll and financial wave business process meetings.	10/5/2023	All Administrative Services	Provided a summary of relevant topics and links to FL PALM website to accounting and payroll/personnel staff.	
Processes	EOG is actively participating in all FL PALM design workshops and is completing the tasks associated with office processes.	ongoing	All Administrative Services and IT		
Processes	Started a current state desktop procedures library.	ongoing	All Administrative Services	Create a single location for all desktop procedures as required to complete PALM Tasks.	
Technology	EOG IT is actively engaged in the requested IT needs for FL PALM.	ongoing	All Administrative Services and IT		

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

EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

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

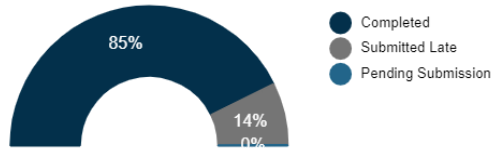
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

FCOR Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Gina Giacomo

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 12
- Meetings Missed = 1



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

Implementation:

- Interfaces = TBD

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 = 7
- Criticality:
 - High = 4 Med = 3 Low = 0 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	FDC requested funding	Funding is required for PM and potentially technical staff augmentation.	10/31/23	Greg Prescott, FDC OIT
People Processes Technology	1078 - FLAIR interfaces	Closed	6 (High/Medium)	FDC assigned a Business Analyst	Received response.	09/20/23	Greg Prescott, FDC OIT
People Processes Technology	1074 - OIT Resource Capacity Technical FTEs	Open	3 (High/Low)	FDC Staff Augmentation required due to current capacity	FDC has implemented an OIT Governance Process to manage all FCOR IT Projects and assign resources based upon capacity. The PALM-FDC Project has been approved by Governance. The risk rating improved from 6 to 3.	09/20/23	Greg Prescott, FDC OIT

FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
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People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Open	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	To access the available Administered Funds to support the PALM Project and readiness activities. The Planned or Actual Resolution Date has been extended to 11/30/23 to allow time for the resource to be hired by FDC, as the process has been initiated.	11/30/23	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

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	The agency will be able to access the available Administered Funds to support readiness activities	Logged	07/01/23	All agency business systems and FDC PM roles	July 31st, FDC submitted a budget amendment requesting funds for staff augmentation to perform project management functions for the agency's readiness activities. Due to the overallocation of FDC key subject-matter resources, hiring consultants and other resources to augment the FPST Project is essential for the department's continuity of operations and successful transition to the Florida PALM solution.
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	Currently still relevant.
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	Currently still working on Task 328.

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	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AP Module	To remove/cleanup all payables	
Data	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AR Module	To remove/cleanup all CF receivables	
Data	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AR Module	To remove/cleanup all CF encumbrances	
People	Task 326 Internal Discussion Meeting	09/06/2023	Systems Reporting	To discuss the information provided by Systems Reporting on Task 326 to determine the next steps to complete the task	
People	FDC/FCOR FL PALM Merger Meeting	10/06/2023	FCOR Agency Sponsor, FDC Backup Agency Sponsor and FDC/FCOR Agency Liaisons	To discuss the merging of FDC/FCOR in Smartsheet for FL PALM	
People	Task 326 Internal Discussion Meeting	10/10/2023	Systems Reporting	To discuss the information provided by Systems and OIT on Task 326 to complete the additional fields required in the addendum and to finalize the agency business systems and interfaces	
People	PALM – FDC/FCOR Discussion	10/11/2023	Backup Agency Sponsor, Agency Liaison, Project Management Liaison	Met to discuss the upcoming project related task 500, 501 & 502 with FDC's Project Manager from OIT	
People	Task 326 Internal Discussion Meeting	10/16/2023	Agency Liaisons	To discuss the information provided by Systems and OIT on Task 326 to complete the additional fields required in the addendum	
People	CCN PALM Monthly Standing Meeting	10/20/2023	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 328 Internal Discussion Meeting	10/31/2023	Agency Liaisons	To discuss the information provided by all units on Task 328 to start completion of this task	
Processes	Continuous updates to our current-state desktop procedures library	09/01/2023-10/31/2023	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	Review of posted RFQ and funding to obtain consulting services	09/05/2023	Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC and FCOR's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions FDC/FCOR currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Received vendor quote to RFQ on August 15th. Only received one quote, this has not moved forward due to funding issue. Analyzed funding issue again as of September 5th.
Processes	Continuous documentation of our current state reports, agency business systems, and interfaces.	09/01/2023-10/27/2023	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	Review of posted RFQ and funding to obtain consulting services	09/05/2023	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of FDC/FCOR Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions FDC/FCOR currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Received vendor quote to RFQ on August 15th. Only received one quote, this has not moved forward due to funding issue. Analyzed funding issue again as of September 5th.

management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.

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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FCOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Gina Giacomo	ginagiaco@fcor.state.fl.us	11/13/23
July - August 2023	Gina Giacomo	mary.quinsey@fdc.myflorida.com	09/08/23

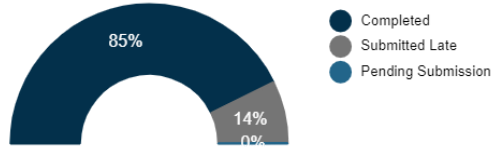
Helpful Links

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

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

FDC Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Mark Tallent

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 173

- Related Business Systems = 5
- Related Reports = 33
- Documentation Status:**
 - Complete = 91 Partial = 55 Not Started = 27

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

- Criticality:**
 - High = 10 Med = 5 Low = 5 None = 6
- Documentation Status:**
 - Complete = 13 Partial = 8 Not Started = 5

Cataloged Interfaces = 33

- Inbound Interfaces = 30
- Outbound Interfaces = 3

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 73

- Associated Unique Uses = 222**
 - Continued Use - Yes = 183
 - Continued Use - No = 10
- Associated Business Systems = 2**
- Cataloged Reports = 224**
- Criticality:**
 - High = 207 Med = 8 Low = 0 None = 10

Implementation:

- Conversions = TBD
- Configurations = 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.

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	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	Funding request	Funding is required for PM and potentially technical staff augmentation	10/31/23	Greg Prescott, OIT
People Processes Technology	1078 - FLAIR interfaces	Closed	6 (High/Medium)	Assign Business Analyst	Received response.	09/20/23	Greg Prescott, OIT
People Processes Technology	1074 - OIT Resource Capacity Technical FTEs	Open	3 (High/Low)	Staff Augmentation required due to current capacity	FDC has implemented an OIT Governance Process to manage all IT Projects and assign resources based upon capacity. The PALM-FDC Project has been approved by Governance. The risk rating improved from 6 to 3.	09/20/23	Greg Prescott, OIT

FDC 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	Open	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	To access the available Administered Funds to support the PALM Project and readiness activities. The Planned or Actual Resolution Date has been extended to 11/30/23 to allow time for the resource to be hired by FDC, as the process has been initiated.	11/30/23	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

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	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/01/23	All agency business systems and PM roles	July 31st, the agency submitted a budget amendment requesting funds for staff augmentation to perform project management functions for the agency's readiness activities. Due to the overallocation of FDC key subject-matter resources, hiring consultants and other resources to augment the FPST Project is essential for the department's continuity of operations and successful transition to the Florida PALM solution.
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	Currently still relevant.
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.

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	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AP Module	To remove/cleanup all payables	
Data	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AR Module	To remove/cleanup all CF receivables	
Data	Subsidiary Cleanup	09/01/2023-09/30/2023	FLAIR, Daily Data and Report Distribution, FLAIR Scripts: AP Module	To remove/cleanup all CF encumbrances	
People	Monthly Enlightenment Communication	09/05/2023	All F&A staff & Inmate Grievance	Monthly communication about any upcoming activities and to engage new staff onboarding	
People	Task 326 Internal Discussion Meeting	09/06/2023	Systems Reporting	To discuss the information provided by Systems Reporting on Task 326 to determine the next steps to complete the task	
People	Monthly Enlightenment Communication	10/02/2023	All F&A staff & Inmate Grievance	Monthly communication about any upcoming activities and to engage new staff onboarding	
People	FDC/FCOR FL PALM Merger Meeting	10/06/2023	FCOR Agency Sponsor, FDC Backup Agency Sponsor and FDC/FCOR Agency Liaisons	To discuss the merging of FDC/FCOR in Smartsheet for FL PALM	
People	Task 326 Internal Discussion Meeting	10/10/2023	Systems Reporting	To discuss the information provided by Systems and OIT on Task 326 to complete the additional fields required in the addendum and to finalize the agency business systems and interfaces	
People	PALM – FDC/FCOR Discussion	10/11/2023	Backup Agency Sponsor, Agency Liaison, Project Management Liaison	Met to discuss the upcoming project related task 500, 501 & 502 with our Project Manager from OIT	
People	Task 326 Internal Discussion Meeting	10/16/2023	Agency Liaisons	To discuss the information provided by Systems and OIT on Task 326 to complete the additional fields required in the addendum	

People	CCN PALM Monthly Standing Meeting	10/20/2023	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 328 Internal Discussion Meeting	10/31/2023	Agency Liaisons	To discuss the information provided by all units on Task 328 to start completion of this task	
Processes	Continuous updates to our current	09/01/2023-10/31/2023	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	RFQ posted to obtain consulting services	09/05/2023	Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Received vendor quote to RFQ on August 15th. Only received one quote, this has not moved forward due to funding issue. Analyzed funding issue again as of September 5th.
Processes	Continuous documentation of our current state reports, agency business systems, and interfaces.	09/01/2023-10/27/2023	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	Review of posted RFQ and funding to obtain consulting services	09/05/2023	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Received vendor quote to RFQ on August 15th. Only received one quote, this has not moved forward due to funding issue. Analyzed funding issue again as of September 5th.

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

FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

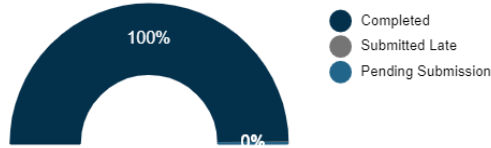
Helpful Links

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

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

FDLE Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Charlotte Fraser

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 15
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = 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:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 73

- Associated Unique Uses = 193
 - Continued Use - Yes = 21
 - Continued Use - No = 155
- Associated Business Systems = 11
- Cataloged Reports = 112
- Criticality:
 - High = 90 Med = 14 Low = 42 None = 21

Implementation:

- Conversions = TBD
- Configurations = 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.	Monitoring	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 additional technical and project management staff.	Open	3 (High/Low)	LBR requests have been submitted for funding to hire staff required to complete the project.	Awaiting FY 24/25 legislative session. We have been approved for FY 23/24 Administered funds.	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.	Addition	10/31/23	Andrew Gutsch
People	Current systems have high visibility and are	Open	2	Project Manager will identify cutover schedule for all	Addition	10/31/23	Andrew Gutsch

Processes Technology	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.		(Medium/Low)	affected applications and provide detailed plans much before PALM go-live date.			
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.	Addition	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	Request for administered funds submitted in addition to LBR request.
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.
People Processes Technology Data	The agency will be approved for administered funding to support readiness activities.	Removed	11/07/23	All agency business systems	We have been notified that our request for administered funds has been approved.

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
People Processes Data	Segment I Design Workshop - Budget Mgmt / Cash Control	10/3/2023	Office of Financial Management Office of Information Technology Services	Review BPMs, interface layouts, and reports for the Set up/Maintain Chart of Accounts and Enter/Process Budget Journals.	Six members attended for seven hours.
People Technology Data	Tuesday Task Talk - RW Task 326 - Update Current-State Agency Business System Inventory and Documentation	9/26/2023	Office of Financial Management Office of Information Technology Services	Understanding and documenting FDLE's business systems technical and functional specifications.	Three members attended for thirty minutes.
People	August's FDLE/PALM Readiness Touchpoint Meeting	9/7/2023	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	One member attended for one hour.
People	Advisory Council	9/20/2023	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council	Two members attended for two hours.
People	September's FDLE/PALM Readiness Touchpoint Meeting	9/28/2023	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	Four members attended for one hour.
People	Florida PALM Production Support Roundtable	10/12/2023	Office of Financial Management	Provide an opportunity for agency end users to meet the production team, hear about current system processes, future updates, and ask questions.	One member attended for two hours.
People	Tuesday Task Talk - RW Task 503 - Create Workforce Readiness Plan	10/17/2023	Office of Financial Management Office of Information Technology Services	Create a plan to identify and engage impacted stakeholders within your agency workforce including a communication strategy, knowledge transfer needs, and workforce attrition planning.	Three members attended for thirty minutes.
People	Advisory Council	10/18/2023	Office of Financial Management	Recurring monthly meeting to participate in discussions on agenda item it issues referred to the council	Two members attended for two hours.
People	October's FDLE/PALM Readiness Touchpoint Meeting	10/25/2023	Office of Financial Management	Recurring monthly Florida PALM Readiness touchpoint meeting between FDLE's Change Champion Network (CCN) and our Readiness Coordinator, Kim York.	Three members attended for one hour.
People	Project Management Liaison Forum	10/26/2023	Office of Financial Management Office of Information Technology Services	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Change Management and Training Liaison Forum	10/26/2023	Office of Financial Management	Ask questions, network with one another, and find the support and resources that are needed to prepare for PALM.	Three members attended for two hours and thirty minutes.
People	Tuesday Task Talk - RW Task 504, 505, 506, and 507.	10/31/2023	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 two hours and thirty minutes.
People Processes	Updated all Financial Mangement supervisors on PALM implementation timeline, upcoming Design Workshops, current and upcoming PALM tasks.	08/23/23	Office of Financial Management Agency business systems	Ensure updated and information is shared with the core support team.	Relayed that PALM activities will be increasing in the near future.
People Processes	Readiness Workplan Release & Walkthrough	9/14/2023	Office of Financial Management	Discussing the updated RW that aligns with the next Major Implementation and the Project activities over the remainder of the Waves.	Three members attended for one hour.
People Processes	Payroll Wave Business Process Models Review - Meeting 1 of 2	9/18/2023	Office of Financial Management	The Project team provides an overview of the process design, documented by the draft flows and narratives, for the future state payroll functions.	Four members attended in person and one member attended virtually for three hours and thirty minutes.
People Processes	Technical Town Hall	9/18/2023	Office of Financial Management Office of Information Technology Services	To provide a Project update and available resources for agency technical team members.	Three members in attendance for three hours.
People Processes	Payroll Wave Business Process Models Review - Meeting 2 of 2	9/19/2023	Office of Financial Management	The Project team provides an overview of the process design, documented by the draft flows and narratives, for the future state payroll functions.	Four members attended in person and one member attended virtually for three hours.
People Processes	Segment I Design Workshop - Disbursements Management	10/4/2023	Office of Financial Management	Review BPMs, interface layouts, and reports for entering and processing vouchers.	Five members attended for seven hours.
People Technology	Met with new Chief of Business Systems Engineering and Systems	08/24/23	Office of Information Technology Services	Provided overview of PALM project and ensure updated information is shared with the technical	Discussed FY 24/25 LBR request and request for administered funds.

	Programming Administrator to discuss LBR requests and PALM timeline.		Office of Financial Management Office of Budget and Policy Planning	system owners.	
People Technology	Tuesday Task Talk RW Task 501 - Create Agency Specific Implementation Schedule. RW Task 502 - Create Agency Specific Risks and Issues Mangement Plan.	10/10/2023	Office of Financial Management Office of Information Technology Services	Discuss the instructions and reviewing the spreadsheets to ensure the task is done correctly.	Four members attended for thirty minutes.

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

FDLE Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

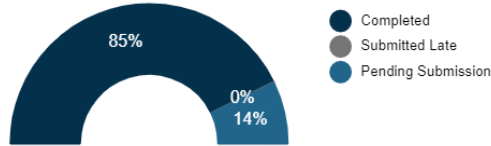
Helpful Links

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

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

FDOT Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Lisa Saliba

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 0
- Pending Submission = 1

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 25
- Duplicate Filled Role = 0
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 8

- Related Business Systems = 6
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 8 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 309

- Criticality:
 - High = 21 Med = 9 Low = 9 None = 0
- Documentation Status:
 - Complete = 18 Partial = 20 Not Started = 1

Cataloged Interfaces = 119

- Inbound Interfaces = 47
- Outbound Interfaces = 15

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 92

- Associated Unique Uses = 92
 - Continued Use - Yes = 18
 - Continued Use - No = 1
- Associated Business Systems = 3
- Cataloged Reports = 215
- Criticality:
 - High = 87 Med = 72 Low = 33 None = 23

Implementation:

- Conversions = TBD
- Configurations = 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	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	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
Technology	The New 8.6 GEN COM Bridge and HIS windows server have been built. Efforts are underway to migrate to the Dev and Test environments for additional testing. Errors have been encountered and the Department is working through a resolution.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Continue efforts to finalize migration.		09/30/23	Brian Wilson

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 11/1/23, 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	As of 11/1/2023, sufficient LBR funding yet to be made available.
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

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.	6/30/2023	Florida PALM End Users	Reduce the number of Speed Chart and Speed Types that will be required in the Florida PALM solution.	
Data	Continued analysis of the Department's use of "hard-coded" values for General Ledger, Object Code, and Other Cost Accumulator for all computing assets.	6/30/2023	Florida PALM End Users	Develop detail requirements for Agency Business Systems use of the Account ChartField.	Findings are being documented for review with SMEs to determine if specific outbound interfaces should be targeted for processing changes, data validation routines updated, and/or data references replaced with specific Account ChartField values.
Data	Unit test batch program to address legacy system FLAIR Transactions with missing Trust Funds.	6/30/2023	Florida PALM End Users	Create the landing zone for the Fund tree structure and complete data cleansing.	
Data	PALM Expansion Option Discussion	8/17/2023	FDOT Florida PALM System Transition Team	discuss options for the remediation or replacement of Expansion Option	
Data	Data Archiving Planning Meeting	9/1/23-10/31/23	FDOT Florida PALM System Transition Team, OIT	Plan data archiving activities	
People Processes Technology Data	Technology Transformation Weekly Status Review	9/14/23-10/31/23	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.	
Processes Data	System Based Remediation Preparation: CFM - Contracts Fund Management	9/1/23 - 11/1/23	FDOT Florida PALM System Transition Team	Commenced sprints to begin development effort towards remediation of system	
Processes Data	System Based Remediation Preparation: PCM - Project Cost Management	9/1/23 - 11/1/23	FDOT Florida PALM System Transition Team	Commenced sprints to begin development effort towards remediation of system	
Processes Data	System Based Remediation Preparation: RPS - Receipt Processing System	9/1/23 - 11/1/23	FDOT Florida PALM System Transition Team	Commenced sprints to begin development effort towards remediation of system	
Processes Data	System Based Remediation Preparation: GEN Code COA Infrastructure	9/1/23 - 11/1/23	FDOT Florida PALM System Transition Team	Commenced sprints to begin development analysis effort towards remediation of system	
Processes Technology Data	Documenting current state requirements for Payroll Processing system	9/1/23-10/31/23	FDOT Florida PALM System Transition Team, Florida PALM end users	Documenting current state requirements for Payroll Processing system	
Processes Technology Data	PCM Batch Job Meeting	9/12/23	FDOT Florida PALM System Transition Team, OIT	A meeting with OOC and OWPB to review the list of batch jobs and assign the proper owners.	
Processes Technology Data	GEN Demonstration	9/28/23	FDOT Florida PALM System Transition Team	A meeting with internal technical liaisons and vendor, NH to demonstrate how the GEN toolset works. How we make changes to the "code". How we implement changes on the mainframe.	
People	OIT Staff Meetings	5/1/23-8/31/23	FDOT Florida PALM System Transition Team-OIT members	Provide status update on readiness task and remediation status	
People	Monthly FDOT/Florida PALM Readiness Touchpoint Meetings	5/19/23 - 11/2/23	FDOT Florida PALM System Transition Team	Review and discuss Florida PALM implementation activities	Meetings: 9/27 and 11/2
People	OOC Remediation Counts Updates	5/1/23 - 8/1/23	FDOT Florida PALM System Transition Team	Review and update OOC Status for Assets and Objects in the scope of PALM remediation	
People	Weekly BSSO Staff Meeting	5/3/2023 - 11/1/2023	FDOT FPST Team FDOT PALM End Users	Provide status update on readiness task and remediation status	Met weekly during reporting period
People	FPST Internal Workgroup	6/1/2023	FDOT Florida PALM System Transition Team		
People	FPST Technology Components	6/8/2023	FDOT Florida PALM System Transition Team		
People	Weekly PALM Planning and Stand-Up Meeting	5/1/23 - 11/1/23	FDOT Florida PALM System Transition Team	Weekly meeting series to discuss Readiness Task, Updates on PALM plans, Budget, Risks, and Issues	Met 9/1 through 11/1
People	PALM Technical Meeting	8/1/23-10/31/23	FDOT Florida PALM System Transition Team	Weekly meeting series to discuss technical PALM issues.	
People Processes	Project Set Up in Service Now	9/20/23	FDOT Florida PALM System Transition Team	A meeting with project sponsor and PM liaisons to discuss organization and set up of Florida PALM projects in Service Now.	
Processes	RW Task 329: (Update CCN and Project Contacts): Reviewed the CCN and SME selections to align to the roles as defined by the Florida PALM Team. Identified back-ups for key subject areas as well as defined organizational units. Contacts folder was completed.	5/1/23-6/1/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide agency project contacts to the PALM project.	
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.	5/1/23-6/30/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide Current State Agency Business Systems Inventory to PALM project.	Task ID 326 80% complete and on target to be completed by December 29, 2023.
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. Areas of concentration include Federal Programs Management (FPM), Contract Funds Management (CFM), Disbursement Operations Office (DOO), and Project Cost Management (PCM).	5/1/23-6/30/23	Florida PALM team, FDOT Florida PALM System Transition team	Provide Report Inventory to PALM project.	Task ID 327 is on target to be completed by July 28, 2023.
Processes	EED Requirements document reviewed, revised, and accepted by business unit stakeholders.	6/13/2023-8/4/2023	Multiple	Document the requirements for replacing the EED system.	

Processes	Cost Table 22 Meeting	7/27/2023	Subject Matter expert	Discuss cost table 22-anticipated use of landing zones, database structure	
Processes	NH-FDOT PCM Batch Job Discussion Meeting	7/31/2023	FDOT Florida PALM System Transition Team	Functional requirement review.	
Processes	PPS Touchpoint	8/11/2023	Business Analysts	PPS payroll processing	
Processes	PALM Discussion	8/15/2023	Business Analysts	PPS payroll processing	
Processes	PCM Red Box Diagram Review with North Highland	8/16/2023	FDOT Florida PALM System Transition Team	Discuss impacted PCM subject areas that need to be remediated by FL PALM, including chart of account fields, data model changes, etc.	
Processes	Azure DevOps Technical user story review	8/17/2023	Subject Matter expert	Discuss user stories	
Processes	PCM Decomposition Working Session w North Highland	8/2/2023	FDOT Florida PALM System Transition Team	The North Highland team is setting this time to review the PCM Decomposition Process, including: Process to identify PCM Batch Jobs, break down technical and business functionality, and create an Azure DevOps backlog for Florida PALM Readiness & PCM Modernization Actions, roles, and responsibilities needed	
Processes	Payroll Distribution	8/21/2023	Subject Matter expert	Payroll distribution	
Processes	Florida PALM Readiness Azure Dev Ops Working Session	8/25/2023	FDOT Florida PALM System Transition Team	Setting up this session to continue our collaboration and progress towards a useful central repository in Azure DevOps for Florida PALM readiness.	
Processes	FDOT-NH Onsite Sessions: - Scope, Agile Approach, Repository Overview & Florida PALM Readiness - PCM Modernization Process & Business Functions - PCM Functional Requirements - EED Review - Closeout & Next Steps	8/9/2023	FDOT Florida PALM System Transition Team	Discuss Scope, Agile Approach, Repository Overview & Florida PALM Readiness Discuss PCM Modernization Process & Business Functions Discuss PCM Functional Requirements Review EED System Discuss closeout of onsite sessions and next steps	
Processes	RW Task 331: Discuss Florida PALM-Readiness Task 331	9/1/23	FDOT Florida PALM System Transition Team	A meeting to discuss, collaborate, and complete the RW task 331 - bimonthly status report.	
Processes	Biweekly FPST Internal Workgroup Meeting	7/1/23-10/31/23	FDOT Florida PALM System Transition Team	These bi-weekly workgroups are to discuss, deep-dive, and document all efforts/tasks related to PALM readiness.	Met biweekly
Processes	RW Task 500: Create Agency Specific Project Charter	10/02/2023-10/31/2023	FDOT Florida PALM System Transition Team	Collaborate with your Change Champion Network, Agency Sponsor, and key stakeholders to draft or update a project charter.	
Processes	RW Task 506: Submit Bimonthly Agency Readiness Status Report	11/7/23-11/9/23	FDOT Florida PALM System Transition Team	Confirm with Sponsor and submit bimonthly status report to Florida PALM on the activities and ongoing work within FDOT.	
Processes	RW Task 328: Document Current Agency Business Processes	7/31/23 - 11/1/23	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.	Currently 45% complete with target for completion by 12/15/23
Processes Technology	DevOps Q&A Reporting	9/19/23	FDOT Florida PALM System Transition Team	A meeting with vendor, NH to discuss tracking hours and using dev ops for reporting.	
Technology	Completed physical data structure changes for the State Program, Organization, and Operating Level Org ChartFields, and the elimination of the Internal Budget Indicator ChartField. Targeting Fund (a.k.a. Trust Fund) as the next COA field to physically change in the test environment and create the landing zone for the Fund tree structure.	5/1/23-6/30/23	Multiple	Provide PALM data to agency systems.	
Technology	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	5/1/23-6/30/23	Multiple	Replace the functionality provided by the Expansion Option and Expansion Set in agency business systems.	
Technology	Continued analysis of the Department's use of "hard-coded" values for General Ledger, Object Code, and Other Cost Accumulator for all computing assets.	5/1/23-6/30/23	Multiple	Replace functionality with PALM Chart of Accounts	
Technology	Continued the analysis efforts for the Department's Electronic Estimate Disbursement (EED) system.	5/1/23-6/30/23	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 analysis of the Chart of Accounts and Standardized Business Process Model adoption impact on the Department's project cost accounting functionality and supporting computing assets	5/1/23-6/30/23	Multiple	Ensure systems continue to function after PALM implementation.	
Technology	Continued the analysis on the impact of the Chart of Accounts and Standardized Business Process Model adoption on the Department's Contract Funds Management (CFM) system.	5/1/23-6/30/23	Multiple	Replace functionality with PALM Chart of Accounts	
Technology	Continued the Florida PALM Impact Analysis Phase for Office of Comptroller (OOC) owned computing assets	5/1/23-6/30/23	Multiple	Ensure OOC systems continue to function after PALM implementation.	
Technology	Continued the impact analysis and remediation of the Office of Work Program and Budget (OWPB) owned computing assets.	5/1/23-6/30/23	Multiple	Ensure OWPB systems continue to function after PALM implementation.	
Technology	EED POC Rewrite	8/17/2023	App Services Architect Team	Demonstration of Informatica ETL capabilities.	
Technology	GEN Installation Activities	7/1/23-10/31/23	Subject Matter expert	GEN installation activities	
Technology	Landing Zone Implementations	7/1/23-10/31/23	Subject Matter expert	Landing zone implementations	

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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FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	11/12/23
July - August 2023	Lisa Saliba	lisa.saliba@dot.state.fl.us	09/07/23

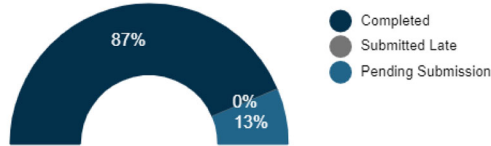
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- [Florida PALM Resources](#)
- [Florida PALM Workbook for FGCC](#)
- [Readiness Workplan](#)

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

FGCC Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

November - December 2023

Agency Sponsor

Lisa Mustain

Readiness Workplan Tasks:

Total Tasks = 8

- Completed = 7
- Submitted Late = 0
- Pending Submission = 1

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 3
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

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

Segment III - Documentation Updates: TBD

Segment IV - Documentation Updates: TBD

Planned Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0
- Spreadsheet Uploads = 0

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:

- Conversions = TBD
- Configurations = 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.	Waiting on OPB approval.	12/01/23	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	11/13/23	All agency business systems.	Approval Received.
Technology	FGCC will have a replacement for Versa Regulation by PALM go live	Logged	11/13/23	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
People	PALM Biweekly Meeting		Division of Administration	To provide future Florida PALM end users with a view of what Florida PALM looks like and to discuss current-state and remediation needs.	Meetings for the balance of the year have been scheduled.
Processes	Started a current-state desktop procedures library		Bureau of Financial Support Services	Create a single location of all procedure documents that will require updating for Florida PALM.	Ongoing process.

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:
November - December 2023	Lisa Mustain	brice.kayiranga@flgaming.gov	12/07/23
July - August 2023	Lisa Mustain	lisa.mustain@flgaming.gov	09/11/23

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- [Readiness Workplan](#)

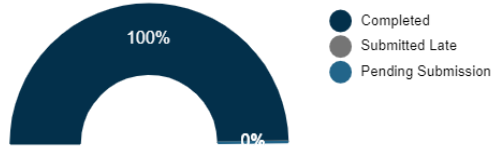
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

FLHSMV Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Steve Burch

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 56

- Related Business Systems = 3
- Related Reports = 14
- Documentation Status:
 - Complete = 19 Partial = 30 Not Started = 7

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 6

- Criticality:
 - High = 4 Med = 2 Low = 0 None = 0
- Documentation Status:
 - Complete = 3 Partial = 3 Not Started = 0

Cataloged Interfaces = 5

- Inbound Interfaces = 3
- Outbound Interfaces = 2

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 92

- Associated Unique Uses = 155
 - Continued Use - Yes = 85
 - Continued Use - No = 4
- Associated Business Systems = 3
- Cataloged Reports = 156
- Criticality:
 - High = 89 Med = 17 Low = 46 None = 23

Implementation:

- Conversions = TBD
- Configurations = 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	HSMV has a number of key vacancies within the Bureau of Accounting.	Closed	4 (Medium/Medium)	HSMV is attempting to fill these positions.	Risk is closed and moved to Issue	09/01/23	Steve Burch
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.	New Issue	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	Met with all FLAIR users to provide update on Florida PALM progress and upcoming tasks.	09/12/23	All FLAIR users	Ensure all FLAIR users are aware of Florida PALM go-live date and key upcoming tasks.	
People	Meeting between Human Resources and Payroll staff to review payroll BPMs.	10/12/23	Human Resource and Payroll staff	Ensure Human Resource and Payroll managers are aware of Florida PALM roles that will be preformed by each area.	
People	Meeting between IT and Functional staff to discuss ABS.	10/17/23	IT and Functional staff for ABS.	Ensure IT and Functional staff are aware of upcoming tasks and due dates associated with ABS.	

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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FLHSMV Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Steve Burch	steveburch@flhsmv.gov	11/07/23
July - August 2023	Steve Burch	steveburch@flhsmv.gov	09/08/23

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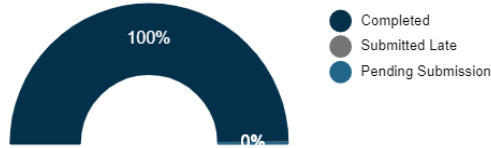
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- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for FSDB](#)
- [Readiness Workplan](#)

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

FSDB Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Tracie Snow

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 8
- Meetings Missed = 3



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 7 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

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

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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

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 *

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FSDB Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	John Wester for Tracie	westerj@fsdbk12.org	11/14/23
July - August 2023	Tracie C. Snow	snowt@fsdbk12.org	09/07/23

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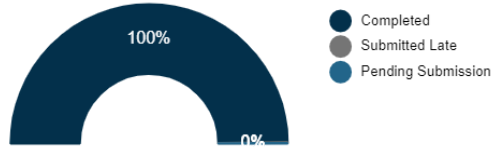
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- [Dashboard Snapshots](#)
- [Florida PALM Resources](#)
- [Florida PALM Workbook for FWC](#)
- [Readiness Workplan](#)

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

FWC Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Jessica Crawford

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 7
- Submitted Late = 0
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 19

- Criticality:
 - High = 12 Med = 6 Low = 0 None = 1
- Documentation Status:
 - Complete = 19 Partial = 0 Not Started = 0

Cataloged Interfaces = 8

- Inbound Interfaces = 8
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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 = 34
- Criticality:
 - High = 27 Med = 8 Low = 1 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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	Added	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 and often 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	Change Champion Meeting	7/27/2023	Change Champions	Change Champion Meeting	Complete
People	Change Champion Meeting	8/7/2023	Change Champions	Change Champion Meeting	Complete
People Processes Technology	Provide ongoing Project Management FY23/24	7/3/2023	Florida PALM users	Provide ongoing Project Management FY23/24	In Process
People Processes Technology	Change Champion Meeting	9/13/2023	Change Champions	Change Champion Meeting	Complete
People Processes Technology	Meet with business team to complete documentation - Revenue Agreement Tracking System (RATS) combined with RCF	9/15/2023	Florida PALM users	Meet with business team to complete documentation - Revenue Agreement Tracking System (RATS) combined with RCF	Complete
People Processes Technology	Meet with business team to complete documentation - Revenue Coding Forms (RCF) combined with RATS	9/15/2023	Florida PALM users	Meet with business team to complete documentation - Revenue Coding Forms (RCF) combined with RATS	Complete
People Processes Technology	Attend Payroll Wave Business Process Review meeting	9/18/2023	Florida PALM users	Attend Payroll Wave Business Process Review meeting	Complete
People Processes Technology	Florida PALM Technical Town Hall	9/18/2023	Florida PALM users	Florida PALM Technical Town Hall	Complete
People Processes Technology	Attend Payroll Wave Business Process Review meeting	9/19/2023	Florida PALM users	Attend Payroll Wave Business Process Review meeting	Complete
People Processes Technology	Meet with business team to complete documentation - Delinquent Accounts Reporting (SharePoint)	9/20/2023	Florida PALM users	Meet with business team to complete documentation - Delinquent Accounts Reporting (SharePoint)	Complete
People Processes Technology	Meet with business team to complete documentation - Revenue Management System (RMS)	9/20/2023	Florida PALM users	Meet with business team to complete documentation - Revenue Management System (RMS)	Complete
People Processes Technology	Meet with business team to complete documentation - Commercial Licensing System	9/21/2023	Florida PALM users	Meet with business team to complete documentation - Commercial Licensing System	Complete
People Processes Technology	Meet with business team to complete documentation - GoOutdoorsFlorida and replicated DB (Sherry/Beth)	9/21/2023	Florida PALM users	Meet with business team to complete documentation - GoOutdoorsFlorida and replicated DB (Sherry/Beth)	Complete
People Processes Technology	Meet with business team to complete documentation - Allotment Monitoring	9/25/2023	Florida PALM users	Meet with business team to complete documentation - Allotment Monitoring	Complete
People Processes Technology	Meet with business team to complete documentation - DMFM Expenditure Moves/Allotment Monitoring	9/25/2023	Florida PALM users	Meet with business team to complete documentation - DMFM Expenditure Moves/Allotment Monitoring	Complete
People Processes Technology	Meet with business team to complete documentation - DMFM OPS Salary Moves/Allotment Monitoring	9/25/2023	Florida PALM users	Meet with business team to complete documentation - DMFM OPS Salary Moves/Allotment Monitoring	Complete
People Processes Technology	Meet with business team to complete documentation - Invoice Tracking System (Laserfiche)	9/27/2023	Florida PALM users	Meet with business team to complete documentation - Invoice Tracking System (Laserfiche)	Complete
People Processes Technology	Meet with business team to complete documentation - Grant Cost Sheets	9/29/2023	Florida PALM users	Meet with business team to complete documentation - Grant Cost Sheets	Complete
People Processes Technology	Meet with business team to complete documentation - Encumbrance Process combined with FMT	10/2/2023	Florida PALM users	Meet with business team to complete documentation - Encumbrance Process combined with FMT	Complete
People Processes Technology	Meet with business team to complete documentation - Financial Management Tracking combined with Encumbrances	10/2/2023	Florida PALM users	Meet with business team to complete documentation - Financial Management Tracking combined with Encumbrances	Complete
People Processes Technology	Attend Florida PALM Segment I Design Workshop: Budget Mgmt. / Cash Ctrl.	10/3/2023	Florida PALM users	Attend Florida PALM Segment I Design Workshop: Budget Mgmt. / Cash Ctrl.	Complete
People Processes Technology	Attend Florida PALM Segment I Design Workshop: Disbursements Management	10/4/2023	Florida PALM users	Attend Florida PALM Segment I Design Workshop: Budget Mgmt. / Cash Ctrl.	Complete
People Processes Technology	Meet with business team to complete documentation - Daily Cash Report	10/6/2023	Florida PALM users	Meet with business team to complete documentation - Daily Cash Report	Complete
People Processes Technology	Meet with business team to complete documentation - ACH Processing combined with Revenue and Disbursement Scripts	10/9/2023	Florida PALM users	Meet with business team to complete documentation - ACH Processing combined with Revenue and Disbursement Scripts	Complete
People Processes Technology	Meet with business team to complete documentation - HSC Federal Aid/WMA and LMUAC Reporting	10/9/2023	Florida PALM users	Meet with business team to complete documentation - HSC Federal Aid/WMA and LMUAC Reporting	Complete
People Processes Technology	Meet with business team to complete documentation - Internal Operating Budget Monitoring Report - Operating and Non-Operating	10/9/2023	Florida PALM users	Meet with business team to complete documentation - Internal Operating Budget Monitoring Report - Operating and Non-Operating	Complete
People Processes Technology	Meet with business team to complete documentation - Payroll Cost Distribution System	10/9/2023	Florida PALM users	Meet with business team to complete documentation - Payroll Cost Distribution System	Complete
People Processes Technology	Meet with business team to complete documentation - Revenue and Disbursements Scripts combined with ACH Processing	10/9/2023	Florida PALM users	Meet with business team to complete documentation - Revenue and Disbursements Scripts combined with ACH Processing	Complete
People Processes Technology	Meet with business team to complete documentation - WMA Project Reporting (LMAUC Reporting Tool)	10/9/2023	Florida PALM users	Meet with business team to complete documentation - WMA Project Reporting (LMAUC Reporting Tool)	Complete
People Processes	Meet with business team to complete documentation - Depreciation	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Depreciation	Complete

Technology					
People Processes Technology	Meet with business team to complete documentation - Equipment Usage Log	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Equipment Usage Log	Complete
People Processes Technology	Meet with business team to complete documentation - Fleet/plate number	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Fleet/plate number	Complete
People Processes Technology	Meet with business team to complete documentation - FLEETWAVE	10/13/2023	Florida PALM users	Meet with business team to complete documentation - FLEETWAVE	Complete
People Processes Technology	Meet with business team to complete documentation - Property Donation or Confiscation Information Tracking form.	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Property Donation or Confiscation Information Tracking form.	Complete
People Processes Technology	Meet with business team to complete documentation - Property Forms	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Property Forms	Complete
People Processes Technology	Meet with business team to complete documentation - Property Pending	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Property Pending	Complete
People Processes Technology	Meet with business team to complete documentation - Property Transfers	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Property Transfers	Complete
People Processes Technology	Meet with business team to complete documentation - Property/Fleet deletion/missing/stolen	10/13/2023	Florida PALM users	Meet with business team to complete documentation - Property/Fleet deletion/missing/stolen	Complete
People Processes Technology	Finalize and submit Current-State Agency Business System Inventory and Documentation	10/16/2023	Florida PALM users	Finalize and submit Current-State Agency Business System Inventory and Documentation	Complete
People Processes Technology	Review Functions by Position document	10/11/2023	Florida PALM users	Review Functions by Position document	Complete
People Processes Technology	Communicate to team members meetings will be occurring	10/17/2023	Florida PALM users	Communicate to team members meetings will be occurring	Complete
People Processes Technology	Meet with manager/supervisors to review the Functions by Position document	10/18/2023	Florida PALM users	Meet with manager/supervisors to review the Functions by Position document	Complete
People Processes Technology	Update Project Charter	10/2/2023	Florida PALM users	Update Project Charter	Complete
People Processes Technology	Approve Project Charter	10/12/2023	Florida PALM users	Approve Project Charter	Complete
People Processes Technology	Publish Project Charter for Florida PALM team	10/12/2023	Florida PALM users	Publish Project Charter for Florida PALM team	Complete
People Processes Technology	Update Project Schedule	10/13/2023	Florida PALM users	Update Project Schedule	In Process
People Processes Technology	Update Project Plan	10/13/2023	Florida PALM users	Update Project Plan	Complete
People Processes Technology	Publish Project Plan for Florida PALM team	10/24/2023	Florida PALM users	Publish Project Plan for Florida PALM team	Complete
People Processes Technology	Coordinate printing of Agency Implementation Roadmap	10/9/2023	Florida PALM users	Coordinate printing of Agency Implementation Roadmap	Complete
People Processes Technology	Print Agency Implementation Roadmaps	10/11/2023	Florida PALM users	Print Agency Implementation Roadmaps	Complete
People Processes Technology	Distribute Agency Implementation Roadmaps	10/17/2023	Florida PALM users	Distribute Agency Implementation Roadmaps	In Process
Processes	Business Process Model Review Debrief	8/18/2023		Business Process Model Review Debrief	Complete
Technology	Agency Business System Inventory - Voucher Meeting	8/3/2023	Voucher	Agency Business System Inventory - Voucher Meeting	Complete
Technology	Agency Business System Inventory - Status Meeting	8/16/2023		Agency Business System Inventory - Status Meeting	Complete
Technology	Florida PALM - Agency Business System Documentation Review	8/28/2023	All Transaction Detail and FLINT	Florida PALM - Agency Business System Documentation Review	Complete

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

FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
September - October 2023	Jessica Crawford	jessica.crawford@myfwc.com	11/08/23
July - August 2023	Jessica Crawford	laurie.kershaw@myfwc.com	09/08/23

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Helpful Links

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

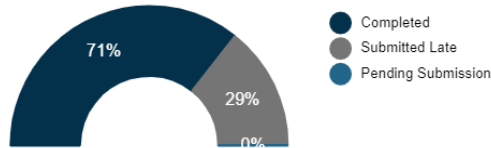
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

JAC Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Alton L. "Rip" Colvin, Jr.

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 2
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

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



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

Participation:

- Meetings Attended = 14
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 1

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 1

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 10

- Criticality:
 - High = 7 Med = 1 Low = 0 None = 1
- Documentation Status:
 - Complete = 0 Partial = 6 Not Started = 3

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 97

- Associated Unique Uses = 97
 - Continued Use - Yes = 68
 - Continued Use - No = 1
- Associated Business Systems = 5
- Cataloged Reports = 139
- Criticality:
 - High = 57 Med = 63 Low = 23 None = 1

Implementation:

- Conversions = TBD
- Configurations = 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.

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)	The agency has been discussing mitigation options with the PALM team.	No change since the last reporting period. We continue to remind the PALM team of the importance of this issue.		Rip Colvin, Executive Director
People	Low acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	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.	No update		Rip Colvin, Executive Director
People Processes Technology Data	Funding insufficient for project costs	Open	6 (High/Medium)	The agency will continue to look at projected costs and request needed funding	New identified risk	10/20/23	Rip Colvin, Executive Director
People	Availability of staff to work on the project/Limited qualified staff	Open	6 (High/Medium)	The agency is looking at ways to supplement current staff.	New identified risk	10/20/23	Rip Colvin, Executive Director
Processes	Delays in PALM information will create delays in remediating our systems and processes	Open	6 (High/Medium)	The agency will continue to monitor information received especially regarding models and interfaces	New identified risk	10/20/23	Rip Colvin, Executive Director
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.	Open	4 (Medium/Medium)	The agency will continue to discuss this issue with DFS staff and react to their guidance	New identified risk	10/20/23	Rip Colvin, Executive Director

	DFS manages these records, and there is not guidance on how DFS will eliminate these records prior to go-live.						
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	The agency is initiating discussions with internal partners to create a new org code structure with a goal of implementing on July 1, 2024	The CCN members plan to meet with all stakeholders in November or December to start discussions regarding this topic.		Rip Colvin, Executive Director
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	3 (High/Low)	The agency needs to engage the business system vendor to discuss new chartfields once the agency has additional technical information	The agency intends to engage the vendor after December 31.		Rip Colvin, Executive Director
Processes	PALM fails to integrate properly with other state-owned systems such as PeopleFirst, STMS, and PCard Works	Open	3 (High/Low)	The agency will continue to monitor information being received from the PALM team and other agencies.	New identified risk	10/20/23	Rip Colvin, Executive Director
People Processes	Replacement or major upgrade of PeopleFirst involving the same team members as the PALM Project	Open	3 (High/Low)	The agency will review all available information regarding this potential new contract and then plan accordingly.	New identified risk	10/20/23	Rip Colvin, Executive Director
Data	Data may not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	The agency is preparing a plan for Data Cleansing	No update		Rip Colvin, Executive Director
Processes	Downtime during transition	Open	2 (Medium/Low)	The agency will create a plan to minimize this risk such as front loading work in December 2025.	New identified risk	10/20/23	Rip Colvin, Executive Director

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 be able to access the available Administered Funds to support readiness activities for all fiscal years	Logged	09/01/23	All processes and systems	The agency has prepared work plan to be able to plan for access FY 2023-24 appropriations. The agency is also preparing an amended LBR for FY 2024-25.
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 impeded 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 Technology Data	Attended Advisory Council Meeting	09/20 and 10/18	CCN	Gather information to share/have input into decisions	
People	Continuously communicated PALM activities via newsletters, Commission Meeting Minutes, Executive Director Reports, etc	Multiple	All agency employees	To provide affected employees with up-to-date information regarding Agency activities regarding PALM	N/A
People	Touchpoints	09/13/2023 and 10/11/2023	CCN	Communication with PALM Team	
People	Internal Meeting - PALM Kickoff for JRO staff	10/12/2023	All JRO staff	To share information about the PALM project	
People	Internal Meeting - Discuss the makeup of the JAC PALM team	10/24/2023	All JAC employees	Attempt to assure that the correct people are included on calls and in meetings	
People Processes	Attended GoToWebinar - Readiness Workplan	09/14/2023	CCN	Instructions on new Task	
People Processes	Attended GoToWebinar - Payroll wave	09/18 and 09/19/2023	Payroll team	To learn about the Payroll Wave	
People Processes	Internal Meeting - Discuss Business Process Inventory	09/21, 10/11, and 10/19	JAC Executive Steering Committee and alternates	Discuss how to begin and complete Task 328	
People Processes	Attended Tuesday Task Talks	09/26, 10/10, 10/17, and 10/31/2023	CCN	To receive new information and instructions	
People Processes	Internal Meeting - JAC Executive Steering Committee discussion of the PALM Project and concerns	10/17/2023	JAC Executive Steering Committee	To discuss potential issues and plan for next steps	
People Processes	Internal Meeting - Discuss Task 501 - Implementation Plan	10/25 and 10/30/2023	JAC Executive Steering Committee	Discuss the plan for preparing the Agency Specific Implementation Schedule as required in Task 501	
People Processes	Attended the Project Management Liaison Forum	10/26/2023	Project Management Liaison	To learn more about other agency's plans	
People Processes	Attended the Change Management and Training Liaison Forum	10/26/2023	Business Liaison, Change Management Liaison, Training Liaison	To learn more about other agency's plans	
Processes	Internal Meeting - Discuss Reports Inventory	09/28/2023	JAC Executive Steering Committee and alternates	Discuss how to prepare this Task.	
Processes	Attended Segment I Design Workshops	10/03/2023 and 10/04/2023	Budget and Accounting	To learn about Segment I processes	
Processes	Attended PALM Solution Center Round Table	10/12/2023	All agency employees	To learn about the Solution Center	

Processes	Internal Meeting - Discuss/Create the JAC Agency Specific Project Charter, and Risks and Issues	10/23/2023	JAC Executive Steering Committee	Discuss the project charter as required in Task 500 and Task 502	
Processes	Internal Meeting - JRO Reports Inventory	10/24/2023	JRO staff	To request that the JROs start cataloguing the FLAIR reports that they use	
Technology	Attended Technical Town Hall	09/19/2023	CCN	To receive new information on the technology aspects of the PALM project	
Technology	Submitted the Agency Business System Inventory	10/27/2023	Technical Team	Inventory all Agency Business Systems as required in Task 326	

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:
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

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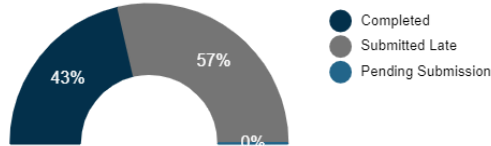
Helpful Links

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

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

LEG Status Report Dashboard

Readiness Workplan Tasks



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

Reporting Period

September - October 2023

Agency Sponsor

Lisa Swindle

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 3
- Submitted Late = 4
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 8
- Vacant Role = 0



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

Participation:

- Meetings Attended = 13
- Meetings Missed = 0



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 35

- Related Business Systems = 2
- Related Reports = 17
- Documentation Status:
 - Complete = 15 Partial = 10 Not Started = 5

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 15

- Criticality:
 - High = 9 Med = 1 Low = 0 None = 1
- Documentation Status:
 - Complete = 12 Partial = 0 Not Started = 0

Cataloged Interfaces = 9

- Inbound Interfaces = 3
- Outbound Interfaces = 5

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 77

- Associated Unique Uses = 77
 - Continued Use - Yes = 12
 - Continued Use - No = 0
- Associated Business Systems = 1

Cataloged Reports = 70

- Criticality:
 - High = 41 Med = 23 Low = 6 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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

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
	Our Activities we need to accomplish during reporting period				
	Travel System	To be determined	ImageAPI/All Travelers & Finance and Accounting	To be able to use the travel system in Palm on January 1, 2026	
	HR System	To be determined	High Line/All employees/ HR staff	To be able to use the HR system with FI PALM on January 1, 2026	

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

LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
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

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Helpful Links

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

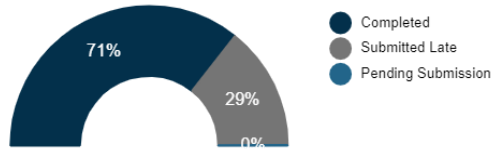
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

PSC Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Apryl Lynn

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 5
- Submitted Late = 2
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 2
- Duplicate Filled Role = 10
- Vacant Role = 2



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

Participation:

- Meetings Attended = 10
- Meetings Missed = 3



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 0

- Related Business Systems = 0
- Related Reports = 0
- Documentation Status:
 - Complete = 0 Partial = 0 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 5

- Criticality:
 - High = 2 Med = 0 Low = 0 None = 3
- Documentation Status:
 - Complete = 0 Partial = 5 Not Started = 0

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

Current-State:

Unique FLAIR Data Elements = 70

- Associated Unique Uses = 70
 - Continued Use - Yes = 11
 - Continued Use - No = 37
- Associated Business Systems = 3

Cataloged Reports = 10

- Criticality:
 - High = 6 Med = 2 Low = 2 None = 0

Implementation:

- Conversions = TBD
- Configurations = 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

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:
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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Helpful Links

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

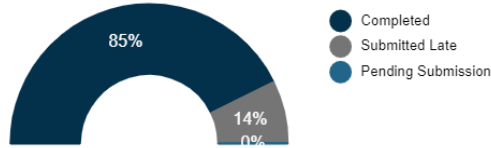
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

SCS Status Report Dashboard

Reporting Period
September - October 2023

Agency Sponsor
Eric Maclure

Readiness Workplan Tasks



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

Readiness Workplan Tasks:

Total Tasks = 7

- Completed = 6
- Submitted Late = 1
- Pending Submission = 0

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.

The dials below 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.

Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 5
- Vacant Role = 3



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

Participation:

- Meetings Attended = 11
- Meetings Missed = 2



The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

- Training = TBD

Current-State:

Cataloged Business Processes = 22

- Related Business Systems = 3
- Related Reports = 16
- Documentation Status:
 - Complete = 3 Partial = 19 Not Started = 0

Implementation:

- Role Mapping = TBD

Current-State:

Cataloged Business Systems = 6

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

Cataloged Interfaces = 0

- Inbound Interfaces = 0
- Outbound Interfaces = 0

Implementation:

- Interfaces = TBD

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:

- Conversions = TBD
- Configurations = 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	We have experienced a few key personnel changes which could affect us with the personnels in our CCN	Open	4 (Medium/Medium)	Whenever a new member is added to our CCN we will have to get them up to speed as quickly as possible. We also will have current CCN members able to fill in other roles if or when needed.			
Technology	Heather's departure from SCS is critical as we work on Task 328. Not sure who will be her replacement or when that transition will take place.	Open	4 (Medium/Medium)	The current CCN member will try our best to complete our current tasks as best as possible.			

SCS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Our Agency is without an Agency Sponsor	Open	Low - All impacts not listed as Critical or High	Try to get the new State Court Administrator to assign a new agency Sponsor and get the Sponsor upto speed with the agency's current status.			

SCS Assumptions

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

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
Data	We will be depending on PALM to help with any data clean up		F&A and Buget Offices	Make sure we clean up our ORG list Inactive thORG codes which are not been used	
Data	Reconciliation		F&A	Should be allowed to reconcile FLAIR and FL PALM	1/1/2026
Data	Property Management clean up		F&A	Make sure all the active property items have all accounting data	
People	Training state wide	7/15/2025	Everyone	To makesure our unique business processes are captured in FL PALM. Create job aids internally or use FL PALM materials to train OSCA, Supreme Court, JQC, DCA and Circuits. In person, Remote and other methods	12/15/2025
People	Communication	Continuing	Everyone	Information sharing for everyone to be in the loop. ASD yearly training and timely updates on the status of FL PALM implementation. Susan within the communication statewide.	
People	Turnover	On going	Everyone	Document and communicate internally the efforts with FL PALM	
People	Additional staff	7/1/2024	OSCA	Potion need for additional staff. Request of funds from FL PALM 2024	
Processes	IMS batch upload with FLAIR	12/12/2023	OSCA Finance & Accounting	Key accounting invoices in IMS with FLAIR	
Processes	IMS corrections will still be processed in FLAIR	12/12/2023	OSCA Finance & Accounting		
Processes	Update Desktop Procedures	10/01/2023	F&A, OIT	Complete all tasks desktop procedures.	
Technology	Procurement (data integration services)		OIT		API purchase to assist with remediation.
Technology	Survey statewide		OIT	to find out if any DCA Circuits have any business system they are using that need to remediate	
Technology	Business systems updates	10/1/2023	F&A, OIT,	Make sure all our business systems will be ready for implementation. Getting the development environment prepared	

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:
September - October 2023	Eric W. Maclure, Interim	macluree@flcourts.org	11/13/23
July - August 2023	Carlington Brown	brownd@flcourts.org	09/12/23

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