

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 2024/25 General Appropriations Act.

Reporting Period:

January – February 2025

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for AHCA
- Readiness Workplan

AHCA Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Lynn Smith

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 95.16%

- Submitted On Time = 22
- Submitted Late = 9
- Pending Resubmission = 0

Other Task Timeliness:

Score = 66.31%

- Submitted On Time = 29
- Submitted Late = 30
- Pending Resubmission = 5

Direct Task Completeness:

Score = 81.67%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 8

Other Task Completeness:

Score = 89.38%

- Submitted Complete = 26
- Submitted Incomplete = 0
- Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 4
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		11/1 - Discussed completion of the tasks and in the process of documentation 8/30 - On-going process for updates. Identifying most important processes to document. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. processes for Disbursement. Assets To-Be Designs are in progress. AR To-Be processes are in progress. Contracts is not impacted as much and internal Agency Business System (CATS) needs to be remediated. 6/28 - Continuing discovery of processes performed by the BFS team 4/30 - New Resources are reviewing as is to identify gaps. 4/12 - Documentation of business processes have not begun due to resource constraints		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission	03/07/25	3/7/2025 - ABS Remediation Complete 11/1 - Completed remediation for the Chart of Account structure 9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements. 8/30 - Development team is actively involved with the remediation, beginning with the Chart of Accounts.		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		8/30 - Documentation has not been completed for the lack of access to the BFS team that are understaffed. 7/12 - Continue to work on the AS-IS and have begun design the To-Be. Assets To-Be Designs are in progress. AR To-Be processes are in progress. CMIA is being worked. 6/28 - Continuing discovery of processes performed by the BFS team		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress				
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		9/18 - Agency Business System remediation is not in line with Florida PALM remediation requirements. Agency is documenting a remediation plan for Agency Business System remediation to address Florida PALM remediation requirements.		

N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering			
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25		Submission Complete
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress			
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress			
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25		Submission Complete
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/06/25		Submission Complete 02/13/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete 02/14/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete 02/13/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/03/25		Submission Complete
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/07/25		Submission Complete
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		3/7/2025 - All but 3 interfaces are ready for Cycle 2 Testing. 01/27-All files have started 01/17- A third of the interfaces have been remediated.	
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/05/25		Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/25/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/20/25		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 38</p> <ul style="list-style-type: none"> • Business Process Groupings = 12/13 <p>Identified Subject Matter Experts = 13</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 67</p> <ul style="list-style-type: none"> • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 4 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 23</p> <p>Planned Interfaces = 17</p> <ul style="list-style-type: none"> - Inbound Interfaces = 2 - Outbound Interfaces = 15 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #3: Family - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed

- Projects = Not Needed
 - Projects Balances = Not Needed

Agency Reported

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

AHCA Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Data	If there is not an accounting system available in June 2026, AHCA will not be able to complete the Weekly Medicaid Run and will not have the ability to pay the providers, costing the State, millions of dollars in fines/penalties.	Open	9 (High/High)	Strategy: 1) Change statutory requirements 2) Meet with CMS to explain the absence of Accounting System to plan for holding federal funds for more than 72 hours. 3) Meet with A&A and Treasury to aid in decision making process on the solution. 4) Multiple Projections for the month of December. Note: Banks are still operational		11/25/24	Smith, Lynn
Technology	If funding for Third Party Vendor maintained ABS applications is not received by 3/31/2025, AHCA will not be ready for Readiness Certification 4	Open	9 (High/High)	1) Review all ACHA System documentation for applications that may use FLAIR data elements (completed) 2) Meet with Leadership/Stakeholders to discuss the need for their teams to relook at possible impacts (completed) 3) Hire a second PM to manage the ABS applications that are indirectly impacted by Florida PALM where impacts are associated with the Enterprise applications (PeopleFirst, FACTS, etc.)- Completed 4) Review Sponsor/Stakeholders to discuss approach on other ABS identification. 5) Create an amendment for FY25/26 LBR to include additional operating budget for both the Agency Business Systems remediation and business systems remediation by Vendors.		01/31/25	Wander, Phyllis
People	If Florida PALM project scope increases based upon unidentified agency requirements that were missed, the Agency's FY25-26 LBR funding requests will be inadequate to complete the Florida PALM transition (schedule, scope and budget).	Open	6 (High/Medium)	Request administrative funding from the Legislature.	2/28/2025: The Florida PALM Implementation date has impacted the need to request additional funding for Florida PALM Go-Live.	11/02/23	Wander, Phyllis
People Processes	Given that Budget resources in the Bureau of Financial Services are involved in the FY25/26 Legislative Budget Request Process, if the budget team has not provided a plan for accomplishing Florida PALM YE UAT by 04/04/2025, AHCA will not provide Agency Readiness for Stage Gate 4 for Agency Readiness.	Open	4 (Medium/Medium)	Utilize resources from the IT team (Business Consultants) to perform the testing for the Agency Complete a checklist of all processes to be tested Obtain sign-off from BFS Budget team that results were as expected, given the transactions processed during the Project Led Testing period	2/28/2025: This risk still exists but will need to be re-evaluated due to the changed implementation date. Changed from High to Medium risk. 1/31/2025- IT resources have begun to identify and document BFS YE closing activities. Additional business analysis resource (IT) has been added to address the year end process analysis and what needs to be accomplished by the BFS Team	11/18/24	Hughes, Levis
Technology	If remediation for In-house ABS applications that are impacted with the implementation of Florida PALM have not been planned for by 3/31/2025, AHCA may have the resource constraints that will impact the Readiness 4 Certification requirements.	Open	4 (Medium/Medium)	1) Hire a second PM to manage the ABS applications that are indirectly impacted by Florida PALM where impacts are associated with the Enterprise applications (PeopleFirst, FACTS, etc.)- Completed 2) Identify change requirements for identified applications. 3) Create Plan of ABS remediation and testing		01/31/25	Wander, Phyllis

AHCA Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Funding for Third Party Vendor supported Agency Business Systems currently identified as needing remediation that are indirectly impacted by Florida PALM was not requested in the FY25/26 LBR. Those currently identified are ePAR and CATS, where Vendors are required to make changes.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Planning in progress	2/28/2025: Another PM within Agency has been identified to determine the impacts of other Agency applications where the Enterprise applications have made changes to support Florida PALM.	03/28/25	Wander, Phyllis
Technology	Identification of Agency Business Systems that may need remediation is still under way.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Planning in progress	2/28/2025: Another PM within Agency has been identified to determine the impacts of other Agency applications where the Enterprise applications have made changes to support Florida PALM.	03/28/25	Wander, Phyllis
People	As of August 2024, BFS had 22 vacant positions. As a result, the Bureau of FS team is challenged with performing operational activities and Florida PALM task requirements. The Florida PALM workload will only increase as the project progresses, where testing will require more of their time during end of year process and will hinder the ability for AHCA to complete task assignments.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Hire additional BFS staff with different skillsets; and do not make it a requirement to possess FLAIR experience. Hire additional staff augmented staff to perform more of the Florida PALM related tasks.	2/15/2025-Two additional resources are to begin within the month 1/31/2025-Vacancy in the Financial and Accounting team is at 30%	03/28/25	Hughes, Levis
People Processes	AHCA Florida PALM team needs at least two additional resources for the remainder of the Florida PALM project.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Obtain budget to hire additional staff	2/28/2025: Resubmitted Amendment to AHCA Budget team on	03/07/25	Smith, Lynn

	The Agency currently has budget to hire one additional resource, but needs budget to hire the second.				2/24/2025: 2/1/31/2025 - Submitted the amendment for additional funding for the current FY 1/8/2025-Completing the documentation for the amendment		
People	Lack of Training Coordinator Resource	Open	High - Impacts the ability of the agency to meet deadlines or milestones	A Training Coordinator Role is needed to aid in the documentation of the Training Plan. Current Staff Aug resources are documenting functional requirements, testing scenarios and other documentation to aid the BFS team and technical team in remediation and Florida PALM Tasks. Action Plan: Staff Aug team will be SME testers to help the short-staffed Bureau of Financial Services team document Agency training materials	2/28/2025: Staff Aug team has begun to formulate a plan for training the staff by role assignment	06/27/25	Wander, Phyllis
People	Florida PALM Tasks and Financial Operations are Competing for the same resources	Open	High - Impacts the ability of the agency to meet deadlines or milestones	With limited resources, production incidents in SunFocus will take precedence over Florida PALM Financial Services Tasks, causing a shift in resources to focus on the incident. Escalate for BFS leadership to set the priority as the incidents are identified	2/28/2025: A high priority item is being worked by the BFS team, but they continue to work Florida PALM tasks as time permits	06/28/25	Hughes, Levis
Technology	Remediation of the Agency Business System (SunFocus) application is not on the same schedule as the Florida PALM schedule. Some remediation activities will cross Segments, causing the agency timeliness of task to continue to be low.	Open	Low - All impacts not listed as Critical or High	Update the comments of the remediation tasks as they become complete.	2/28/2025: Interface remediation is on target for all but two of the selected interfaces due to lack of incomplete information in the Knowledge Center. 1/31/2025-Interface remediation is on target for Agency Interface Cycle 2 Testing (6 of the 17 interfaces completely remediated)	05/30/25	Wander, Phyllis

AHCA Assumptions

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

Agency Sponsor Confirmation

AHCA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lynn Smith	lynn.smith@ahca.myflorida.com	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for APD
- Readiness Workplan

APD Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Rose Salinas

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 96.56%

- Submitted On Time = 30
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 99.85%

- Submitted On Time = 63
- Submitted Late = 1
- Pending Resubmission = 0

Direct Task Completeness:

Score = 85.81%

- Submitted Complete = 19
- Submitted Incomplete = 0
- Completed After Submission = 12

Other Task Completeness:

Score = 86.50%

- Submitted Complete = 25
- Submitted Incomplete = 1
- Completed After Submission = 14

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 13
- Duplicate Filled Role = 4
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	Pending Resubmission	03/11/25	11/4 - IT Team is addressing - Business System by Business System 1/13 - review in progress - to be completed b4 due date 1/24 - updates and review scheduled week of 1/27 3/11- Added Developer to our APD Team - for this specific ABS	Submission Incomplete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission		12/16 - PM and BA working to update the tools - in progress 12/30 - Core team working to update/input data 1/9 - Team is working on it. 1/13 - updating 1/24 - team review in progress - clarification and sheet alignment with PALM completed today		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission		12/16 - reviewing the task in depth with APD PALM Team 12/30 - BA and PM in review of training docs that will be incorporated in the APD plans 1/7 - re-read task - use template 1/13 - reviewed with core team - reviewing the template 1/24 - training survey submitted 1/24 3/3 - actively working plan		
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25	1/9 - Team is working on it. 1/13 - core team working 1/24 - final review to be completed wed. 1/29 2/3 - working with D & R 3/4 - team updates completed to be submitted 3/5 3/5 - completed for resubmission - chose option of selecting values that do not have a match as "do not configure" until next round of tasks that enable us to add new Grant/OA2 values	Submission Complete	03/05/25
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		1/24 - IT team working 3/3 - IT sources working in tandem and updates in progress		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/21/25	1/30 - reviewing with core team 2/3 - team review today 2/21 - BA closing loop with some answers from core team	Submission Complete	02/21/25
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25	1/30 listing updates 2/3 - working up list with updates 2/6 - updated noting the impact of Hurricane Milton/Weather events and holidays - Thanksgiving and Christmas = all noted	Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25	1/30 - updates verifying with teams 2/3 - validate the list - checking with H 2/3 - updates - reviewed - cross checked BM	N/A	

Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission		2/10-team is in review and planning 3/3 - mapping meeting completed 3/4	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25	3/3 - completed and updates done 3/5 - Rose emailed to sign off reminder 3/7 - All signed off and reviewed by Rose	Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress		3/3 - ongoing 3/11 - working	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission		3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission		3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission		3/3 - team workbooks meetings and deliverables in progress with full efforts to complete	

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 73 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 42	Implementation: Impacted Agency Business Processes = 237 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 2	Implementation: Business Systems Planned for Integration = 8 Planned Interfaces = 26 - Inbound Interfaces = 5 - Outbound Interfaces = 21	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

APD Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Data loss during migration	Open	9 (High/High)	Implement robust backup and recovery mechanisms, conduct thorough testing	Measurement: Percentage of data migrated successfully noted: Migration Phase 12/13 - being addressed in UAT plan	12/08/23	APD Finance Team
Processes	Downtime during the transition	Open	9 (High/High)	Develop a detailed migration plan with scheduled downtime, parallel run for testing	Measurement: Duration of downtime noted: Migration Phase 12/13 - being addressed in UAT plan	12/08/23	PALM Team/APD Project Team
People Processes Technology Data	COA - Update accounting business system software or system with the new chart of accounts.	Open	9 (High/High)	- This includes modifying the account structure and assigning codes as needed, within the APD Business Systems so that the alignment flows thru upon migration and that all accounting is correctly	IT Team will align to update and make required changes in the Business System	12/27/23	IT Team and APD Teams

				the same	arena 12/13 - new coa and field specifications being supported based on PALM parameters		
People Processes Technology Data	COA - Testing old to new and establishing a valid testing exercise	Open	9 (High/High)	- Establish testing to ensure that transactions are posted correctly to the new chart of accounts. Verify that financial reports generate accurate results.	Testing scenarios and plan to be defined 12/13 - UAT Development in process 2/26 - working with mock error files to challenge the new COA structure for APD	12/27/23	ALL APD Finance and IT Teams
Technology Data	Use of API technologies to create Data Tables not available in timely manner to begin the Agency Build	Open	9 (High/High)	KB/Tech Analyst is driving the request with the PALM IT team to get schema provided	With Task 519 - the updates required to ABS does not have all information required to start the effort Ideal would be to have an API Schema that is pushed by PALM to update and execute all the requirements 6/26 - IT Team will work with strategy to build parallel data base with PALM parameters that will be set up with all the correct fields/requirements/etc 12/13 - ongoing 2/26 - APD making great progress	04/24/24	ALL APD Finance and IT Teams
Technology Data	Compatibility issues between old and new systems	Open	9 (High/High)	APD is in a re-write mode with several ABS - this will be a double effort and therefore use of old systems to adapt will be an issue	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - leaving open - documenting any issues	04/24/24	ALL APD Finance and IT Teams
Technology Data	Integration challenges with existing accounting software on ABS	Open	9 (High/High)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - all APD ABS are being upgraded to support PALM Specs	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Training - Lack of Familiarity with New System Features	Open	6 (Medium/High)	- Provide comprehensive training. - Offer hands-on practice and simulations. - Encourage knowledge sharing.	- noting that the "sandbox" will be open and provided with PALM team roll out of training phase(s) 12/13 - we are all not familiar with the new platform 2/26 - Still open and waiting	12/27/23	APD Teams
Data	Training - Data Migration Errors	Open	6 (Medium/High)	- Conduct thorough data validation and testing. - Have backup plans for data recovery.	- Organizing Data Review Teams and timeline 12/13 - track in UAT	12/27/23	APD Teams
People Processes	Training - Time Constraints with routine business	Open	6 (Medium/High)	- Plan training schedules to minimize disruption. - Allocate extra time for learning and transition.	- teams will be in review of scheduling and clean up in 2024 12/13 - working to schedule around critical Finance dates	12/27/23	APD Teams
People Processes Technology Data	Training - Inaccurate Financial Reporting	Open	6 (Medium/High)	- Verify and validate financial data during and after migration. - Have contingency plans for reporting errors.	- clean preparation prior to and then checking team after - APD is in clean up mode going forward. 12/13 - UAT to be training effort by PALM 2/26 - change analysis exercises for the workbooks with each APD Team	12/27/23	APD Financial Accounting Team
Processes Technology Data	Data Security Breach	Open	6 (High/Medium)	- Implement strict access controls and encryption measures.	- Conduct quarterly security audits and address any vulnerabilities immediately. - PALM Team to engage thru Technical reviews the security support and activities with PALM 12/13 - PALM Team 2/26 - PALM issue and end user matrix defined with the security requirements for Business Systems	12/27/23	APD IT Team
People Processes Technology Data	Technology Failures	Open	6 (High/Medium)	- Implement data backup and recovery procedures	- Regularly test technology systems and document results in monthly IT reports. - roll out with IT team in 2024 12/13 - IT Teams to support as needed - new PALM Helpdesk access 2/26 - APD will be doing a separate Business Systems UAT	10/24/23	APD IT Team
People	Timing in Financial accounting arena - Loss of	Open	6 (High/Medium)	- Plan for a gradual transition with overlapping	- Teams will be	12/27/23	APD Teams

Processes	Productivity During Transition			systems if possible.	attending focus group meetings 1st qtr 2024 and will participate in designing a workable schedule 12/13 - addressing timeframe for 2025 - 12/19 - 1/7 2/26 - scope creep - documented by APD Teams during 2024 for Dec 19-Jan 7		
People Processes Technology Data	COA - Archive old Data	Open	6 (High/Medium)	- archiving or retaining old chart of accounts data for historical reference and compliance purposes.Where/When/How	Plan to establish archive process to be determined or updated from present archive responsibilities within the agencies processes and policies 12/13 - APD working on Archive for FAS/FRS archive for all data prior to PALM Migration - internal APD	12/27/23	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll - Severe Data Loss or Corruption during Migration of data	Open	6 (High/Medium)	Severe data loss or corruption during migration, leading to incorrect payroll processing and legal compliance issues. Implement robust backup and recovery procedures, conduct extensive testing, involve experts in data migration, and have a rollback plan in case of failures. Conversion Plan is Critical for detail and review/testing and acceptance.	Conversion PLAN critical to success with PALM and APD Teams 6/26 - Seg IV 12/13 - s/B non issue- keep open	01/26/24	ALL APD Finance and IT Teams
People Processes Technology Data	Payroll -Integration issues between the new accounting system and other HR or finance software, causing delays in payroll processing.	Open	6 (High/Medium)	. APD will conduct thorough integration testing, involve IT specialists, and ensure seamless data exchange protocols thru a detailed conversion plan.	Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - should not effect APD = keep open	01/26/24	ALL APD Finance and IT Teams
Technology Data	Data Integrity issues during schema migration	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - APD will be prepared in advance leaving open for now	04/24/24	ALL APD Finance and IT Teams
Technology Data	Lack of scalability in new API architecture	Open	6 (High/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - API - interface questions continue as APD works to build	04/24/24	ALL APD Finance and IT Teams
Technology Data	Data Breach	Open	6 (High/Medium)	Implement multi-factor authentication, encrypt sensitive data, and regularly audit access logs	12/13 - global issue for any could based applications	10/31/24	ALL APD Finance and IT Teams
Technology Data	Unauthorized Access (Insider Threat)	Open	6 (High/Medium)	Apply role-based access controls, monitor user activities, and conduct regular training for employees on data security	Conduct periodic internal audits and monitor for suspicious activity 12/13 - checking internal APD users access abilities SSO	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incomplete Test Coverage	Open	6 (High/Medium)	Define comprehensive test cases based on requirements, prioritize critical features, conduct test case reviews	Ensure requirements traceability to avoid missed scenarios 12/13 - UAT plan updates in progress with CORE Team	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Defects Missed in UAT	Open	6 (High/Medium)	Implement multiple testing stages (functional, integration, regression), train testers on critical business flows, and conduct defect reviews	Encourage detailed documentation and communication for defect reporting 12/13 - create a capture log for PALM during UAT - incorporating into the UAT plan	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unclear Exit Criteria for UAT	Open	6 (High/Medium)	Define clear pass/fail criteria, set quality benchmarks, and ensure all criteria are met before exiting UAT	Review exit criteria with stakeholders before starting UAT 12/13 - open until PALM provides UAT plan for go - no go 2/26 - UAT planning in the works	10/31/24	ALL APD Finance and IT Teams
Processes Data	Time lag/Plan for AR and conversion accounts	Open	4 (Medium/Medium)	Review date impact with review of GL accounts and establish conversion accounts for time element affect - 2/6 - Team working to map COA	Measurement: Reconciliation issue noted: Migration Phase 12/13 - part of updated convergence plan - teams noting now	02/06/24	APD Finance Team
People Technology Data	Training - Insufficient Training Resources - needing a variety	Open	4 (Medium/Medium)	- Secure necessary training materials and resources. - Engage vendor-provided training and support.	- looking to PALM for direction and scheduling when it becomes available 12/13 - training for APD = being developed - no PALM training at this time	12/27/23	APD and PALM
People Processes	Inadequate Post-Training Support	Open	4 (Medium/Medium)	- Establish a helpdesk or support team. - Provide ongoing access to resources.	- PALM Team to define 12/13 - APD to determine addition Training Headcount 2/26 - proposed team support to be provided	12/27/23	PALM and APD IT Team
People Processes Technology Data	Payroll - Insufficient training for payroll staff on the new system, resulting in errors and productivity loss.	Open	4 (Medium/Medium)	APD will work with PALM to develop comprehensive training programs, provide user manuals, and offer ongoing support during the transition.	Ongoing teams meetings to mitigate 6/26 - Seg IV 12/13 - UAT - keep open	01/26/24	ALL APD Finance and IT Teams

					2/26 - teams meetings in progress		
Technology Data	Insufficient documentation for new API interfaces	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - IT team working thru each ABS at this time	04/24/24	ALL APD Finance and IT Teams
Technology Data	Ineffective communication between IT and accounting teams	Open	4 (Medium/Medium)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 6/26 - improvement in the PALM team presence with IT Readiness team building 12/13 - PALM Log for all IT questions ongoing	04/24/24	ALL APD Finance and IT Teams
Technology Data	Service Downtime/Disruptions	Open	4 (Medium/Medium)	Implement failover and disaster recovery protocols, choose a provider with SLAs for high availability, monitor system uptime	Inform users in case of downtime and provide transparent communication 12/13 - testing now for impacts = all teams	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Environment Downtime	Open	4 (Medium/Medium)	Plan for backup environments, perform load testing on UAT, and have an incident response plan for UAT	Inform stakeholders of potential downtime impacts 12/13 - working with 12/19-1/7 freeze timeframe - exercise by teams within APD at this time 2/26 - uat still to be defined	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT - Incorrect Test Data Use	Open	4 (Medium/Medium)	Set up accurate and relevant test data, train testers on data setup, and maintain a standardized test data set	Establish guidelines for creating and using test data 12/13 - scenarios review in progress	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Inadequate UAT Documentation	Open	4 (Medium/Medium)	Maintain detailed test plans, cases, and results, and set documentation standards; conduct reviews to ensure clarity	Ensure all stakeholders have access to up-to-date UAT documentation 12/13 - UAT scenarios/stories being captured at this time for 1st qtr 2025	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	UAT Poor Test Case Prioritization	Open	4 (Medium/Medium)	Identify high-risk areas for prioritization, work with stakeholders to prioritize based on business impact	Focus on areas with high impact on the application's functionality 12/13 - Teams are in review of their critical tasks	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Documentation Errors	Open	3 (High/Low)	- Implement a peer review process for critical documentation.	- Monitor error rates and track corrective actions in weekly status reports. -effort to b initiated with COA review 12/13 - UAT to document in plan 2/26 - UAT Plan still in development	12/27/23	APD Core Team
Technology Data	Security vulnerabilities in new API interfaces	Open	3 (High/Low)	APT TA to work with PALM IT to gain best updates and data	Running re-writes in the parallel with IT side of mitigation with ABS 12/13 - open data/cloud - IT question-challenge 2/26 - challenge to verify and close this risk	04/24/24	ALL APD Finance and IT Teams
People Processes Technology Data	Roll Back Plan to be included in the Conversion Plan	Open	3 (High/Low)	APT to incorporate the parallel effort with current business processes and also with the strategy process with PALM Data and ABS alignment.	Prepare for unexpected issues that cause risk during migration causing significant problems that will stop progress forward into PALM 12/13 - UAT and PALM to provide a plan for migration time frame	08/27/24	ALL APD Finance and IT Teams
Technology Data	Data Loss due to Cloud Provider Failure	Open	3 (High/Low)	Enable regular automated backups, store backups in geographically separate regions, test data restoration	Partner with reputable providers with a history of reliability 12/13 - PALM issue - may impact service	10/31/24	ALL APD Finance and IT Teams
Technology Data	Inaccurate Financial Data	Open	3 (High/Low)	Implement input validation checks, automate data reconciliation, perform regular audits on financial data	Include error reporting mechanisms and alerts for users 12/13- APD reconciliation will be part of the UAT to determine that FLAIR Data base was migrated/in sandbox/and mapped correctly	10/31/24	ALL APD Finance and IT Teams
People Processes Technology Data	Unauthorized Access to UAT Environment	Open	3 (High/Low)	Use role-based access controls, monitor access logs, and enforce MFA for test environment access	Regularly review UAT environment access rights 12/13 - not certain of the user access and will be tested in UAT	10/31/24	ALL APD Finance and IT Teams
People Processes Technology	Payroll - Inaccurate employee data migration leading to payroll discrepancies and employee dissatisfaction.	Open	2 (Medium/Low)	Validate data migration processes, cross-reference data, and conduct reconciliation checks to ensure accuracy. UAT required.	Ongoing teams meetings to mitigate - IT included	01/26/24	ALL APD Finance and IT Teams

Data						6/26 - Seg IV 12/13 - APD Teams to determine migration trust 2/26 - teams meetings in progress		
People Technology Data	Training - set up with current IT Platform and making available the training online requirements for the user experience - Software Compatibility Issues	Open	2 (Low/Medium)	- Ensure that the new system is compatible with existing hardware and software.	- IT Team engagement is strong within APD so this will be part of the IT agenda 12/13 - training for APD = being developed - no PALM training at this time	12/27/23	IT Team	
People Processes Technology Data	Insufficient user training and support	Open	1 (Low/Low)	Develop comprehensive training materials, provide ongoing user support	Measurement: User feedback and help desk tickets note: Training phase 12/13 - Training still open - will also be a part of UAT 2/26 - still an agency concern	10/24/23	PALM Team/APD Project Team	
People Processes Technology Data	Payroll - Minor delays in the migration timeline due to unexpected technical issues or resource constraints	Open	1 (Low/Low)	Develop contingency plans for minor delays, allocate extra resources if needed, and maintain clear communication with stakeholders- PALM Team Centric and APD IT engaged.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - shouldn't be an issue per PALM - but keeping open 2/26 - teams meetings in progress	01/26/24	ALL APD Finance and IT Teams	
People Processes Technology Data	Payroll - Minimal impact documentation discrepancies that have no significant effect on payroll processing	Open	1 (Low/Low)	Continuously monitor and address documentation issues as part of routine maintenance. HR and Finance Teams will be collaborating for all reviews/training/queries to pass success.	Ongoing teams meetings to mitigate - IT included 6/26 - Seg IV 12/13 - APD IT team working any issues and aligning PAYROLL	01/26/24	ALL APD Finance and IT Teams	

APD Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Data	Data Quality issue	Closed	Low - All impacts not listed as Critical or High	Ongoing efforts with all teams to cleanse data in FLAIR 12/10 - data cleansing continues but not to be considered an issue	8/27 - ongoing issue and ongoing cleanse in progress	02/28/25	PM/BA/Finance Teams

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 4/24 - noted that the PALM Project Personnel for APD has been Hired: HB for Business Analyst/KB for Sr. Technical Analyst	
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 4/24 - Conversion Plan is not yet created by the PALM Team and is a significant requirement for the IT and Finance Teams at APD @Feb 2025 - pending updated for Amendment 12	
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 12/13 - UAT - timeframe is the test	
People	The Florida PALM production sandbox will continue to be a	Logged	09/06/23	PALM Project Team/APD Project Team	second half and then ongoing as the project readiness plan is	

Processes Technology Data	copy of the current production environment and will be updated in January 2026 for this major implementation			Team	outlined by PALM Feb. 2025 - adjustment to delays will determine enough time to test and work in the sandbox and team confidence
People Processes Technology Data	Dedicated hyper care and post-implementation support will be available following implementation to ensure stabilization of business operations within APD	Logged	09/06/23	PALM Project Team/APD Project Team	Post implementation - At Live
People Processes Technology Data	APD Business Systems will continue to be used within APD and be supported with gateway/interface connectivity to the PALM Database for data capture as needed by APD - stay in the same effort as currently supported with FLAIR	Logged	12/27/23	PALM Project Team/APD Project Team/APD IT Team	Technology alignment 4/24 - noted that APD will initiate review of Business Systems for retention after the conversion to PALM Platform - there will be a timeframe to review and consider PALM capabilities/reports/access that will aide in this determination sponsored by the APD IT Team.
People Processes Technology Data	APD COA will be aligned and designed based on new PALM parameters	Logged	02/28/24	APD Project Team/APD IT Team	Accounting Alignment 4/24 - In process with Task 513 - also in data cleanse effort 12/13 - APD Completed to test in UAT
People	APD Organizational Structure is fully defined and correlated to the correct org code by personnel alignment - updated by HR	Logged	02/28/24	APD Project Team/APD IT Team	Organizational Alignment 4/24 - APD faces a reorganization over the next 9 months - thru Dec. 2024. Approvals remain outstanding. The PALM requirements will be "as is" for the agency and updates will occur when approvals move thru. There will be no wait time or hold to update. Following the Task requirements of 513 toward the May due date. 12/13 - base on current to date ORG code for APD Feb 2025 - Tasks are challenging due to alignment to structure and team is working to make certain all is correctly in place - roll up in tree and updated
Data	APD is able to identify the data within the Grant field in FLAIR and get it out of there prior to conversion/map it to the correct OCA2 - because this is not a true Grant and will not be a part of FCTS system - getting it identified and readied for conversion is a big must have and with it correctly supported will not cause issues.	Logged	02/28/24	APD Project Team/APD IT Team	4/24 - this remains a big concern on the handling of this data prior to conversion. The data pull for the conversion must be aligned correctly so that the PALM load places the data into the OA2 field in support of the accounting requirements for APD. Planning within APD is on-going as understanding of the data requirements becomes available. APD has discussed in several Touchpoint meetings and also reviewed with the PALM IT RC Lead Chris. 6/25 - Consideration into the conversion plan and how data will map. Need to review all possibilities 12/13 - considerations completed -Feb. 2025 - the OA2 challenge in tasks continue to challenge for COA alignment with APD use of field - in review
Data	APD is assuming responsibility thru Task requirements to perform data cleansing activities and that any data transformation or cleansing processes required during the pre-migration timeframe will be successfully implemented in the best captured data at time of migration.	Logged	04/24/24	APD Finance Teams	4/24 - there is still no defined conversion plan so that data input and accounting activities are not frozen and unaffected at time of conversion - this is critical to accounting reconciliation after conversion - cleansing data is ongoing and APD will face 2 Fiscal year ends prior to the conversion to PALM. The assumption is that data will be pulled at the last possible time with imposed moratoriums on activities while data is loaded into PALM for use in past conversion. 6/26 - data cleansing continues and will continue thru the next 18 months. Updates will be made in FLAIR as required by the accounting daily/weekly/monthly -Feb 2025 - continued effort
People Processes Technology Data	APD assumes that the security matrix for Module Use is fully in place at migration to PALM so that all teams can reconcile and work to validate data transfer	Logged	04/24/24	APD Finance Teams	4/24 - understanding team business process vs PALM Module accessibility has been identified and the teams overlap must be tailored to their work activity.
People Processes Technology Data	Data Security Compliance	Logged	08/27/24	APD Finance Teams	The cloud-based system will comply with all state and federal regulations regarding data privacy and security, such as CJIS, HIPAA, or IRS 1075, as applicable
People Processes Technology Data	No Major Changes to Existing Workflows,	Logged	08/27/24	APD Finance Teams	Assumes minimal disruption to existing business processes or workflows, and that the new system can adapt to existing operational requirements. -assuming the agency will continue with current Business Systems operating as they do prior to migration
Processes Technology Data	High Availability and Reliability	Logged	08/27/24	APD Finance Teams	The cloud-based system will be more reliable than the legacy mainframe, with a guaranteed uptime and robust disaster recovery capabilities.
Technology Data	Scalability	Logged	08/27/24	APD Finance Teams	The new system can handle future growth in terms of users, transactions, and data volume without requiring significant reconfiguration or additional infrastructure
People Processes Technology Data	Realistic Timeline.	Logged	08/27/24	APD Finance Teams	The project will follow a realistic timeline with adequate buffers for unforeseen delays, ensuring that all milestones are met without excessive pressure -Amendment proposal - what is the status of FLAIR for scope slide?
People Processes Technology Data	Auditability	Logged	08/27/24	APD Finance Teams	The new system will provide sufficient audit trails and logs to satisfy internal and external audit requirements. -TBD
People Processes Technology Data	UAT Environment Mirrors Production Environment	Logged	10/31/24	UAT Team, IT	Confirm that configurations and settings match production before UAT begins
People Processes Technology Data	UAT -Test Data Accurately Reflects Real User Data Scenarios	Logged	10/31/24	UAT Team, QA	Test data generation in progress; validation with real user scenarios needed @ Feb 25 - teams in review
People Processes Technology Data	All Key Stakeholders are Available for UAT Feedback	Logged	10/31/24	Business Users, Project Lead	Stakeholders have confirmed availability, but final schedule pending
People Processes Technology Data	All Major Functionalities are Developed and Deployed in UAT	Logged	10/31/24	UAT Team, Development	90% of functionalities are ready; remaining features are expected by the end of this week
People Processes Technology Data	UAT Test Cases Cover All Critical Business Requirements	Logged	10/31/24	UAT Team, Business Analyst	Initial review complete; updates to test cases in progress based on new requirements based on the Business Processes by Module outlined in the Knowledge center
People Processes Technology Data	Project Scope creep will not impact compliance and financial reporting	Logged	02/27/25	APD Agency Teams, IT Teams	• Delays could impact critical financial reporting deadlines (e.g., quarter-end, year-end, tax filing deadlines). • Regulatory compliance (GAAP, IFRS, SOX, etc.) may be at risk if the transition is incomplete.
People Processes Technology Data	Data integrity and validation challenges are checked for outdated and inconsistent data	Logged	02/27/25	UAT Team, IT, QA Team	The longer the migration takes, the higher the risk of outdated or inconsistent data. Extended timelines may require additional reconciliation efforts and dual-system maintenance.
People Processes Technology Data	Support teams remain in place - contractors and budget overruns are supported	Logged	02/27/25	APD Agency Teams	results in increased costs for additional development, testing, training, and consulting services are challenged, along with additional licensing fees may apply if the legacy system must remain operational longer.

People Processes Technology Data	Change management - project fatigue is addressed and mitigated	Logged	02/27/25	APD Agency TEams	Extended projects can lead to user fatigue and resistance to change - impact to training may need to be repeated or revised due to staff turnover.
People Processes Technology Data	Downstream delays with other agency business systems are not disrupted	Logged	02/27/25	APD Agency Teams, IT Teams	Contingency plans may require more attention

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

Submit

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APD Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Rose Salinas	rose.salinas@apdcares.org	03/06/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for CITRUS
- Readiness Workplan

CITRUS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Christine Marion

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 88.57%

- Submitted On Time = 17
- Submitted Late = 11
- Pending Resubmission = 0

Other Task Timeliness:

Score = 90.63%

- Submitted On Time = 45
- Submitted Late = 14
- Pending Resubmission = 4

Direct Task Completeness:

Score = 80.00%

- Submitted Complete = 16
- Submitted Incomplete = 2
- Completed After Submission = 9

Other Task Completeness:

Score = 76.67%

- Submitted Complete = 21
- Submitted Incomplete = 5
- Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition

CITRUS

Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/23/24		Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24			Due to budget constraints, Citrus is delaying starting remediation efforts until January 2025.		
Indirect	People	536-B	Create Agency Specific User Acceptance Testing Plan	08/19/24	10/11/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25			Due to budget constraints and the pending changes to Florida PALM's schedule, Citrus is delaying starting remediation efforts until May 2025.		
Direct	Technology	557	Confirm Interface Inventory for Cycle 2 Interface Testing	11/18/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25					
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25					
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25	IT IS NOT POSSIBLE TO SCROLL THE ENTIRE LIST AND MAKE SELECTIONS, AS IT IS TOO LONG FOR THE SMARTSHEET. IF YOU CORRECT THIS, I CAN GO IN AND MAKE APPROPRIATE SELECTIONS.	Submission Complete	01/15/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	03/11/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/17/25	Completed and resubmitted per instructions provided on 2/17 and 2/25.	Submission Complete	02/25/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/17/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/17/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	01/09/25
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Florida PALM: Agency submitted incomplete. Task required to be close as reporting period has ended.	Task Closed - Submission Incomplete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/17/25	Citrus resubmitted this task following the February Readiness Touchpoint	Submission Complete	02/28/25

Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25			Citrus anticipates this task to be delayed to match the new timeline.		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	03/11/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	Pending Resubmission	02/17/25	E-mail communication to all PALM users and team involved with ABS Remediation; Weekly PALM user meetings	Submission Incomplete	03/03/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 9 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 6	Implementation: Impacted Agency Business Processes = 32 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 26 - Inbound Interfaces = 0 - Outbound Interfaces = 26	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Not Needed - Grants = Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

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	The legislature has provided funding for this fiscal year, but there is a misalignment between the timing of project schedule, the availability of funds, and the timeframe staffing resources are needed.	Open	9 (High/High)	Citrus will have to carefully design our implementation schedule to ensure that there is no delay or gaps in services during UAT.	This risk remains active and has been increased with Amendment 12.	02/28/25	Matthew Christovich
Technology Data	Florida PALM designs fail to take into account the reporting and business needs of the agencies, requiring each agency to develop alternative solutions to meet their existing business needs currently met by FLAIR.	Open	9 (High/High)	Citrus will carefully monitor the Design Segments and document, as soon as possible, any apparent deficiencies in the Florida PALM Design.	The realization of this risk has directly created Issue 004 and Issue 005.	02/28/25	Matthew Christovich
Processes	Citrus currently purchases foreign currency to pay overseas vendors. We use a SPIA account, and transfer funds as needed to wire payments overseas. Foreign vendors are transitioning away from accepting paper check, which is the only way the state will allow us to pay with USD (Treasury will not wire funds to a foreign bank).	Open	6 (Medium/High)	We have made the project manager aware of the issue, and he has informed PALM that we need to determine how foreign currency payments will be handled through PALM.	Citrus has adjusted our UAT planning process to accommodate a cycle of leadership testing prior to full end user testing to determine the specific PALM methods to handle this process.	02/28/25	Matthew Christovich

CITRUS Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology Data	On 11/14/2024, Florida PALM finalized the parameters (scope and schedule) regarding interface selection, interface testing, and data warehouse design in a way that makes it impossible for Citrus to create interfaces with our agency business systems at Go-live, hampering the ability of the agency to conduct business related to revenue collection, contract tracking, and overseas payments.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	On 12/12/24, Citrus elected to select all "outbound" interfaces from Florida PALM and will be requesting funds in an OWP to solicit and contract for a data repositing solution to collect all Florida PALM data and provide more advanced, robust, and specific reporting capabilities than Florida PALM presented on 11/14/24. In addition, as the DW solution for Florida PALM is not planned for full functionality at Go-live, Citrus will also be constructing our own reports from PALM data in this environment.	This item has been moved out to correspond with the new interface design and testing timeline.	08/01/25	Project Manager
Processes Technology Data	On 12/12/24, Citrus discovered that the design of Florida PALM prevents the Organization codes used for budgeting and transacting to be the same. The budget is designed to "roll-up" up groups of Organization codes.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Citrus raised the issue with PALM in our December 2024 Touchpoint Meeting. This issue cannot be resolved by Citrus, as it relates to design decisions made during the budget module during Design Segment I and was not discovered until the configuration files were submitted to PALM.	Citrus has repeatedly requested during our Touchpoint meetings in January and February to meet with the budget design team to address our issues. As of 2/28, no meeting has been scheduled.	05/30/25	Project Manager

CITRUS Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes	The DFS Florida PALM project team will provide a PALM UAT environment to all CCN members, SMEs, and End Users prior to go-live. The Department will be given sufficient time to test and practice critical transactions before go-live in this dedicated testing environment.	Logged	11/14/23	PALM Project Team, Citrus Accounting Dept, CCN's	It was clarified by Jimmie Cox during the Design Segment meetings that PALM will have two environments: Sandbox, which is a copy of Production, and Test, which is intended to test future functionality.
People Processes Technology	The Legislature will appropriate and timely release General Revenue funding for contracted services for Agency support of the PALM project and those resources are available to perform the work assigned to them as scheduled.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated to reflect the necessity of both appropriation and timely release of General Revenue funds.
Processes Technology Data	The DFS Florida PALM project team will provide a reporting solution at go-live to support the business needs of the Department.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Design Segment IV for Data Warehouse is currently pending. Language updated for standardization.
People Processes Data	The DFS Florida PALM project team will provide information regarding the data fields to support all Chart of Accounts values Citrus currently uses (such as OCA's).	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated for standardization.
Processes Technology Data	The DFS Florida PALM project team will provide solutions and integration for Enterprise applications - WORKS, STMS, People First, Etc.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated for standardization.
People Processes Technology	The DFS Florida PALM project team will provide both in-person, on-line, and recorded training for CCN's, SMEs, and all accounting staff.	Logged	11/14/23	Citrus Accounting Dept and all Admin staff, CCN's PALM project team	Language updated for standardization.
People Processes Data	Key tasks, such as user maintenance, vendor maintenance, vendor payment registration, etc. will be done outside of PALM in their respective enterprise systems, e.g. AOD, STMS, VIP, etc.	Logged	02/09/24	Citrus Admin Staff, CCN's PALM project team	Language updated for standardization.
People Processes Technology Data	The leadership of the Department of Citrus 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	08/30/24	Citrus Admin Staff, CCN's PALM project team	Assumption added to reflect the need for Department buy-in as a Critical Success Factor.
People Processes Technology Data	The DFS 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	08/30/24	Citrus Admin Staff, CCN's PALM project team	Assumption added to reflect the dependency of the Department on Florida PALM to provide timely and complete information as a Critical Success Factor.

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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CITRUS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Christine Marion	cmarion@citrus.myflorida.com	03/03/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for COM
- Readiness Workplan

COM Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Tisha Womack

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 96.88%

- Submitted On Time = 25
- Submitted Late = 7
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.46%

- Submitted On Time = 57
- Submitted Late = 7
- Pending Resubmission = 0

Direct Task Completeness:

Score = 98.33%

- Submitted Complete = 26
- Submitted Incomplete = 0
- Completed After Submission = 4

Other Task Completeness:

Score = 96.67%

- Submitted Complete = 36
- Submitted Incomplete = 0
- Completed After Submission = 3

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	02/18/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/16/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/10/25	Project released task addendum which included additional guidance for Project-related fields, as well as extended task due date to January 31, 2025. Florida PALM email notification sent on 01/17/2025 at 10:31am.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/10/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/10/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/07/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/21/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/10/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/10/25			02/21/25
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/03/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/08/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				
Direct	Data	567-L	Share, Review, and Update	03/03/25	03/28/25	25% - Beginning Initial				

			Configuration workbooks			Internal meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 73</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 22</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 103</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9/13 Planned Spreadsheet Uploads = 10 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 22</p> <p>Planned Interfaces = 10</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 9 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

COM Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Lack of support for Life-to-Date Accounting and Reporting	Open	9 (High/High)	Create internal life-to-date reporting system	Commerce needs LTD balances for federal grant reporting, which is a predominant portion of funding for this department. PALM will make available a Project Costing module that has some type of LTD capability but details are not known to agencies at this time. Contingency plans have been identified and Commerce is currently working to determine best response if Project Costing module will not provide needed support. UPDATE as of 6/5/2024: Risk reviewed by CCN. Risk remains in place until Commerce has more information on how PALM will handle or is able to assist in LTD reporting. UPDATE AS OF 8/26/2024: Commerce will not be using PALM Project Costing module to address LTD needs. Risk remains as is. 01/03 - Impact and Probability were updated to High based on email sent by Ken on 01/03.	06/05/24	Caroline (Tisha) Womack / Dean Modling / Ken Heim
People Processes	If there is no documentation tracking process in place, then documentation updates may be missed, causing delays, inconsistencies, or	Open	9 (High/High)	Develop documentation tracking process tool, schedule meetings with supervisors and determine a centralized location for BPs. We will then develop a	UPDATE as of 12/12/2024: Meeting was held with risk team	12/12/24	Tulani Honablew

	errors in project deliverables.				matrix to cross check and verify all BPs listing in the tracking tool are in the centralized location. Supervisors will provide any missing information or correct incorrect information.	to discuss moving the BP to SharePoint and prioritization of business processes based on project impact. UPDATE as of 2/21/2025: unit teams meet weekly to review business processes documentation to ensure alignment with agency and project requirements.		
People Processes Technology Data	If there is no common understanding of the PALM project goals, then there could be misalignment among team members, leading to potential misunderstandings, inconsistent priorities, and inefficiencies in project task execution.	Open	6 (Medium/High)		Provide project update communications to team or team members associated with the areas of impact via email, Teams channels, Teams chat, face-to-face and/or virtual meetings. Also provide opportunities to participate in workshops and CoLab sessions provided by PALM. We will also provide and share information to team members with office/agency social gatherings approved by management in approved locations/areas.	UPDATE as of 12/12/2024: PALM knowledge center pamphlet with QR codes will be made available on 12/20/2024 during office event. UPDATE as of 2/21/2025: communication channels have been created for each business process unit in Microsoft Teams to share project updates regularly to ensure common understanding of PALM project goals and other relevant communications.	12/12/24	Tulani Honablew
Data	If the data migration process from FLAIR to PALM encounters inconsistencies or errors, then critical financial data could be compromised, leading to reporting inaccuracies and delays in operational processes.	Open	4 (Medium/Medium)		- Perform a comprehensive data audit before migration to identify and resolve inconsistencies - Use automated data validation tools to ensure data accuracy during migration - Conduct multiple rounds of data testing in a staging environment to verify accuracy and completeness - Establish a plan to address any critical issues identified post migration	UPDATE as of 1/30/2025: Commerce is waiting for mock data by Project	01/30/25	Ken Heim, Dean Modling, Lisa Simpson
People	If end users are not adequately trained or fail to adapt to Florida PALM, then system usage could be inefficient, causing a decrease in productivity and potential disruption to daily operations.	Open	3 (High/Low)		- Develop a detailed training plan tailored to various user roles, including hands-on practice sessions - Provide user-friendly guides, FAQs, and on-demand video tutorials for continuous learning - Partner with Florida PALM to provide support helpdesk information to address end-user questions during and after implementation - Involve SMEs and end users in Commerce specific and Florida PALM User Acceptance Testing for familiarization purposes, as well as feedback	UPDATE as of 2/21/2025: training plan in process of being completed by 3/28/2025	01/07/25	Michelle Harvey, Michelle Ayer, Lisa Simpson, Tulani Honablew, Jeff Stachnik
Technology	If FLAIR does not seamlessly integrate with existing Commerce applications and third-party interfaces (MFMP, etc.), then there could be disruptions in data exchange, resulting in operational bottlenecks and delayed financial transactions.	Open	2 (Medium/Low)		- Conduct a system mapping and dependency analysis for all interfacing applications - Test integrations thoroughly during User Acceptance Testing - Partner with Florida PALM, third-party vendors, and in-house teams to ensure compatibility - Monitor system performance post-integration and address any issues promptly using Florida PALM help desk	UPDATE as of 2/21/2025: team will conduct ongoing system mapping and dependency analysis via agency/project tasks and activities, as well participate in UAT to test integrations.	01/07/25	Lisa Simpson
Processes	If existing business processes are not adequately reviewed and aligned with Florida PALM, the inefficiencies may persist or new process gaps could emerge, leading to operational delays and reduced system effectiveness.	Open	2 (Medium/Low)		- Review all Florida Commerce Finance & Administration business processes impacted by the Florida PALM implementation in order to identify inefficiencies and areas for improvement before system implementation - Collaborate with key stakeholders to design optimized processes that align with the capabilities of Florida PALM - Document the redesigned processes and train staff to ensure smooth adoption - Conduct regular reviews post-implementation to identify and address any process gaps	UPDATE as of 2/21/2025: unit teams meet weekly to review business processes documentation to ensure alignment with agency and project requirements.	01/07/25	Lisa Simpson, Michelle Harvey, Wade Sansing

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

COM Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates	
Technology	It is assumed that Florida PALM will be fully operational and accessible to all users at go-live, with minimal downtime required for maintenance and updates.	Logged	01/08/25	Commerce F&A Stakeholders	Commerce will have the ability to prioritize things that need to be uploaded. Put together a workflow of transactions to be posted in case there are limited user access.	
Data	It is assumed that all critical financial data from FLAIR will be accurately migrated and available in the cloud-based system before go-live, ensuring continuity in financial operations and reporting.	Logged	01/08/25	Commerce F&A Stakeholders	Seek verification from PALM prior to the migration, during UAT, in order to have a solid understanding of what is going well and note potential issues.	
Data	It is assumed, at go-live, Florida PALM will provide a data warehouse with detailed data tables, including data that may not currently be available through outbound interfaces. This data will be essential for supporting F&A's reporting and financial analysis requirements.	Logged	01/08/25	Commerce F&A Stakeholders	Commerce F&A will build in-house processes so we are not relying on the data warehouse.	

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.

COM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Tisha Womack	caroline.womack@commerce.fl.gov	03/06/25

Agency Sponsor name: ^

Confirm *

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Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DACS
- Readiness Workplan

DACS Status Report Dashboard

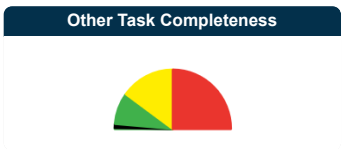
Reporting Period
January - February 2025

Agency Sponsor
Alan Edwards

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

RW Task Timeliness

RW Task Completeness



Direct Impact Task Timeliness:

Score = 100%

- Submitted On Time = 32
- Submitted Late = 0
- Pending Resubmission = 0

Other Task Timeliness:

Score = 95.38%

- Submitted On Time = 61
- Submitted Late = 0
- Pending Resubmission = 3

Direct Task Completeness:

Score = 99.03%

- Submitted Complete = 28
- Submitted Incomplete = 0
- Completed After Submission = 3

Other Task Completeness:

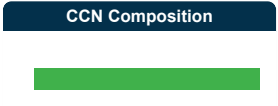
Score = 99.71%

- Submitted Complete = 34
- Submitted Incomplete = 0
- Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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



- Change Champion Network:**
- Unique Filled Role = 16
 - Duplicate Filled Role = 0
 - Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		02/06/2024 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025/TBD pending Amendment 12). 01/06/2025 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 01/06/2025 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 12/13/2024 - Remediation efforts for Segment I - IV designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 11/01/2024 - Remediation efforts for Segment I - IV designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities. 10/02/2024 - Remediation efforts for Segment I - IV designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities. 09/01/2024 - Remediation efforts for Segment I (and all segment) designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities. 08/02/24 - Remediation efforts for Segment I designs are still in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities. 06/28/24 - Our agency is actively working on ABS remediation based on Segment I designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function		

										following our internal project schedule, that cannot be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. We will continue to monitor our progress and provide status updates to the Florida PALM project through our Readiness Coordinator and as part of our Agency Status Reporting.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission				02/06/2024 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025/TBD pending Amendment 12). 01/06/2025 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 12/13/2024 - Remediation efforts for Segment I - IV designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 11/01/2024 - Remediation efforts for Segment I - IV designs are in progress. We continue to monitor this task for completion in order to align with the Florida PALM Project's timeline to participate in future testing activities. 10/02/2024: Our agency is actively working on ABS remediation based on Segment I - IV designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that could not be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. We will continue to monitor our progress and provide status updates to the Florida PALM project through our Readiness Coordinator and as part of our Agency Status Reporting.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	75% - Consolidating/Inputting Information for Submission				02/06/2024 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025/TBD pending Amendment 12). 01/06/2025 - Remediation efforts for Segment I - IV designs continue to progress and move toward completion in order to align with the Florida PALM Project's timeline to participate in future testing activities (March 2025). 12/13/2024 - Our agency is actively working on ABS remediation based on Segment I - IV designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that could not be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities (March 2025). We will continue to monitor our progress and provide status updates to the Florida PALM project through our Readiness Coordinator and as part of our Agency Status Reporting.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission						
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted		01/10/25				Submission Complete
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission						
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission						
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted		01/09/25				Submission Complete
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress						
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted		01/09/25				Submission Complete
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted		01/09/25				Submission Complete

Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25		Submission Complete	01/28/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25	Primary Sponsor unavailable to confirm and submit.	Submission Complete	01/10/25
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/24/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/28/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/17/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/04/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	50% - In Progress				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/03/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 69</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 25</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Implementation:</p> <p>Impacted Agency Business Processes = 149</p> <ul style="list-style-type: none"> Related Business Process Groupings = 13/13 Planned Spreadsheet Uploads = 11 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Implementation:</p> <p>Business Systems Planned for Integration = 15</p> <p>Planned Interfaces = 30</p> <ul style="list-style-type: none"> Inbound Interfaces = 9 Outbound Interfaces = 21 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Needed Assets = Needed Contracts = Needed Customers = Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

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	FL PALM Project UAT Plan details unknown at this time. FL PALM must be running regular batch processing during UAT to allow FDACS to interface Agency Business System test scenario data (API002, ARI007, ARI009, ARI011, IUI002, POI002, POI006, SDI009) to PALM during the testing window.	Open	3 (High/Low)	The Department is waiting on more information from PALM regarding their testing plans. We attended PALM's test preparation workshop in mid-November where these topics were discussed and the PALM team provided more insight. Pending information about UAT testing details will impact our internal management of this risk.	02/19/2025 - No Change or update at this time.	10/31/24	Rosemarie Zubler
Technology Data	FL PALM Project UAT Plan details unknown at this time. FDACS must receive outbound interface file data from PALM (AMI003, API020, API031, ARI002, ARI020, ARI024, ARI034, GLI001, GLI017, IUI003, KKI009, POI001, POI007, SDI008) that will contain records associated with the agency test data and foundational data such as the chart of account values, chartfield combinations, and budget information.	Open	3 (High/Low)	The Department is waiting on more information from PALM regarding their testing plans. We attended PALM's test preparation workshop in mid-November where these topics were discussed and the PALM team provided more insight. Pending information about UAT testing details will impact our internal management of this risk.	02/19/2025 - No Change or update at this time.	10/31/24	Rosemarie Zubler

DACs Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology Data	Division of FL PALM information by Segments may result in timing differences between what is needed for remediation and task due date.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Our agency is actively working on ABS remediation based on Segment designs, ensuring alignment with our own agency specific project management approach. The FDACS remediation approach is to complete all required changes for each application function following our internal project schedule, that cannot be defined by segment design timing. Agency remediation efforts are ongoing and will continue in order to meet the overall Florida PALM Project's timeline for remediation completion to participate in future testing activities. Regular monitoring of the interface catalog is occurring to stay up to date on any changes made to interface layouts or sample data files.	02/19/2025 - No Change or update at this time.	03/14/25	Rosemarie Zubler

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.	02/19/2025 - Continuing to monitor.
Data	Division reporting needs currently handled by Data Warehouse will be taken care of by user roles for Information Warehouse or PALM reports.	Logged	12/19/23	Division fiscals, Finance and Accounting, OPB, Purchasing, Payroll	02/19/2025 - Continuing to monitor.
People	The Florida PALM team will be able to provide timely and complete requirements for the transition to Florida PALM with sufficient detail and time to implement the changes according to the Florida PALM schedule	Logged	11/13/23	FDACS PALM Readiness Team, CCN, all FDACS key stakeholders, PALM/impacted Agency Business System end users	02/19/2025 - Continuing to monitor.
Processes	Work efforts of staff augmentation resources are undertaken to collectively achieve a broader understanding of the totality of work that must be accomplished to meet all Critical Success Factors. As such, the deliverables outlined in the Operational Work Plan are critical, and the FDACS PALM Transition Readiness Team assumes that the deliverables are accurately and thoroughly defined and reflect the necessary Level of Effort to achieve all transition tasks and activities. Work efforts under the deliverables may adjust to accommodate operational variances, but the deliverables are fixed.	Logged	11/13/23	Staff Augmentation; FDACS PALM Readiness Team, CCN	02/19/2025 - Continuing to monitor.
Technology Data	FDACS is assuming that interface testing between PALM and enterprise partners/third parties will be completed on schedule and that suitable batch scheduling between PALM and enterprise partners/third parties will be established. Deviation from those outcomes might impact downstream project activities including agency interface testing and user acceptance testing.	Logged	10/22/24	FDACS PALM Readiness Team, PALM/impacted Agency Business System end users.	02/19/2025 - Continuing to monitor.

DACs Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Alan Edwards	alan.edwards@fdacs.gov	03/03/25

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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Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DBPR
- Readiness Workplan

DBPR Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Sally Huggins

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 96.33%

- Submitted On Time = 25
- Submitted Late = 5
- Pending Resubmission = 0

Other Task Timeliness:

Score = 93.44%

- Submitted On Time = 52
- Submitted Late = 11
- Pending Resubmission = 0

Direct Task Completeness:

Score = 98.67%

- Submitted Complete = 28
- Submitted Incomplete = 0
- Completed After Submission = 2

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 37
- Submitted Incomplete = 0
- Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 12
- Duplicate Filled Role = 6
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		Versa will produce upload spreadsheets API041 and IU1001		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25	Added new Technical and User Documentation for Versa for DBPR	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission	01/29/25	The final UAT Testing Plan has been drafted and reviewed internally by DBPR Project Directors.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/07/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/07/25	DBPR believes only one Distribution Code is needed; however, sub-locations have had recent activity against them.	Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25	All updates applied by Jennifer in Secure File Share	Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/13/25	One PCard Speedkey has Category of 030000, which previously was not allowed, but now it is.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	03/07/25	Reviewing differences between Organizations configured and those being converted.	Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/21/25	Reviewed balances remaining on OCAs and cleaned up where appropriate	Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25	All related updates applied to Smartsheet	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Covers January and February 2025	Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/25/25	No mapping of Grants to occur. Balances on inactive grants liquidated.	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission		No ABS interfaces to test at this time		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/20/25	3 FGCC Funds/Organizations were divested/liquidated on 2/17/25. As discussed at meeting on 2/20/25, DBPR submitted with these comments.	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25	No changes required	N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Need to add DMS-owned location(s) under PALM Task 657		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25	Reporting on January and February 2025	Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation	02/28/25	04/30/25	25% - Beginning Initial		For activity during March and April		

		Schedule, Risks and Issues		Internal Meetings and Information Gathering		2025	
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission	
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission	
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering	

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 32</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 23</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 117</p> <ul style="list-style-type: none"> Related Business Process Groupings = 9/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 2</p> <p>Planned Interfaces = 1</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 0 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

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	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Open	4 (Medium/Medium)	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in April 2025.	No Crosswalk review sessions have been conducted in several weeks.	02/19/25	Gary Townsend
People	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional), then PALM readiness could be negatively impacted	Open	3 (High/Low)	Mitigation - Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners Create visual aids, mapping documents, and other PALM educational tools.	PALM Task 568 - DBPR End User Training Plan has been released and is actively being worked. PALM Education continues to be an area of focus.	04/08/24	Gary Townsend
People Processes Technology Data	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete work flows	Open	3 (High/Low)	Mitigation - Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, etc.)	PALM Task 560 aides in documenting processes and related details. User Stories are being created out of Future-State review sessions and these User Stories should foster learning the new process flows. In addition to workflows, UAT test scripts could be negatively impacted as well. Reduced Impact from High (3) to Medium (2).	04/18/24	Thomas Richardson
People Processes Technology Data	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data necessary to complete Future-State Business Processes	Open	3 (High/Low)	Mitigation - Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations	Action Item #69 was created to establish a repository for PALM post-production install support items. It is	04/23/24	Thomas Richardson

	once we go live				precipitated by batch cycles that need to run.	believed data queries, direct PALM access, and reports will provide all of the necessary data that is needed by Finance & Accounting and no new tool will be necessary. User Stories are including additional details, particularly on the data and use of FLAIR@BPR. Reduced Impact from 3 to 2.		
People Processes Technology Data	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Engaging DBPR SMEs to assist with User Stories should help. Current-State to Future-State Crosswalk sessions are behind the scheduled dates the OCM lead requested. An Assumption (#44) was added for getting caught up. Current-State to Future-State Crosswalk sessions should resolve.	05/31/24	Thomas Richardson	
People Processes Technology Data	If all various Future-State Business Process scenarios (including anomalies and non-happy path conditions) are not identified and accounted for in test scripts, then testing will not be comprehensive and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Mitigation - Work with DBPR SMEs and identify all possible scenarios. Account for these scenarios in UAT test scripts in advance of scheduled UAT.	User Stories are being created, and this should flesh out all scenarios. Decreasing Probability from 2 to 1. Some anomalies and scenarios are trickling in from F&A staff. A Task for each process crosswalk session has been added to identify any anomalies or scenarios. Changed Probability from High (3) to Medium (2). Some anomalies for test cases associated with Versa upload spreadsheets were added to the Test Scripts folder.	07/03/24	Thomas Richardson	
People Processes Technology Data	If significant time is not spent planning and preparing for UAT as well as business processes not intended to be performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	Open	3 (High/Low)	Mitigation - If significant time is not spent planning and preparing for UAT as well as business processes not being performed in PALM, then UAT could be delayed and/or ineffective which would negatively impact DBPR's PALM readiness	UAT Testing Plan draft (PALM Task 536-C) has been drafted and is under internal DBPR review. Significant UAT planning and documentation has been accomplished. Internal definition of defect tiers has been drafted and discussed. Test scripts have been started and there are placeholders for every business process to be tested during UAT. Research for UAT has already been started. Decreasing Impact from High (3) to Medium (2). Test scripts have been started and there are placeholders for every business process to be tested during UAT.	07/17/24	Thomas Richardson	
People Processes Technology Data	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness	Open	3 (High/Low)	Identify an Agency that we can partner up with and coordinate send/receive testing with them	This has been added as a Task on the Leadership Summary of Tasks. Reduced Impact from High (3) to Medium (2).	08/16/24	Thomas Richardson	
People Processes Technology Data	If all PALM CMS Wave processes already in production that have a current FLAIR component have not been identified how the FLAIR piece will be replaced, then we will have problems executing Business Processes when the PALM Financial Wave is deployed to production considering FLAIR is going away at that time	Open	3 (High/Low)	Identify all PALM Business Processes done by DBPR in production today and identify all that have a FLAIR component, review the FLAIR components in detail and identify a replacement, confirm the approach, and test the approach during Financial Wave UAT. RC indicated possibly 2 weeks of downtime; however, details are not known at this time. Outstanding questions include: How certain is two weeks of downtime? What is the plan for payroll? When will additional information be available about downtime?	RC indicated possibly 2 weeks of downtime; however, details are not known at this time. Outstanding questions include: How certain is two weeks of downtime? What is the plan for payroll? When will additional information be available about downtime?	11/13/24	Thomas Richardson	
People Processes Technology Data	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely and successful completion of UAT	Open	3 (High/Low)	Ensure that crosswalks and flow detail diagrams are covered at a detail level. Details should be addressed when User Stories and Business Process Crosswalk sessions are conducted.	Decision #32 has been documented that articulates the desire to have detailed user stories to support research and test script writing. Details should be addressed when User Stories and Business Process Crosswalk sessions are conducted. Changed Status from Decreasing to Stable. All systems external to FLAIR need to be clearly identified.	01/13/25	Gary Townsend	
People Processes Technology Data	If user stories for all scenarios and anomalies are not created then the required test scripts may not be completed and there could be tests that should have been conducted during UAT that did not get tested. This could lead to problems once PALM is in production when a scenario arises that has not been tested	Open	3 (High/Low)	Ensure that time is spent to cover all possible scenarios and anomalies.	Staff should be encouraged to recall past scenarios and conditions. New Test Scripts were created for scenarios where there are problems/anomalies building Versa upload spreadsheets. User stories should be created for all possible	01/13/25	Gary Townsend	

					created for all possible scenarios. User stories should be created for all possible scenarios.		
People Technology	If significant problems are encountered during UAT when testing spreadsheet uploads, there may not be enough time for DBPR IT to make modifications in time to be retested	Open	3 (High/Low)	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT. This was shared with RCs at the Monthly Touchpoint and they are checking to see if DBPR can volunteer as guinea pig so testing upload spreadsheets can begin prior to UAT in July 2025. This was shared with DBPR IT at the Biweekly meeting.	PALM is ensuring that interfaces produced from ABSS are being tested well in advance of UAT, however, upload spreadsheets must wait until UAT to be tested. While the due dates for some PALM Tasks were extended, Task 561 was not one of them. This needs to be revisited. This was shared with RCs at the Monthly Touchpoint, and they are checking to see if DBPR can volunteer as guinea pig so testing upload spreadsheets can begin prior to UAT in July 2025. This was shared with DBPR IT at the Biweekly meeting.	01/13/25	Thomas Richardson
Processes	If all new Future-State Business Requirements are not captured, communicated, and reviewed by the DFS PALM technical team for feasibility, then DBPR future-state processes may not be properly addressed (developed, tested, documented, etc.)	Open	2 (Medium/Low)	Mitigation - Ensure that all Business Requirements are captured in the RTM and shared with all key stakeholders	Reduced Impact from High (3) to Medium (2).	04/08/24	Thomas Richardson
People Processes Technology	If PALM Future-State Business Processes are not stable and subject to significant change during or after PALM education presented to DBPR end users, then this can lead to confusion and negatively impact DBPR's PALM readiness	Open	2 (Medium/Low)	Mitigation - Communicate with Readiness Coordinators early and often and ensure Organizational Change Manager and F&A staff are quickly made aware of any process changes. Identify any shortcomings in Future-State Business Processes and communicate them to the DFS PALM Project team via the RC as soon as possible	Current-State to Future-State Crosswalk sessions are behind schedule but are taking place. A template for addressing flow changes as well as technical changes is being developed. PALM-led training in the UAT environment in April 2025 should help.	06/19/24	Thomas Richardson
People Processes	If DBPR does not have all PALM roles clearly defined and permissions properly set up for UAT as well as production, then there could be permissions-related problems when we go live with PALM and required activities may be delayed	Open	2 (Medium/Low)	Be sure to define all required roles and set up the proper permissions as early as possible	Reduced Impact from High (3) to Medium (2).	08/19/24	Jennifer Gaines
People Processes Technology Data	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Open	2 (Medium/Low)	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	All roles have been defined. Just need to properly assign them to the proper individuals. Updated priority from Low (L) to Medium (M).	08/19/24	Thomas Richardson

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	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR end users		
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository.	
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan.	Logged	04/01/24	Sally Huggins Jennifer Gaines Thomas Richardson PALM	Updates are current through February 2025.	
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR end users PALM	Year End and other situations could be exceptions that will need to be managed.	
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR end users PALM	The Executive Steering Committee agreed to a 6-month extension.	
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR end users PALM	The DBPR staff remain active and engaged	
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR end users PALM		
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	All DBPR end users Thomas Richardson PALM		
People Processes Technology Data	The Department will remediate all agency business systems impacted by Florida PALM that cannot be retired.	Logged	04/01/24	All DBPR end users Versa FLAIR@BPR	Versa Regulation is the only ABS being remediated. FLAIR@BPR will be replaced by Agency Query Writer and reports in PALM.	

People Processes Technology Data	The Department will complete all necessary interface builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producing 2 other files to be imported into PALM, but those remain upload spreadsheets.
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM.	Logged	04/01/24	All DBPR end users PALM FLAIR	However, a snapshot of FLAIR@BPR that will not be kept current will be available for historical reference.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or no longer needed.	Logged	04/01/24	All DBPR end users PALM FLAIR	There are some business processes that DBPR will perform that have no component in PALM but will still need to be completed. These will be tested as part of UAT.
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	Changes to business processes should be minimal.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR end users PALM	The Project Schedule is updated and managed on a daily basis. Snapshots are captured on a weekly basis.
People Processes Technology Data	Testing of remediated business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	All DBPR end users PALM	Versa remediation continues. One PALM Spreadsheet Upload has been completed and one more is in the works. I direct interface from Versa to PALM is being developed..
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	UAT test scripts are being assigned to SMEs that will perform the functions in production as part of UAT.
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	Contract Project Manager Contrace Organizational Change Lead	
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	DFS PALM Training Staff All DBPR end users OCM Lead PALM	PALM training Tasks are under way. In addition, PALM Task 568 addresses a training plan. Training for PALM by the project for SMEs will be conducted at the beginning of UAT.
People Processes Technology Data	The Department will support data cleansing.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	DBPR was engaged in the required data cleansing. Additional cleansing is still required.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	DFS PALM Development Staff All DBPR end users PALM	Scheduled PALM Tasks associated with configuration and conversion were completed.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	DFS PALM Development Staff All DBPR end users PALM	
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the To Be processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	DFS PALM Development Staff All DBPR end users PALM	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	04/23/24	DFS PALM Development Staff All Finance and Accounting CMS Staff PALM	All PALM CMS processes that include a FLAIR component, were revisited to determine if the FLAIR component (because FLAIR is going away) needs to be replaced or accounted for. It was determined that nothing special needs to be done to account for FLAIR going away.
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested.	Logged	05/01/24	DFS PALM Development Staff All DBPR end users PALM	Placeholder test scripts have been created.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR end users	Received confirmation we will only have the UAT environment, which will be available in August 2025.
People Processes	DFS PALM (The Project) will create base test scripts for UAT and DBPR staff will tweak as needed with specific department details	Logged	06/14/24	All DBPR end users	Has been included in the UAT Testing Plan (Task 536)
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of UAT	Logged	06/17/24	All DBPR end users PALM PALM Website	Future-State Business Processes are currently being reviewed with DBPR staff. Only 10 videos are currently available.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	This information is being captured as part of User Story development.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by Florida PALM and are not the responsibility of DBPR	Logged	06/21/24	All DBPR end users DFS PALM Technical Team DFS PALM Training Team Gary Townsend PALM PALM Website	These will be remediated by the time scheduled testing begins, and enterprise partners will provide the possible scenarios.
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR PALM Readiness Project stakeholders	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that it does not become outdated and obsolete.	Logged	08/07/24	All DBPR PALM Readiness Project stakeholders	The PMP quarterly review was completed as scheduled.
Data	All PALM reports will include all Chart of Accounts fields (including OA2)	Logged	08/16/24	All DBPR PALM Readiness Project stakeholders PALM	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	All DBPR PALM Readiness Project stakeholders PALM	Only one direct interface is being developed for DBPR ABSs at this time (API002). PALM Tasks related to establishing interface network connectivity have been removed off hold for DBPR and are being worked.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR PALM Readiness Project stakeholders PALM	Some data will be provided in the form of reports, but queries can be run whenever needed.
People Processes	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the Business	Logged	10/23/24	All DBPR Revenue staff PALM	PALM upload spreadsheet ARI010 has been finalized and turned over to DBPR IT for remediation

Technology Data	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR Stakeholders Gary Townsend PALM	The Current-State to Future-State Business Processes were rearranged, rescheduled, with revised tasks with the input from the OCM Lead. They are still behind schedule.
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	All DBPR Revenue Accounting Stakeholders PALM Versa Regulation	The PALM Technical Team is limiting the Payment Method values that will be stored in PALM. The Remittance Type values included in the QLIK report should be sufficient.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the Project Schedule	Logged	12/04/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks have been rescheduled and are behind in accordance with the Project Schedule.
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR Stakeholders Gary Townsend PALM	The Future-State crosswalks are currently under way. User Stories are being used to capture the necessary details.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT	Logged	12/18/24	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	STMS continues to provide monthly updates that are very helpful.
People Processes Technology Data	All supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	Complete addresses must be available in PALM to support mailing of refunds considering the API041 upload spreadsheet does not have a spot for the address even though ABS Versa has the address and provides it to SMEs currently.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Sally Huggins Jennifer Gaines Derrick Thomas Gary Townsend Thomas Richardson Gary Townsend	Review sessions have been scheduled once a month and are being conducted with the Microsoft Project comprehensive version of the Schedule.
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	All DBPR Stakeholders Thomas Richardson Gary Townsend PALM	Task 560 is due by 3/28/25 so the business process details will need to be available 1-2 days prior to that.

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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DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DCF
- Readiness Workplan

DCF Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Chad Barrett

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 91.88%

- Submitted On Time = 22
- Submitted Late = 10
- Pending Resubmission = 0

Other Task Timeliness:

Score = 73.69%

- Submitted On Time = 32
- Submitted Late = 25
- Pending Resubmission = 7

Direct Task Completeness:

Score = 91.94%

- Submitted Complete = 24
- Submitted Incomplete = 0
- Completed After Submission = 7

Other Task Completeness:

Score = 88.39%

- Submitted Complete = 21
- Submitted Incomplete = 0
- Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 2
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	516	Update Agency Business System Documentation for Segment II	01/29/24	04/12/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	528	Update Agency Business System Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress		OITS, Remediation strategy has been discussed, approaching remediation with Segments I, II, III, and IV jointly.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/16/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress		Business Areas (FSS, HR, Budget, Revenue, FCO)		
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/13/25	Sue Davis	Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission		Courtney Howell		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/13/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/07/25		Submission Complete	02/17/25
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/13/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/16/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				

Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/14/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/04/25		Submission Complete	02/04/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/13/25		Submission Complete	03/14/25
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress		Matt Brock, Rick Owen		
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress		Matt Brock, Rick Owen		
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress		Matt Brock, Rick Owen		
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress		Matt Brock, Rick Owen		

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 208</p> <ul style="list-style-type: none"> Business Process Groupings = 10/13 <p>Identified Subject Matter Experts = 32</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Implementation:</p> <p>Impacted Agency Business Processes = 52</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10/13 Planned Spreadsheet Uploads = 16 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Implementation:</p> <p>Business Systems Planned for Integration = 23</p> <p>Planned Interfaces = 25</p> <ul style="list-style-type: none"> Inbound Interfaces = 6 Outbound Interfaces = 19 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

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	FL PALM's inclusion of Speed Keys, particularly with Enterprise Applications, can support current business processes that utilize Expansion Option with front end processing.	Open	6 (High/Medium)	Mitigate. Adjust documentation where needed. If Speed Keys are not adopted such that they can support "front end processing" for "splits" then a new application must be made to act as a front end to conduct those operations.	Continue to gather information MFMP implementation of Speed Keys. Continue to Monitor Risk.	07/01/24	Quantrel Johnson
People Processes Technology	Risk of not completing system development/remediation by deadline for interface testing approval, potentially resulting in exclusion from PALM end-to-end testing at a future date.	Open	6 (High/Medium)	Avoid. Establish aggressive development milestones Increase development resources Weekly progress monitoring Early interface testing preparation Prioritize critical system components Regular communication with PALM project team Mock up files as if they were coming from our apps, for completion of April/May testing	Adjusted to reflect Amendment 12.	02/28/25	Quantrel Johnson
People Processes Technology Data	Cutover date from FLAIR to PALM not formally established	Open	6 (High/Medium)	Mitigate. Continue to engage with PALM contract to obtain meaningful and timely schedule for cutover. Establish "roughed-in" and anticipated cutover date and build agency plan around this expectation.		01/15/25	Project Management Team
Processes Data	Potential for inaccurate or inconsistent mapping of organizational codes during transition from FLAIR to PALM, affecting financial tracking, reporting, and departmental accountability.	Open	6 (High/Medium)	Mitigate. Conduct a Comprehensive audit of existing FLAIR org codes. Documentation of mapping logic and decisions. Stakeholder validation of crosswalk methodology		11/20/24	Agency and Business Liaisons
People	Project Manager/Agency Liaison Turnover	Open	4 (Medium/Medium)	Mitigate. Ensure project approach and status are well-documented.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson

Data	Incomplete/Improper Data Cleansing Activities	Open	4 (Medium/Medium)	Avoid. Continue data cleansing activities, otherwise UAT testing with the data sets will produce unexpected and inaccurate results.		07/15/24	Project Management Team
Processes Technology Data	Incomplete/Improper Current State Analysis	Open	4 (Medium/Medium)	Mitigate. Due to change in implementation strategy and change in stakeholders, avoiding inconsistencies in current state analysis is unlikely. Remediation must take place when and where appropriate.		07/15/24	Project Management Team
People Processes Technology Data	Out-of-balance prioritization of PALM with other business processes	Open	4 (Medium/Medium)	Mitigate. Work with business units to develop work management plan to ensure adequate distribution of personnel resources across competing priorities. Involve SMEs frequently in discussion of interface systems to ensure mapping of existing FLAIR chartfields to PALM chartfields. Engage Agency Liaison and Sponsor as necessary to set priorities for business system managers		02/28/25	Agency and Business Liaisons
People Processes	Potential delays or complications in obtaining federal approval for transition of GRANTS remediation/replacement when interfacing with Florida PALM versus current FLAIR system. This may impact federal grant management and reporting capabilities.	Open	4 (Medium/Medium)	Mitigate. Early engagement with federal stakeholders Detailed documentation of PALM-GRANTS interface specifications Parallel testing of both systems during transition Regular status updates to federal authorities Contingency planning for extended approval timeline		11/20/24	Agency and Business Liaisons
People	Operational Management Turnover - Key Personnel	Open	3 (High/Low)	Accept. Work to document business processes and roles for the impact of a sudden or unexpected departure.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson
People	Operational Staff Turnover - Key Personnel	Open	2 (Medium/Low)	Accept. Work to document key personnel knowledge and specific operational processes in the event of a sudden or unexpected departure.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson
People	Financial Leadership Distraction by competing priorities	Open	2 (Medium/Low)	Avoid. Engage stakeholders in a constant dialogue regarding the status and direction of the Project.	Growing interest in prioritizing PALM implementation ahead of UAT.	11/20/24	Quantrel Johnson
People Processes	Incomplete/Improper UAT planning and execution	Open	2 (Medium/Low)	Avoid. Build user stories that accurately represent current business processes so that users are aware which processes to test against PALM and enterprise systems. Ensure a time management plan for SMEs so that a testing/work balance can be achieved.		07/22/24	Project Management Team
People Processes	Not enough time for training before go live.	Open	2 (Medium/Low)	Mitigate. Continue to promote the importance of prioritizing the PALM transition at a level equal to or greater than performance of legacy business processes.	Adjusted to reflect Amendment 12.	02/28/25	Agency Liaison
People	Project Staff Turnover	Open	2 (Low/Medium)	Accept. Ensure project staff responsibilities are well defined and documentation is up-to-date	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson
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.	06/18/24	Quantrel Johnson
People	Project Sponsor Turnover	Open	1 (Low/Low)	Accept. Ensure sponsor commitments and operational plans are well documented and rationale is well established.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson
People	Operational Management Turnover - General	Open	1 (Low/Low)	Accept. Ensure job-specific processes are documented and generic enough to permit retraining of new incoming staff.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson
People	Department Leadership Turnover	Open	1 (Low/Low)	Accept. Monitor political developments as they unfold, and adapt as needed.	None. Continue to Monitor Risk.	06/18/24	Quantrel Johnson

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. (See attachments)	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	On going pending SpeedKey and other conversation with Enterprise applications	DCF is revisiting as plans for remediating internal applications for PALM. Several overtures have been made to PALM RA to communicate functional impacts to DCF processes and requesting one or more sessions with PALM technical and DFS F&A staff regarding DCF concerns.	01/01/26	Joan Davis
Processes Technology Data	DCF's journal distribution process	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	As DCF is moving forward with reviewing and updating processes, we have several concerns related to the journal distributions which is a critical business process in DCF. We have sent the related concerns to the PALM team, conversations are ongoing. Several of our updates are dependent on the concerns being addressed.	Given information provided, DCF team has concluded there are 2 viable options: building a front end application to perform front end splits or utilize Speed Key functionality (amongst PALM and Enterprise Applications) to simulate splits. Further conversation will be had post Segment 4 as of 8/20.	07/01/25	DCF team
Processes	Budget Funding Process since PTAXX cannot be loaded in FACTS.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Develop alternate budgeting process for TANF processing that estimates and budgets revenue per year.		07/01/25	Revenue and Budgeting Team
Processes	MFMP to PALM interface will not support more than 100 splits per invoice line item, some of our Collocated expenditures are expected to split to at least 500 lines, directly impacting our ability to utilize that enterprise business system.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Restructure invoices and implement manual processing in the short term Develop intermediate processing systems and request interface enhancements in the medium term System integration improvements and potential accounting structure redesign for the long term		07/01/26	DCF Team
Technology	Joint strategy to pursue applications development for Segments I-III will result in tasks being considered late.	Open	Low - All impacts not listed as Critical or High	Tasks relating to applications development/remediation will be late as we're working all segments simultaneously, to conclude with the end date of Segment IV remediation.		07/01/25	Project Team

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 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.

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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DCF Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Chad Barrett	chad.barrett@myffamilies.com	03/13/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DEM
- Readiness Workplan

DEM Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Jeremy Smith

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.35%

- Submitted On Time = 29
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 97.38%

- Submitted On Time = 54
- Submitted Late = 10
- Pending Resubmission = 0

Direct Task Completeness:

Score = 100.00%

- Submitted Complete = 30
- Submitted Incomplete = 0
- Completed After Submission = 0

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 39
- Submitted Incomplete = 0
- Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/30/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/15/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/28/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/20/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/12/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/04/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 36</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 16</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 41</p> <ul style="list-style-type: none"> Related Business Process Groupings = 12/13 Planned Spreadsheet Uploads = 3 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 5</p> <p>Planned Interfaces = 11</p> <ul style="list-style-type: none"> Inbound Interfaces = 4 Outbound Interfaces = 7 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

DEM Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Data	If life to date balances are not transferred either as a datum or as a concept between FLAIR grant tracking and PALM project costing then a system of balance tracking processes will need to be built to managed life to date reporting, meaning process complexity will be added to the Finance team	Open	6 (Medium/High)	The FDEM Finance team is building it's reporting effectiveness to increase the agility of building reporting structures to the necessary level to meet this challenge	No Change	10/31/24	Michael Braun
Technology Data	If the PALM interfaces do not cover all required data elements as currently engaged by DEMES to FLAIR connections, then either the elements will need to be accessed via the data warehouse or DEMES will need to be changed to interact correctly with the new PALM structure, meaning cost will be added to the DEMES development project.	Open	6 (High/Medium)	DEMES development assets have been onboarded to the PALM project to project any issues that may arise and attempt to port all elements of PALM on top of the FLAIR structure	No Change	10/31/24	Michael Braun
People Processes Data	EOG and DEM interfaces and elements are under the same OLO umbrella. Could lead to increased lead time in access aspects of processes or reporting confusion when summarizing agency workload	Open	2 (Medium/Low)	Working directly with Kelley Sasso in EOG to put process agreements in place.	Still need to monitor, reduced probability due to good relationship with EOG/Kelley Sasso	08/28/24	Michael Braun
Processes Technology	If the payroll processes built in PALM cannot support the needs of the FDEM Payroll team, then the payroll system currently managed by FDEM IT may need continuing support meaning the Payroll process may become more complex/expensive	Open	2 (Medium/Low)	Highlighting Payroll within UAT as an important module with downstream impact so we can quickly close or escalate this risk	No Change	10/31/24	Michael Braun
Processes Technology	Many projects related to DEM incidents are built by an enterprise business system Florida PA. If the Florida PA development team is not aware of the inbound and outbound Project information interface needs the process of creating projects related to an incident may become more complex	Open	1 (Low/Low)	Will socialize with Florida PA users and then the poc for those users to ensure the appropriate interface conversation is had	Discussions Begun with Florida PA development Team, Civix, and internal FDEM Management team.	08/01/24	Michael Braun
Processes Data	If stale funds are carried over into the project costing module then the day to day operation of project accounting will increase in complexity meaning the project costing module will create less value for the accounting team	Open	1 (Low/Low)	The budget team in the finance bureau has been tasked with clearing stale funds/project ids out of our system	No Change	10/31/24	Michael Braun
People	If PALM is seen as creating work or uncertainty then the finance team will be unwilling to explore further functionality, meaning the FDEM agency may have trouble with accounting post PALM launch	Open	1 (Low/Low)	Communication about PALM including changes and updates is ongoing, frequent and positively positioned	No Change	10/31/24	Michael Braun
Technology	If FLAIR shuts down before PALM goes live then our business processes will be delayed,	Open	1 (Low/Low)	Request more information from Felecia	No Change	12/26/24	Michael Braun

meaning we may lose effectiveness on PALM rollout as well as day to day business execution

DEM Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	CSFA and ALN values not recognized from FACTS. See Mock Conversion 1 for specifics Grants & Contracts in FACTS affected, 31086 should be active.	Open	Low - All impacts not listed as Critical or High	Discuss the specific expectations with a technical contact	Need to Review Mock Conversion 2 to see if changes were effective	12/17/24	Michael Braun

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.
Technology Data	Connecting to interfaces within PALM will be supported by a request process that is not difficult to navigate AFTER launch	Logged	10/31/24	DEMES; FDEM IT; Slalom Development Team	No change.
Processes	There will be a process to change, add, remove speedkeys after launch. The knowledge center is up to date on exceptions and speedkey expectations.	Logged	10/31/24	Finance;	No change.
Data	The PALM Data Warehouse will be accessible by appropriate agency staff for self service reporting	Logged	10/31/24	DEMES; FDEM IT; Slalom Development Team; Finance	No change.
Processes Data	Project information and OA1 & 2 can be added to PALM if needed for data conversion post Configuration	Logged	02/28/25	Finance	Newly Added
Processes	Budget Year Close will be either done in FLAIR or easily managed in PALM post cutover 6/1/26	Logged	02/28/25	Finance	Newly Added
Processes Technology	FLAIR Shutdown will occur roughly 2 weeks before PALM go-live	Removed	02/28/25	Finance; DEMES	Removed

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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DEM Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Jeremy W. Smith	jeremy.smith@em.myflorida.com	03/06/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DEP
- Readiness Workplan

DEP Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Darinda McLaughlin

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 100%

- Submitted On Time = 32
- Submitted Late = 0
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.77%

- Submitted On Time = 61
- Submitted Late = 1
- Pending Resubmission = 2

Direct Task Completeness:

Score = 99.68%

- Submitted Complete = 30
- Submitted Incomplete = 0
- Completed After Submission = 1

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 36
- Submitted Incomplete = 0
- Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

CCN Composition

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



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	75% - Consolidating/Inputting Information for Submission		DEP's current remediation schedule is prioritized based on the agency business system (ABS) tier. DEP's ABS remediation schedule continues to be adjusted to allow for interface updates posted to the knowledge center. A completion date that correlates to the PALM deadline for the end of March 2025 is anticipated.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		DEP's current remediation schedule is prioritized based on the agency business system (ABS) tier. DEP's ABS remediation schedule continues to be adjusted to allow for interface updates posted to the knowledge center. A completion date that correlates to the PALM deadline for the end of March 2025 is anticipated.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	03/28/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/08/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/08/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	

Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25		Submission Complete
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress			
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/12/25		Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	50% - In Progress			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			

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

Implementation:

- Planned Florida PALM End Users = 151
- Business Process Groupings = 13/13
- Identified Subject Matter Experts = 22

Implementation:

- Impacted Agency Business Processes = 255
- Related Business Process Groupings = 12/13
- Planned Spreadsheet Uploads = 5

Implementation:

- Business Systems Planned for Integration = 31
- Planned Interfaces = 23
 - Inbound Interfaces = 4
 - Outbound Interfaces = 19

Implementation:

Configuration

- Commitment Control (KK)
 - Budget Allotments - Control Option = Option # 3 - Track without Budget
 - Account ChartField Tier Selection = Account Tier #1: Highest
 - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned
- Org Security Rule = Agencywide
- Optional ChartFields
 - OA1 = To Be Configured
 - OA2 = Not To Be Configured
 - PC Category = To Be Configured
 - PC Subcategory = To Be Configured
 - PC Source Type = Not To Be Configured

Conversion

- Optional Conversions
 - Accounts Receivable = Not Needed
 - Assets = Needed
 - Contracts = Needed
 - Customers = Not Needed
 - Encumbrances = Needed
 - Grants = Needed
 - Projects = Needed
 - Projects Balances = Needed

Agency Reported

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

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	Agency business system remediation dates are too close to or past the PALM UAT start date for any meaningful DEP Business System testing to be completed prior to UAT. If DEP business systems are not tested internally prior to PALM UAT, agency data and system issues could result in PALM testing errors.	Open	9 (High/High)	DEP is working to prioritize all changes based on prioritization strategy for the portfolio of ABS applications scheduled for change. As change impacts are clarified and finalized, the remediation dates for these applications will be updated.	DEP will closely monitor progress on remediation of all ABS systems. 12/18/2024 Based on current progress, remediation dates are anticipated to end earlier than originally estimated. 3/10/2025 Due to changes from Amendment 12 DEP is still accessing the impacts.	11/20/24	Steve Waters and Joseph Veretto
Processes Technology Data	PALM reporting information is being provided in a staggered cadence, with many reports dependent on the outcome of the data warehouse design which will extend report definitions and mockup completion into 2025. There is a risk that agency reporting needs	Open	9 (High/High)	DEP will continue to monitor and evaluate report formats as they are made available by PALM to integrate with the existing reporting systems in place for change and usability. Due to the late development and finalization of PALM	This risk will be monitored as more information becomes available. 12/18/2024	11/20/24	Steve Waters and Joseph Veretto

	may not be identified until UAT. Delayed identification of reports needed for PALM could cause additional strain on agency remediation schedules and the ability to provide management reporting needs in time for go-live.			reports, DEP will have to speculate on agency reporting needs that would not be covered by PALM.	DEP is monitoring changes to PALM reports through the knowledge center. DEP is identifying critical reports that PALM will not provide or may be provided in the data warehouse. These reports will be updated in DEP's reporting tool due to uncertainty of the PALM data warehouse. 3/10/2025 DEP continues to monitor changes to PALM reports through the knowledge center. DEP is identifying critical reports that PALM will not provide or may be provided in the data warehouse. These reports will be updated in DEP's reporting tool due to uncertainty of the PALM data warehouse.		
People Processes Technology	Loss of knowledge due to staff turnover.	Open	6 (High/Medium)	Ensure job-specific processes are properly documented, staff are cross trained and backups are trained on processes.	DEP continues to engage the Division/District/Office staff throughout the department and is documenting key business processes to foster knowledge sharing. 12/18/24 DEP has acquired additional staff to address testing and training for planned implementation.3/11/2025 DEP is drafting the agency testing and training plans.	04/01/24	Lydia Griffin & Steve Waters
Processes Technology Data	Due to the way PALM interface, report, and process catalog change entries are referenced by PALM in the version history notes, it is possible for agencies to miss specific changes made to the interface file being referenced. The need to physically check every field for changes in the layout for changes that may have been made but not referenced in the Version history or the version history not having the change documented in a timely manner. The risk to the agency is that a specific change that is not referenced in the Version History or added after the fact may be missed by the agency during analysis of the changes to the Interface file and potentially cause errors during development of the data for the interface.	Open	6 (High/Medium)	DEP has requested to have a column added to the interface file layout with the change narrative and the date that the field was last changed. This would allow for field-level change log documentation and remove any potential human error due to interpretation of the Version History notes where there is another potential opportunity for human error to be introduced. DEP will manually monitor interfaces, reports, and processes on a routine basis to identify and record changes. Documented changes will have to be communicated timely to applicable agency staff as needed in order to reduce impacts to existing planned system and process changes.	DEP has brought this up at the PALM Touchpoint meeting with the Technical PALM liaison on 07/10/2024 and other occasions. DEP has implemented a routine review process to identify and record changes. PALM has added a column to the Interface Catalog in Knowledge Center to capture dates when revisions were made to the interface; however the risk remains at the data element specifications within the version updates. 12/18/2024 There continue to be instances where the revision history updates have not been synced with actual revisions made. This is causing some rework for the agency, and requires this risk to continue to be monitored going forward. 3/10/2025 PALM is now communicating interface changes weekly. There are no updates to how report and process changes are communicated or noted.	11/20/24	Steve Waters and Joseph Veretto
Processes Technology Data	Based on preliminary information about PALM's mock conversion data and configuration processes, agencies will not have access to PALM data files until full UAT in July 2025. Therefore, DEP will have to create sample files or sample data sets to mimic PALM data to test agency business systems and reports. Waiting until July 2025 for full UAT training with PALM files could create testing and remediation delays that would coincide with PALM UAT and agency training efforts.	Open	6 (High/Medium)	DEP will establish a data strategy for testing based on the mock conversion and configuration data submitted to PALM. Additional mock files and data will have to be created where PALM does not have planned conversions. Sample test data will be created by using FLAIR data files mapped to PALM values. DEP will also establish testing scenarios and cases to ensure that transactions are posted correctly to the new Chart of Accounts and verifiable totals possible for new and old transactions based on reporting.	DEP will mimic PALM's data snapshot timing planned for use with the different UAT cycles. 12/18/2024 DEP is identifying the test data and updates that will be needed to test the changes to processes and systems. 3/10/2025 Due to changes from Amendment 12 DEP is still accessing the impacts.	11/20/24	Steve Waters and Bento Eyles
Processes Technology Data	Insufficient time to test PALM and agency business system processes due to shortened testing windows or unexpected changes to functionality is a risk to DEP. Potential changes to PALM testing windows due to project delays or delayed PALM functionality changes would limit the agencies' ability to timely verify processes through PALM and agency testing.	Open	4 (Medium/Medium)	DEP will continue to monitor PALM project schedule changes and potential impacts to agency remediation, testing, and training timelines. These agency activities will be scheduled as soon as possible to reduce potential resource issues from PALM and agency process changes.	DEP will closely monitor progress on any changes affecting impacts to remediation, testing and training activities and milestones. 12/18/2024 PALM's testing timeline was updated to begin interface cycle 2 and UAT online later than originally planned.	11/20/24	Steve Waters and Bento Eyles

						3/10/2025 Due to changes from Amendment 12 DEP is still accessing the impacts.		
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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 continues to facilitate information gathering and identifying financial data impacts. The results will be used for future planning of PALM implementation. 12/18/2024 DEP has acquired additional staff to address testing and training for planned implementation. 3/10/2025 DEP is drafting our testing and training plans.	07/01/25	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

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 *

[Privacy Notice](#) | [Report Abuse](#)

DEP Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Darinda McLaughlin	darinda.mclaughlin@floridadep.gov	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DFS
- Readiness Workplan

DFS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Scott Fennell

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.69%

- Submitted On Time = 31
- Submitted Late = 1
- Pending Resubmission = 0

Other Task Timeliness:

Score = 89.85%

- Submitted On Time = 53
- Submitted Late = 8
- Pending Resubmission = 3

Direct Task Completeness:

Score = 95.81%

- Submitted Complete = 27
- Submitted Incomplete = 0
- Completed After Submission = 4

Other Task Completeness:

Score = 98.29%

- Submitted Complete = 34
- Submitted Incomplete = 0
- Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 16
- Duplicate Filled Role = 6
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Build will not start until design is complete. Build scheduled from August - December 2024. Build is still in progress for two applications using Design Segment I interfaces.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		Build will not start until design is complete. Build scheduled from August - December 2024. Build is still in progress for one application using Design Segment II interfaces.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		Build will not start until design is complete. Build scheduled from August - December 2024. Build is still in progress for one application using Design Segment III interfaces.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25		Submission Complete	
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25	Project made requested changes to SS on 1/16/25.	Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	12/27/24		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/04/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/17/25	RC responded to pending questions on assignment and the SME completed by deadline but didn't inform PM or AL to mark tracker until 2/17 (11am).	Submission Complete	02/24/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/07/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/14/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to	01/06/25	07/25/25	50% - In Progress				

			prepare for Cycle 2 - Technical Interface Testing							
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/11/25	Two Workbooks: 1 for DFS Proper and a second for Treasury 4301	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A	
Direct	Data	568-D	Submit Data Field Mapping	02/03/25	03/14/25	50% - In Progress				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 351 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 45	Implementation: Impacted Agency Business Processes = 481 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 1	Implementation: Business Systems Planned for Integration = 21 Planned Interfaces = 24 - Inbound Interfaces = 8 - Outbound Interfaces = 16	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

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	The loss of CCN resources would constrain current CCN staff capacity and could result in the loss of critical functional and institutional knowledge, which is imperative to the success of the Florida PALM Project.	Open	9 (High/High)	<ul style="list-style-type: none"> Create a knowledge base of CCN operational processes and procedures; develop training methods to facilitate knowledge transfer; and provide cross-training among CCN members where feasible. Use of dedicated back-up CCN Liaisons will aid in the short-term continuity. 	Monitoring	02/19/24	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. A&A is seeking additional FTE through the LBR process with intent to onboard and train within the 	Monitoring	10/11/23	Renee Hermeling

				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. 	Monitoring	10/11/23	Renee Hermeling	
Technology	<p>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.</p>	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. 	Monitoring	10/20/23	Stacey Pollock	
Processes	<p>ENTERPRISE TREASURY: Discussions relating to the status of outstanding warrants at the cutover from December 2025 to January 2026 has not been finalized and could, potentially, have impacts to warrant recipients and reconciliation processes.</p>	Open	6 (High/Medium)	<ul style="list-style-type: none"> Continue to collaborate with the Florida PALM Project on policy relating to outstanding warrants. Potential solutions being discussed between PALM and Treasury including the possibility that warrants would be maintained in FLAIR and concurrently canceled and reissued in PALM while maintaining warrant number. Note that solution is pending approval from Treasury. 	Monitoring	01/25/24	Sarah Pons	
Processes	<p>ENTERPRISE TREASURY: The current Concentration Account contract ends in March of 2026. If a different financial institution is awarded the contract during the procurement process, an implementation will need to occur with Florida PALM. The new bank and all of the subaccounts (currently 550+) will need to be configured in PALM, along with file transmissions, BAI codes, returned item processing, book to bank processing, cash transfer processing, and reconciliation rules. Agencies will be involved in this transition and will need to communicate new depository instructions to their vendors, including Federal agencies. They will also need to receive and distribute new depository supplies to their locations.</p>	Open	6 (High/Medium)	<ul style="list-style-type: none"> Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered. 	Monitoring	12/13/23	Sarah Pons	
Technology	<p>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.</p>	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. 	Monitoring	10/20/23	Stacey Pollock	
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 rollop 	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. 	Monitoring	10/11/23	Renee Hermeling	
People Processes Technology Data	<p>ENTERPRISE TREASURY/Deferred Compensation: Background: As a step 1, Bureau of Deferred Compensation recently launched the Roth deferral type that allows participants to make (Post- Tax) Roth contributions and/ or Pre-Tax contributions to the Deferred Compensation Plan. Since Roth was rolled out without restriction to Catch- up contributions, participants may contribute to both deferral types in any proportion they choose.</p> <p>Current Challenge: As a step 2, beginning in January 2026, the Deferred Compensation Plan will have to implement a new federal regulation that limits 50+ Catch up contributions made to the 457b Pre-Tax deferral type for participants whose prior year FICA wages exceed \$145,000.</p> <p>The federal government has been slow to clarify a few key points, especially applicable for multi- employer plans like ours. The Bureau of Deferred Compensation is committed to determine and communicate exactly what is needed for implementation as soon as possible.</p>	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> The Bureau of Deferred Compensation will make expeditious efforts to get clarity from FEDs. BOSP, OIT, and PALM management will be made aware of all known details and will be updated on further details as soon as they are available. BOSP, OIT, and PALM management will evaluate the information (when made available by Bureau of Deferred Compensation) and will make a conscious effort to assign resources to implement the required changes. Contingency plan will be prepared by Bureau of Deferred Compensation for a scenario in which PALM is unable to implement the changes within the required timeline. 	Risk Assessment still valid and monitoring	07/09/24	Sarah Pons (BOSP/OIT/PALM/DC)	

	<p>Once specified, BOSP, OIT, and PALM will need to be able to implement requested changes to meet this federal regulation deadline, which coincides with the timing of the release of PALM.</p> <p>BOSP, OIT and PALM resources will be needed to implement whatever changes are necessary.</p> <p>Risk Highlight:</p> <p>The risk is that the appropriate resources may not be available to meet the timing of this Federal mandate.</p> <p>Implication:</p> <p>If we do not implement on time we would be required to suspend or terminate the 50+ catchup for ALL participants in our plan.</p>						
Technology	Agency business systems supported by third-party vendors could have different design and build timelines for Florida PALM remediation activities. This could impact the Department's ability to meet the scheduled finish dates for Florida PALM Readiness Workplan tasks related to design, build, and testing activities.	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> • Communicate the Florida PALM timelines with third-party vendors. • Provide information and advisory support to the functional area(s) related to remediation activities and timelines. • Provide advisory support if needed related to interfaces, interface field mapping, and possible functional changes. 	Monitoring	02/27/24	Stacey Pollock
Processes	ENTERPRISE TREASURY: Relating to CMA, expenditures for agency covered programs will need to be tracked in PALM by CFDA number so clearance patterns can be calculated. Agencies will be responsible for providing the PALM chartfields for their covered programs and PALM will need to track the expenditures for those account codes. Clearance patterns will have to be calculated by CFDA Number for CMA reporting.	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> • Continue to collaborate with the Florida PALM Project and seek resources through staff augmentation, additional FTE, or contracts as needs are discovered. 	Monitoring	12/13/23	Sarah Pons
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. 	Monitoring	10/20/23	Stacey Pollock
People	ENTERPRISE A&A: <ul style="list-style-type: none"> • All bureaus within the division will have significant process changes. • 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. 	Monitoring	10/11/23	Renee Hermeling
People Processes Technology Data	ENTERPRISE A&A: A&A serves all other agencies, therefore our processes are at risk from external impacts: <ul style="list-style-type: none"> • Agencies – All A&A processes are downstream of agency processes. Agencies may lack their own training and resources for proper preparation. If agencies are not ready for implementation, this will cause significant issues for A&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. • Project – There may be changes in Project directions or decisions that negatively affect A&A that would cause an increase of time and resources or provide confusion and lack of clarity among A&A's expectations. • Government/Florida Statutes/Regulations – Any potential changes to laws, regulations, or elected officials could change Project direction or restrict A&A's operations. 	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 determine training needs for skills that will be needed in Florida PALM users. • Participate with all FFMS and Enterprise partners to ensure remediation, testing and change management needs are understood and acted upon. • Assist agencies with readiness tasks such as data analysis and cleansing. • Develop contingency plans for agencies that are not prepared for Florida PALM implementation. • Monitor activities, changes in rules and regulations, and agencies competencies. • Establish contingency plans as risks become more probable (as information becomes available) and communicate those changes as quickly and clearly as possible. • 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. 	Monitoring	10/11/23	Renee Hermeling
People Technology Data	A&A is responsible for several enterprise business systems, some of which are interdependent. Testing each system through the entire process, from start to finish, will be critical to determine success. This will require testing to be synchronized according to the interdependencies and workflow. Failure to do so could result in functions not being appropriately tested. This risk is really meant to address the issue around the complication of staging multiple business systems and the data within them for testing. This requires a huge effort and an	Open	4 (Medium/Medium)	<ul style="list-style-type: none"> • Identify all enterprise business systems that will need to be tested. • Work with Division/Office management to allow dedicated technical and functional resources to be available for enterprise business systems testing efforts when the UAT timeline is released. • We plan to work through the CCN Network with other agencies on planning and collaboration that needs to happen for those cross agencies testing scenarios. 	Monitoring	10/08/24	Renée Hermeling / Don Hurst

misalignment of data, or refresh dates, can impact testing results, or the ability to test processes.
 Both Interface Testing and User Acceptance Testing can be impacted.
 It has potential to impact, or delay go live if agency enterprise systems cannot be fully tested in the allotted time.
 The enterprise owners and systems impacted includes STMS, PeopleFirst, PCard Works, FACTs, LASPBS, and other critical agency business systems that interface with Florida PALM.

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	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	Assumption is still valid.
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	Assumption is still valid.

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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DFS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Scott Fennell	scott.fennell@myfloridacfo.com	03/06/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DJJ
- Readiness Workplan

DJJ Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Heather DiGiacomo

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 97.59%

- Submitted On Time = 24
- Submitted Late = 5
- Pending Resubmission = 0

Other Task Timeliness:

Score = 86.46%

- Submitted On Time = 45
- Submitted Late = 19
- Pending Resubmission = 0

Direct Task Completeness:

Score = 89.64%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 6

Other Task Completeness:

Score = 98.97%

- Submitted Complete = 37
- Submitted Incomplete = 0
- Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/03/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	01/15/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/10/25		Submission Complete	
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/03/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25		Submission Complete	02/07/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/12/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	02/03/25
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/17/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25	Sponsor submitted confirmation 3/10/25.	Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	100% - Submitted	03/07/25			

People

The staff and stakeholders affected by your agency's

Processes

The sequence of procedures to accomplish a business

Technology

The applications or tools used to process, track, or report

Data

Information used in or produced from an agency's

Implementation:

Planned Florida PALM End Users = 57

• Business Process Groupings = 12/13

Identified Subject Matter Experts = 30

Implementation:

Impacted Agency Business Processes = 107

• Related Business Process Groupings = 12/13

• Planned Spreadsheet Uploads = 1

Implementation:

Business Systems Planned for Integration = 22

Planned Interfaces = 6

- Inbound Interfaces = 1

- Outbound Interfaces = 5

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 2 - Track with Budget

- Account ChartField Tier Selection = Account Tier #1: Highest

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• **Org Security Rule = Agencywide**

• **Optional ChartFields**

- OA1 = To Be Configured

- OA2 = To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = To Be Configured

Conversion

• **Optional Conversions**

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Not Needed

Agency Reported

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

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	Budget schedule conflict between UAT and LBR deadline.	Open	6 (Medium/High)	When developing the testing schedule, the Budget Office will need to go first so that an appropriate amount of time is dedicated to both UAT and the LBR due 9/25/25; The agency's LBR schedule started earlier this year due to prepare for this.	Further analysis is needed to better understand how the new UAT timeline will impact this schedule.	10/28/24	PMO/Budget
People Processes	Limited staff resources for business units during end user UAT due to competing priorities and vacant positions.	Open	6 (High/Medium)	OPS positions are being created and will be used in F&A and General Services to support agency operations so that managers can focus on PALM-related initiatives including UAT.	No changes for this period.	11/25/24	F&A, Budget, General Services, HR, PMO
People	If DJJ loses quality staff, then the agency may be at risk of losing historical knowledge.	Open	6 (High/Medium)	Encourage SMEs to document and archive their job functions and business processes to allow for swift training and knowledge transfer; Continue to advertise to recruit for vacant positions; Continue to allow for management decisions that support personnel actions to retain qualified employees.	Updated Mitigation/Response Strategy	12/03/24	BU Chiefs
People Processes Technology Data	Shortened UAT time could impact the completion and quality of UAT	Closed	6 (High/Medium)	Aggressive UAT testing with additional resources.	Resolved due to the additional 2 months of UAT.	02/28/25	Sponsor
People Processes Technology Data	FLAIR @ DJJ is an agency system that staff rely on to pull financial information and to conduct research. When PALM goes live, FLAIR @ DJJ will only maintain financial historical information; it will not be remediated to incorporate PALM financial information. Because of this, users will need to rely on untested PALM and Data Warehouse reports for their duties, potentially leading to challenges.	Open	6 (High/Medium)	SMEs to work with Agency Liaison to ensure that all related financial reports and research information are documented and tested during UAT.	No changes for this period.	02/10/25	Bureau Chiefs and SMEs (excluding HR)
Technology	Limited number of testing data has been provided by the Project, leaving interface testing to be done with many assumptions as opposed to testing with real test files.	Open	6 (High/Medium)	Test remediations during interface testing period.	Add during this period.	02/28/25	IT
People	If adequate training is not provided to end users, then the quality of testing during UAT may be impacted.	Open	4 (Medium/Medium)	The Project will provide training to SMEs so they can effectively train end users	No changes for this period.	12/03/24	BU Chiefs
Processes	DJJ does not have a current process in place to document physical construction work in progress (WIP). With Florida PALM, this process is built in and must be used for tracking WIP.	Open	4 (Medium/Medium)	Agency staff work together to establish a process and develop an understanding of how current capitalization will work in PALM.	No changes for this period.	02/07/25	Chiefs of General Services, Budget and F&A
People Processes Technology Data	Assigned tasks not accurately completed.	Open	3 (High/Low)	Submissions will be checked by another PALM Administrator/Agency Liaison prior to submission; associated SME's and PALM administrators will be invited to attend task talks at the beginning of the task.	No changes for this period.	11/15/24	Chiefs (Budget, F&A, GS, HR)
Data	Data cleansing activities not properly maintained which could lead to inaccurate, incomplete, or errors in data being transferred to Florida PALM.	Open	3 (High/Low)	Concerted effort required to ensure data cleansing completed accurately; biweekly meetings with bureaus to discuss ongoing data cleansing and/or process improvements efforts continues.	This will remain a risk on the log, but with low probability at this time.	11/15/24	BU SMEs, BU Chiefs (excluding HR)
People Technology	With limited staff resources, F&A is currently managing a heavy workload of disbursements due to ABS failure in the last quarter of FY 2023-24. If F&A is unable to process the backlog of outstanding invoices to bring the agency to managing the standard workload	Open	3 (High/Low)	Hire and engage staff to help clear work backlog and bring disbursements to standard workload.	Keeping as a risk at this time and reducing to 'low probability'. Backlog is being continuously monitored. The additional time prior	02/28/25	F&A Bureau Chief

agency in managing the vendor's needs, SMEs may not have time for adequate participation in UAT.

The additional time prior to the start of UAT as well as length of UAT may resolve this risk.

DJJ Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Positions within pertinent bureaus remains high which may have an impact on staff involvement in UAT preparation and involvement.	Open	Low - All impacts not listed as Critical or High	Bureaus will continue to advertise and fill vacancies.	With the extension of go-live, vacancies within the bureaus primarily responsible for preparing for and conducting UAT may still have an impact if positions cannot be filled. Bureau Chiefs and PMO need to further discuss and address this issue to ensure it's being documented accordingly. Decreased priority from High to Low due to the extension.	07/31/25	Bureau Chiefs of Finance and Accounting, Budget, General Services, HR, Contract Procurement and Administration (BPCA), Contract Management (BCM), and Project Management Office (PMO).

DJJ Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes Data	Chart of Account (COA) will not change beyond what the FL PALM team has forecast	Logged	08/01/23	Marcia Hays	No change for this period.
People	All SMEs will be available to work on required PALM-tasks, as needed.	Logged	04/17/24	All	No change for this period.
Technology	Software licenses will be available for PMO staff to manage the project.	Logged	04/17/24	Godfrey Ekata, Rhett Pinelo	PM has not received the Software license for Microsoft Projects.
People	DJJ PMO can drive the implementation of the PALM Project with four team members.	Logged	12/03/24	PMO	PMO is 50% staffed during this reporting period.
People	There is a commitment from end users to the PALM Project.	Logged	04/23/24	All	Based on the results of the end-user survey, the End-User stakeholders are 53% committed. Additional action steps are in place to increase the commitment of the project within the agency.
People Technology	PALM funding is maintained at the current level or greater allowing current BU-specific PALM administrators to be kept on staff.	Logged	04/23/24	PMO, F&A, General Services, Budget	DJJ anticipates receiving the same amount of funding to continue operations at the same level for FY2025-26.
People Processes Technology	There will be sufficient engagement from DJJ's SME's who are knowledgeable about agency business processes.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, Grants, Revenue	No change for this period.
People Processes Technology	The PALM team will provide sufficient and adequate guidance to DJJ.	Logged	04/23/24	F&A, Budget, General Services, HR, Contracts, PMO	PALM's Readiness Coordinators have proven to be adequate and responsive resources for questions and assistance when needed.
Processes Technology Data	DJJ's IT/PALM Technical liaisons will understand and document the current state of its technical architecture and business systems.	Logged	04/23/24	IT	No change for this period.
Processes Technology Data	DJJ's IT/PALM Technical liaisons will remediate agency business systems so that current business practices can be continued when Florida PALM goes live.	Logged	04/23/24	IT	No change for this period.
Technology Data	The Payment Detail Report (APR032) will provide all necessary information so that it can be used in place of printing payment pages for upload into Axiom Pro.	Logged	12/18/24	F&A	Working with Image API (Axiom Pro) to determine best way to remediate this 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

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DJJ Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Heather DiGiacomo	heather.digiacom@fldjj.gov	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DLA
- Readiness Workplan

DLA Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Sabrina Donovan

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.06%

- Submitted On Time = 29
- Submitted Late = 3
- Pending Resubmission = 0

Other Task Timeliness:

Score = 91.08%

- Submitted On Time = 53
- Submitted Late = 8
- Pending Resubmission = 3

Direct Task Completeness:

Score = 88.75%

- Submitted Complete = 19
- Submitted Incomplete = 1
- Completed After Submission = 12

Other Task Completeness:

Score = 85.83%

- Submitted Complete = 23
- Submitted Incomplete = 0
- Completed After Submission = 13

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 10
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission		The file format has been identified and provided to Business Unit for Remediation.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		The file format has been identified and provided to Business Unit for Remediation.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	25% - Beginning Initial Internal Meetings and Information Gathering		The file format has been identified and provided to Business Unit for Remediation.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/17/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/04/25		Submission Complete	
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/14/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/24/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/24/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/07/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/14/25		Submission Complete	02/05/25
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/12/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	Pending Resubmission	02/26/25	3/7/25 RC: Update Mapping to Florida PALM Location Code missing for row 106. Guidance is to map to a default	Submission Incomplete	

N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25	value, note in comments to add the needed value the next config iteration.	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25				Submission Complete
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 26</p> <ul style="list-style-type: none"> Business Process Groupings = 12/13 <p>Identified Subject Matter Experts = 10</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 67</p> <ul style="list-style-type: none"> Related Business Process Groupings = 11/13 Planned Spreadsheet Uploads = 8 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 8</p> <p>Planned Interfaces = 11</p> <ul style="list-style-type: none"> Inbound Interfaces = 2 Outbound Interfaces = 9 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

DLA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Technology	Loss of technical CNN participant	Open	9 (High/High)	Backup technical CNN participant will need to take lead role. IT will be recruiting for replacement staff to support Finance & Accounting functions.	Position is still vacant. 04/23/2024 position is still vacant	02/26/24	Sabrina Donovan
Processes Technology	Changes to project scope potentially impacts agency planned mitigation.	Open	9 (High/High)	Review BPM's for changes to workflows to identify potential impacts to agency solutions, interfaces and processes.	Review continues 04/23/2024 this is a continuing risk.	03/11/24	Sabrina Donovan
People Processes Technology Data	PALM Interfaces are not been fully developed on time for UAT scheduled for July 2025.	Open	9 (High/High)	Onboarding additional developer resources will ensure interface development will be ready for UAT. 02/26/2025 Developer got selected and will be onboarded after the BGC results.	New Risk	12/20/24	Sabrina Donovan
People Technology	Technical Documentation: Lack of technical knowledge and/or documentation related to business systems and interfaces being impacted by the project.	Open	4 (Medium/Medium)	Staff Aug business analyst to assist with gathering requirements.	Staff aug has been on-boarded, but is still becoming familiar with agency and the project. Additional staff aug will begin 03/25/2024. 12/20/2024- We are still pending on additional developer.	03/11/24	Sabrina Donovan

DLA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes Technology	Reengineer FLAIR accounting interfaces to Florida PALM.	Open	Critical - Impacts the ability of the agency to	Engage technical CNN participation to review data formats and interface options to determine optimal	Continuing issue. 04/23/2024 - this is a	04/14/25	Sabrina Donovan

			move forward with work without resolution	solution.	continuing issue.		
People Processes Technology	Software Integration Issues: Planned software integration may not work as expected, leading to re-design and re-work.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Engage technical CNN participation in design workshops and UAT.	Continuing issue. 04/23/2024 - this is a continuing issue.	04/14/25	Sabrina Donovan
Processes	Need ability to make corrections to closed reporting period	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option	new issue moved from risk-I don't think this has a resolution. 04/23/2024 - still need to understand the transaction correction process in Florida PALM.	04/14/25	Darlene Faris
Processes Data	No Single Payer Interface for VANext in PALM for remediation	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option from PALM.	New. 11/12/2024 - DLA anticipates the use of Single Payer for VANext individual claimants, consumer restitution and refunds. 12/20/2024- A&A has not set a policy on approval process. 2/18/2025 Agency provided response to DFS request for what we need single pay for on.	04/14/25	Sabrina Donovan
Processes Technology	Approval seeking on batch upload to Import process for supporting documents	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	If there is no project solution it will require considerable staff effort to complete the supporting docs	12/20/2024- No resolution on supporting documents and A&A policy has not been set for support documents. 02/26/2025 It is still outstanding.	04/14/25	Sabrina Donovan
Processes Technology	The recent decision to begin UAT on July1 will have an adverse impact on fiscal year close out and opening a new fiscal year and thats critical.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need PALM funding to support F&A consultants that will perform the duties of F&A FTEs during UAT.	Outstanding issue-10/31/2024. It's a continuing concern-12/20/2024. 02/26/2025 We understand that there is a contract amendment to modify the dates but no official notification.	04/01/25	Steven Ritacco
Processes Data	DFS approval to use single pay option for consumer restitution payments and refunds.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Need a solution option from PALM.	2/18/2025 Agency provided response to DFS request for what we need single pay for on.	07/31/25	Sabrina Donovan
People	Availability of Finance & Accounting SMEs: Due to workload and competing priorities SMES may not be available. This may result in extending the overall schedule, and adding cost to the budget.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	When the staff aug business analyst is engaged, interviews will need to be scheduled to minimize work disruption.	Scheduling of Segment IV workshops coincides with year-end activities, resulting in reduced availability. 04/23/2024 - this is a continuing issue.	04/14/25	Sabrina Donovan

DLA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments or Updates
Processes	processes will require modification to accommodate new roles	Logged	09/07/23	Finance & Accounting		no change
Data	data field changes will impact systems	Logged	09/07/23	Finance & accounting, VANExt, EGrants, SQL reporting		no change
People Processes Technology Data	Final build is complete and available for UAT and Interface Testing	Logged	12/20/24	Finance & accounting, VANExt, EGrants, SQL reporting		New

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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DLA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Sabrina Donovan	sabrina.donovan@myfloridalegal.com	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DMA
- Readiness Workplan

DMA Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Col. Adam Curry

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.33%

- Submitted On Time = 28
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 98.77%

- Submitted On Time = 58
- Submitted Late = 6
- Pending Resubmission = 0

Direct Task Completeness:

Score = 90.34%

- Submitted Complete = 19
- Submitted Incomplete = 0
- Completed After Submission = 10

Other Task Completeness:

Score = 87.50%

- Submitted Complete = 29
- Submitted Incomplete = 1
- Completed After Submission = 10

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 2
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	Pending Resubmission	02/24/25	Will update as soon as the Quickbooks replacement has been tested and complete.	Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	12/19/24	No Final ABS Documentation Complete Column on spreadsheet.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/21/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25					
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/13/25		Submission Complete	01/13/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25					
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/24/25		Submission Complete	03/05/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/18/25		Submission Complete	02/24/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	12/30/24	Agency sponsor confirmed for Nov-Dec 24 but it is listed as Oct-Nov 24	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/24/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/19/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/04/25		Submission Complete	02/04/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/04/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/11/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/04/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-O	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 26 • Business Process Groupings = 10/13 Identified Subject Matter Experts = 12	Implementation: Impacted Agency Business Processes = 24 • Related Business Process Groupings = 13/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 6 - Inbound Interfaces = 3 - Outbound Interfaces = 3	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Not Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

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 Processes Technology Data	Testing of Quickbooks replacement program interface with PALM	Open	6 (High/Medium)	Must ensure that we test the system prior to go-live scheduled in Apr/May timeframe.	Jan/Feb	02/24/25	Kevin Creech

DMA 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	Start planning process for 2-3 week downtime of system when FLAIR converts to PALM	Open	High - Impacts the ability of the agency to meet deadlines or milestones	DMA Staff must plan and implement downtime process necessary for the potential FLAIR offline due to conversion to PALM.	Sep/Oct 24 - Continue to monitor	07/31/25	Kevin Creech
Processes Data	Lump sum payment made for multiple items that become Assets: a. FLAIR allows these payments to be utilized into Assets by the Asset tag and cost per item. b. Palm allows these payments to be utilized into Assets by dividing the total costs by the total assets averaging the costs per unit rather than by the true costs.	Open	Low - All impacts not listed as Critical or High	Cost averaging is ok if every asset has the exact same cost but there are many assets purchased together where the costs are completely different. This will result in inaccurate asset valuations. Example would be a skid steer with multiple attachments.	Sep/Oct 24 - Continue to monitor	02/28/25	Brad Bowman
Processes Data	FLAIR Pending table vs PALM staging table	Open	Low - All impacts not listed as Critical or High	a. FLAIR allows for pending items to be deleted. If payments are made for assets that fall outside the threshold of property by State and Agency requirements. These can be deleted. b. Palm allows for the pending item to be skipped but its can never be deleted.	Sep/Oct 24 - Continue to monitor	02/28/25	Brad Bowman
People Processes Technology Data	Quickbooks replacement go-live will be prior to PALM go-live. Potential changes may occur in PALM which would require changes to be made to the Quickbooks program.	Open	Low - All impacts not listed as Critical or High	Ensure that DMA tracks any changes in PALM that would affect any changes to Quickbooks replacement program. Have a contingency PO in place to fund changes to Quickbooks replacement program.	Feb 24 - Continue to monitor	07/31/25	Kevin Creech

DMA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Processes	Changing of ARRO file format	Logged	03/05/24	Agency has concern about potential file changes that will be required from ARRO without ..	Jan/Feb

People Processes Technology Data	A downtime plan for FLAIR will be in place prior to the conversion to PALM.	Logged	07/31/25	missing any bi-weekly payrois. All agency business systems	Mar/Apr 24
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Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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DMA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	COL Adam Curry	adam.m.curry.mil@army.mil	03/04/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DMS
- Readiness Workplan

DMS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Lance Dyal

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.67%

- Submitted On Time = 29
- Submitted Late = 1
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.62%

- Submitted On Time = 57
- Submitted Late = 7
- Pending Resubmission = 0

Direct Task Completeness:

Score = 85.52%

- Submitted Complete = 18
- Submitted Incomplete = 1
- Completed After Submission = 10

Other Task Completeness:

Score = 91.58%

- Submitted Complete = 33
- Submitted Incomplete = 0
- Completed After Submission = 5

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 9
- Duplicate Filled Role = 6
- Vacant Role = 1

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/13/25	DMS: Updates will be ongoing.	Submission Complete	01/13/25
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		Jan 24: Agency Training Plan Survey submitted.		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25	Met with PALM 01-13-25. DMS Agency Sponsor confirmed direction for 567-B on 01-14-25. Tasks 541-C and 567-B need to be confirmed in order for 567-J to be unlocked. Jan 20: J is complete.	Submission Complete	01/24/25
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25	Met with PALM 01-13-25. DMS Agency Sponsor confirmed direction for 567-B on 01-14-25. Tasks 541-C and 567-B need to be confirmed in order for 567-P to be unlocked. Jan 20: P is still in progress. Feb 14: Received a zero error report. Task 541-C is also complete - must be unlocked by PALM for resubmission.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/30/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/30/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/25/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/30/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/13/25	March 11: Sheet has been properly revised and is considered complete for this task.	Submission Incomplete	03/11/25

N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/11/25	March 11: DMS PALM Sponsor has approved the dashboard.	Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 68</p> <ul style="list-style-type: none"> Business Process Groupings = 12/13 <p>Identified Subject Matter Experts = 55</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 75</p> <ul style="list-style-type: none"> Related Business Process Groupings = 11/13 Planned Spreadsheet Uploads = 4 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 5</p> <p>Planned Interfaces = 13</p> <ul style="list-style-type: none"> Inbound Interfaces = 6 Outbound Interfaces = 6 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Needed Projects Balances = Not Needed

Agency Reported

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

DMS Risks								
Sheet Name	Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
DMS Risks	People Processes	Risk of User Acceptance Testing (UAT) failure. Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction. Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training.	Open	9 (High/High)	Feb 19: Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail to create the UAT tests. UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.	Logged Feb 19, 2025	02/19/25	Stephen Russell
FRS Risks	People Processes Technology Data	Retiree payroll warrants and EFTs (approximately \$12 billion per year for 472,000+ payees) not being processed timely and/or accurately. Currently, because we are using the accounts payable module, instead of a payroll module, we may not be able to schedule payrolls with a specific timing. We may not be guaranteed that the payments will be made timely, or the checks will be printed prior to the pay date. • Pay dates for Retired Payroll is set a year in advance. After going through an approval process, these dates are sent to DFS every year before December prior to the year beginning. (Payroll schedule attached.) o This may need to be adjusted on the fly for natural disasters.	Open	9 (High/High)	Going through confirming requirements, build an acceptable design, extensive testing - especially formal parallel testing to ensure everything is running properly for several cycles. Working with PALM to get more information to better define the programming needs.	2023-09-22 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-13 - Updated Impact Rating to (3) High and Probability Rating to (2) Medium 2024-12-19 - Updated Probability Rating to (3)	09/22/23	Division of Retirement / Megan Biederman

		<ul style="list-style-type: none"> o Pay date for Retired Payroll is the last business day of every month, as required by statute (F.S. 121.091(1), F.S. 121.091(3), and F.S. 121.091(4)). o Florida PALM needs to be responsible for scheduling changes or adjustments. • We believe we can make this work using the Accounts Payable (AP) module, however, this could be an extremely human driven and coordinated process, if this cannot be pre-established with supplemental and monthly fixed dates. • Of other known retirement systems, none process benefit payments through Accounts Payable (AP) modules. • Potential Options: <ul style="list-style-type: none"> o Have a direct interface with the state disbursement bank (currently JP Morgan) (this is how other states function). o Third Party sending bank files to and from our state disbursement bank account. o Build the AP module around our pay cycle. (Supplemental and Monthly) 				High and added additional language to the description to better clarify why the risk has intensified.			2025-02-21 - No change.
DMS Risks	People Processes Technology Data	The requirement of Speedkeys for transactions can pose a problem for several of our enterprise systems. If the speedkeys are still hardcoded and unable to be changed once entered there is an additional risk of user error both on the entry of the speedkey and the selection.	Closed	6 (Medium/High)	<p>This topic was recently brought up in our monthly PALM Touchpoint with the DMS RC. DMS is seeking additional information on requirements.</p> <p>Workshop in Sept 2024 will address this along with a required RW Task.</p> <p>Oct 23: This task has been completed and submitted for Payroll and Pcard. There will be another opportunity to review and edit.</p> <p>Dec 18: New task will provide an opportunity to review and edit prior to UAT and Go Live.</p> <p>Feb 19: Task 567-P addressed this risk.</p>	<p>Logged April 25, 2024</p> <p>Reviewed again Aug 28, 2024. Edits made.</p> <p>Oct 23: No change. Continuing to monitor.</p> <p>Dec 18: No change. Continuing to monitor. Review date TBD. Hardcoding no longer an issue.</p> <p>Feb 19: Closed.</p>	02/19/25	Finance and Administration / Eric Thiele	
DMS Risks	Processes Technology Data	Developing test plans before the system is available will limit test coverage.	Open	6 (Medium/High)	<p>Have test bed available prior to UAT execution.</p> <p>Oct 23: UAT Plan currently in development to address this. Waiting on PALM to provide more info.</p> <p>Dec 18: No change. Continuing to monitor.</p> <p>Feb 19: No change. Continuing to monitor and address via tasks.</p>	<p>Logged Oct 9, 2024.</p>	10/09/24	OIT / FMS	
DMS Risks	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.	Open	6 (High/Medium)	<p>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> <p>Dec 18: Key staff are required to do fiscal year end close out. Also required to participate in UAT and Training activities. Attempting to mitigate this risk with staff augmentation.</p> <p>Feb 19: Staff augmentation has been onboarded for this fiscal year.</p>	<p>Logged April 27, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2, 2023 and closed.</p> <p>Reviewed again Dec 18, 2024 and reopened.</p> <p>Reviewed again Feb 19, 2025.</p>	12/18/24	Finance and Administration / Eric Thiele	
DMS Risks	People Processes Technology Data	Functionality. Will PALM deliver the functionality needed for DMS operations?	Open	6 (High/Medium)	<p>Develop a testing plan. Use the PALM Sandbox environment.</p> <p>Functionality assessment in progress. Sandbox environment is approved for a limited number of DMS employees.</p> <p>PALM is addressing this risk.</p> <p>June 20: PALM is requiring that agencies create and implement their own testing plans. That initiative is in planning.</p> <p>Oct 23: Implementation plan in development. UAT plan is in progress.</p> <p>Dec 18: Still evaluating interface requirements in light of new business requirements. UAT plan will address this and is in progress.</p> <p>Feb 19: In progress. Evaluating training needs and requirements. Timeline has not been officially confirmed for testing activities. TBD.</p>	<p>Logged April 26, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2 - no change.</p> <p>Reviewed again Dec 20 - no change.</p> <p>Reviewed again April 24, 2024. Re-opened. Continuing to monitor.</p> <p>Reviewed again June 20, 2024. Edits made. Continuing to monitor.</p> <p>Reviewed again Aug 28, 2024. Continuing to monitor.</p> <p>Oct 23: No change. Continuing to monitor.</p> <p>Dec 18: Remediation in progress. Continuing to monitor.</p> <p>Feb 19: Continuing to monitor.</p>	02/22/24	Finance and Administration / Stephen Russel	
DMS Risks	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)	<p>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>	<p>Logged April 26, 2023. Reviewed again September 6, 2023.</p> <p>Reviewed again Nov 2 - no change. Continuing to monitor.</p> <p>Reviewed again Dec 20 - no change. Continuing to monitor.</p> <p>Reviewed again Feb 22 - no change. Continuing to monitor.</p> <p>Reviewed again April 24, 2024. No change.</p> <p>Reviewed again Aug 28, 2024. No change.</p> <p>Oct 23: No change. Continuing to monitor.</p> <p>Dec 18: No change. Continuing to monitor.</p> <p>Feb 19: No change. Continuing to monitor.</p>	11/02/23	Finance and Administration / Sandy Watson	

FRS Risks	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. Retirement needs to be able to go negative in specific funds, not all funds have been approved that are required to be able to go into negative cash balances. Specifically fund 70500 (need to invest Health Insurance Subsidy (HIS) and Investment Plan (IP) Investment Vouchers need to post even if the fund is negative in cash), other funds needed were previously approved. The current process has allowed us to keep loss of earnings at a minimum, however, if the process is changed and we are unable to go negative and must wait on funds to be available to transfer funds to Investment Plan (IP) member accounts we will be forced to pay more loss of earnings which would negatively effect the Florida Retirement System (FRS) Trust Fund.	Open	6 (High/Medium)	Programming needs to be completed to allow for flexibility so funds can be released timely. Continue to work with the PALM team.	Continuing to monitor. 2023-11-6 - Logged 2023-12-20 - No change. 2024-02-09 - No change. 2024-04-19 - No change. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Updated description and mitigation/response strategy to give more details. Raised the probability rating. 2025-02-21: Need to meet with PALM to get more information on the process, this is still a risk and it has not yet been resolved.	11/07/23	Division of Retirement / Megan Biederman
FRS Risks	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)	Plan for report identification and testing. Verify reports are available.	2023-11-6 - Logged 2023-12-20 - No change. 2024-02-09 - No change. 2024-04-19 - No change. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - No change. 2025-02-21 - No change.	11/07/23	Division of Retirement / Megan Biederman
FRS Risks	People Processes Technology Data	Any significant change to existing Retiree payroll, EFT processing (EFT processes, including payment information for retirees, pre-noting, bank account changes, EFT returns, stop payments, etc., not being automated or not being processed timely and/or accurately), BOSP retirement reporting, and/or interface files between IRIS and FLAIR could require substantial programming and lead time.	Open	6 (High/Medium)	Going through confirming requirements, build an acceptable design, extensive testing. Clearly define processes, make sure no interfaces are missed - all designs/build/tests are accounted for. Some items have a work around, some do not - unknown solution at this time. The only option would be to create online entries manually in Florida PALM. Working with PALM to get more information to better define the programming needs.	2022-02-17 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-13 - Updated Impact Rating to (3) High and Probability Rating to (2) Medium 2024-12-19 - Updated language in description and mitigation/response strategy to include language from closed Issue #3. 2025-02-21 - No change.	02/17/22	Division of Retirement / Megan Biederman
DMS Risks	People Processes Technology Data	Functionality. Will Agencies have enough time to work in the sandbox environment to ensure their respective divisions can test and see if the current work they perform in FLAIR can be achieved in the PALM Environment? If time is limited and a required field is missing, will there be enough time for it to be fixed and re-tested prior to the January 2026 go live date?	Open	4 (Medium/Medium)	Roll out sandbox test capabilities as sections are completed for Agencies to test. Sandbox environment is not secure for testing - PALM needs to work on true test environment. Sandbox status has not changed. PALM is addressing this risk. Aug 8: This remains a risk until UAT goes into production. Waiting on a status update from PALM on how the sandbox will function during UAT.	Logged April 21, 2023. Reviewed again September 6, 2023. Reviewed again Nov 3, 2023. Mitigation notes updated. Reviewed again Dec 15, 2023. No change. Continuing to monitor. Reviewed again Feb 2 2024. No change. Continuing to monitor. Reviewed again April 24, 2024. No change. Continuing to monitor. Reviewed again June 20, 2024. No change. Continuing to monitor. Reviewed again Aug 8, 2024. No change. Continuing to monitor. Reviewed again Aug 28, 2024. No change. Expect to monitor more closely during UAT activities.	11/03/23	Division of State Group Insurance / Jason Ottinger

						Oct 23: No change. Continuing to monitor. Reviewed again Dec 18, 2024. No change. Expect to monitor more closely during UAT activities. Feb 20: No change. Continuing to monitor. This will be addressed as the DMS UAT develops.		
PF Risks	People Processes Technology	With development happening in multiple systems held by multiple organizations, schedule variance in different areas can have unforeseen impacts on People First development. If developments become too out of sync, it could cause issues with productivity and the ability to pass stage gates successfully.	Open	4 (Medium/Medium)	People First is on schedule and anticipates continuing to be in lock step with the project timeline well before the next stage gate. Team has hired a project manager with primary focus on ensuring People First maintains PALM readiness. Additionally, People First will be adding significant staff augmentation to assist us.	Logged June 28, 2024	06/28/24	Michael Livingston / Tony Lloyd
PF Risks	People Processes Technology Data	Late discovery of defects, requirements changes, or any other event that could cause redevelopment for People First could strain resources on the People First team and our vendor.	Open	4 (Medium/Medium)	PALM and People First teams will continue to meet weekly to collaborate on testing timelines and will add additional meetings on special topics as needed. We are continuing to refine our parallel testing schedule to ensure that we have time built into the schedule for development. People First will continue to send functional design documents to the PALM team to review and provide feedback to minimize surprises during development.	Logged September 9, 2024	09/09/24	Michael Livingston
PF Risks	Technology Data	In order to meet testing dates, the People First team will need to start UAT using the three agencies' data that we already have as PALM cannot commit to providing additional data until the end of March.	Open	4 (Medium/Medium)	Although we are starting with three agencies, we can load new agencies as we get them if PALM is able to provide. We can't reload agencies that we've loaded in the past, however. PF has reached out to PALM to get access to DOE, FSDB, DOT, DCF, FDC, and DOR records to ensure we have the test cases that we need. Due to timeline, we accept that we will need to test with the data that we have. However, we are analyzing the data we do have to determine what test scenarios we are missing. We can load additional data as we have it - and may need to pressure PALM to provide what they have when they have it.	Logged 2/11/24	02/28/25	Michael Livingst
FRS Risks	People Processes Technology Data	Unknown risks due to changes to major statewide systems during modernizations. (Example: Changes to HR Class Code System, Changes to People First System)	Open	4 (Medium/Medium)	Solution is continued information sharing and communication with PALM team and Retirement. As well as adhering to the Retirement reporting format. Continuing to monitor Class Code implications by being aware of what is coming out of HR regarding class codes.	2023-11-6 - Logged 2023-12-20 - Updated mitigation. 2024-02-09 - No change. 2024-04-19 - Class Code System changes could create high impact for Retirement Interface Files. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Added clarification in Response Strategy. 2025-02-21 - No changes here, unsure what is to come. Continue to monitor as stated.	11/07/23	Division of Retirement / Megan Biederman
STMS Risks	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)	Identify impacted users and trainings that will be offered, to coordinate a DMS training schedule. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20, 2023. No change. Continuing to monitor. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again June 12, 2024. No change. Reviewed again on Sept 10, 2024. No change. Reviewed again on Oct 29, 2024. No change. Reviewed again on Dec 18, 2024. Reviewed again on Feb 24, 2025. No change.	11/06/23	STMS / Casey Taylor
FRS Risks	People Processes Technology Data	Bureau of State Payrolls' (BOSP) reporting and payment of contributions to the Division of Retirement for both the FRS and optional retirement plans not being completed timely and/or accurately.	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. In the process of working through the design with PALM. No work around except using the existing payroll system.	2022-02-17 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No	02/17/22	Division of Retirement / Megan Biederman

						change. 2024-12-19 - Confirmed this risk is still valid and ratings are appropriate. 2025-02-21 - No change.		
FRS Risks	People Processes Technology Data	Upload of revenue accounting transactions from the Division's business system (IRIS) to PALM not being processed timely and/or accurately. This risk includes the timely and accurate posting of revenues in PALM. (These transactions record the receipt of retirement contributions of approximately \$6 billion per year.) If this risk happens, Retirement would not be able to receive the revenue and be able to invest (loss of earnings) and allocate to employer's accounts (the delay will affect allocations to balance the retirement reports which will delay posting of contribution data in IRIS which delays funds transfers to Investment Plan member accounts which may result in loss of earnings. If the employer submitted timely and the delay is on Retirement, the loss of earnings could be assessed to Retirement).	Open	3 (High/Low)	Going through confirming requirements, build an acceptable design, extensive testing. The risk would be on IRIS - would be able to take information from the Department of Revenue website and manually enter, reconcile, and adjust in IRIS. Completed everything regarding strategy, need to test in UAT.	2022-02-17 - Originally entered. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - Updated description to added more detail. 2025-02-21 - Learning more about the process, confirm that the probability rating is still low. No other changes.	02/17/22	Division of Retirement / Megan Biederman
PF Risks	Processes Data	The need for parallel testing will increase the complexity of operations. Data will need to be maintained in a new environment and the legacy environment and could lead to inconsistencies.	Open	2 (Medium/Low)	Parallel testing meetings Scheduled for August 2024 to ensure that the needs of PALM project team align with the current processes implemented by People First team and vendor. In addition, People First team has brought in a full-time project manager so that the team can maintain PALM readiness and continue day to day operations without sacrificing either.	Logged June 28, 2024	06/28/24	Michael Livingston / Tony Lloyd
PF Risks	Processes Technology Data	Testing for PALM includes multiple success criteria. To be successful, People First will need to test payroll parallel to production payroll. But we will also need to test interfaces, conversions, and end user testing of changes within People First and our agency interfaces / reports. Scheduling must align with PALM schedules and environments will need to be refreshed at multiple intervals. We currently are limited in testing environments, so schedule management is key.	Open	2 (Medium/Low)	People First team is crafting a change order to add 5 additional environments during the PALM testing period. This will allow us to build contingencies into the testing schedule to accommodate any schedule creep. This will also allow us to hold production data from the first payroll run in 2025 until PALM's environment is built to run parallel testing of payroll. Along with Amendment 12, the PALM schedule has extended its testing period, which should mitigate the complexity of testing for People First (in conjunction with enhanced environment management).	Logged 10/28/24	02/28/25	Michael Livingston
STMS Risks	People Technology	Functionality. Inability to design new STMS user interface for creating vouchers.	Open	2 (Medium/Low)	Provide training in PALM for creating vouchers so that we can attempt to replicate the process and minimize confusion for users in both systems. Provide information about flat files with information required to build vouchers in STMS and confidently pass combo edit checks using the PALM Combo Edit Check API. Meetings with PALM have been initiated. Still early in the process. Close to resolution; will review next cycle.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Dec 20 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again July 12, 2024. Likely resolution next cycle. Reviewed again Sept 10, 2024. Design sessions are in process. Reviewed again on Oct 29, 2024. Design/development in process. Reviewed again on Dec 18, 2024. Design/development in progress. Reviewed again on Feb 24, 2025. Design/development in progress. Likely resolution next cycle.	11/06/23	STMS / Casey Taylor
STMS Risks	Technology Data	Interface. Inability to design flat file transfer process.	Open	2 (Medium/Low)	Provide information about when and where flat file data will be provided and how it will be accessed. Meetings with PALM have been initiated. Still early in the process.	Logged Sept 8, 2023. Reviewed again Nov 6, 2023 - no change. Reviewed again Feb 29, 2024. Continuing to monitor. Reviewed again April 24, 2024. No change. Reviewed again July 12, 2024. No change. Reviewed again Sept 10, 2024. No change. Reviewed again Oct 29, 2024. Development and testing in progress. Reviewed again on Dec 18, 2024. Development in progress. Reviewed again on Feb 24, 2025. Ready for integration testing to confirm solution.	11/06/23	STMS / Casey Taylor
STMS Risks	Technology Data	Functionality. Inability to design user interface to	Open	2 (Medium/Low)	Provide information about the Speed Key interface, as well as training about how agencies will be using it in	Logged Sept 8, 2023.	12/19/23	STMS / Casey Taylor

		accommodate Speed Keys instead of Expansion Options			<p>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>CCN and Enterprise Partners are currently collaborating.</p> <p>Close to resolution; will review next cycle.</p>	<p>Reviewed again Nov 6, 2023 - no change.</p> <p>Reviewed again Dec 19, 2023 and closed.</p> <p>Reviewed again and reopened April 24, 2024.</p> <p>Reviewed again July 12, 2024. Likely resolution next cycle.</p> <p>Reviewed again Sept 10, 2024. PALM team is providing additional details on speed keys 9/11/24. Likely resolution next cycle.</p> <p>Reviewed again Oct 29, 2024. Development in progress.</p> <p>Reviewed again on Dec 18, 2024. Design/development in progress.</p> <p>Reviewed again on Feb 24, 2025. Design/development in progress. Shared design mockup to agencies during webinar.</p>	
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DMS Issues								
Sheet Name	Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
DMS Issues	People Processes Technology Data	Risk of User Acceptance Testing (UAT) failure. Current scheduled readiness tasks require agencies to have created their testing and training plan for all business processes without knowing or seeing the manual procedures in PALM to perform the business process transaction. Under this situation, DMS is unable to create a detailed enough test and training to ensure successful end user training.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	<p>Feb 19: Based on discussions with PALM in the touchpoint meeting, PALM will create "process steps" that will provide the needed detail create the UAT tests.</p> <p>• UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.</p>	UAT success will be depended on PALM publishing the "process steps" in time to be utilized by the agencies for UAT plans.	03/28/25	Stephen Russell
STMS Issues	Technology Data	Error while testing web service connection.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PALM Team is troubleshooting the connection issue and will schedule a meeting for resolution when available.	<p>Reviewed again on Dec 18, 2024. PALM team will contact us with an update when available.</p> <p>Reviewed again on Feb 24, 2025. No change.</p>	11/08/24	PALM
DMS Issues	Processes	MIP interfaces selected may not be 100% remediated without testing.	Open	Low - All impacts not listed as Critical or High	<p>Could be manually resolved with more manpower, but would want to make changes to interface selection and possibly the interfaces themselves to account for missing / unknown elements.</p> <p>Oct 23: Confirmed interfaces. MIP has updated and automated internal FLAIR reports. Next steps are in progress - id data fields that need to be integrated with MIP and PALM.</p> <p>Feb 19: Reconfirmed interface selections. Potential interfaces are selected, but may not be initially required.</p>	<p>If we mark "Remediation Complete" on the PALM Smartsheet, does that preclude us from making changes once testing starts?</p> <p>Reviewed again Aug 28, 2024. No change. Continuing to monitor.</p> <p>Oct 23: Continuing to monitor.</p> <p>Dec 18: Continuing to monitor. Some remediation complete and some still in progress. Process mapping in progress.</p>	01/15/25	OIT / Production Support / John Ross

						Feb 19: Continuing to monitor.		
DMS Issues	People Processes	The majority of the DMS End Users are new to DMS. An even larger percentage have held their current jobs at DMS for less than 5 years.	Open	Low - All impacts not listed as Critical or High	Consistent monitoring, training and follow up. Regular communication, meetings, and increased involvement in the project Readiness Workplan Tasks.	This issue was logged as low priority because half of the DMS End Users have worked for the state for over 15 years. The remainder have been in the state system for between 6 and 15 years. DMS End Users as a whole are familiar with and have worked in PALM, counteracting their short time with DMS and / or in their current position. These numbers represent minimal risk to the project. Reviewed again Aug 28, 2024. No change. Continuing to monitor. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor. Staff augs have been briefed and risk level is minimal to date. Feb 19: No change. Continuing to monitor.	01/30/26	Lance Dyal / Eric Thiele
FRS Issues	People Processes Technology Data	Business System (IRIS) upgrade is happening at the same time as the PALM implementation. This impacts resources and a new system, with new screens and interfaces.	Open	Low - All impacts not listed as Critical or High	Testing and training in advance - plan to be developed.	As long as we can produce an accurate accounting file and benefit payroll file, and process the incoming state retirement file from BOSP, as well as the information transferred between IRIS and PALM is correct. 2024-02-09 - No change. 2024-04-19 - No change. 2024-06-18 - No change. 2024-09-04 - No change. 2024-10-25 - No change. 2024-12-19 - No Changes 2025-02-21 - No Changes.	12/01/25	Florida Retirement System / Megan Biederman

DMS Assumptions

Sheet Name	Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
DMS Assumption	People Processes Technology Data	Decreased timeliness and staff familiarity with the new PALM system prior to go live. Unforeseen vacant positions in key role areas will have an effect on over utilization on staff not familiar with PALM in general.	Logged	09/07/23	Logged by: State Group Insurance / Jason Ottinger All DMS PALM end users are impacted.	Start PALM training on new system and UAT testing as soon as possible. Ensure units have backup staff trained along with primary staff early on to be able to continue with PALM functions in the Division. Reviewed again on Dec 27. No change. Reviewed again on Feb 2, 2024. No change. This assumption is directly related to the risk associated with the Sandbox. Reviewed again April 24, 2024. No change. Intend to address this general assumption in more detail with the End User Survey Analysis. Reviewed again Aug 8. No change. Reviewed again on Aug 28. No change. Oct 23: No change. Continuing to monitor. Dec 18: No change. Continuing to monitor. Some staff aug is now in place. Feb 25: Continuing to monitor.
FRS Assumption	Data	The State Retirement file from Bureau of State Payrolls (BOSP) will contain all of the same data elements that it currently contains, the reporting will function as it currently does, and Retirement will continue receiving the same information from People First.	Logged	08/28/24	Bureau of Enrollment and Contributions, IRIS	2024-10-25: Worked with PALM, they confirmed the file properties will be the same, however, leaving open until testing. 2024-12-19: Reviewed, no changes. 2025-02-21: Reviewed, no changes.

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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DMS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lance Dyal	lance.dyal@dms.fl.gov	03/11/25

FRS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Kathy Gould	kathy.gould@dms.fl.gov	02/24/25

MFMP Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Tyler Brown	tyler.brown@dms.fl.gov	03/03/25

PF Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Tony Lloyd	tony.lloyd@dms.fl.gov	02/28/25

STMS Status Report Confirmation

Reporting Period	Enterprise Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Casey Taylor	casey.taylor@dms.fl.gov	02/28/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOAH
- Readiness Workplan

DOAH Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Megan Silver

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.64%

- Submitted On Time = 27
- Submitted Late = 1
- Pending Resubmission = 0

Other Task Timeliness:

Score = 92.46%

- Submitted On Time = 57
- Submitted Late = 4
- Pending Resubmission = 3

Direct Task Completeness:

Score = 97.78%

- Submitted Complete = 25
- Submitted Incomplete = 0
- Completed After Submission = 2

Other Task Completeness:

Score = 95.43%

- Submitted Complete = 31
- Submitted Incomplete = 0
- Completed After Submission = 4

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		DOAH only has Axiom Pro software as a Agency Business System. DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		DOAH only has Axiom Pro software as a Agency Business System. DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress		DOAH only has Axiom Pro software as a Agency Business System. DOAH and several other agencies are collaborating regarding the mapping and rewrite of Axiom Pro. DOAH has been conversing with Image API (owners of Axiom Pro Software) and they are working on reconfiguring how to pull vouchers from FLAIR to PALM.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/06/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/06/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/06/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				

		Interface Testing							
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/19/25		Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/04/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/12/25		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 11 • Business Process Groupings = 11/13 Identified Subject Matter Experts = 9	Implementation: Impacted Agency Business Processes = 26 • Related Business Process Groupings = 6/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 1 Planned Interfaces = 1 - Inbound Interfaces = 0 - Outbound Interfaces = 1	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = Not To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

DOAH Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	If Axiom Pro is not reconfigured for UAT, accountants will be unable to test and verify the functionality of the application with FL PALM..	Open	6 (High/Medium)	Agency Liaison will collaborate with other agencies and Image API to ensure the reconfiguration is completed prior to UAT. Agency Liaison will request status updates from Image API to ensure timeliness of end product.	Agency Liaison is meeting with Image API on March 3rd to discuss the reconfiguration of Axiom Pro software.	11/07/24	Patricia Kenyon
People	If resources are not fully trained to do their jobs, go-live will continue but DOAH will not be ready for go-live.	Open	3 (High/Low)	DOAH will work with the PALM team to ensure staff's capabilities to function in PALM by attending meetings to keep abreast of new information. Have affected staff participate in testing PALM. Have affected staff participate in all training activities provided. SMEs have participated in Segment III and IV meetings.	Agency Liaison has integrated PALM awareness discussion during staff meetings. Accounting staff members are actively participating in completing PALM tasks. Accounting staff have been shown the PALM Knowledge Center and have reviewed the information regarding their business processes as updated by Segment updates. CCN and SMEs and future end users are participating in preparing for UAT	07/05/23	Patricia Kenyon

People	The staff's previous experience with system implementations may lead to low or lack of engagement in transitioning to the new financial system.	Open	2 (Medium/Low)	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. SMEs and future end users will participate in Segment IV meetings and meet regularly to discuss PALM implementation in designated meetings so the conversation is focused.	Agency Liaison has integrated PALM awareness discussion during accounting staff meetings. Accounting, Budget and HR staff are assisting with completing PALM tasks. DOAH future end users have been introduced to the FL PALM Knowledge Center. CNN Members, SMEs and end users are engaged in preparing for UAT activities.	08/28/24	Patricia Kenyon
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DOAH Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	DOAH's HQ location is being relocated by June 30, 2025. All staff working on PALM related activities are impacted by this move.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Management and Staff will communicate regarding prioritizing tasks. Staff will use time blocking to ensure tasks are being addressed and focused on meeting deadlines.	Staff are focused on prioritizing activities and keeping their supervisors informed on statuses.	06/30/25	Patricia Kenyon
People	Staff Member (Contract Manager) retiring October 31 who prepares invoices for review/approvals.	Open	Low - All impacts not listed as Critical or High	Transition plan to hire new staff member with overlap time in order for the retiring staff member to train the new staff member.	Manager is reviewing contract manager's duties and responsibilities for job advertisement.	10/31/25	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 perform their assigned function proficiently in PALM on Go Live Date	Logged	09/08/23	End Users	Agency Liaison is working with DOAH's CCN members to complete readiness tasks and provide awareness of PALM activities and resources to impacted stakeholders. End Users have been provided awareness of FL PALM's Knowledge Center to review individually and during staff meetings as well as through emails. End users (SMEs) are working with CCN to develop User Stories for the UAT.
Technology	Axiom Pro Application will be reconfigured to pull the vouchers in PALM by UAT	Logged	10/31/24	End Users	Agency Liaison will meet with Image API on March 3rd to discuss reconfiguration steps for the Axiom Pro software.

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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DOAH Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Megan S. Silver	megan.silver@doah.state.fl.us	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOE
- Readiness Workplan

DOE Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Suzanne Pridgeon

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Task Completeness:

Score = 95.67%

- Submitted On Time = 28
- Submitted Late = 1
- Pending Resubmission = 1

Other Task Timeliness:

Score = 89.08%

- Submitted On Time = 53
- Submitted Late = 7
- Pending Resubmission = 4

Direct Task Completeness:

Score = 81.07%

- Submitted Complete = 15
- Submitted Incomplete = 1
- Completed After Submission = 12

Other Task Completeness:

Score = 83.94%

- Submitted Complete = 23
- Submitted Incomplete = 3
- Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 11
- Duplicate Filled Role = 5
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress				
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	10/18/24	Documentation is still in progress. To be completed the according to the rubric, the documentation must be completed.	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24	Test cases has not been identified yet.	Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
Direct	Data	555-C	Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001)	11/08/24	12/06/24	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/16/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/19/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/12/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				

		Implementation Schedule, Risks and Issues									
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 124</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 13</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 132</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10/13 Planned Spreadsheet Uploads = 8 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 14</p> <p>Planned Interfaces = 13</p> <ul style="list-style-type: none"> Inbound Interfaces = 5 Outbound Interfaces = 7 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

DOE 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 Data	The testing schedule and related details have not been sufficiently outlined	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
People Technology Data	The potential time constraints in communicating our requirements to vendors.	Open	9 (High/High)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	No status change	06/25/24	Project Manager
Processes Technology Data	Significant delay in receiving the technical requirements	Open	6 (High/Medium)	DOE will continue to communicate with PALM team as much as possible to facilitate the need information.	Quicker response time has lowered the risk level.	06/25/24	Project Manager
People Processes Technology Data	<p>A potential risk for the TraQ application not being ready for User Acceptance Testing (UAT) is the possibility of incomplete functionality or unresolved bugs. If critical features are not fully implemented or existing issues have not been addressed, it can lead to:</p> <ol style="list-style-type: none"> Delays in Project Timeline: UAT is a crucial phase, and if the application isn't ready, it can push back the overall project schedule, affecting subsequent phases such as deployment and user training. Increased Costs: Remediation efforts to fix issues identified during UAT can lead to unexpected costs, particularly if extensive changes are needed or if additional resources are required. User Dissatisfaction: If the application does not meet user expectations during UAT, it can result in negative feedback, eroding user confidence and satisfaction, which may impact future adoption. Reputational Damage: Failing to deliver a functional product on time can harm the organization's reputation, especially if stakeholders or customers are relying on the 	Open	6 (High/Medium)	<p>Clear Communication: Maintain Transparent Communication with Stakeholders about timelines, potential risk and the importance of maintaining the project schedule.</p> <p>Risk Management Plan: Create a comprehensive risk plan to outline potential risk and the impacts on the application and the timeline of the project.</p>	New Risk	12/13/24	Application Owner

	application for critical business operations. 5. Compliance Risks: If the application is intended to meet specific regulatory or compliance standards, not being ready for UAT could lead to non-compliance issues, resulting in legal or financial repercussions.						
People Processes Technology	Applications (FLAGS, Deposit, Indirect Cost and PARS) Missing Remediation and UAT Due to Resource (Programmers/Developers) Constraint Risk 1: Applications Not Remediated Before Go-Live -Description: Critical applications may not be fully remediated, leading to potential failures, security vulnerabilities, or non-compliance with regulations post-launch. - Impact: High – Could result in operational disruptions, financial losses, and damage to reputation. - Likelihood: Medium – Resource constraints are common, but proactive measures can reduce this risk. Risk 2: Missing User Acceptance Testing (UAT) - Description: Inadequate UAT can lead to undetected defects and user dissatisfaction, resulting in a product that does not meet user needs or expectations. -Impact: High – Can lead to significant rework, increased costs, and user resistance to adopting the solution. - Likelihood: Medium – UAT is often deprioritized under resource constraints. Risk 3: Delay in Project Timeline - Description: Both remediation and UAT delays can extend project timelines, affecting overall delivery and stakeholder satisfaction. - Impact: Medium – Extended timelines can lead to increased costs and resource contention. - Likelihood: High – Delays are likely if remediation and UAT are overlooked. Summary By actively identifying and addressing the risks associated with applications not being remediated and missing UAT due to resource constraints, Agency can take proactive measures to mitigate potential impacts. Implementing prioritization, effective resource allocation, and streamlined processes will enhance the likelihood of successful project outcomes despite challenges.	Open	6 (High/Medium)	Risk 1: 1. Prioritization of Applications: Assess and prioritize applications based on criticality and impact. Focus remediation efforts on the highest-risk applications first. 2. Resource Allocation: Identify and allocate resources from less critical projects or consider temporary hires/contractors to bolster the team. 3. Phased Rollout: Consider a phased rollout approach where non-critical features are delayed to allow for necessary remediation. 4. Regular Progress Reviews: Implement weekly check-ins to monitor remediation progress and adjust resources as needed. Risk 2: 1. Engage Stakeholders Early: Involve key stakeholders early in the process to identify critical functionalities that must be tested. 2. Simplified UAT Processes: Streamline UAT processes by reducing the scope to focus on core functionalities, allowing for quicker testing cycles. 3. Utilize Automated Testing Tools: Implement automated testing tools to supplement manual UAT efforts, increasing efficiency. 4. Schedule UAT in Phases: Conduct UAT in phases aligned with sprint cycles to ensure continual feedback and reduce the backlog of testing. Risk 3 1. Clear Timeline Management Use project management tools to visualize timelines and set clear milestones. 2. Buffer Periods: Incorporate buffer periods in project schedules to accommodate potential delays. 3. Transparent Communication: Maintain open communication with stakeholders about potential risks and delays, managing expectations effectively.		02/07/25	DOE Leadership
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 10/01/2024 This risk will remain throughout the project	10/03/23	DOE Management
People Technology	Limited communication between the business and IT team (there is no daily communication or stand up for the project team (anyone working on PALM)). If all communication has to go thru the PPM Pro system, it could cause delay in the flow of communication, systems to miss functionality, the project to fall behind and miss the go-live date.	Open	4 (Medium/Medium)	Business team will place more tickets into PPM Pro to increase the communication between the two sides.	Risk remains for future task but has escalated to an issue.	10/27/23	Project Manager
Data	loss of data could affect audit information.	Open	4 (Medium/Medium)	Pending	No update - 10/11/2024	02/14/24	DOE
Data	Incorrect invoice or missed invoices	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
Technology Data	Double or no payment to vendors at the time of implementation	Open	4 (Medium/Medium)	Create a manual checking system for implementation.	New Risk - UAT will help the determine if the level of risk moving throughout the Project.	02/14/24	DOE
People Processes Data	Slow response time from PALM can/will affect the decision-making process and time. The delayed response can delay push back DOE schedule remediations.	Open	4 (Medium/Medium)	PM will work with RC's to acquire information as quickly as possible to prevent any delays on DOE side.	Updating the risk due to the new risk that has been identified. 10/01/2024 The quicker response by PALM have lowered the risk level.	05/30/24	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	Testing will discover any deficiencies. 10/01/20/24 This risk remains current	07/04/23	DOE IT
Processes Technology	Change in Financial payment may result in payment delays.	Open	3 (High/Low)	DOE will perform testing to ensure processing with DFS.	No update-10/11/2024	01/12/24	DTI and Aware technical teams
People Processes Technology Data	The project is heavily reliant on one individual (Matt Kirkland) who possesses the primary knowledge of the business applications. If this individual becomes unavailable (due to illness, departure, or other reasons), there is a risk of project delays, errors, and reduced efficiency in resolving technical or operational challenges. Impact: -Delays in project timelines due to the lack of expertise available to address critical issues. -Reduced quality of deliverables due to incomplete understanding of business applications. -Increased operational and knowledge transfer costs if the individual exits or is unavailable. -Potential for project failure in critical phases where the knowledge is essential.	Open	3 (High/Low)	1.) Knowledge Sharing: Implement regular knowledge-sharing sessions to distribute expertise among team members. 2.) Documentation: Develop comprehensive documentation for business applications, ensuring critical knowledge is stored and accessible. 3.) Cross-Training: Train other team members to create redundancies in expertise. 4.) Backup Plans: Establish a clear plan for knowledge transition and business continuity. 5.) Mentorship Programs: Pair the individual with a mentee who can gradually acquire similar expertise. By addressing this risk proactively, the project can reduce its dependency on a single resource and ensure continuity.	New Risk Assessment	11/22/24	DOE Leadership
Data	Missing Agency Business Systems - Task 326 not all systems recognized.	Open	2 (Medium/Low)	DOE PALM Team will continue to interview staff for any additional systems and work it DOE IT to determine if remediation is needed for PALM	Task has been submitted to PALM. If additional systems are	07/13/23	DOE PALM Team

					discovered, DOE will revisit the task.		
					10/01/2024 No new system has been identified.		
People Technology	Vendor available and cost could delay the project.	Open	2 (Medium/Low)	Agency will communicate with vendor as often as possible to ensure timely processing.	No update - 10/11/2024	01/30/24	AWARE Team

DOE Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Lack of technical resources for the project. - No dedicated staff for the project.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Executive team place staff	RFQ for Technical Business Analysis have been submitted	10/01/23	DOE Executives
People Technology Data	Task 519 remediation phase 1 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	No update as of 10/11/2024	12/02/24	PM/DTI
People Processes Technology Data	Task 531 remediation phase 2 not being met due to limited department IT resources and reliance on timely vendor involvement. Department has not complete remediation system redesign specs and has not started any recoding of business systems for remediation to PALM. Completing remediation to meet PALM testing deadline in 7 months is very unlikely without having IT staff dedicated full time to remediation tasks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	PM is working for DTI to develop a strategy to speed up the process of starting remediation.	New issue	12/02/24	PM/DTI

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 update coming	

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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DOE Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Suzanne Pridgeon	suzanne.pridgeon@fldoe.org	03/12/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOEA
- Readiness Workplan

DOEA Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Teresa Johnson

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 96.54%

- Submitted On Time = 22
- Submitted Late = 4
- Pending Resubmission = 0

Other Task Timeliness:

Score = 65.16%

- Submitted On Time = 32
- Submitted Late = 29
- Pending Resubmission = 2

Direct Task Completeness:

Score = 92.31%

- Submitted Complete = 21
- Submitted Incomplete = 0
- Completed After Submission = 5

Other Task Completeness:

Score = 87.18%

- Submitted Complete = 34
- Submitted Incomplete = 3
- Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	25% - Beginning Initial Internal Meetings and Information Gathering		Temporary staff has been hired to manage PM related tasks.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	01/31/25	Working with SMEs to resubmit by month's end.	Submission Incomplete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	01/31/25	Working with SMEs to resubmit by month's end.	Submission Incomplete	
N/A	People	535	Update Workforce Readiness Plan	06/17/24	08/02/24	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	01/31/25	Working with SMEs to resubmit by month's end.	Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/21/24	DOEA does not have any business systems interacting with FLAIR and will not have any business systems interacting with PALM.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	11/21/24	No business systems affected by the PALM implementation that need to have their documentation updated.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/31/25	Confirmed with TJ and SMEs that all documents are ready for submission.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	100% - Submitted	01/31/25	Confirmed with SMEs that this task could be marked and mapping was completed for each Change Analysis Smartsheet.		
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/06/25	Confirmed with TF that task was completed.	Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/28/25	Confirmed during status call the correct organization value.	Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/13/25	Confirmed with TF and RP that the SpeedKey smartsheet is ready for submission	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/31/25	Confirmed with TF and RP that organization smartsheet ready for submission.	Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/11/25	Confirmed with RP that OCA smartsheet is ready for submission.	Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25	Confirmed with Teresa that the status report was submitted.	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/25/25	Confirmed the risks and issues with the CCN during weekly touchpoint.	Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/30/25	Confirmed with RW and AH that the Grand ID Conversion Mapping worksheet was ready to submit.	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business	01/06/25	07/25/25	100% - Submitted	01/09/25	Marked as completed due to DOEA not	Submission	

			System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing					having any business systems interfacing with Florida PALM.	Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25	Got approval on language. Scheduled email to be sent out.	Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25	Confirmed with TF that the current users with access to SS is sufficient and accurate.	N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25	Confirmed with CE that the SmartSheet is ready to submit.	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 29 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 10	Implementation: Impacted Agency Business Processes = 175 • Related Business Process Groupings = 12/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 0 Planned Interfaces = 0 - Inbound Interfaces = 0 - Outbound Interfaces = 0	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 1 - Control - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

DOEA Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Data	While cleaning up existing data, making sure new data entered meets PALM requirements for conversion	Open	2 (Low/Medium)	Reviewing conversion inventory carefully to minimize post go-live clean up. Also communicating new requirements to staff.	Consulting services aiding in data clean up and other activities.	12/27/24	Nancy Frye
Processes	Internal manual processes - uncertain how these may be impacted and what measures are needed.	Open	1 (Low/Low)	SMEs to continue to work and prep tasks for PALM UAT and to continue documenting their tasks as new items come up.	Processes were crosswalked as part of RW-560. Keeping open in case something unexpected comes up. Adjusted the impact and probability ratings.	12/27/24	Randy Pupo

DOEA Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	Staff limitations still exist, turnover creates knowledge gaps	Open	High - Impacts the ability of the agency to meet deadlines	Working on retention and building processes and procedures so when turnover occurs, knowledge is	Knowledge gaps still exist in agency	06/24/25	Ryan White

			deadlines or milestones	not completely lost	processes while new staff are being trained. Vacancies still exist.		
Processes	Current processes may be outdated or not fully known due to turnover creating issues in determining how they will be done in PALM	Open	Low - All impacts not listed as Critical or High	Working to build processes and utilize resources for when employees are learning and understanding the "why", and when possible looking in the knowledge center to understand how it will change	Continuing to document as we discover processes.	12/31/25	Ann Habib

DOEA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	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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DOEA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Teresa Johnson	johnsont@elderaffairs.org	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOH
- Readiness Workplan

DOH Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Robert Herron

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 100%

- Submitted On Time = 32
- Submitted Late = 0
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.77%

- Submitted On Time = 61
- Submitted Late = 1
- Pending Resubmission = 2

Direct Task Completeness:

Score = 84.19%

- Submitted Complete = 15
- Submitted Incomplete = 0
- Completed After Submission = 16

Other Task Completeness:

Score = 88.95%

- Submitted Complete = 27
- Submitted Incomplete = 2
- Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	75% - Consolidating/Inputting Information for Submission	06/14/24	Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Interface files have updates based on questions or corrections asked to the PALM team, thus interface file is not finalized. 2) Some questions asked about the interfaces from Segment I for remediation are crucial and many technical decisions are made based on the answers provided by PALM 3) Part of remediation and data dependencies are contingent on Segment IV and recap in October	Submission Incomplete	
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies are contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 9/27 now 10/4		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. technical team is now deciphering information and meeting with ABS systems to give this information. 3) Coding to reflect and make changes has started but will not complete by 12/13 (Task end date)		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		*Our Agency cannot reflect our remediation as 100% due to following reasons: 1) Some questions asked about the interfaces are crucial and many technical decisions are made based on the answers provided by PALM 2) Part of remediation and data dependencies were contingent on Segment IV and recap in November. Technical team is now deciphering information and meeting with ABS systems to give this information		

								3) Coding to reflect and make changes has started but will not complete by 03/14 (Task end date)"		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/21/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	100% - Submitted	01/16/25		Submission Complete	01/16/25
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	100% - Submitted	03/12/25		Submission Complete	
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25		Submission Complete	01/30/25
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25	Since DOH had two separate error files, the two were combined as directed by the Readiness Coordinator (Dora Thomas) via email dated 01.13.25 2:27PM. Combined file is located in the Secure File Share Portal>Configuration Workbook Inventory Folder>Task 567P DOH Speedkey Errors Combined 01.21.25.	Submission Complete	02/27/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/30/25	For some rows - The appropriate PALM Organization is not in the drop down menu contained in the "Update Mapping to Florida PALM Organization ID" column. The instruction given via email by the DOH PALM Readiness Coordinator on January 28, 2025 was to put a default Organization value in this column; however, the agency does not want to place incorrect information which then has to be corrected and/or the possibility of the incorrect field mapping being setup in the system.	Submission Complete	03/10/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/30/25	For some rows - The appropriate OA1 is not in the drop down menu contained in the "Update Mapping to Florida PALM OA1" column. The instruction given via email by the DOH PALM Readiness Coordinator on January 28, 2025 was to put the default OA1 value in this column; however, the agency does not want to place incorrect information which then has to be corrected and/or the possibility of the incorrect field mapping being setup in the system.	Submission Complete	03/10/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/30/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	01/30/25		Submission Complete	03/10/25
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/03/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25					
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/06/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People

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

Implementation:

Planned Florida PALM End Users = 457

• Business Process Groupings = 13/13

Identified Subject Matter Experts = 16

Processes

The sequence of procedures to accomplish a business objective.

Implementation:

Impacted Agency Business Processes = 62

• Related Business Process Groupings = 12/13

• Planned Spreadsheet Uploads = 3

Technology

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

Implementation:

Business Systems Planned for Integration = 53

Planned Interfaces = 41

- Inbound Interfaces = 14

- Outbound Interfaces = 26

Data

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

Implementation:

Configuration

• **Commitment Control (KK)**

- Budget Allotments - Control Option = Option # 3 - Track without Budget

- Account ChartField Tier Selection = Account Tier #3: Family

- Organization ChartField Translation Tree

Selection = Translation Tree #3: No Tree Assigned

• Org Security Rule = Agency Defined

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Needed

- Projects = Needed

- Projects Balances = Needed

Agency Reported

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

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 August 2025. Upon delivery of this we will remove the risk.	Lack of testing environment for Financials and Payroll wave. Reviewed risk and agency continues to monitor this risk. Updated: 02/28/25	02/28/25	PALM & DOH
Processes Technology	Awaiting confirmation and finalized configurations, conversions, 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.	As the requirements, interfaces, process flows, and updates to interfaces files and reports come to us in Segments; Review, process changes and remediation are fragmented. Reviewed risk and agency continues to monitor this risk. Updated: 02/28/25	02/28/25	PALM & DOH
People Processes Technology Data	Payroll Design Sessions are scheduled to complete / finalize by the PALM project in July-October 2024 (Segment IV). Agencies may not have enough time to understand and implement change of processes, requirements, interface files.	Closed	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.	Reviewed risk and agency continues to monitor this risk. Reviewed and closed 02/28/25	02/28/25	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. Meeting set up with DFS the week of 4/29 and 05/06	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
Processes	The intention is for DFS to setup all of our organization codes and they have to route through their team for an approval process as well.	Open	9 (High/High)	Work with PALM and DFS to set up a successful Service Level Expectation.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
Technology	Lack of prototype system. Agency would like a demo of the overall process in the PALM to better understand how the processes would start and end.	Closed	9 (High/High)	DOH would like to see a prototype system, actual screens so SME's can figure out the processes.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	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	Within the realm of financial audit, we need to show financial documents in support of financial activity. This is the need that we have identified at our agency. Reviewed & Updated: 02/28/25	02/28/25	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.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
People Data	Missing or Incomplete information - Clear understanding and instructions from the Project team to the agency to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.	Open	9 (High/High)	Clear understanding and instructions from the Project team to complete tasks. Time to process the ask of the task and have enough time to discuss and complete the task correctly.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
Technology	Lack of Training: The training needs to be specific to the State of Florida implementation, including specific Chart of Accounts ChartField values as well as other configured elements. In addition, there also needs to be technical related training for interfacing methods, data access for the IW, and remediation techniques	Open	6 (High/Medium)	DOH can create DOH's specific training. SPM team is part of PALM Readiness updates and is attending all PALM meetings.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	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.	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
People Processes	Enterprise entities like AG/IG's offices or Agencies like DMS, DFS may present new processes / changes at or close to Go-Live or during Hypercare, that may present more work on the Agency. For example, auditing of payments and the increased number of returns and possibly hold up of payments all while transitioning and learning how to work within PALM. Back in 2019 when we went live with the Statewide Travel Management System (STMS), our trips were sampled for audit and returned by DFS increased from approximately 0-2 trips returned per month to 34 trips returned in April 2019 and 197 trips returned in May 2019. Once these trips were returned, we had to review the return and clear up the issue with the returns which meant coordinating with each traveler for each trip returned. This was very time consuming and a struggle to learn a new system and deal with the influx in sampled trips being returned.	Open	6 (High/Medium)	DOH would like to know if there are any new processes and changes that are discussed at Enterprise level that will impact DOH	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	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	4 (Medium/Medium)	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)	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	PALM & DOH
Processes	Payroll Reallocation Voucher Adjustment: • How will we complete payroll reallocations for a voucher that posted in FLAIR in May - June 2026 when PRP is to process in July 2026 using the PALM data? • How will FIRS or CHDs edit or correct any vouchers between May-June 2026 when we go to PALM July 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	Reviewed risk and agency continues to monitor this risk. Reviewed: 02/28/25	02/28/25	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
Technology	Changes to PALM website, PALM tasks, and the Interface files: Our agency is taking a lot of effort to educate and train technical and non-technical staff. Constant changes disrupts processes and it takes time to find the same information and retrain staff. For e.g., our technical staff was well versed in accessing Smartsheet for interface and reports for creating our DOH warehouse.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Retrain staff		10/31/24	Sheetal Shidhaye Terri Mulkey

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

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 *

DOH Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Robert Herron	robert.herron@flhealth.gov	03/06/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOL
- Readiness Workplan

DOL Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Becky Ajhar

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 98.93%

- Submitted On Time = 26
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 93.69%

- Submitted On Time = 59
- Submitted Late = 2
- Pending Resubmission = 3

Direct Task Completeness:

Score = 94.44%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 5

Other Task Completeness:

Score = 99.71%

- Submitted Complete = 33
- Submitted Incomplete = 0
- Completed After Submission = 1

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. We anticipate finalizing the updated documentation within 3 weeks. 5/29 - Documentation for business processes reviewed and completed. Areas which require remediation have been identified and currently being updated by Finance Department. ETC unknown. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	50% - In Progress		Updating current state business process documentation is underway, but it's taking longer than initially anticipated. Due to the comprehensive review needed, the timeline for completing this task is being adjusted. 7/12/24 - Documentation updates still pending for submittal 12/2024 - Will not submit until UAT		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	50% - In Progress		12/2024 - Will not submit until UAT		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25		Submission Complete	02/05/25
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/14/25		Submission Complete	02/25/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific	12/30/24	02/28/25	100% - Submitted	02/27/25		Submission Complete	

Category	Item	ID	Description	Start Date	End Date	Progress	Completion Date	Status
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		Complete
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/20/25	Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25	Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25	N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25	Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering		
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering		
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering		
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering		

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 22 • Business Process Groupings = 9/13 Identified Subject Matter Experts = 10	Implementation: Impacted Agency Business Processes = 49 • Related Business Process Groupings = 2/13 • Planned Spreadsheet Uploads = 1	Implementation: Business Systems Planned for Integration = 6 Planned Interfaces = 18 - Inbound Interfaces = 4 - Outbound Interfaces = 14	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Needed - Projects Balances = Not Needed

Agency Reported

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

DOL Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology Data	The Florida Lottery's new Claims and Payment system (CAPS) is scheduled to tentatively go-live during FY 25-26. The implementation of Lottery's CAPS may impact PALM training activities. The new CAPS will be replacing the current system known as Fortune.	Open	4 (Medium/Medium)	Develop a proactive strategy for the upcoming launch of the new CAPS; will focus on early communication, training for PALM activities, continuous monitoring, and establish contingency plans to address any potential adjustments required in the supplied data.	Ongoing	09/07/23	Chris Rorison
Technology Data	Mega Millions will require changes involving the removal of Megaplier; as a result, reporting to PALM will require changes.	Open	3 (Low/High)	Will make the required changes and develop process that will work for PALM		02/10/25	Meghan Gregg

DOL Issues

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

DOL Assumptions

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

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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DOL Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Rebecca Ajhar	ajharb@flalottery.com	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOR
- Readiness Workplan

DOR Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Clark Rogers

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 92.67%

- Submitted On Time = 21
- Submitted Late = 9
- Pending Resubmission = 0

Other Task Timeliness:

Score = 90.31%

- Submitted On Time = 52
- Submitted Late = 12
- Pending Resubmission = 0

Direct Task Completeness:

Score = 91.03%

- Submitted Complete = 19
- Submitted Incomplete = 0
- Completed After Submission = 10

Other Task Completeness:

Score = 82.63%

- Submitted Complete = 24
- Submitted Incomplete = 0
- Completed After Submission = 14

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 17
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	03/10/25		Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/17/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	02/25/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/16/25		Submission Complete	03/03/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	01/13/25
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/25/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/30/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/11/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/05/25		Submission Complete	02/19/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/11/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/05/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 97</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 47</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 210</p> <ul style="list-style-type: none"> Related Business Process Groupings = 11/13 Planned Spreadsheet Uploads = 5 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 25</p> <p>Planned Interfaces = 20</p> <ul style="list-style-type: none"> Inbound Interfaces = 5 Outbound Interfaces = 15 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) Budget Allotments - Control Option = TBD Account ChartField Tier Selection = TBD Organization ChartField Translation Tree Selection = TBD Org Security Rule = TBD Optional ChartFields OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions Accounts Receivable = Not Needed Assets = Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

DOR Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes Data	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	Open	3 (High/Low)	Unable to mitigate at agency level; must be mitigated by the enterprise.	New Risk, also logged as an assumption.	06/28/24	Shannon Segers
Data	With Agency Reporting Systems like RABIT and FICAS retiring away, DOR will solely rely on PALM Reports and the proposed PALM Datawarehouse for all its reporting needs. Until the PALM Data warehouse is available, DOR is not sure whether it can meet its reporting needs. PALM Datawarehouse is proposed to be available in June 2025.	Open	2 (Medium/Low)	Unable to mitigate at agency level; must be mitigated by the enterprise.	New Risk	12/04/24	CCN Members
People	Natural Gas project #006277 for GTA has an implementation date of January 2026, same time as PALM financials wave UAT/Interface testing dates, and could create a resource issue.	Open	1 (Low/Low)	Plan efficiently with the resources provided.	Continue monitoring risk. We plan to kick-off this project Fall 2024 to ensure we have sufficient time for all projects. Updated risk owner and backup.	11/02/23	Marsha Revell, GTA; Andrea Hunter, GTA, Backup Owner
People	The GTA E-services project may be conducted at the same time agency business system remediation is conducted.	Open	1 (Low/Low)	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. As of 10/28/24 DOR management has reprioritized IT projects to reallocated support to our four major, high-priority IT projects. This includes mandatory SAP upgrade, eFile and Pay, and Florida PALM.	10/17/23	David Potter, GTA - BTO
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	1 (Low/Low)	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. As of October 2024, GTA is drafting emails and an Excel workbook to send to the 16 Agencies to request their Chart Field values. As of Feb 2025, DOR have received COA values from 11 of the agencies, and we are still waiting on the remaining 5.	11/02/23	Wynette Davis

DOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Supplier ID not provided by PALM for DOR Vendors. DOR is not able to perform any test generate vouchers/distributions until that information is available.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Supplier ID is a required field in Interface Files, and must be provided.	Issue opened Dec 2024. Waiting on the Vendor conversion to occur by Florida PALM team.	01/31/25	Deepak Haldiya, Wynette Davis

DOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
Data	New chart of account data from the configuration workbooks will be loaded by the Florida PALM Project Team into all enterprise business systems.	Logged	03/08/24	All agencies, all agency business systems.	Needed before UAT so that the new COA data may be utilized in UAT to validate agency business system remediations.
Data	People First data will be cleansed and updated chart of accounts data will be available in a test environment for UAT.	Logged	04/12/24	All agencies, all business systems that use People First data.	Data cleansing needed and new COA data available for UAT. Also, old data must be purged from People First prior to first live payroll in PALM to avoid errors in payroll processing. 6/10/24: Requested funding information by program from Budget to create spreadsheet to load funding information into People First.
Processes Data	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	Logged	06/28/24	All enterprise systems will be remediated and operating with PALM COA data in the test environment used for UAT so that agency business systems may be fully validated by processing actual data generated by normal business processes in the test environment.	This is necessary for agencies to fully validate the remediated agency business systems.

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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DOR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Clark M. Rogers	clark.rogers@floridarevenue.com	03/05/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DOS
- Readiness Workplan

DOS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Antonio Murphy

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 98.89%

- Submitted On Time = 25
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 79.84%

- Submitted On Time = 37
- Submitted Late = 26
- Pending Resubmission = 0

Direct Task Completeness:

Score = 80.74%

- Submitted Complete = 15
- Submitted Incomplete = 1
- Completed After Submission = 11

Other Task Completeness:

Score = 84.25%

- Submitted Complete = 31
- Submitted Incomplete = 1
- Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/26/24	Agency does not have any agency business systems.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	11/20/24	Agency has no Agency Business Systems	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/06/25	At DoS, our business systems will be replaced by PALM, and we currently do not have any test scripts requiring testing. We aim to mark this as complete during the 12/20 DFS touchpoint meeting.	Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/06/25	End users are being kept informed, and the item has been attached. We're also hoping this will simplify role mapping. Jordan Clyatt topic is left blank as he is the security access manager, and won't be working inside of PALM.	Submission Complete	01/10/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		We are utilizing the attached test cases as a training plan and hope to use this template to gather user stories as well. We also have several staff members using PALM currently who will participate in the "Train the Trainer" program once the program details are available.		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25	2/17/25: Submission incomplete due to errors on error report and errors indicated by conditional formatting in Smartsheet	Submission Complete	02/19/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25	Submitted 1/10.	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Attachments contain RAID logs and schedule. Please note: DoS doesn't have any specific implementation and the schedule is based off of the task tracker.	Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25	This is optional, and I'm assuming Antonio has chosen not to map grants. I think this is the workbook. https://app.smartsheet.com/sheets/cx8hvF	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25		Submission Complete	
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/21/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25	Please see the attachment for the full communication plan detailing the approach for key stakeholders. .	Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25	The attachment is a rough snapshot of our end users within DoS. Please excuse	N/A	02/07/25

Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering			its lack of refinement.		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25			Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 18</p> <ul style="list-style-type: none"> Business Process Groupings = 10/13 <p>Identified Subject Matter Experts = 9</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 10</p> <ul style="list-style-type: none"> Related Business Process Groupings = 5/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 0</p> <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree Org Security Rule = Agencywide Optional ChartFields OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions Accounts Receivable = Needed Assets = Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

DOS Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Processes	There is an opportunity to use UAT and Sandbox environments to cross-train employees.	Closed	1 (Low/Low)	Sharing information about this opportunity appears to be the best approach to encourage adoption.		09/16/24	Marc Weeks

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
Processes	Many of the tasks involve properly identifying work process flows. While we are working hard to identify these issues, it is assumed that many of them will be properly identified during UAT.	Logged	07/29/24	Current agency F&A staff	
People Processes Technology	It is assumed that PALM will be able to facilitate our reporting & data needs and that UAT will proceed smoothly.	Logged	01/08/25	Current agency F&A staff	

Agency Sponsor Confirmation

DOS Status Report Confirmation

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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DOS Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Antonio Murphy	antonio.murphy@dos.myflorida.com	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for DVA
- Readiness Workplan

DVA Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

AI Carter

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 92.67%

- Submitted On Time = 27
- Submitted Late = 2
- Pending Resubmission = 1

Other Task Timeliness:

Score = 76%

- Submitted On Time = 39
- Submitted Late = 19
- Pending Resubmission = 6

Direct Task Completeness:

Score = 90.00%

- Submitted Complete = 20
- Submitted Incomplete = 1
- Completed After Submission = 7

Other Task Completeness:

Score = 82.29%

- Submitted Complete = 25
- Submitted Incomplete = 4
- Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	06/28/24	1/16/2025: task remains incomplete. Address items noted in verification form for completion. -dlit ETA by July 2024 - RFQ in process RC comment: as of 8/20, task remains incomplete via review with E. RiceMorgan. Anticipate completion by end of December 2024. VACO Analyst Jose Gutierrez working through Business processes.	Submission Incomplete	01/15/25
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	07/12/24	Remains incomplete. 1. Mark None where spreadsheet uploads are not identified. 2. Complete process documentation updates for Segments I, II, and III. -dlit, 11/6/2024	Submission Incomplete	09/19/24
N/A	N/A	539	Manage Agency Specific Implementation Schedule, Risks and Issues	07/01/24	08/29/24	75% - Consolidating/Inputting Information for Submission		Agency continues to work through risk issues and issues. Procurement progressing. Vendor listing provided and interviews scheduled with vendors. Vendor (VACO) selected and integration has begun. Vendor attended meetings and duties outlined and implementation schedule updated. SOPs to be completed by end of December 2025. Nov 6, 2024: Agency continues to work through its SOPs to ensure procedures and processes marry with those in PALM. Simultaneously we continue to work through tasks and attend workshops and UAT requirements while performing hurricane recovery operations and nursing home inspections/assessments and Legislative Budget action items. Having a much smaller administrative staff than other Agencies makes meeting suspenses challenging. 3/7/2025: Agency continues to struggle with uploading segment III and IV resource codes, ensuring they align with the Agencies structure. Also, Agency continues to work through the transition of existing SOP's to reflect perceived operations in PALM. Agency timelines continue to shift as we try to maintain day-to-day operations and meet PALM requirements. As communicated in the latest ESC amendment 12 meeting, Agencies will have to determine where they will assume risks. Agency is currently working through that process.	N/A	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	544	Update Agency Business System Documentation for Segment IV	07/22/24	10/18/24	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission				

N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	Information for Submission 75% - Consolidating/Inputting Information for Submission			
N/A	N/A	552	Manage Agency Specific Implementation Schedule, Risks and Issues	08/30/24	10/31/24	50% - In Progress	3/7/2025: Agency continues to work through project requirements despite being plagued by personnel shortfalls. The Agency does not have the internal financial resources to hire more qualified contract personnel and currently, none that meet experience requirements are available and the Agency does not have the resources to train a vendor to assist the Agency while simultaneously performing PALM Tasks and day-to-day operations.	N/A	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission			
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/30/25		Submission Complete
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/08/25		Submission Complete
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25		Submission Complete
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/16/25		Submission Complete
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete 02/17/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/27/25		Submission Complete
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/13/25		Submission Complete 01/13/25
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/05/25	Florida PALM: Agency did not submit. Task required to be close as reporting period has ended.	Not Submitted
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/13/25		Submission Complete
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/17/25		Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	01/30/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	01/30/25		N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/06/25		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 62 • Business Process Groupings = 12/13 Identified Subject Matter Experts = 8	Implementation: Impacted Agency Business Processes = 118 • Related Business Process Groupings = 9/13 • Planned Spreadsheet Uploads = 2	Implementation: Business Systems Planned for Integration = 2 Planned Interfaces = 2 - Inbound Interfaces = 1 - Outbound Interfaces = 1	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 2 - Track with Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured

- PC Category = To Be Configured
- PC Subcategory = To Be Configured
- PC Source Type = To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed
- Assets = Needed
- Contracts = Needed
- Customers = Not Needed
- Encumbrances = Needed
- Grants = Needed
- Projects = Needed
- Projects Balances = Needed

Agency Reported

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

DVA Risks

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

DVA Issues

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

DVA Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	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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DVA Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	ALFRED D. CARTER	al.carter@fdva.fl.gov	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for EOG
- Readiness Workplan

EOG Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Dawn Hanson

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 100%

- Submitted On Time = 32
- Submitted Late = 0
- Pending Resubmission = 0

Other Task Timeliness:

Score = 99.38%

- Submitted On Time = 63
- Submitted Late = 1
- Pending Resubmission = 0

Direct Task Completeness:

Score = 98.06%

- Submitted Complete = 26
- Submitted Incomplete = 0
- Completed After Submission = 5

Other Task Completeness:

Score = 98.50%

- Submitted Complete = 34
- Submitted Incomplete = 0
- Completed After Submission = 6

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 5
- Duplicate Filled Role = 12
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/23/24	n/a This was submitted on time. There are no business systems to update.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	12/19/24	No business systems at this time. As of 12/20/2024 and 12/26/2024, there are still no new business systems to test.	Submission Complete	12/26/24
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/30/25		Submission Complete	
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25					
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25	Confirmed DEM completion 1/15/2025.	Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/15/25	Confirmed DEM completion 1/15/2025.	Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/11/25	Confirmed DEM completion 1/15/2025. Confirmed DEM updated per recent instructions update 1/17/2025. No changes for EOG.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/24/25	MB shared update complete. 2/11/2025 Confirmed DEM completion 1/24/2025.	Submission Complete	02/11/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/24/25	Confirmed DEM completion 1/24/2025.	Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/08/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/27/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/24/25	Confirmed DEM completion 1/24/2025.	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/19/25	Confirmed DEM completion 2/18/2025.	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	03/03/25	Confirmed DEM completion 3/3/2025.		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/04/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 9 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 5	Implementation: Impacted Agency Business Processes = 151 • Related Business Process Groupings = 13/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 0 Planned Interfaces = 0 - Inbound Interfaces = 0 - Outbound Interfaces = 0	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agency Defined • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

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	Some of the FL PALM project activities and tasks coincide with the busiest times for financial and accounting agency resources. Training is indicated as being conducted prior to go live in the March - June, 2025 timeframe. The July-Mid-Oct timeframe is the busiest of the year with most duties falling to a very limited number of staff. November, 2026 - early 2027 is an elected official transition period.	Open	9 (High/High)	The EOG will monitor staff workload.	Updated.	02/27/25	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. It was determined that many of the solutions initially discussed will not be able to be effectively implemented. We will continue to monitor and meet with the PALM team as the final design takes shape to determine the best methodologies for the differentiation of data. System configuration will be tested during UAT to determine what will be policy or procedure driven changes vs. what will require additional PALM knowledge or staff resources.	Updated.	12/13/24	Kelley Sasso
People	There will be many competing priorities for staff working on this project. Staff on the project may serve in more than one capacity and time may not be fully dedicated to accounting and FL PALM work.	Open	6 (Medium/High)	The EOG will monitor staff workload.	No change.	10/31/23	Kelley Sasso
People Processes	FL PALM transactions are based on roles with an approval workflow. Because of EOG's limited staff, transactions requiring approvals will likely bottleneck with 1 or possibly 2 staff members. There is insufficient staffing for backup processors and approvers.	Open	6 (Medium/High)	The EOG has discussed this risk with FL PALM and communicated its inability to have role backups and the risk of transaction approval bottlenecks with so few individuals available to work on any given process. There exists the possibility for some transactions to utilize a spreadsheet upload of transactions rather than individual transaction approvals.	No change.	10/31/23	Kelley Sasso
People Processes Data	Nomenclature is changing in from FLAIR terms to PALM terms. Some fields in PALM are named the same as in FLAIR but with different meanings/uses. Examples are category, asset location, etc. This will primarily be a training challenge; however, there exists the risk that procedures, guidelines, data, queries, etc will be misinterpreted or not updated properly.	Open	6 (Medium/High)	The EOG will work to highlight terminology/naming differences to mitigate risk of confusion.	No change.	06/06/24	Kelley Sasso
People Processes Data	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities	Open	6 (Medium/High)	The EOG has reported the issue and made suggestions to FL PALM as potential solutions.	New.	08/23/24	Kelley Sasso

	Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing Segment IV - Inter-Unit transactions, we noted that all receiving transactions may be rolled together with no ability to discern 'ownership' of the transaction since only OLO is required. Sent suggestions to the PALM team requesting addition fields be mandatory. Also requested that search menus be available on each workcenter screen to filter out unneeded transactions to only those relevant to DEM or EOG.							
People Processes	The Division of Emergency Management is physically and functionally separate from the Executive Office; however, the two entities share the same OLO/business unit. Detailed risk outline in Line 007 relates to payment management. In reviewing the hardcopy draft of new warrants, if the wrong payment handling code is selected by DEM, EOG will not be able to tell who the warrant belongs to since BE is not printed on the warrant.	Open	4 (Medium/Medium)	The EOG and DEM have met with FL PALM to outline concerns. We will reach out to the PALM team during configuration to determine at what level certain codes can be defaulted to ensure this does not happen. As long as the warrants do not combine, we will be able to research to accommodate. If warrants combine, the entire warrant may need to be deleted and invoices re-vouchered. Noted during review of configuration values worksheet that DEM has been assigned 2 pmt handling codes. Also noted that ORIGIN will not work for differentiation since Works, MFMP, STMS are origins which both EOG and DEM use.	Updated upon review of most recent configurations values worksheets.	06/06/24	Kelley Sasso	
People Processes	Due to limited staff and staff turnover, there exists a risk that relevant or important steps in a new or revised task will be missed or not completed.	Open	2 (Medium/Low)	The EOG will outline as many processes as possible to mitigate risk of missing a step. The EOG will ensure that all staff attend training, perform work during UAT, and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso	
People Processes Technology	With the revision of interfaces for all Enterprise business systems, such as Works, STMS, and MFMP, and staff learning the updates to all new systems with FL PALM, it may be more difficult to pinpoint the source of errors in transaction processing.	Open	2 (Medium/Low)	The EOG will monitor all tasks and attempt to report issues to all relevant parties.	No change.	10/31/23	Kelley Sasso	
Processes Technology Data	The EOG uses a purchased software that accepts an FTP download of FLAIR recorded asset data and transmits the data to a mobile device for state asset inventory purposes. A risk exists that the inventory software is not ready to purchase during the first year of go-live and/or the PALM solution will not work as intended for our agency.	Open	2 (Medium/Low)	The EOG will monitor progress with other state agencies who also use this software and/or have this business need. The EOG will test PALM's inventory solution during UAT to determine if it will meet our agency's needs.	No change.	02/27/25	Kelley Sasso	
People Data	Risks relate to attachments of documents in FL PALM. Staff will need training on what can and should be attached or redacted prior to attaching in FL PALM.	Open	1 (Low/Low)	The EOG will outline as many processes as possible to mitigate risk of incorrectly attached documents, and will ensure that all staff attend training and have access to PALM resources when appropriate.	No change.	10/31/23	Kelley Sasso	

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

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

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 *

EOG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Dawn Hanson	dawn.hanson@eog.myflorida.com	03/04/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FCOR
- Readiness Workplan

FCOR Status Report Dashboard

Reporting Period
January - February 2025

Agency Sponsor
Ryan Schenck

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 99.23%

- Submitted On Time = 24
- Submitted Late = 2
- Pending Resubmission = 0

Other Task Timeliness:

Score = 95.08%

- Submitted On Time = 58
- Submitted Late = 6
- Pending Resubmission = 0

Direct Task Completeness:

Score = 99.20%

- Submitted Complete = 23
- Submitted Incomplete = 0
- Completed After Submission = 2

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 40
- Submitted Incomplete = 0
- Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	11/17/24	FCOR doesn't have any ABS systems to update documentation or remediation needed.	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/09/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/12/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/03/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/06/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	01/09/25	FCOR doesn't have any ABS systems to update so no interfaces or remediation required	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/03/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/05/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 6</p> <ul style="list-style-type: none"> Business Process Groupings = 6/13 <p>Identified Subject Matter Experts = 14</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 18</p> <ul style="list-style-type: none"> Related Business Process Groupings = 4/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 0</p> <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #3: Family Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

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	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Open	6 (High/Medium)	1. Identify the High level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT	11/05/2024 : Solution concept shared with the OIT experts to review and guide FDC PALM team on the next steps for technical solutioning. 11/06/2024 : Initial resourcing plan has been reviewed with OIT leadership and received alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design and Technology platform. 2/10/2025: Hiring of staff-aug Reports Developer and Business Analyst has been initiated, interviews are currently in-progress.	06/30/25	Dipak Roy, OIT PM
People Processes	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Utilize the PALM site to develop and deploy a 3-part preliminary training series to future PALM end users. The training series will be followed by a Process Gap Analysis and Process Gap Remediation activity for each Business process group. Action 2: Identify future PALM superusers, to participate in the preliminary PALM training series and closing activities. Action 3: Once available, leverage the Sandbox and Demo sessions to further familiarize users with system functionality.	12/17/2024: CML- Training Development is underway and is on track to be completed by June 30, 2025. 12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated. 2/19/2025: Training liaison has been engaged to prepare for overall training plan and training materials.	06/30/25	Erica Starling, Financial Administrator
People	The Testing phases in the Florida PALM project	Open	6	1. Prepare the UAT testing team thoroughly, regarding	12/05/2024: Florida	06/30/25	Erica Starling, Financial

Processes Technology Data	plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.		(High/Medium)	business processes, Configurations, user roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team, and assess the impact due to the risk.	PALM team need across-agency kick-off of the UAT planning activity. There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT. Most of the preparation activities are affected by non-availability of the final system. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.		Administrator
People Processes Technology Data	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Open	6 (High/Medium)	Action: Develop and Launch Pre-PALM Training Closing Activities. Closing Activity 1: Process Gap Analysis Closing Activity 2: Process Gap Remediation	12/17/2024: CML- Training Development is underway and will precede the initiation of the Closing Process Gap Analysis and Remediation activities. The deployment of the training Series is on track to launch by February 01, 2025. 11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM). 2/19/2025: Identification of specific gaps and remediation plan has been initiated.	09/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Open	6 (High/Medium)	1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.	12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing. To continue working on to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supporting activities to ensure agency readiness for PALM project. Identification of specific remediation plan has been initiated. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.	09/30/25	Erica Starling, Financial Administrator
People Processes Technology	Insufficient information on access security model and planning of changes to current users role/ responsibilities may impact agency user readiness/ adoption.	Open	4 (Medium/Medium)	Action: Utilize the Current State Position Catalogue to map current positions to PALM's future state roles. Action: Develop and Launch Training 4 of Pre-PALM Training series (Orientation to PALM Roles & Workflows). Training will focus specifically on future PALM roles enabling the linkage between current and future state job roles.	11/15/2024: CML- People Readiness Lead completed the development of the Role Mapping Workbook and socialized workbook with the project team. 11/30: Team started exploring the user & security roles definitions in the Florida PALM portal. 12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topic is & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new work book. 12/17/2024: CML-The provision of the RWP 560-"Topics & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched. 2/19/2025: FDC-FCOR PALM project team is awaiting detailed information from FL PALM team on security roles, privileges, and segregation of duty information for Financials wave. Similar details from CMS wave is being considered as a reference.	06/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology	Unavailability of existing BARS reporting infrastructure will impact agency ability to	Open	3 (High/Low)	Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform	11/06/2024 : Overall requirement was reviewed with OIT	06/30/25	Dipak Roy, OIT PM

Technology Data	generate user reports based on legacy historical data.			completing	reviewed with OIT leadership and received alignment. Currently in discussion with OIT Systems Management team to identify a solution. Next step is implement and test the solution. 1/10/2025: Technical workshop conducted with FDC OIT experts and finalized the architectural design and technology platform. 2/10/2025: FDC-FCOR PALM project team and OIT technical teams are currently brainstorming, to understand the scope and approach.	
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FCOR Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology Data	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that. Therefore, the FDC/FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces. 2. Solution approach for New Database and CAIRS has been prepared. 3. Architectural design of the solution currently in-progress.	08/29/25	Dipak Roy, OIT PM
People Processes	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Crosstrain staff to ensure adequate backup. 2. Cross training will be completed during the project to ensure operational resiliency.	The planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date - January 2026.	06/30/25	David Eskin, FDC Finance and Accounting/Systems Reporting
People Processes	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance. 2. Collaborate with Florida PALM team on the issues with the Smartsheets.	1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions. 2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues. 2/19/2025: Highlighted this issue again as part of Thursdays Task Talk topics, and requested FL PALM team to consolidate all updates to the PALM readiness workplan and share at once, with appropriate level of communication.	01/06/26	Erica Starling, Financial Administrator
People Processes Technology Data	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Onboard additional staff aug position with FLAIR data experience.	1. Created RFQ for an additional staff aug position. 2. The resource has been onboarded in early December 2024. 2/10/2025: New resource to be onboarded as a replacement for the person onboarded in December 2024. Additionally one more resource request has been raised with FDC Contract management team.	12/31/24	Erica Starling, Financial Administrator
Processes Technology	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g. UAT Test Plan, UAT Test Scripts, Future State Work Processes	Open	High - Impacts the ability of the agency to meet deadlines or milestones	1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios. 2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT. 3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT	9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work. 10/16/2024: UAT high level plan was shared in PALM advisory council meeting.	01/13/25	Dipak Roy, OIT PM

				progress.	11/20/2024. DA requirement has been reviewed with the OIT leadership and available vendors are being evaluated. 2/7/2025: Discussion in-progress with the OIT Quality Assurance vendor to leverage their expertise in UAT planning and preparation of test cases and test scripts.	
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FCOR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	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	List of agency business systems are documented, i.e. as-is state, systems in the scope of remediation. Remediation approach for 2 systems are finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FCOR UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan.
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop it is understood that the IT development activities for enterprise systems are in-progress.
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g., ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	

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:
January - February 2025	Ryan C. Schenck	ryanschenck@fcor.state.fl.us	03/05/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FDC
- Readiness Workplan

FDC Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Mark Tallent

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 93%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 88%

- Submitted On Time = 51
- Submitted Late = 12
- Pending Resubmission = 1

Direct Impact Task Completeness



Direct Task Completeness:

Score = 94.48%

- Submitted Complete = 24
- Submitted Incomplete = 0
- Completed After Submission = 5

Other Task Completeness



Other Task Completeness:

Score = 92.70%

- Submitted Complete = 32
- Submitted Incomplete = 0
- Completed After Submission = 5

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 16
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering		3/7/2025: Task-519 was marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	25% - Beginning Initial Internal Meetings and Information Gathering		This task cannot be completed. This is due to us not have the sufficient information from PALM to complete the remediation of our Agency Business Systems. We are still analyzing the data that they have provided, and will continue to work to complete this task. ETA Unknown. 3/7/2025: Task-504 and Task-544 were marked 'Completed' based on the understanding of success criteria and readiness workplan at the time of task due date. With the increased clarity on success criteria recently we realized that some parts of this task are still in-progress. However, based on the discussion with FL PALM project team we agreed to keep the status of those tasks unchanged, and FDC will continue to work on systems remediation activities.		
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/09/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/07/25		Submission Complete	01/07/25

		Status report								Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/26/25			Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/24/25	I didn't know whether or not to say yes or no for the first line with the attachment.		Submission Complete	02/14/25
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/05/25			Submission Complete	02/05/25
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/03/25			Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25			N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering					
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25			Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering					
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering					

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <ul style="list-style-type: none"> Planned Florida PALM End Users = 138 Business Process Groupings = 13/13 Identified Subject Matter Experts = 43 	<p>The sequence of procedures to accomplish a business objective.</p> <p>Implementation:</p> <ul style="list-style-type: none"> Impacted Agency Business Processes = 157 Related Business Process Groupings = 13/13 Planned Spreadsheet Uploads = 10 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Implementation:</p> <ul style="list-style-type: none"> Business Systems Planned for Integration = 15 Planned Interfaces = 22 <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 21 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Implementation:</p> <ul style="list-style-type: none"> Configuration <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #3: Family Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured Conversion <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

FDC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology Data	Continued changes to the interface specifications by FL PALM due to delay in system development, may require FDC PALM project team to rework on the solution for agency system remediation, which could lead to agencies missing the interface testing milestone.	Open	9 (High/High)	1. Develop a scalable solution design with system level flexibility built-in. 2. Collaborate closely with the FL PALM interface team, and ensure the FDC PALM team is updated with the recent/ upcoming changes to the interface file structures. 3. Resolve the gaps in the agency system remediation solution.	2/25/2025: This risk was discussed with the FL PALM Readiness Coordinator, and understood that these changes to the interface specifications are currently inevitable,	07/31/25	Dipak Roy, OIT PM

				4. Escalate in case the changes to interfaces are not feasible to be mitigated.	since Segment 3 and 4 related interfaces development are in-progress. FDC PALM team to do detailed assessment of the impact and propose remediation plan.		
People Processes Technology	Unavailability of IT resources with required skillset may impact timely remediations of agency business systems.	Open	6 (High/Medium)	1. Identify the High-level solution for Agency Business System (ABS) remediation. 2. Finalize the Architectural design and technology stack identification. 3. Conclude the resources/ roles required for ABS remediation. 4. Onboard the required resources, complete the IT development activities to ensure readiness for E2E interface testing/ UAT	11/05/2024 : Solution concept shared with the OIT experts to review and guide FDC PALM team on the next steps for technical solutioning. 11/06/2024 : Initial resourcing plan has been reviewed with OIT leadership and received alignment on hiring Reports developer. 12/10/2024 : Solution concept aligned with the OIT Enterprise Architect. Next step is to have a technical workshop, to finalize on the Architectural design and Technology platform. 2/10/2025: Hiring of staff-aug Reports Developer and Business Analyst has been initiated, interviews are currently in-progress.	06/30/25	Dipak Roy, OIT PM
People Processes	Unavailability of Florida PALM system training and Demo sessions early in the project phase may result in insufficient time given to agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Utilize the PALM site to develop and deploy a 3-part preliminary training series to future PALM end users. The training series will be followed by a Process Gap Analysis and Process Gap Remediation activity for each Business process group. Action 2: Identify future PALM superusers, to participate in the preliminary PALM training series and closing activities. Action 3: Once available, leverage the Sandbox and Demo sessions to further familiarize users with system functionality.	12/17/2024: CML- Training Development is underway and is on track to be completed by June 30, 2025. 12/16/2024: Identification of Train-the-trainer and PALM superusers community for FDC has been initiated. 2/19/2025: Training liaison has been engaged to prepare for overall training plan and training materials.	06/30/25	Erica Starling, Financial Administrator
People Processes Technology Data	The Testing phases in the Florida PALM project plan assumes right-at-first-time, therefore may not allow sufficient time for defect management and retest of fixes.	Open	6 (High/Medium)	1. Prepare the UAT testing team thoroughly, regarding Business processes, Configurations, User roles, PALM trainings, Test scripts. 2. Establish a communication channel with Florida PALM to get quick turnaround on the defect management. 3. Identify across-agency best practices for UAT planning and execution. 4. Continue to touch base with the Florida PALM team and assess the impact due to the risk.	12/05/2024: Florida PALM team held across-agency kick-off of the UAT planning activity. There are several follow-up workshops shall be planned, to support agency teams in preparation for UAT. Most of the preparation activities are affected by non-availability of the final system. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project team to re-assess this risk.	06/30/25	Erica Starling, Financial Administrator
People Processes Technology Data	Inadequate planning to identify specific process gaps and remediation planning may impact agency user readiness/ adoption.	Open	6 (High/Medium)	Action 1: Launch the Process Gap Analysis and Process Gap Remediation Planning/ Implementation Activities at the conclusion of the 3-Part PALM End user Orientation preliminary trainings. -- Preliminary PALM End User Orientation Training Series -- Closing Activity 1: Process Gap Analysis -- Closing Activity 2: Process Gap Remediation Planning & Implementation Action 2: Outputs from Activity-1: Process Gap Analysis will be leveraged to finalize and document the deltas between the As-Is and To-Be states. Action 3: Output implementation plans from Activity-2: Process Gap Remediation Planning & Implementation will be launched to resolve the deltas for each Business Process Group. Action 4: Delta remediation effectiveness and progress will be tracked and monitored.	12/17/2024: CML- Training Development is underway and will precede the initiation of the Closing Process Gap Analysis and Remediation activities. The deployment of the training Series is on track to launch by February 01, 2025. 11/30/2024: As-is processes (FLAIR) are mapped to the to-be processes (PALM). 2/19/2025: Identification of specific gaps and remediation plan has been initiated.	09/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Competing priorities for SMEs leading to limited bandwidth availability, may impact timely completion and quality of FDC/ FCOR PALM project deliverables, including data cleanup, configurations, process mapping & remediation, Trainings, agency systems remediations, and UAT preparation & execution.	Open	6 (High/Medium)	1. Identify the areas where it needs the SMEs bandwidth. 2. Come out with a plan to support FDC PALM project with required SMEs bandwidth.	12/10/2024 : Highlighted the risk in the FDC/FCOR Sponsors briefing. To continue working on to find a remediation plan, on how to optimize the resource allocation between the business critical activities and supporting activities to ensure agency readiness for PALM project. Identification of specific remediation plan has been initiated. 2/17/2025: Awaiting FL PALM ESC approval on the extension of the PALM go-live. FL PALM to publish updated Readiness Workplan in Mar/2025, for FDC-FCOR PALM project	09/30/25	Erica Starling, Financial Administrator

					team to re-assess this risk.		
People Processes Technology Data	Timely remediation of the 3rd party managed agency systems (Axiom Pro and SSTC Bar Code Scanning tool) could be challenging as (a) the vendor adopts a common remediation approach across agencies and (b) high dependency on technical specifications and sample interface files from FL PALM.	Open	6 (High/Medium)	1. Vendor to refer FL PALM knowledge center to plan & design the system remediation. 2. Vendor to perform unit testing with the information provided by the FL PALM team. 3. FL PALM Team to make sizable and reliable testing data available. 4. Vendor to perform exhaustive Technical Testing of the system integration (Cycle 2 - Testing)	2/17/2025: Vendor is remediating the systems, but continued to face challenges due to limitations of sample data available, and the change in the interface specifications by FL PALM team. Also identified high dependency on the updated timeline from PALM regarding to conduct testing.	06/01/25	Dipak Roy, OIT PM
People Processes Technology	Insufficient information on access security model and planning of changes to current user roles/responsibilities may impact agency user readiness/ adoption.	Open	4 (Medium/Medium)	Action 1: People Readiness Lead will develop a Role Mapping Workbook to document and map current state positions to future PALM roles and Business Process Groups. Action 2: People Readiness Lead will leverage the PALM site (Now RWP 560: Topics & Activities Workbook) to obtain and map future PALM roles and to all PALM Business Process Groups. Action 3: People Readiness Lead will leverage the Current State Position Catalogue to obtain the current state roles and collaborate with FDC Project Manager and SMEs to map those roles to the documented future PALM roles within the Role Mapping workbook (Now RWP 560: Topics & Activities Workbook) for each Business Process Group. Action 4: People Readiness Lead in collaboration with the FDC Training lead will utilize the PALM site and Role Mapping Workbook to develop and deploy a 4-part preliminary training series to future PALM end users. Training 4 of the series will focus specifically on future PALM roles allowing the training participant to understand the linkage between their current role and future PALM role. Training 4: End User Orientation to PALM Roles & Workflows.	11/15/2024: CML- People Readiness Lead completed the development of the Role Mapping Workbook and socialized workbook with the project team. 11/30: Team started exploring the user & security roles definitions in the Florida PALM portal. 12/09/2024: CML-As a part of RWP Task 560, the PALM State team has now provided the agency teams with the "Topic is & Activities" Workbook. The People Readiness Lead will sunset the previously created Role Mapping Workbook and transition work efforts to this new work book. 12/17/2024: CML-The provision of the RWP 560-"Topics & Activities" Workbook invalidates the need for further effort towards Action 2 (Mapping is Provided). Work effort towards the completion of Action 3 has launched. 2/19/2025: FDC-FCOR PALM project team is awaiting detailed information from FL PALM team on security roles, privileges, and segregation of duty information for Financials wave. Similar details from CMS wave is being considered as a reference.	06/30/25	Mary Quinsey, FDC & FCOR PALM Liaison
People Processes Technology Data	Unavailability of existing BARS reporting infrastructure will impact agency ability to generate user reports based on legacy/ historical data.	Open	3 (High/Low)	Work with FDC OIT on archival of BARS reporting solution, including database, UI and any platform components	11/06/2024 : Overall requirement was reviewed with OIT leadership and received alignment. Currently in discussion with OIT Systems Management team to identify a solution. Next step is implement and test the solution. 1/10/2025: Technical workshop conducted with FDC OIT experts and finalized the architectural design and technology platform. 2/10/2025: FDC-FCOR PALM project team and OIT technical teams are currently brainstorming on the scope and approach for BARS archival.	06/30/25	Dipak Roy, OIT PM

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 Data	Unavailability of PALM Data Warehouse and technical specifications (File format, Data dictionary) affecting the remediation activities for the agency based system.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	1. Setup new database, to remediate 12 agency business systems/ tools, depends on the PALM Data Warehouse for data. 2. Design the new database, and subsequently plan for the user reporting solution (CAIRS - Corrections Accounting Information Resource System) with appropriate reports. 3. Remediate Agency based systems to integration to CAIRS and internal functional testing	1. It is recently understood that PALM Data Warehouse shall be available in Jun/2025. No technical specification for the PALM Datawarehouse will be available before that.	08/29/25	Dipak Roy, OIT PM

						<p>Therefore, the FDC/FCOR PALM team is taking a workaround to mitigate the Reporting platform and 11 other downstream system mitigation using PALM outbound interfaces.</p> <p>2. Solution approach for New Database and CAIRS has been prepared.</p> <p>3. Architectural design of the solution currently in-progress.</p>		
People Processes Technology	Not having resource backup in the FDC F&A team for recently created agency systems, to ensure business continuity.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	<p>1. Crosstrain staff to ensure adequate backup.</p> <p>2. Cross training will be completed during the project to ensure operational resiliency.</p>	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	
People Processes	Lack of clear instructions and frequent changes to the Task guidelines from Florida PALM team impacts agency's ability to complete the tasks on time.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	<p>1. To minimize frequent changes in task instructions. Consistent guidance fosters stability and improves overall performance.</p> <p>2. Collaborate with Florida PALM team on the issues with the Smartsheets.</p>	<p>1. Communicated to Florida PALM team on the challenges with ongoing changes to task instructions.</p> <p>2. Ongoing basis FDC team highlight the specific issues with the Smartsheets to get quick turnaround on issues.</p> <p>2/19/2025: Highlighted this issue again as part of Thursdays Task Talk topics, and requested FL PALM team to consolidate all updates to the PALM readiness workplan and share at once, with appropriate level of communication.</p>	01/06/26	Erica Starling, Financial Administrator	
People Processes Technology Data	Lack of resource capacity within FDC F&A team for Financial data analysis, impacting the timely data cleanup activities and ensure conversion readiness.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Onboard additional staff aug position with FLAIR data experience.	<p>1. Created RFQ for an additional staff aug position.</p> <p>2. The resource has been onboarded in early December 2024.</p> <p>2/10/2025: New resource to be onboarded as a replacement for the person onboarded in December 2024.</p> <p>Additionally one more resource request has been raised with FDC Contract management team.</p>	12/31/24	Erica Starling, Financial Administrator	
Processes Technology	Resource availability is limiting agency ability to progress on UAT preparation activities, e.g., UAT Test Plan, UAT Test Scripts, Future State Work Processes.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	<p>1. Onboard additional OIT BA to assist with mapping future state work processes to PALM and write test scenarios.</p> <p>2. The SMEs from F&A team will guide this OIT BA and will review, revise, approve, and use the test scripts in UAT.</p> <p>3. OIT BA will guide the F&A team on the UAT process and support on Test Management and monitoring UAT progress.</p>	<p>9/12/2024 : waiting for clarity on the UAT approach, scope and volume of work.</p> <p>10/16/2024: UAT high level plan was shared in PALM advisory council meeting.</p> <p>11/20/2024: BA requirement has been reviewed with the OIT leadership and available vendors are being evaluated.</p> <p>2/7/2025: Discussion in-progress with the OIT Quality Assurance vendor to leverage their expertise in UAT planning and preparation of test cases and test scripts.</p>	01/13/25	Dipak Roy, OIT PM	

FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	FDC's Organizational Change Management (OCM) Lead was onboarded and started working 05/06/2024. Onboarded project team from OIT including Project Manager, Business Analyst and Data Analyst. Key SMEs from F&A team has been engaged actively.
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	List of agency business systems are documented, i.e., as-is state, systems in the scope of remediation. Remediation approach for 2 systems is finalized, and the same for remaining systems are currently in-discussion. Team will continue with analysis and reach out to sponsors for any major change in the interface approach.
Technology Data	It is assumed that data in FLAIR will exist in a new field in PALM except for fields that are discontinued. For the discontinued fields, it is assumed that PALM project team will communicate the names of the discontinued fields and will be shared as the data dictionary is updated for each Palm Design Segment.	Logged	04/22/24	All agency business systems and the remediation of agency business systems.	The complete data mapping sheet/ crosswalk between FLAIR and PALM data fields are yet to be published by the Florida PALM team.
People Processes Technology	Additional clarity required from Florida PALM team, for finalizing the FDC UAT plan	Logged	10/21/24	UAT Planning for user readiness for performing UAT	Requested additional clarity from Florida PALM team. Florida PALM team to setup follow up sessions with the agency team to finalize the details of the UAT plan.

Technology					
People Processes Technology	Florida PALM team will work closely with agency team to mitigate any challenges the agency may face to meet the strict cutover timeline.	Logged	12/20/24	All users in agency financial functions.	Tentative plan for go-live is 1/6/2026, and the forecasted cutover period is around 2 weeks prior to it. Agency teams are asked to prepare the list of pre-requisites and the plan to meet this timeline. Agency to schedule further discussion to get the required support from the Florida PALM team/ DFS.
People Processes Technology	Agency team will receive required support (availability of Infrastructure and Florida PALM team) while performing the User Acceptance Testing and defect management.	Logged	12/20/24	All UAT Testers.	User Acceptance Test plan to document the pre-requisites and support required from Florida PALM team.
People Processes Technology Data	Enterprise systems shall be available for User Acceptance Testing including respective business processes.	Logged	12/20/24	All UAT Testers.	During Florida PALM design workshop, it is understood that the IT development activities for enterprise systems are in-progress.
Technology	IT Infrastructure for the agency shall support the user access and continued use of Florida PALM system.	Logged	12/20/24	All users in agency financial functions.	Florida PALM team expected to share the volumetrics for the agency.
Processes Technology	Required operations support team (both IT and F&A team) has been setup to support Florida PALM system access for the agency users, e.g. ongoing user access, user/ security roles assignments, access to data/ reports etc.	Logged	12/20/24	All users in agency financial functions.	

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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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Mark Tallent	mark.tallent@fdc.myflorida.com	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FDLE
- Readiness Workplan

FDLE Status Report Dashboard

Reporting Period
January - February 2025

Agency Sponsor
Charlotte Fraser

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

- Score = 93.44%**
- Submitted On Time = 24
 - Submitted Late = 8
 - Pending Resubmission = 0

Other Task Timeliness:

- Score = 85.38%**
- Submitted On Time = 52
 - Submitted Late = 9
 - Pending Resubmission = 3

Direct Task Completeness:

- Score = 84.52%**
- Submitted Complete = 24
 - Submitted Incomplete = 0
 - Completed After Submission = 7

Other Task Completeness:

- Score = 90.86%**
- Submitted Complete = 31
 - Submitted Incomplete = 0
 - Completed After Submission = 4

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 7
- Duplicate Filled Role = 6
- Vacant Role = 3

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		12/6 Remediation Ongoing		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		12/6 - Remediation Ongoing		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		12/6 - Final spreadsheet currently being updated for submission		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25	Task Complete	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
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Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/05/25	Task Complete	Submission Complete	02/12/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/30/25	Task Complete	Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25	Task Complete	Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/06/25	Task Complete	Submission Complete	
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Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/29/25	Task Complete	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/18/25	Task Complete	Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/05/25	Task Complete	Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/04/25	Task Complete	N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				

						Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25	Task Complete	Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 47</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 22</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 0</p> <ul style="list-style-type: none"> Related Business Process Groupings = 0/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 19</p> <p>Planned Interfaces = 6</p> <ul style="list-style-type: none"> Inbound Interfaces = 4 Outbound Interfaces = 2 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Needed Assets = Needed Contracts = Needed Customers = Not Needed Encumbrances = Needed Grants = Needed Projects = Needed Projects Balances = Needed

Agency Reported

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

FDLE Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
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 5/16/24: Still pending 7/22/24: No Change 8/19/24: No Change 10/14/24: No Change 11/19/24: No Change 12/9/24: No Change 1/6/25: No Change 2/3/25: No Change	05/16/24	Mike Moore
Processes Data	Information is needed related to the data warehouse for PALM	Open	4 (Medium/Medium)	FDLE is depending on the PALM project to provide FDLE project team information regarding the data warehouse. Mitigate this risk	6/25/24: - Reached out to our RC's for any available information. 7/22/24: No Change 8/19/24: Will update by 8/22/24 10/14/24: No Change 11/19/24: No Change 12/9/24: No Change 2/3/25: No Change	06/25/24	Anik Datta
Processes Data	Early visibility of Data Warehouse & Report Query Builder will help us to decide the future scope of custom reports for data validation (well before interface testing)	Open	4 (Medium/Medium)	Will address once PALM begins working on the Data Warehouse	8/7/24 New Risk 9/4/24: A/I for Angie to f/u 10/14/24: No Change 11/19/24: No Change 12/9/24: No Change 1/6/25: No Change 2/3/25: No Change	08/07/24	Anik Datta

Processes Technology Data	FDLE is in need of a comprehensive list of anticipated errors and warnings that may occur in relation to interface interactions and report parameters inputs.	Open	4 (Medium/Medium)	Pursue more information /direction from the PALM team. Further delay may impact our ability to meet downstream activities for example UAT.	9.4.24 New Risk 9/17/24: No Change 10/14/24: No Change 11/19/24: No Change 12/9/24: No Change 1/6/25: No Change 2/3/25: No Change	09/04/24	Anik Datta
Technology Data	Timeline for interface testing coinciding with integration testing presents a risk.	Open	4 (Medium/Medium)	Continue to watch the project timeline to see if this will change. Otherwise, we will accept the risk.	11/19/24: No Change 12/9/25: No Change 1/6/25: No Change 2/3/25: No Change	11/19/24	Anik Datta
Processes Technology	The Configuration Review and Update task during UAT poses a potential risk. Changes could affect the UAT timelines and outcomes.	Open	2 (Medium/Low)	Accept the risk.	11/19/24: No Change 12/9/24: Paused for now	10/31/24	Anik Datta
Processes Data	The task "Update Reports Inventory" is missing from the new 'Agency Implementation Roadmap.' There is no visibility of the Data Warehouse reporting tool in the current roadmap.	Open	2 (Low/Medium)	Accept the risk.	10.31.24: New Risk 11/19/24: No Change 12/9/24: No Change 1/6/25: No Change 2/3/25: No Change	10/31/24	Anik Datta

FDLE Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Processes	There is no cutover plan to transition from current systems to PALM compliant systems in future on the day of PALM go-live.	Open	Low - All impacts not listed as Critical or High	New PM onboarded and will develop cutover schedule for all affected applications and provide detailed plans much before PALM go-live date	6/21/24: Ongoing	12/31/25	Anik Datta

FDLE Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments or Updates
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.
Technology Data	FDLE assumes all PALM reports WILL match 1:1 with current FLAIR reports	Logged	08/19/24	Office of Information and Technology Systems Office of Financial Management		Monitor information as provided by PALM.

Agency Sponsor Confirmation
<p>As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.</p> <p>Agency Sponsor Name: *</p> <input type="text"/> <p><input type="checkbox"/> Confirm *</p> <p><input type="button" value="Submit"/></p> <p>Privacy Notice Report Abuse</p>

FDLE Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Charlotte Fraser	charlottefraser@fdle.state.fl.us	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FDOT
- Readiness Workplan

FDOT Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Lisa Saliba

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 90%

- Submitted On Time = 18
- Submitted Late = 14
- Pending Resubmission = 0

Other Task Timeliness:

Score = 74.46%

- Submitted On Time = 32
- Submitted Late = 26
- Pending Resubmission = 6

Direct Task Completeness:

Score = 89.35%

- Submitted Complete = 23
- Submitted Incomplete = 1
- Completed After Submission = 7

Other Task Completeness:

Score = 89.68%

- Submitted Complete = 20
- Submitted Incomplete = 2
- Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 31
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Data	514	Complete Data Readiness Analysis and Data Cleansing Activities for Segments I and II	01/29/24	04/12/24	75% - Consolidating/Inputting Information for Submission		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Data	526	Complete Data Readiness Analysis and Data Cleansing Activities for Segment III	04/29/24	07/12/24	25% - Beginning Initial Internal Meetings and Information Gathering		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	25% - Beginning Initial Internal Meetings and Information Gathering		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Data	542	Complete Data Readiness Analysis and Data Cleansing Activities for Segment IV	07/22/24	10/18/24	Pending Resubmission	02/12/25	Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with blended business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress		Will be completing from a systems perspective rather than segment perspective. Segment delineations do not match with		

									pienced business system functionality. FDOT is planning to complete remediation tasks at once rather than in segment order. Completion Target at 3/14/2025		
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	75% - Consolidating/Inputting Information for Submission					
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress					
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission					
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	03/05/25	Plan to be completed along with RW 560. We found it easier to identify the end users after completing the analysis tool, est. 3/28	Submission Complete		
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress					
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/14/25		Submission Complete		
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/10/25		Submission Complete		
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/17/25		Submission Complete		
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete		
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete		
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete		
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/03/25	Florida PALM: Agency submitted incomplete. Task required to be close as reporting period has ended.	Task Closed - Submission Incomplete	03/05/25	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/13/25		Submission Complete		
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	75% - Consolidating/Inputting Information for Submission					
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/20/25	Two entries marked in comments as Trust fund closed and not needing configuration. Other entries with comments indicate the Budget Entity requires updates. Please indicate how to conduct these changes or when we may be able.	Submission Complete		
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/08/25		Submission Complete		
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A		
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission					
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete		
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25						
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25						

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 201</p> <ul style="list-style-type: none"> Business Process Groupings = 11/13 <p>Identified Subject Matter Experts = 41</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 147</p> <ul style="list-style-type: none"> Related Business Process Groupings = 13/13 Planned Spreadsheet Uploads = 6 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 234</p> <p>Planned Interfaces = 40</p> <ul style="list-style-type: none"> Inbound Interfaces = 17 Outbound Interfaces = 22 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #2: Groupings Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agency Defined Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p>

- **Optional Conversions**
- Accounts Receivable = Needed
- Assets = Needed
- Contracts = Needed
- Customers = Needed
- Encumbrances = Needed
- Grants = Needed
- Projects = Needed
- Projects Balances = Needed

Agency Reported

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

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	FDOT Applications - Impacted asset inventory inconsistencies cause problems in planning remediation efforts.	Closed	9 (High/High)	Control - Regularly reviewing asset impact and assessing priority to asset for planning purposes	No comment this period	02/26/25	Brian Boyd
Technology	PALM Interfaces - Timeliness of PALM Nightly Batch Files and Data Warehouse Updates and Data Warehouse Updates introduce instability of established processes and payments.	Open	9 (High/High)	Transfer - Expecting the PALM solution to have timely or as needed batch files and Data Warehouse needs are available in agency or from interfaces until DW is fully available. (Adjust mitigation once we see it in action and understand the ramifications.)	Looking for guidance.	11/01/23	Brian Boyd
Processes	PALM Response - Issues not resolved in a timely manner, FDOT not receiving clear answers from Florida PALM in a timely manner will increase the duration to perform the remediation.	Open	9 (High/High)	Conduct monthly RAID meetings and promptly escalate issues to FDOT leadership and PALM leadership	Technical question on Interfaces remain unaddressed and will request a focused meeting to review each. Improving.	08/29/24	Brian Boyd
Technology	PALM Technical - Not knowing the batch schedule until at least July 2025 will leave agencies little time to remediation processes as needed.	Open	9 (High/High)	It is an absolute necessity. We are dependent on PALM. We will be ready and give it priority when we know more.	Impact is increasing.	12/12/24	Mark Rissinger
Technology	PALM Technical - The inability to efficiently enter large amounts of records via Excel uploads will incur delays due to the need to provide technical solutions for mass entry.	Open	9 (High/High)	Project costing could have a large number of records, as an example. An interface to accept our transactions in an automated fashion is needed.	No comment this period	08/29/24	Mark Rissinger
Processes	PALM Technical - Need to identify the "Input and Automated" records in extracts. FLAIR indicates whether records are input manually, automated, or system generated. FDOT uses this indicator for various reporting and balancing methods. PALM not having this indicator could cause major impacts to Cost Allocation and Cash Forecasting, especially if the automated records do not come across in the extracts.	Open	9 (High/High)	Prefer having PALM provide this indicator. If not, may need to quantify the result and come up with backup plan.	Worsening	02/28/25	Brian Boyd
Processes Technology	PALM Technical - Project Costing Module and duplicating information into Florida PALM for 15,000 projects manually is not feasible. (Hiring staff will be more expensive than developing and interface. Average 90-70 updates a day.)	Open	9 (High/High)	Florida PALM - will advise if it can be through Excel upload.	PALM to provide an interface, have not received it.	10/30/24	Brian Boyd
Processes Data	PALM Interfaces - Uploading data files through the use of Excel is critical for interface testing, yet there is no mechanism in place to test this in advance for our unit testing.	Open	9 (High/High)	Be ready when there is the ability to completely test the functionality.	No comment this period.	12/12/24	Mark Rissinger
Processes Data	PALM Functionality/Interfaces - Lack of Subsidiary and Available Balances files. The key subsidiary files currently used include the Encumbrance Subsidiary and the Accounts Payable Subsidiary - files that contain summaries of all active encumbrances/accounts-payables, including their balances.	Open	9 (High/High)	Under construction. The pdf report might be used. We are sure we can replicate a way to have this functionality.	New 2/28/25	02/28/25	Mark Rissinger
Technology Data	PALM Technical—Unresolved Issues on PALM Interface file layouts, relationships among the records, data examples, and not receiving definitive answers limit the visibility of the Enterprise System processing.	Open	9 (High/High)	Expect for an unknown amount of rework, consider this in planning activities.	New 2/28/25	02/28/25	Mark Rissinger
Processes Data	PALM Data - The Mock Conversion is problematic, having conversion errors that are inaccurate.	Open	6 (Medium/High)	Continue to work through the process and find a pattern to help identify the problem points.	No comment this period.	12/12/24	Magdiel Puig
Processes Data	PALM Data - The Mock Conversion 2 does not include a method to keep data in sync, for example, Project, how to make updates because we will have new projects and similar to other fields like organization, location, etc.	Open	6 (Medium/High)	Structure the testing in small units recognizing the problems and limit how far we can effectively test.	No comment this period.	12/12/24	Magdiel Puig
Processes Technology	FDOT Applications - The analysis of FDOT systems is complex and software components requiring remediation may be overlooked.	Open	6 (High/Medium)	Broaden the analysis as soon as possible, ensure to include SME. Applying early QA processes.	Worsening	02/28/25	Brian Boyd
Technology	PALM Interfaces - If agencies are expected to have to communicate with PALM via inconsistent interfaces (Excel upload vs batch upload), then it will lead to increased time needed for remediation.	Open	6 (High/Medium)	Through repeated trials and analysis to arrive at the best sequence and timing.	Worsening	02/28/25	Mark Rissinger
Technology Data	PALM Technical - Knowledge Center does not have version history on what was changed. It is a manual compare effort. The change log has not been updated for these interfaces. This would require agencies to check each field in every interface to implement technical changes and some changes may be missed.	Open	4 (Medium/Medium)	Ask PALM project to understand high level of dependency and stability interfaces require and to ensure completeness and accuracy in interface management.	In the January Report this was noted for agencies in general.	08/29/24	Mark Rissinger
Technology	PALM Technical - PALM is unable to provide accurate data crosswalk examples, such as for the Supplier supporting multiple vendor ids for same TIN/FEIN.	Open	4 (Medium/Medium)	Request PALM for an example. Many questions, until we are shown examples to know how to convert data and place in TVI.	There has been progress, but remains a Risk. (12/12/24)	08/29/24	Brian Tippel
Processes Technology	PALM Planning — The UAT Testing period is inadequate for agencies to test their applications and determine appropriate remediation strategies.	Open	4 (Medium/Medium)	Under review for options. Pending approval of new PALM roadmap.	.Pending approval of new PALM roadmap.	08/29/24	Program Management

Technology	PALM Interfaces - If FDOT is required to use the Excel uploads generated from automated processes, then we will need the comma-delimited layouts for the upload files to be more successful.	Open	4 (Medium/Medium)	Create our best estimate for comma-delimited layouts.	PALM has offered a discussion, unsure if resolves problem.	10/07/24	Mark Rissinger
Processes	PALM Functionality - There is a concern that more roles will be added in the future before go-live and PALM is not communicating when they do this, so it's a risk going forward that some roles may not be captured in AARF/SailPoint right away.	Open	4 (Medium/Medium)	Raise awareness to the Readiness Coordinator.	New 2/28/25	02/28/25	Mark Rissinger
Processes	Funding - allocations may not be available through to completion for all systems.	Open	3 (Low/High)	Avoid - Document program funding requirements and communicate with FDOT leadership, Governor's office, and House/Senate staff.	24-25 funding received, 25-26 LBR to be submitted in August, results in late winter/early spring of calendar 25. 2/26/25 - May need to revisit based on project timeline.	02/26/25	Brian Boyd

FDOT Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Data	Interface layouts contain errors.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Notify PALM and work to gain clarity and accuracy on interface layouts.	Contact_Sequence_Num	05/31/24	Brian Tippel
Data	Interface schema relationship details not provided in layouts, samples, or knowledge center.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Reaching out to PALM technical staff to gain guidance on entity relationship diagrams.	Improving	05/31/24	Mark Rissinger
People	SME Resources limited for business processes and the technical knowledge experts are overallocated.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	The majority of the tasks for these resources are critical for others to continue with analysis or remediation.	Monitor allocations closely and identify tasks that may be accomplished by another resource. Streamline communications. Set Priorities and work arounds. Escalate to management.	08/29/24	Program Management
Technology Data	PALM Interfaces - In the Interface layout files, the tab containing the type of feedback the agencies will receive after file processing was removed. This information is necessary to know of successful entries, or which ones had errors and the cause; need the format/layout definition what we will receive. We need the journal ID or unique ID that was generated so they can pair the processing with the transaction.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Raised to the Technical Coordinator.	No comment this period	10/07/24	Mark Rissinger
Processes Technology	FDOT Applications - Switching from the FLAIR transactions to the internal PALM functionality will vary for our internal systems. Required functionality may be missed.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Thoroughly test with historical and new test data.	No comment this period	12/12/24	Mark Rissinger
Technology Data	PALM COA, Project codes - Will PALM be enforcing agencies to use project numbers starting with two-digit agency numbers? We have project numbers set before entering them into the statewide accounting system, if another agency takes a project number we need, it will create an issue.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Critical - Having exclusive project numbers for FDOT. Perform comparison with other agencies. Three agencies use Project number that is length of 11.	No comment this period	12/12/24	Mark Rissinger
Processes Technology Data	PALM Technical - The sample data for the interface files is standalone and does not represent actual transactions; without data continuity examples that support workflow scenarios the accuracy of the internal edits and quality checks most likely will be inaccurate.	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	Critical - Impacts the ability to support the data linkage and business rules for processing. Continue to develop internal test data as a substitute.	No comment this period	12/12/24	Mark Rissinger
Technology	Low on mainframe available capacity and space to allocate for separate PALM environments..	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Application performance in Dev and Test may be limited. Requested Ensono for increase capacity.	No comment this period	07/08/24	Brian Tippel
Technology	PALM Interfaces - 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. From Risks.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Longer duration for remediation and testing.	Continue to convey the importance and provide as much assistance to help.	12/12/24	Mark Rissinger
Processes Technology	PALM COA - The new "Account" CoA field will be replacing the GL and Object codes. The Account codes restrict the necessary level of detail.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Propose moving this to Issues. This risk has already occurred, and we are Accepting it with a work-around being proceeding with the best information we have been provided and our best education guesses. This is not an idea and rework is an expected impact.	Monitor Florida PALM publications and attend work sessions. We received them from PALM and did Tommy said we have more for PALM than we use today. 12/11/24 -Tippel: Needing more info. 6/19/2024 moved from Risk.	08/29/24	Brian Boyd
Technology Data	PALM Interfaces - Cannot provide ERD's or DDL for the interface files reduces the understanding of the data relationships. Not enough detail on parent/child/sibling, one:one, or one:many, relationships, or optional record types. There is a desperate need for ERD diagrams to answer these questions for remediation	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Reach out to PALM regularly for details. Matt Breeding implied this would have a fast turnaround, but we have not heard anything back since Nov 20th. 1/17 Update - new commitment to provide ERDs.	We received 9, 2/26.	10/07/24	Mark Rissinger

... efforts. Moved from Risk to Issue.

FDOT Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	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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FDOT Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lisa Saliba	lisa.saliba@dot.state.fl.us	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FGCC
- Readiness Workplan

FGCC Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Lisa Mustain

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 97.5%

- Submitted On Time = 22
- Submitted Late = 6
- Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.92%

- Submitted On Time = 56
- Submitted Late = 8
- Pending Resubmission = 0

Direct Impact Task Completeness



Direct Task Completeness:

Score = 91.85%

- Submitted Complete = 21
- Submitted Incomplete = 1
- Completed After Submission = 5

Other Task Completeness



Other Task Completeness:

Score = 92.97%

- Submitted Complete = 28
- Submitted Incomplete = 0
- Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25					
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/18/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/18/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/18/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/21/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	02/28/25
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/07/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/12/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 14 • Business Process Groupings = 12/13 Identified Subject Matter Experts = 14	Implementation: Impacted Agency Business Processes = 29 • Related Business Process Groupings = 10/13 • Planned Spreadsheet Uploads = 0	Implementation: Business Systems Planned for Integration = 7 Planned Interfaces = 42 - Inbound Interfaces = 16 - Outbound Interfaces = 25	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 3 - Track without Budget - Account ChartField Tier Selection = Account Tier #2: Groupings - Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = Not To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Not Needed - Projects = Not Needed - Projects Balances = Not Needed

Agency Reported

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

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	Our configuration workbooks are out of date and there is no set timetable for when they will be refreshed	Open	9 (High/High)	FGCC has requested that our workbooks get refreshed and that we establish a regular schedule to refresh them so that as we make updates to FLAIR the workbooks will also get updated	Previously we have been given a timeframe of mid-December for when the current workbooks available in the knowledge center would be updated. As of 2/28/2025, the workbooks have not been updated yet.	05/02/24	Rob Stoner
Processes Data	FGCC has not found any definitive information regarding the use of inbound interface files, conversions, or spreadsheet uploads before or during UAT. Likewise, FGCC has not found any information about the availability of outbound interface files after the initial data upload and during UAT. FGCC intends to use these files as part of our UAT process.	Open	6 (Medium/High)	FGCC would like to get clarification on the availability of inbound and outbound interfaces prior to the beginning of UAT as well as during the UAT process. Additionally, if spreadsheet uploads will be available before PALM interfaces please let us know.	We have not received any update from DFS on this risk (10/25/2024) There has been some information shared during the most recent workshops. However, the planned interface testing seems to be focused on agency to palm and palm to agency and does not provide much information about enterprise system to palm. So, additional clarification is still needed (11/25/2024) This is still an outstanding question (2/28/2025)	08/15/24	Rob Stoner
Technology	FGCC did not receive funding for the Versa replacement system. Therefore, FGCC will need to work closely with DBPR in order to complete detailed business analysis and determine necessary remediation tasks.	Open	6 (High/Medium)	FGCC will reach out to IT within DBPR to establish regular analysis and design meetings in order to determine the business case and data requirements related to direct interface with PALM	Monthly.	09/11/23	Lisa Mustain, Director of Administration
Processes Data	Currently, PALM has not been able to provide definitive timelines of how much time we have to make adjustments to earnings and position funding during preliminary payroll accounting	Open	6 (High/Medium)	FGCC would like to get clarification on the expected time frames for the preliminary processing	We have not received any update from DFS on this risk (10/25/2024) We have not received any update from DFS on this risk (11/25/2024) This is still an outstanding question (2/28/2025)	09/27/24	Rob Stoner
Processes Data	FGCC has not found any definitive information regarding the use of inbound interface files, conversions, or spreadsheet uploads before or during UAT. Likewise, FGCC has not found any information about the availability of outbound interface files after the initial data upload and during UAT. FGCC intends to use these files as part of our UAT process.	Open	6 (Medium/High)	FGCC would like to get clarification on the availability of inbound and outbound interfaces prior to the beginning of UAT as well as during the UAT process. Additionally, if spreadsheet uploads will be available before PALM interfaces please let us know.	We have not received any update from DFS on this risk (10/25/2024) There has been some information shared during the most recent workshops. However, the planned interface testing seems to be focused on agency to palm and palm to agency and does not provide much information about enterprise system to palm. So, additional clarification is still needed (11/25/2024) This is still an outstanding question (2/28/2025)	08/15/24	Rob Stoner

Processes Technology Data	FGCC has not found any definitive information regarding the schedule and cut off dates for conversion data prior to go live and/or UAT. This information is needed in order for FGCC to implement any process and procedures for UAT testing and go live data verification.	Open	5 (High/Medium)	FGCC would like to get clarification on the schedule and cut off dates related to conversion data prior to UAT and GoLive	We have not received any update from DFS on this risk (10/25/2024). We have not received any update from DFS on this risk (11/25/2024) With the Go Live schedule getting pushed back FGCC realizes that specific cut off dates are still unknown. Can we please just get some kind of guideline like "cut off dates will be established and presented to agencies at a minimum of 90 days prior to the cut off date itself"	09/21/24	Rob Stoner
Processes Technology Data	FGCC has not found and definitive information regarding the processes that the enterprise systems will be following during UAT. For example, during UAT are Enterprise systems going to be updating both FLAIR and PALM UAT for ongoing daily transactions so that balances are properly maintained during UAT or are the enterprise systems only going to periodically update UAT? If it is periodic, is there a schedule?	Open	6 (High/Medium)	FGCC would like to get clarification on each enterprise testing strategy	We have not received any update from DFS on this risk (10/25/2024) We have not received any update from DFS on this risk (11/25/2024) This is still an outstanding question (2/28/2025)	09/27/24	Rob Stoner
Processes Technology Data	Currently, PALM has explained that during UAT there will be no scheduled resets of the initial data loads. This presents a risk associated to the overall UAT testing. Without scheduled resets during the UAT process we will be unable to confirm fixes associated with any identified errors that occur during UAT. This means that any errors could re-occur during Go Live.	Open	6 (High/Medium)	FGCC would like to have a few scheduled resets back to the initial Mock 4 conversion data so that we can test and corrective actions implemented as a result of UAT errors	We have not received any update on this risk (2/28/2025)	11/25/24	Rob Stoner
Processes Technology Data	Currently, FGCC is unable to identify how often during interface testing and UAT we are going to be able to receive updated COA values from PALM. Additionally, currently the is a COA workbook which will at some point be replaced by the standard PALM outbound interfaces and FGCC does not know when this transition will occur. The inability to receive updated COA values at regular intervals during interface testing and UAT has a direct impact on the ability to test our interface files and UI.	Open	6 (High/Medium)	FGCC would like to get clarification on when the PALM project will transition from the COA workbook to outbound interface files and how often the related data will be updated during interface testing and UAT.	We have not received any update on this risk (2/28/2025)	11/25/24	Rob Stoner
Technology	The Current State Business Process smartsheet does not have columns for both spreadsheet uploads and PALM Interfaces. Therefore, we do not have the ability to track and report progress for our business systems that may use PALM Interfaces	Open	4 (Medium/Medium)	FGCC has requested that the smartsheets be updated to allow this capability	We have not received any update from DFS on this risk (10/25/2024). We have not received any update from DFS on this risk (11/25/2024). At this point it seems like there will not any changes made to the smartsheets. If that is the case please just tell us so that we can simply accept the risk and close the risk. It very unlikely that the smartsheets are going to be updated as requested if this is the case please just close this risk. (2/28/2025)	05/02/24	Rob Stoner
Technology	Conversion Inventory and Data Readiness smartsheet utilizes a column called Agency Maintain Data Source. Due to the fact that each data source requires a date evaluation, cleanliness plan, and data monitoring, this column seems to be the same as Agency Business Systems but the smartsheet does not link to the business systems smartsheet. This makes it difficult to identify and track progress associated to data source clean up and business system remediation.	Open	4 (Medium/Medium)	FGCC would like to get clarification on the distinction between an Agency Business System and an Agency Maintained Data Source as well as insight into how to track how data from agency systems that is not in the primary sources gets converted into PALM.	We have not received any update from DFS on this risk (10/25/2024) We have not received any update from DFS on this risk (11/25/2024). At this point it seems like there will not any changes made to the smartsheets. If that is the case please just tell us so that we can simply accept the risk and close the risk. It very unlikely that the smartsheets are going to be updated as requested if this is the case please just close this risk. (2/28/2025)	05/02/24	Rob Stoner
Processes Data	FGCC has not found any definitive information regarding the schedule, depth, and scope of the conversion testing. Without this information we cannot determine the depth and scope of our testing, verification, and validation	Open	4 (Medium/Medium)	FGCC would like to get clarification on what will be included in the conversion testing. For example, after the conversion process is completed are we going to have access to the PALM sandbox to review and confirm our data within the PALM application, are we going to get samples of PALM reports, are we going to get PALM outbound interface files, etc.	We have not received any update from DFS on this risk (10/25/2024). As part of the workshops in the past month there has been some clarification on this issue. However, there is still not enough definitive information about interaction with enterprise systems and timelines of when functionality will be available to establish	06/28/24	Rob Stoner

					full testing plans. (11/25/2024)		
					This is still an outstanding question (2/28/2025)		
Processes Technology	<p>It is extremely problematic that Enterprise Systems are not using the PALM CCN when setting up meetings and workshops associated with system modifications related to PALM. BOSP only reaches out to our HR staff, MFMP only reaches out to our purchasing staff, STMS only reaches out to our processors, etc. It is incumbent on these staff members to forward any meeting invites to other people on the CCN.</p> <p>Essentially, the enterprise systems are notifying SME's of things that the Agency Sponsor, Business Liaison, and Project Manager are not getting. In some cases, the enterprise systems are starting a completely separate CCN that is specific to their system. This circumvents the entire reason for the PALM CCN.</p>	Open	4 (Medium/Medium)	FGCC would request that all enterprise system meeting and workshops that are associated to modifications and remediation related to PALM be communicated with all members of our PALM CCN	<p>It seem unlikely that our request is going to occur. If this is the case please let us know (2/28/2024).</p> <p>We have lowered the risk rating because it was originally overstated</p>	12/10/24	Rob Stoner

FGCC Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People	FGCC lacks the appropriate staffing levels to fully support readiness activities.	Open	High - Impacts the ability of the agency to meet deadlines or milestones	FGCC has requested Administered Funds.	FGCC has received some funding which has allowed FGCC to bring on additional staff augmentation resources. However, currently FGCC has not received any funding beyond the end of the current fiscal year.	06/30/25	Robert Stoner

FGCC Assumptions						
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period	Comments or Updates
People Processes Technology	FGCC will be able to access the available Administered Funds to support readiness activities.	Logged	02/29/24	All agency business systems.	12/14/2023 Update: Appropriation received. 02/29/2024 Update: FGCC is actively recruiting a Project Manager for the implementation of Florida PALM at FGCC. 03/12/2024 Update: FGCC conducted interviews for the Project Manager position during the week of March 8th.	
Technology	FGCC will not have a replacement for Versa Regulation by PALM go live	Logged	11/13/23	Revenue Management		The Versa Replacement budget line item was vetoed so FGCC will not have a Versa Replacement system by PALM Go Live
Technology	DBPR will continue to update and keep FGCC abreast on any modifications or remediations, if any, of Versa Regulation.	Logged	01/10/24	Revenue Management		Ongoing.
Processes Technology Data	FGCC will establish an agency consolidated financial database that will serve as a single repository for historical FLAIR data as well as ongoing PALM data	Logged	04/11/24	All agency business systems		Ongoing
Processes Technology Data	FGCC will be granted access to all interfaces available to agencies at some point after Go Live	Logged	02/28/25	All agency business systems		Ongoing

Agency Sponsor Confirmation

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

Agency Sponsor Name: *

Confirm *

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FGCC Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lisa Mustain	lisa.mustain@fgaming.gov	03/12/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FLHSMV
- Readiness Workplan

FLHSMV Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Steve Burch

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 96.88%

- Submitted On Time = 26
- Submitted Late = 6
- Pending Resubmission = 0

Other Task Timeliness:

Score = 94.15%

- Submitted On Time = 54
- Submitted Late = 8
- Pending Resubmission = 2

Direct Task Completeness:

Score = 88.39%

- Submitted Complete = 19
- Submitted Incomplete = 0
- Completed After Submission = 12

Other Task Completeness:

Score = 80.00%

- Submitted Complete = 26
- Submitted Incomplete = 3
- Completed After Submission = 9

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

CCN Composition

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



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 6
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
	People	328	Document Current Agency Business Processes	07/31/23	12/15/23	50% - In Progress		Due to the importance of other tasks, and the agency's operational work priorities, this task may not be completed by HSMV.	N/A	
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	04/16/24	We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during UAT testing, when we'll have full access to the PALM screens and testing environment.	Submission Incomplete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	75% - Consolidating/Inputting Information for Submission		We have completed this task, except for the updates to our current state business process documentation. Our goal is to update our procedures during UAT testing, when we'll have full access to the PALM screens and testing environment.		
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	11/01/24	Submitted 11/1/2024 per previous update.	Submission Incomplete	
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	Pending Resubmission	12/12/24		Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	Pending Resubmission	03/06/25	1-Please see our updated comments and statuses in Imp Interfaces & Dev and Interface Test Planning sheets, in context of A12 approval / go live extension. 2-Please ADD interface GLI051 to FLHSMV interface inventory, per email sent 3/6/2025 to our RC. 3-The Implementation Interfaces Details sheet has a yellow cell for AMI002 because the Interface ID is missing from the pulldown (008 or 007 - ?).	Submission Incomplete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25	Completed 558 Jan 10. Resubmitted 544 Jan 21 after reexamining rubric for 558 and 544. Our 558 progress led to completed 544. Updating and resubmitting 558 and 544.	Submission Complete	01/17/25
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission		Agency approved final agency UAT plan on 1/30/25, for submission by original deadline of 1/31/25. Plan held given extended deadline to 3/28/25, to allow for review of PALM UAT plan when published. Agency UAT plan available for review, and will be updated w/outcomes of vote on Amendment 12. Test schedule, Error tracking workbooks, and user story enhancement/test scenarios are in progress.		
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	100% - Submitted	01/31/25	Agency reviewed response and updated DM sheet. Approved to resubmit. - 2/14/25 Agency reviewed and completed all 13 workbooks. Two lines in DM workbook require selections that are not available in the field	Submission Complete	02/19/25

								minutes, row 1, row 21. Submitting 1/31/25 for analysis, per original deadline. Review of cross-ref reports in process.		
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/09/25	Agency confirmed list updated and complete. 1/9/25 - KG	Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress		Meeting w/ LDO held 1/27/25; will meet biweekly then weekly prior to UAT in April. Planning to use Project UAT stages to capture training aide material and start agency UAT and agency training. Seeking training liaison support from LDO.		
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/09/25	Resubmitted 1/16/25	Submission Complete	01/16/25
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/10/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25	SC updated Speedkey table with comments, and approved to resubmit as of 1/24/25. Reviewed 2/14/25.	Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25	Resubmitted 2/14/25. Updated 2/5/25. Approved by agency 1/27/25. Yellow cells indicate mapping selection for FL PALM OCA was not found in field. Comments contain the desired value from the agency.	Submission Complete	02/06/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	01/28/25	Resubmitted 2/14/25. Updated w/ Placeholder values 2/6/25. Approved by agency 1/27/25. Yellow cells indicate mapping selection for FL PALM Org ID was not found in field. Comments contain the desired value from the agency.	Submission Complete	02/06/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/08/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/28/25	Resubmitted 2/14/25. Updated w/ Placeholder values 2/6/25. Approved by agency 1/27/25. Yellow cells indicate mapping selection for FL PALM Grant ID not available due to agency adding CSFA # into FACTS after 11/30 deadline, per comment field for each applicable row.	Submission Complete	02/06/25
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering		Status check week of Feb 10 via workgroup w/ business and tech teams.		
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/10/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/28/25	Agency approved 2/28/25 Ready for SC review - 2/7		
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering				

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 61</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 25</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Implementation:</p> <p>Impacted Agency Business Processes = 163</p> <ul style="list-style-type: none"> Related Business Process Groupings = 12/13 Planned Spreadsheet Uploads = 0 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Implementation:</p> <p>Business Systems Planned for Integration = 3</p> <p>Planned Interfaces = 8</p> <ul style="list-style-type: none"> Inbound Interfaces = 5 Outbound Interfaces = 3 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #1: Agency-Wide Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured

- PC Subcategory = To Be Configured
 - PC Source Type = Not To Be Configured
- Conversion**
- **Optional Conversions**
 - Accounts Receivable = Not Needed
 - Assets = Needed
 - Contracts = Needed
 - Customers = Not Needed
 - Encumbrances = Needed
 - Grants = Needed
 - Projects = Needed
 - Projects Balances = Not Needed

Agency Reported

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

FLHSMV 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 Data	Final Supplier ID will be provided by PALM before Go Live. Risk to agency is in not receiving finalized Supplier IDs until or just before go live. In order to successfully match supplier IDs provided by PALM, the FEID is critically needed by FLHSMV, confirmed by Data Manager. Seeking clarification from PALM on TIN/SSN field in Additional ID Record Type. (Comm to RC 2/14/25)	Open	9 (High/High)	Pending PALM updates.	If FEID is not provided, the ability to match the Supplier ID to agency data would be quite taxing and require multiple, additional hours that are not currently included in the plan budget.	12/20/24	Nathaniel Seabrooks
People	HSMV is training and attempting to hire new accounting staff to learn new / daily business processes in addition to testing the PALM system and learning adjacent systems.	Open	6 (Medium/High)	HSMV is actively working to train new staff and provide Florida PALM information.		12/20/24	FLHSMV Supervisors
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	6 (High/Medium)	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 has begun building a new interface file in preparation for interface testing in late 2024.	Updated start to building FAME interface file	06/27/24	Steve Burch / Mike Alexander / Nate Seabrooks

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 is actively working to fill these positions.	Maintaining this Issue with added context of new employees needing regular training compounded by UAT occurring during YEC. Accounting has 11 vacant positions, and is authorized to fill 5 of these positions (2/14/2025).	08/22/24	Steve Burch / Stephanie Cabrera

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.	Internal discussions as of 12/20/24 confirmed all technical units are prepared for UAT start date of April 15, 2024 per PALM schedule.

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:
January - February 2025	Steve Burch	steveburch@flhsmv.gov	03/07/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FSDB
- Readiness Workplan

FSDB Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Tracie Snow

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 91.15%

- Submitted On Time = 18
- Submitted Late = 8
- Pending Resubmission = 0

Other Task Timeliness:

Score = 95.94%

- Submitted On Time = 47
- Submitted Late = 16
- Pending Resubmission = 0

Direct Task Completeness:

Score = 76.15%

- Submitted Complete = 13
- Submitted Incomplete = 1
- Completed After Submission = 12

Other Task Completeness:

Score = 83.78%

- Submitted Complete = 23
- Submitted Incomplete = 1
- Completed After Submission = 13

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 12
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/24/24	NA	Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25	NA - We do not use agency business systems to interface with PALM.	Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	02/24/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	03/05/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	03/05/25		Submission Complete	03/11/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/21/25	100% - Submitted	02/21/25	RC: Request for update email sent to agency; no action complete as of date of verification. 3/5/25 agency submitted, noting blank fields for FLAIR Org Codes not belonging to their agency.	Submission Complete	03/07/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/21/25	100% - Submitted	02/21/25	RC: Request for update email sent to agency; no action complete as of date of verification. 3/7/25; submitted; RC updated agency Task Tracker to complete	Submission Complete	03/07/25
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/13/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/05/25	Florida PALM: Agency did not submit. Task required to be close as Reporting Period has ended.	Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/21/25	100% - Submitted	03/05/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25					
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	Pending Resubmission	02/19/25		Submission Incomplete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/19/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/19/25			
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25					
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25					
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25					

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 11</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 4</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 7</p> <ul style="list-style-type: none"> Related Business Process Groupings = 7/13 Planned Spreadsheet Uploads = 0 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 0</p> <p>Planned Interfaces = 0</p> <ul style="list-style-type: none"> Inbound Interfaces = 0 Outbound Interfaces = 0 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #3: Family Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = Agencywide Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Needed Assets = Needed Contracts = Needed Customers = Needed Encumbrances = Needed Grants = Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

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

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

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

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:
January - February 2025	Tracie C. Snow	snowt@fsdbk12.org	03/14/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for FWC
- Readiness Workplan

FWC Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Jessica Crawford

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 97.33%

- Submitted On Time = 24
- Submitted Late = 6
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.77%

- Submitted On Time = 61
- Submitted Late = 3
- Pending Resubmission = 0

Direct Task Completeness:

Score = 96.55%

- Submitted Complete = 22
- Submitted Incomplete = 0
- Completed After Submission = 7

Other Task Completeness:

Score = 97.32%

- Submitted Complete = 39
- Submitted Incomplete = 0
- Completed After Submission = 2

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

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

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	02/20/25		Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	100% - Submitted	01/29/25		Submission Complete	01/29/25
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	100% - Submitted	02/18/25			
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/16/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/14/25	2/17/25: Submission incomplete due to errors on error report and errors indicated by conditional formatting in Smartsheet	Submission Complete	02/18/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/07/25	Jessica is out on maternity leave so our backup signed.	Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/20/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	03/03/25		Submission Complete	
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/14/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/07/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	01/30/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/07/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	50% - In Progress				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				

Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
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People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
Implementation: Planned Florida PALM End Users = 152 • Business Process Groupings = 13/13 Identified Subject Matter Experts = 13	Implementation: Impacted Agency Business Processes = 112 • Related Business Process Groupings = 11/13 • Planned Spreadsheet Uploads = 1	Implementation: Business Systems Planned for Integration = 5 Planned Interfaces = 3 - Inbound Interfaces = 0 - Outbound Interfaces = 3	Implementation: Configuration • Commitment Control (KK) - Budget Allotments - Control Option = Option # 1 - Control - Account ChartField Tier Selection = Account Tier #1: Highest - Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree • Org Security Rule = Agencywide • Optional ChartFields - OA1 = To Be Configured - OA2 = Not To Be Configured - PC Category = To Be Configured - PC Subcategory = To Be Configured - PC Source Type = To Be Configured Conversion • Optional Conversions - Accounts Receivable = Not Needed - Assets = Needed - Contracts = Needed - Customers = Not Needed - Encumbrances = Needed - Grants = Needed - Projects = Needed - Projects Balances = Needed

Agency Reported

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

FWC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
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
Processes Data	There is no communication plan between PALM, Enterprise systems and the agencies. FWC is unable to accurately define impacts to processes and potentially agency business systems.	Open	6 (High/Medium)	1. FWC Analysis, design, and system remediation is being based on calculated assumptions	No change	09/20/24	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
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	4 (Medium/Medium)	1. FWC Analysis and design is being based on calculated assumptions	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

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.

FWC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Jessica Crawford	jessica.crawford@myfwc.com	03/05/25

Agency Sponsor Name: *

Confirm *

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Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for JAC
- Readiness Workplan

JAC Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Alton L. "Rip" Colvin, Jr.

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 90.31%

- Submitted On Time = 24
- Submitted Late = 8
- Pending Resubmission = 0

Other Task Timeliness:

Score = 80.31%

- Submitted On Time = 42
- Submitted Late = 22
- Pending Resubmission = 0

Direct Task Completeness:

Score = 88.71%

- Submitted Complete = 17
- Submitted Incomplete = 0
- Completed After Submission = 14

Other Task Completeness:

Score = 75.90%

- Submitted Complete = 21
- Submitted Incomplete = 3
- Completed After Submission = 15

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

CCN Composition

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



Change Champion Network:

- Unique Filled Role = 15
- Duplicate Filled Role = 2
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Processes	515	Identify Change Impacts and Update Agency Business Process Documentation for Segments I and II	01/29/24	04/12/24	Pending Resubmission	02/24/25	06/14/2024 - We hope to have the first part of Tasks 515 and 527 complete by 07/12/2024.	Submission Incomplete	
N/A	Processes	527	Identify Change Impacts and Update Agency Business Process Documentation for Segment III	04/15/24	07/12/24	Pending Resubmission	02/28/25		Submission Incomplete	
N/A	Processes	543	Identify Change Impacts and Update Agency Business Process Documentation for Segment IV	07/22/24	10/18/24	Pending Resubmission	02/28/25		Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	12/17/24		Submission Complete	12/17/24
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/08/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25	errors corrected on 2/17 verified complete 2/20. Waiting to update task tracker with complete verification til task resubmitted to 100% by JAC. 2/20 verification form attached. (DT)	Submission Complete	02/20/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/14/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/27/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/11/25	Revising this with Nona -3/4, EH	Submission Complete	03/11/25

N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/05/25		Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/05/25		N/A
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress			

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 243</p> <ul style="list-style-type: none"> Business Process Groupings = 12/13 <p>Identified Subject Matter Experts = 31</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 125</p> <ul style="list-style-type: none"> Related Business Process Groupings = 10/13 Planned Spreadsheet Uploads = 1 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 10</p> <p>Planned Interfaces = 5</p> <ul style="list-style-type: none"> Inbound Interfaces = 1 Outbound Interfaces = 4 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree Org Security Rule = TBD Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Not Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

JAC Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People	Low acceptance by Judicial Related Organizations (JROs)	Open	6 (High/Medium)	Mitigate: The agency continues to create opportunities to involve the JROs and keep them informed of the project progress and current status.	A survey conducted in early January 2025 was helpful in determining JRO priorities for communication.	02/25/25	Rip Colvin, Executive Director
Technology	External business system (BOMS) may not be updated with proper accounting fields for integration with PALM	Open	6 (High/Medium)	Avoid: The agency formed an Advisory Council comprised of JRO staff to work with the vendor on remediation.	JAC is assisting the Advisory Council when requested regarding activities related to BOMS.	02/25/25	Kathy LaCorte
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	6 (High/Medium)	Mitigate: The agency believes that the current org security will resolve this issue.	We are leaving this risk on the register until we are actually able to test the org security to assure it works as promised.	02/25/25	Rip Colvin, Executive Director
People	Availability of staff to work on the project/Limited qualified staff	Open	6 (High/Medium)	Mitigate: The agency is looking at ways to supplement current staff.	The agency has engaged multiple professionals to assist in this project. We also submitted an Amended LBR with a request to fully fund our needs for FY 2025-26	02/25/25	JAC Directors
People Processes Technology Data	Funding insufficient for project costs	Open	6 (High/Medium)	Mitigate: The agency will continue to look at projected costs and request needed funding	The legislature granted our FY 2024-2025 request in the GAA. We submitted an Amended	02/25/25	Rip Colvin, Executive Director

Data						submitted an Amended LBR on February 25, to request sufficient funding for FY 2025-26.		
Technology	Org code updates may not be established and implemented which will allow correct reporting especially for grants and projects	Open	3 (High/Low)	Mitigate: The agency has made several submissions of org code data. We continue to work on refining the org code structure.	Our plan has been submitted; we will monitor.	02/25/25	Dina Kamen	
Processes Technology	Delays in PALM information will create delays in remediating our processes	Open	3 (High/Low)	Accept: The agency will continue to monitor information received	No new comments	02/25/25	JAC Directors	
Data	Data may not be sufficiently cleansed at Go-Live	Open	2 (Medium/Low)	Avoid: The agency prepared a plan for Data Cleansing. We are working with DFS to complete this activity	Our agency continues to work on data cleansing.	02/25/25	Nona McCall	
Processes	Downtime during transition	Open	2 (Medium/Low)	Mitigate: The agency will create a revised plan to minimize this risk. The new plan will capture strategies on how to mitigate this risk with the new July 2026 Go-Live date.	We current working on a updated plan.	02/25/25	Dina Kamen and Jamie Johnson	
People Processes	Replacement or major upgrade of PeopleFirst involving the same team members as the PALM Project	Open	2 (Medium/Low)	Mitigate: The agency will review all available information regarding this potential new contract and then plan accordingly.	The current contract for People First expires on August 20, 2026; however, Section 59 of Chapter 2024-228, Laws of Florida, requires DMS to enter into a three (3) – year contract extension with our current service provider, extending the contract to August 20, 2029; with an option to extend the contract for one additional year.	02/25/25	Jamie Johnson	
Data	Data may not be sufficiently cleansed at go-live due to the JACs inability to adjust FLAIR records which are no longer active in FLAIR. DFS manages these records, and there is not guidance on how DFS will eliminate these records prior to go-live.	Open	2 (Medium/Low)	Transfer: The agency will continue to discuss this issue with DFS staff and react to their guidance	We are working with DFS during their published office hours.	02/25/25	Nona McCall	
Processes	PALM fails to integrate properly with other state-owned systems such as PeopleFirst, STMS, and PCard Works	Open	2 (Medium/Low)	Accept: The agency will continue to monitor information being received from the PALM team and other agencies.	We are retaining this as a risk to monitor new information.	02/25/25	Nona McCall	

JAC Issues

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

JAC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology Data	The agency will have sufficient funding in FY 2024-2025 and receive funds via the LBR process for FY 2025-2026.	Logged	02/24/25	All processes and systems	A FY 2025-26 Amended LBR was submitted on February 25, 2025 which reflects an implementation delay to July 2026.
People Processes Technology	Program governance will provide timely decisions and issue resolution	Logged	11/13/23	All stakeholders	The agency continues to monitor those decisions for which we need more information
People Processes Technology Data	Project teams will have access to the appropriate management, staff and related Program stakeholders (internal and external) and other resources as required and as needed without delay	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project. Additionally, the agency is looking into acquiring contracted or OPS staff to assist with the workload
People Processes Technology Data	Stakeholder input will be provided in a timely manner so as to not impede the progress of the Project	Logged	11/13/23	All stakeholders	The agency sponsor has made it clear that this is a priority project.
People Processes Technology Data	PALM Payroll and Financials will go live in January 2026.	Logged	02/24/25	All Stakeholders	None
People Processes Technology Data	A hard cutover from FLAIR to PALM will occur in January 2026 and FLAIR will no longer work.	Logged	02/24/25	All Stakeholders	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 *

JAC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/08/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	03/08/25
January - February 2025	Alton L. Colvin, Jr.	rip.colvin@justiceadmin.org	02/27/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for LEG
- Readiness Workplan

LEG Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Lee Boatwright

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 81.94%

- Submitted On Time = 15
- Submitted Late = 15
- Pending Resubmission = 1

Other Task Timeliness



Other Task Timeliness:

Score = 87.08%

- Submitted On Time = 45
- Submitted Late = 16
- Pending Resubmission = 3

Direct Impact Task Completeness



Direct Task Completeness:

Score = 79.63%

- Submitted Complete = 16
- Submitted Incomplete = 2
- Completed After Submission = 9

Other Task Completeness



Other Task Completeness:

Score = 77.43%

- Submitted Complete = 24
- Submitted Incomplete = 4
- Completed After Submission = 7

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 14
- Duplicate Filled Role = 11
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	519	Remediate Agency Business Systems based on Segment I	01/29/24	06/28/24	50% - In Progress		System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes.		
N/A	Technology	531	Remediate Agency Business Systems based on Segment II	04/29/24	10/04/24	50% - In Progress		System build and test is an ongoing effort. As information is continuing to come regarding crosswalks and valid values, this will remain open until those actions are complete and systems are updated with appropriate changes.		
Direct	Technology	546	Update Florida PALM Interface Inventory for Segment IV	07/22/24	10/18/24	75% - Consolidating/Inputting Information for Submission		Pending meetings for EDR, and for AG's office to confirm what interfaces will be used.		
N/A	Technology	547	Remediate Agency Business Systems based on Segment III	07/22/24	12/13/24	50% - In Progress				
Indirect	Technology	553	Prepare for Interface Testing	09/16/24	10/18/24	Pending Resubmission	10/18/24		Submission Incomplete	
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	50% - In Progress				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	Pending Resubmission	01/10/25		Submission Incomplete	02/06/25
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Incomplete	03/12/25
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	02/20/25		Submission Complete	
Direct	Data	567-K	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	02/18/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/20/25	Made updates per Task completion verification form	Submission Complete	02/25/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	03/11/25		Not Submitted	
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	03/10/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	03/05/25	Florida PALM: Agency did not submit. Task required to be close as reporting period has ended.	Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface	01/06/25	07/25/25	25% - Beginning Initial Internal Meetings and Information Gathering				

			Testing							
Direct	Data	567-Q	Share, Review, and Update Configuration Workbooks	01/27/25	02/21/25	100% - Submitted	02/18/25			Submission Complete
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25			Submission Complete
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25			N/A
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25			Submission Complete
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	100% - Submitted	03/11/25			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	75% - Consolidating/Inputting Information for Submission				

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.
<p>Implementation:</p> <p>Planned Florida PALM End Users = 48</p> <ul style="list-style-type: none"> Business Process Groupings = 10/13 <p>Identified Subject Matter Experts = 11</p>	<p>Implementation:</p> <p>Impacted Agency Business Processes = 112</p> <ul style="list-style-type: none"> Related Business Process Groupings = 8/13 Planned Spreadsheet Uploads = 3 	<p>Implementation:</p> <p>Business Systems Planned for Integration = 11</p> <p>Planned Interfaces = 19</p> <ul style="list-style-type: none"> Inbound Interfaces = 11 Outbound Interfaces = 7 	<p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 3 - Track without Budget Account ChartField Tier Selection = Account Tier #3: Family Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = TBD Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Not Needed Projects Balances = Not Needed

Agency Reported

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

LEG Risks							
Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
Technology	Sufficient Reports	Open	6 (High/Medium)	Maintain consistent and clear communication between the agency and PALM so all reporting needs are met. Document reporting needs and verify they are met prior to go live.		01/14/25	OLS Staff
People	Staff turnover - How many and when possible. We have people that will be completing Drop	Open	4 (Medium/Medium)	Ensure staff is adequately trained and cross-training is taking place. Also ensure internal documentation, use cases, and related information is accurately documented and accessible for new staff.		01/14/25	OLS Staff

LEG Issues							
Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
Technology	Reports - A great deal of management information is created (by reports) and distributed by FLAIR and RDS, as well as information to external users. These reports have been optimized over time	Open	High - Impacts the ability of the agency to meet deadlines or milestones	We have a "Leg Current State Report (Smartsheet)" containing current reports (updates continue as discovered), which DFS has asked for to possibly be provided by DFS or PALM either At Go-Live, Within 30 days of Go-Live, within 180 days of Go-Live, or later.	Much about Reporting is still unknown so it is difficult to assess this issue at this time.	05/31/24	Mike Mentillo

	to efficiently provide the information these users in a familiar format. The ability to create and distribute these financial reports in a useable format may be critical both within and external to the F & A office. Further, as it appears that PALM will use a skill set for reporting that the employees in the F&A office may not possess, if not mitigated, could have a significant impact on operations either within our external to the F & A office.			None of these options allows for testing prior to Go-Live and thus could impact productivity either internal or external of the F & A Office. This may more likely be a state standard (more generic version of report to cover multiple agencies needs- similar to FLAIR approach when it was implemented). Train or hire F & A employee with skill set to write or modify reports in PALM. Access other Legislative units who may have ability to create reports with PALM data (OAG or OLITS).			
Technology	Reports - Current staffing levels are based optimized use of FLAIR over the last 40 years developing efficiencies through both process knowledge and information reports. Both of these things are going to change which could impact current productivity of staff. The current report catalog (61 row is predominantly process reports for system functions, transactions in process, transactions, and reconciliations (which are necessary, however, very different from reports we use in FLAIR). The Report Catalog from 3-10-2022 was 415 lines and included many management reports. Reporting may be one of our larger change management issues both functional users and for internal and external users of financial information. Current Report examples in the PALM Reports Catalog are mostly reports for functional users involved in the business processes in PALM, and the reports very significantly from the reports we use today. This will present a significant change management issue, but with the reports available well in advance of Go-Live, training and opportunities to use the reports in the sand box prior to Go-Live it should be able to be mitigated. Part Two: Internal and external users of financial information.	Open	Low - All impacts not listed as Critical or High	This is a training issue and can be accomplished through end user training and practice in the sand box.	Examples in report catalog are very different than reports we use in FLAIR. Why was the report catalog reduced so much?	05/31/24	Mike Mentillo

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

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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LEG Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Lee Boatwright	boatwright.lee@leg.state.fl.us	03/10/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for PSC
- Readiness Workplan

PSC Status Report Dashboard

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

Reporting Period

January - February 2025

Agency Sponsor

Apryl Lynn

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness



Direct Impact Task Timeliness:

Score = 95.22%

- Submitted On Time = 13
- Submitted Late = 10
- Pending Resubmission = 0

Other Task Timeliness:

Score = 96.25%

- Submitted On Time = 51
- Submitted Late = 12
- Pending Resubmission = 0

Direct Task Completeness:

Score = 85.22%

- Submitted Complete = 15
- Submitted Incomplete = 1
- Completed After Submission = 7

Other Task Completeness:

Score = 88.46%

- Submitted Complete = 30
- Submitted Incomplete = 1
- Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

CCN Composition

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



Change Champion Network:

- Unique Filled Role = 4
- Duplicate Filled Role = 12
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	100% - Submitted	10/29/24		Submission Complete	
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	50% - In Progress				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	50% - In Progress				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	01/10/25
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	50% - In Progress				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/16/25	KM 1/30/25: Organization value has been updated.	Submission Complete	02/11/25
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/20/25		Submission Complete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	01/24/25		Submission Complete	
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	100% - Submitted	02/13/25		Submission Complete	
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/06/25		N/A	
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	100% - Submitted	02/13/25		Submission Complete	
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/04/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and Issues	02/28/25	04/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	50% - In Progress				

People

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

Processes

The sequence of procedures to accomplish a business objective.

Technology

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

Data

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

Implementation:

Implementation:

Implementation:

Implementation:

Summary

Planned Florida PALM End Users = 9

• Business Process Groupings = 10/13

Identified Subject Matter Experts = 3

Summary

Impacted Agency Business Processes = 18

• Related Business Process Groupings = 9/13

• Planned Spreadsheet Uploads = 0

Summary

Business Systems Planned for Integration = 0

Planned Interfaces = 0

- Inbound Interfaces = 0

- Outbound Interfaces = 0

Summary

Configuration

• Commitment Control (KK)

- Budget Allotments - Control Option = Option # 2 - Track with Budget

- Account ChartField Tier Selection = Account Tier #2: Groupings

- Organization ChartField Translation Tree Selection = Translation Tree #2: Agency-Defined Tree

• Org Security Rule = Agencywide

• Optional ChartFields

- OA1 = To Be Configured

- OA2 = Not To Be Configured

- PC Category = To Be Configured

- PC Subcategory = To Be Configured

- PC Source Type = Not To Be Configured

Conversion

• Optional Conversions

- Accounts Receivable = Not Needed

- Assets = Needed

- Contracts = Needed

- Customers = Not Needed

- Encumbrances = Needed

- Grants = Not Needed

- Projects = Not Needed

- Projects Balances = Not Needed

Agency Reported

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

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
People	Training and understanding how to work/maneuver in FL PALM	Open	Low - All impacts not listed as Critical or High	Provide crosswalk, process guides, and training opportunity		07/01/25	Katisha Mobley
Technology	Updating coding of agency business systems that we manually enter FLAIR data from reports into	Open	Low - All impacts not listed as Critical or High	Provide crosswalk		07/01/25	Katisha Mobley

PSC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	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 *

[Privacy Notice](#) | [Report Abuse](#)

PSC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Apryl Lynn	alynn@psc.state.fl.us	03/03/25

Helpful Links

- Dashboard Snapshots
- Knowledge Center
- Florida PALM Workbook for SCS
- Readiness Workplan

SCS Status Report Dashboard

Reporting Period

January - February 2025

Agency Sponsor

Eric Maclure

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

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness



Direct Impact Task Timeliness:

Score = 100%

- Submitted On Time = 29
- Submitted Late = 0
- Pending Resubmission = 0

Other Task Timeliness



Other Task Timeliness:

Score = 96.46%

- Submitted On Time = 55
- Submitted Late = 9
- Pending Resubmission = 0

Direct Impact Task Completeness



Direct Task Completeness:

Score = 85.36%

- Submitted Complete = 15
- Submitted Incomplete = 0
- Completed After Submission = 13

Other Task Completeness



Other Task Completeness:

Score = 91.58%

- Submitted Complete = 29
- Submitted Incomplete = 1
- Completed After Submission = 8

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

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

CCN Composition



Change Champion Network:

- Unique Filled Role = 18
- Duplicate Filled Role = 0
- Vacant Role = 0

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
N/A	Technology	561	Remediate Agency Business Systems based on Segment IV	10/21/24	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	Technology	558	Update Agency Business System Documentation	11/18/24	01/10/25	100% - Submitted	12/13/24		Submission Complete	
Indirect	People	536-C	Create Agency Specific User Acceptance Testing Plan	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
N/A	Processes	560	Submit Change Analysis Tool	12/09/24	04/11/25	75% - Consolidating/Inputting Information for Submission				
Indirect	People	564	Update Future Florida PALM Users	12/09/24	01/10/25	100% - Submitted	01/10/25		Submission Complete	
N/A	People	568	Create Training Plan for Agency Managed End User Training	12/09/24	05/30/25	75% - Consolidating/Inputting Information for Submission				
Direct	Data	567-J	Share, Review, and Update Configuration Workbooks	12/18/24	01/17/25	100% - Submitted	01/17/25		Submission Complete	
Direct	Data	567-P	Share, Review, and Update Configuration Workbooks	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	02/20/25
Direct	Data	658-A	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	02/20/25
Direct	Data	658-B	Submit Data Field Mapping	12/18/24	02/14/25	100% - Submitted	02/13/25		Submission Complete	
N/A	N/A	569	Submit Bimonthly Agency Readiness Status Report	12/30/24	01/10/25	100% - Submitted	01/09/25		Submission Complete	
N/A	N/A	570	Manage Agency Specific Implementation Schedule, Risks and Issues	12/30/24	02/28/25	100% - Submitted	02/28/25	Florida PALM: Agency submitted incomplete. Task required to be closed as reporting period has ended.	Task Closed - Submission Incomplete	
Direct	Data	658-C	Submit Data Field Mapping	01/06/25	02/14/25	100% - Submitted	02/14/25		Submission Complete	02/14/25
Indirect	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress				
N/A	People	582	Share Florida PALM Updates	01/27/25	02/07/25	100% - Submitted	02/06/25		Submission Complete	
N/A	People	584	Update Authorized Smartsheet Users	01/27/25	02/07/25	100% - Submitted	02/03/25		N/A	02/03/25
Direct	Data	658-D	Submit Data Field Mapping	02/03/25	03/14/25	75% - Consolidating/Inputting Information for Submission				
N/A	N/A	589	Submit Bimonthly Agency Readiness Status Report	02/28/25	03/10/25	100% - Submitted	03/10/25		Submission Complete	
N/A	N/A	590	Manage Agency Specific Implementation Schedule, Risks and	02/28/25	04/30/25	75% - Consolidating/Inputting				

			Issues			Information for Submission			
Direct	Data	567-L	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-M	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			
Direct	Data	567-N	Share, Review, and Update Configuration Workbooks	03/03/25	03/28/25	25% - Beginning Initial Internal Meetings and Information Gathering			

People	Processes	Technology	Data
<p>The staff and stakeholders affected by your agency's transition to Florida PALM.</p> <p>Implementation:</p> <p>Planned Florida PALM End Users = 137</p> <ul style="list-style-type: none"> Business Process Groupings = 13/13 <p>Identified Subject Matter Experts = 9</p>	<p>The sequence of procedures to accomplish a business objective.</p> <p>Implementation:</p> <p>Impacted Agency Business Processes = 37</p> <ul style="list-style-type: none"> Related Business Process Groupings = 12/13 Planned Spreadsheet Uploads = 3 	<p>The applications or tools used to process, track, or report on financial operations.</p> <p>Implementation:</p> <p>Business Systems Planned for Integration = 4</p> <p>Planned Interfaces = 9</p> <ul style="list-style-type: none"> Inbound Interfaces = 2 Outbound Interfaces = 7 	<p>Information used in or produced from an agency's financial business operations.</p> <p>Implementation:</p> <p>Configuration</p> <ul style="list-style-type: none"> Commitment Control (KK) <ul style="list-style-type: none"> Budget Allotments - Control Option = Option # 2 - Track with Budget Account ChartField Tier Selection = Account Tier #1: Highest Organization ChartField Translation Tree Selection = Translation Tree #3: No Tree Assigned Org Security Rule = TBD Optional ChartFields <ul style="list-style-type: none"> OA1 = To Be Configured OA2 = Not To Be Configured PC Category = To Be Configured PC Subcategory = To Be Configured PC Source Type = Not To Be Configured <p>Conversion</p> <ul style="list-style-type: none"> Optional Conversions <ul style="list-style-type: none"> Accounts Receivable = Not Needed Assets = Needed Contracts = Not Needed Customers = Not Needed Encumbrances = Needed Grants = Not Needed Projects = Needed Projects Balances = Not Needed

Agency Reported

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

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

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

SCS Assumptions					
Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	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 *

SCS Status Report Confirmation			
Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
January - February 2025	Eric W. Maclure, State	macluree@flcourts.org	03/10/25