FloridaPALM
Planning, Accounting, and Ledger Management

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Project Sponsor:	*Steven Fielder*	**Project Director:**	*Jimmy Cox*
Status Report Period*:*	*June 1, 2025 – June 30, 2025*	**Current Project R&C Category:**	*4*
Project Start Date:	*Project funding began July 1, 2014*	**Project End Date:**	*July 19, 2027* *(Funding appropriated through June 30, 2025)*

1 – FLORIDA PALM STATUS OVERVIEW

A. Agency Engagement
Required for R&C Category

During the month of June, the Department completed the following:

- Published a new article and three demo videos on the Knowledge Center describing the Inter/IntraUnit transaction lifecycle.
- Hosted the Interface Testing and Conversion Workshop to better prepare agencies for upcoming conversion and testing activities.
- Published a Sponsor Scoop to keep Agency Sponsors aware of upcoming and pertinent information.
- Published a new PALMcast episode, focusing on the Florida PALM Reporting Solution.
- Published two "Know Your Change Impact" flyers for agencies to consider the difference between Interface Files and Spreadsheet Uploads and How Users Access Florida PALM Data.
- Published the Project Newsletter providing a recap of activities from fiscal year 24-25 quarter four and a look ahead to upcoming events.
- Enhanced the Agency Collaboration webpage by hosting the Agency Exchange Library on Smartsheet, making searching and accessing resources easier; and by publishing a link to the Division of Accounting and Auditing (A&A) Florida PALM Connection to help agencies find centralized resources published by A&A.
- Published five resources, as requested from agencies, in the Agency Exchange Library to share knowledge with other agencies in areas of People, Process, Technology, Data, or Project Management.
- Enhanced the Florida PALM Solution Center Customer Portal registration process in preparation to support agencies for UAT and go-live.
- Conducted Thursday Task Talks to provide a forum for agencies to learn or ask about RW Tasks.
- Continued to meet with agencies for Agency Touchpoints.
- Continued focused conversations with agencies and enterprise partners in areas of specific importance and personalized support.

B. Implementation Status			Required for R&C Category 1 2 3 4
	Yes	No	Explain:
Is the project on schedule? *If no, explain why and what corrective action(s) are planned to bring the project back on schedule*		✔	The Project is currently trending behind with Stage Gate 3 – Ready to Begin UAT and is actively mitigating delays to system testing to correct for the delay.
Will the project complete on schedule?	✔		The accepted Project Schedule shows Florida PALM going live on July 13, 2026.
Is the project currently within budget? *If no, explain why and what corrective action(s) are planned to bring the project back within budget*	✔		The Project is currently within budget.
Will the project remain within budget?	✔		Spend Plan details provided in Section 4.
Were any Project Change Requests approved during this reporting period?	✔		PCR124 – Exchange for Interface Connections.
Have any risks or issues impacted the project during the reporting period?	✔		See Section 3B.

C. SPI *Provide SPI for Current + Last 3 Reporting Periods*				Required for R&C Category 3 4
	Past Reporting Period	**Past Reporting Period**	**Last Reporting Period**	**Current Reporting Period**
Date	March 2025	April 2025	May 2025	June 2025
Project Schedule Performance Index (SPI)	0.87	0.87	0.94	0.92
Explanation of SPI Variance / Trend	337 tasks are currently behind schedule which include tasks associated with System Testing execution, UAT Training Materials development, DW/BI system test execution, and Mock Conversion III test execution.			

2 – IMPLEMENTATION PROGRESS

A. Stage Gate Decision (Milestones and Critical Path Items)

Provide status tracking for Stage Gate Decisions planned for action by the Project Director and/or Executive Steering Committee and identify the status of each item listed (Completed, In Progress, Future).

Required for R&C Category

Stage Gate Decision Name	Contractual Due Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*
SG1 – Ready to Start Build	12/29/2023	11/08/2023	C
SG2 – Ready to Begin System Testing	08/30/2024	08/05/2024	C
SG3 – Ready to Begin UAT	07/30/2025	N/A	IP
SG4 – Continue Deployment	01/30/2026	N/A	F
SG5 – Agency Readiness	05/27/2026	N/A	IP
SG6 – Deployment Readiness	06/17/2026	N/A	IP
SG7 – Confirm Deployment	07/02/2026	N/A	F
SG8 – Go-Live	07/13/2026	N/A	F

B. Scope Changes

List all scope changes (any changes from the original project objectives and deliverables that impact the project schedule or budget) identified during this reporting period, including those that may impact the project in later reporting periods.

Required for R&C Category

Scope Change Description	Cost Impact	Schedule Impact	Status *(if approved, include approval date)* / Variance Explanation / Comment
N/A	N/A	N/A	N/A

3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues
List all issues identified, open, occurring, or closed within this reporting period related to implementation of the Financials or Payroll Waves.

Required for R&C Category

Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
N/A					

B. Implementation Risks
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 1 – The Project may have negative impacts due to insufficient staffing or delays in onboarding.	Open	9	The Project will track the status of all positions to identify, where possible, which positions will be coming vacant and when. The Project will use, at a minimum, the following resources and strategies to decrease the time needed to fill the vacancy, onboard the new team member, and to bring the team member up to speed quickly: 1. Florida PALM Orientation and Onboarding materials and process 2. Standard Operating Procedures 3. Florida PALM Project Management Plan 4. Project Team member mentoring 5. Accenture Staffing Plan 6. Onboarding Checklist The Project will also: 1. Identify backups for decision making resources to be kept informed and be able to assist if a position is vacated unexpectedly or a replacement is not on-boarded timely.	Increasing	Jimmy Cox

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			2. Hold regular staff meetings with the Team Managers, Project Architects and Project Directors to provide updates on Project progress, planning, and needs. 3. Where possible, hire replacements to overlap current resources and allow for knowledge transfer. 4. Keep the ESC and Executive Sponsors informed of staffing issues as appropriate 5. Review the SSI contractor staffing regularly to ensure alignment with the planned activities or Schedule tasks. 6. Partner with other DFS Divisions and Bureaus to enhance awareness and understanding of the needs of the Project with regard to personnel and technology resources. 7. Leverage staff augmentation resources, where possible, to perform planned activities. 8. Transition resources from other Project activities when those activities have been completed and the resources become available.		
Risk 2 – External stakeholders (e.g., Legislature, EOG) and agencies expectations may not be aligned with the Florida PALM cost, schedule, or scope.	Open	9	Project Directors will provide Project cost, schedule, and scope updates to external stakeholders regularly using the monthly Project status report, other required reports per Proviso, legislative meetings (e.g., committee meetings) and other ad hoc opportunities. The Project will:	Increasing	Jimmy Cox

B. Implementation Risks
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			1. Share information about business process models, interface designs, and report through the Knowledge Center as they are approved. 2. Share comprehensive details about the Solution (FIN/Payroll/DW) as it becomes available and is ready for distribution. 3. Share information through activities, such as Advisory Council meetings and Sponsor Summits, and through written materials, such as Newsletter, Sponsor Scoops, and articles in the Knowledge Center. 4. Work with agencies as needed to educate agencies on available reports, queries, and interface files, and to support the agencies determinations on whether their agency critical business needs are met by these Solutions, or if additional agency specific Solutions are required. 5. Address agency questions during Readiness Touchpoints and as follow-ups to agency submitted questions, including publishing questions to the public view of the Question Log on the Florida PALM website. 6. Support agency evaluation of business system needs as they relate to data and reporting.		

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 3 – Budget related events may impact Project cost.	Open	3	The Project will utilize one or more of the following strategies to manage the risk: 1. Use the weekly RADAR process to record schedule task progress and to identify potential delays. 2. Work with task owners and coordinators for deliverables at risk of delay to keep deliverables on schedule. 3. Notify Project Leadership as soon as potential delays are identified. 4. Actively communicate budget needs internally and externally. 5. Submit clear budget related documentation, including the monthly spend plan, as early as practicable. 6. Utilize Carry Forward funding for invoices which could otherwise be delayed due to a delay in approval of the next fiscal year's budget.	Increasing	Jimmy Cox

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 4 – Agencies' ability to adequately engage and participate may impact agency readiness.	Open	9	The Project will utilize one or more of the following mitigations to manage the risk: 1. Conduct monthly meetings between Readiness Coordinators and agency Change Champion Network members to discuss their internal readiness and preparation to transition to Florida PALM. 2. Conduct meetings between Project leadership and Agency Sponsors to discuss the agency's progress and any concerns, needs, or roadblocks the agency is facing in their transition activities. 3. Lead meetings and workshops designed to share timely and relevant information with agencies throughout the project lifecycle. 4. Provide tools and information (e.g., graphics and content) to support messaging and communication within the agency regarding key implementation activities and change impacts. 5. Review bimonthly agency status reports for indicators and trends relating to engagement difficulties.	Increasing	Angie Robertson

B. Implementation Risks
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner

Risk 5 – The timing and efficiency of information sharing between enterprise partners and agencies and the Project could impact the success of the Project.	Open	9	The Project will leverage existing meetings and schedule additional, as needed, to discuss:
			
			1. The Project's timeline and status identifying timing for key work to be completed.
			2. Projected changes to:
			    a. enterprise systems and their potential impact on the Project.
			    b. the Project and its potential impact on enterprise systems.
			3. Progress of integration.
			4. The Project will look for potential connections between the applications and Florida PALM identified during design and development and their impacts to enterprise partners.
				Increasing	Jimmy Cox

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 6 – The execution of contracts and procurement activities outside of the Project may impact Florida PALM implementation and agency readiness.	Open	6	The Project will utilize one or more of the following strategies to manage the risk: 1. Provide the Project's timeline and key Project dates essential for agency and enterprise partner readiness (e.g., milestones). 2. Engage regularly with agency and enterprise partners to share information and to report progress towards key milestone dates. 3. Request updates and status reporting on key readiness activities. 4. Provide support or information to support agency, enterprise partner, or oversight body planning or decision making or needs. 5. Continue regular meetings and develop mitigation actions should specific contracts not be executed and applications ready at Florida PALM Launch.	Increasing	Angie Robertson

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 11 - Delays in or extended duration of interface testing with enterprise partners for cycle 2 will result in testing overlaps which impact resource allocation as well as activity timing and completion.	Open	6	The Project will take one or more actions listed below: 1. Continue to meet regularly with enterprise partners, increasing the cadence where needed, to stay up to date on their progress. 2. Create and use partner-specific (e.g., People First, MFMP) testing alignment documents to support detailed activities and tracking of progress. 3. Support a testing approach that allows for each partner to have an approach that supports their readiness scenario and timeline. For example, the FACTS integration can be something that is tested first. 4. Expand testing duration for enterprise partners. 5. Move additional Project staff to support Technical Interface Testing.	Stable	Jimmy Cox

B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 12 - The number of RICEFW items in System Test Segment III and their complexity combined with available resources may delay System Test Segment III completion and could impact the timing of the ESC's Stage Gate 3 – Ready to Begin UAT decision.	Open	9	1. Resources from SSI Vendor that have become available from other activities, such as Build and Regression Test Event 1, will be temporarily added to the Testing team. These additional resources, which will include support from the current production support staff (as time permits and without impacting production support), will help execute the remaining system test execution. 2. Hold daily meetings and check-in points to discuss the current testing progress, priorities, and impediments. 3. Use a collaborative approach that combines both State and SSI Vendor resources to speed up the triage, review, and resolution processes for SIRs classified as "clarification," instead of only assigning these SIRs to the SSI Vendor. A "clarification" type of SIR refers to someone seeking understanding or needing additional information or explanations about a process or technical detail. 4. The Application Development team will conduct a smoke test or technical validation, including some regression testing, in the System Integration Test (SIT) environments right after the code fixes are migrated. This approach aims to reduce the number of new issues or SIRs and minimize the need for repeated runs of test scripts, allowing the Testing team to allocate more time to complete the test execution of test scripts.	Increasing	Jimmy Cox

4 – SPEND PLAN

The Florida PALM Project was appropriated $60,944,787 for FY 2024-25. As of the end of this reporting period, $51,210,446 has been released, $50,354,158 has been projected fiscal year to date, $46,672,369 has been incurred, and $46,386,402 has been paid. See the Florida PALM Project Spend Plan for additional details.

5 – REMEDIATION AND TRANSITION TASKS REQUIRED TO REPLACE FLAIR

Remediation and Transition Tasks Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).			Required for R&C Category
Task Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Stage Gate 1 – Ready to Start Build (includes the following critical path items): • Project Schedule (D635) – *Accepted* • Solution Design – Segment I (D636) – *Accepted* • Solution Design – Segment II (D637) – *Accepted* • Update Process Models – Financials – Segment I (I-WP101) – *Complete* • Update Process Models – Financials – Segment II (I-WP101) – *Complete*	12/29/2023	11/08/2023	C
Stage Gate 2 – Ready to Begin System Testing (includes the following critical path items): • Solution Design – Segment III (D641) – *Accepted* • Process Models – Payroll (D639) – *Accepted* • Master Data Configuration Workbooks (D640) – *Accepted* • Updated Technical Architecture Design (D642) – *Accepted* • Update Process Models – Financials – Segment III (I-WP101) – *Complete* • Build – Segment I (D646) – *Accepted* • Solution Design – Segment IV (D644) – *Accepted* • Update Process Models – Financials – Segment IV (I-WP101) – *Complete* • Environment Builds – System Test Environment – *Complete*	08/30/2024	08/05/2024	C

Remediation and Transition Tasks *Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).*			Required for R&C Category
Task Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Stage Gate 3 – Ready to Begin UAT (includes the following critical path items): • Establish DW/BI Environments (D647) – ***Accepted*** • Build – Segment II (D648) – ***Accepted*** • Security Roles Matrix (WP405) – ***Complete*** • Environment Builds – Mock Conversion Test Environment – ***Complete*** • Environment Builds – Interface Test Environment – ***Complete*** • Solution Design – DW/BI (D650) – ***Accepted*** • Mock Conversion I (D651) – ***Accepted*** • Build – Segment III (D649) – ***Accepted*** • Build – DW/BI – Segment I (D653) – ***Accepted*** • System Test – Segment I (D652) – ***Accepted*** • Mock Conversion II (D655) – ***Accepted*** • Build – Segment IV (D654) – ***Accepted*** • Build – DW/BI – Segment II (D659) – ***Accepted*** • Environment Builds – UAT Test Environment – ***In Progress*** • System Test – Segment II (D656) – ***Accepted*** • System Test – Segment III (D696) – ***In Progress (Trending Late)*** • Build – DW/BI – Segment III (D668) – ***Accepted*** • Mock Conversion III (D657) – ***In Progress (Trending Late)*** • System Test – DW/BI (D661) – ***In Progress (Trending Late)*** • UAT Training Materials (I-WP111) * – ***In Progress (Trending Late)*** *Items do not need to be complete for the decision to begin user acceptance testing.*	07/30/2025	N/A	IP
Stage Gate 4 – Continue Deployment	01/30/2026	N/A	F
Stage Gate 5 – Agency Readiness (includes the following critical path items): • Training Build (I-WP110) – ***In Progress*** • UAT Complete • Agency Readiness Certification 4	05/30/2026	N/A	IP

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Remediation and Transition Tasks *Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).*			Required for R&C Category
Task Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Stage Gate 6 – Deployment Readiness • Hypercare Support Plan (D664) – ***Accepted*** • Post Implementation Support Plan (D665) – ***Accepted*** • Deployment and Contingency Plan (D658) – ***In Progress*** • Mock Conversion IV (D662) • Regression Testing (WP416) – ***In Progress*** • Disaster Recovery Testing (D676) • Payroll Parallel Testing (D670) • Interface Testing – Segment II (D671) • Full Batch Schedule Including Critical Jobs List – ***In Progress*** • Penetration Testing (D674) • Performance Testing (D675) • Know Issues & Enhancements List Confirmed • Completion of Dry Runs	06/17/2026	N/A	IP
Stage Gate 7 – Confirm Deployment • Execute Pre-Cutover Activities	07/02/2026	N/A	F
Stage Gate 8 – Go-Live • Execute Cutover Activities	07/13/2026	N/A	F

6 – TRAINING PLANS.

Training Plans for Department Staff *Provide the status of the implementation of training plans for Department staff and identify the status of each item listed (Completed, In Progress, Future).*			Required for R&C Category
Deliverable / Work Product / Activity Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Update Training Strategy (I-WP122)	02/29/2024	03/13/2024	C

Training Plans for Department Staff
Provide the status of the implementation of training plans for Department staff and identify the status of each item listed (Completed, In Progress, Future).

Required for R&C Category

Deliverable / Work Product / Activity Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Training Curriculum (I-WP108)	11/15/2024	11/19/2024	C
Updated Training Delivery Plan (I-WP113)	06/16/2025		IP
UAT Training Materials (I-WP111)	08/07/2025		IP
Training Build (I-WP110)	02/25/2026		IP
End User Manual (I-WP112)	01/15/2026		IP
Conduct Training	07/31/2026		F

7 – REMEDIATION PROGRESS OF AGENCY BUSINESS SYSTEMS

Remediation Progress of Agency Business Systems
Provide an update on the remediation progress for each agency business system required for deployment of Florida PALM functionality.

Required for R&C Category

Chapter 2024-228 implementing the 2024-2025 General Appropriations Act, directs agencies to submit bimonthly status reports to the Florida PALM Executive Steering Committee. The agency-specific, bimonthly status reporting tool was released to agencies, through Readiness Workplan Task 611 for the period of May - June 2025, on July 1, 2025, with a due date of July 10, 2025, for completing the requested information and providing Agency Sponsor confirmation. 34 Primary Agency Sponsors and 1 Backup Agency Sponsor submitted their bimonthly status for the period of May - June 2025, as of July 15, 2025. Agency reports and the summary dashboards are published on the Florida PALM website.

Agencies completed, continued, or began working on the following readiness tasks included in the Readiness Workplan during June (a check mark indicates the due date has passed as of the date of this report):

Direct Project Impact

✓ Task 571 – Complete Data Cleansing Based on Mock Conversion 2 – Released 05/12/2025 – Due 06/20/2025
  o 19 of 35 agencies have submitted and been verified complete. The remaining agencies provided incomplete information. Due to the direct impact to Mock Conversion 3, this task is closed.
✓ Task 657 – Submit Updated Configuration Workbooks – Released 05/19/2025 – Due 06/20/2025

Remediation Progress of Agency Business Systems
Provide an update on the remediation progress for each agency business system required for deployment of Florida PALM functionality.

Required for R&C Category

- o 17 of 35 agencies have submitted and been verified complete. The remaining agencies provided incomplete information. Due to the direct impact to Mock Conversion 3, this task is closed.
- ✓ Task 659 – Update Conversion Field Mapping – Released 05/19/2025 – Due 06/20/2025
  - o 22 of 35 agencies have submitted and been verified complete. The remaining agencies provided incomplete information. Due to the direct impact to Mock Conversion 3, this task is closed.
- ✓ Task 573-A – Complete and Submit End User Role Mapping Worksheet for UAT – Released 05/19/2025 – Due 06/20/2025
  - o 16 of 35 agencies have submitted and been verified complete. The remaining agencies provided incomplete information. Due to the direct impact to UAT, this task is closed.
- ✓ Task 657-A – Submit Updated Configuration Workbooks - Agency Supplier Record – Released 06/09/2025 – Due 06/27/25
  - o 32 of 35 agencies have submitted and been verified complete. The remaining agencies provided incomplete information. Due to the direct impact to Mock Conversion 3, this task is closed.
- • Task 591 – Confirm IdP Configuration for Florida PALM – Released 06/23/2025 – Due 07/11/2025

Indirect Project Impact

- • Task 576 – Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing – Released 01/06/2025 – Due: 07/25/2025
- • Task 574 – Prepare Documentation for User Acceptance Testing – Released 06/02/2025 – Due 08/08/2025
- • Task 593 – Update Agency Readiness Certification #1 – Released 06/23/2025 – Due 07/18/2025

N/A Project Impact

- • Task 610 – Update Authorized Smartsheet Users – Released 06/23/2025 – Due 07/11/2025