

Reporting Approach

The Reporting Approach describes how agency reporting and data needs will be met during the implementation of Florida PALM. Agencies and enterprise partners will have access to reports, data, and reporting tools in Florida PALM. The Project identified over 500 reports that will be available in Florida PALM at the implementation of the CMS Wave, Central Wave, and the Departmental Wave. Reports have not yet been identified for the Payroll Wave. There are over 50 reports planned for CMS Wave for topics such as investments, interest, bank accounts, deposits, and outstanding payments. End users will access reports and data through standard reports, inquiries, data extracts, or dashboards. For reports that require legacy information, the required data will be retrieved from the Information Warehouse for specific data fields and translated, using the new chart of accounts and data structure, for inclusion in the applicable Florida PALM generated report. At each Wave, the remaining FLAIR subsystems will continue to provide reports and data for end users. The Department of Financial Services is evaluating options for the accessibility of the Information Warehouse, the Report Distribution System, and the Informational Database upon retirement of the FLAIR subsystems.

The reporting timeline shows planned activities for agencies, enterprise partners, and the Project Team.



Key

- All Agencies, Enterprise
- Select Agencies
- Project Team

Agency Survey and Review of CMS Reports Catalog

Agencies and enterprise partners will be asked to review the Reports Catalog and provide feedback to the Florida PALM Team through completing a survey based on specific agency reporting needs (MRW Task RPTG03). The Reporting Workgroup will assist the Florida PALM Team in validating a baseline of reports for the implementation of Florida PALM at CMS Wave go-live.

Reporting Workgroup

The Project Team is creating a Reporting Workgroup, comprised of two participants from representative agencies (MRW Task RPTG01). The workgroup will participate in demonstrations and discussions of Florida PALM functionality, identification and analysis of reporting and data needs, and an assessment of the Reports Catalog. Workgroup meetings begin in September 2020 and will occur on a monthly basis through December 2020. A new workgroup will be selected

for each Wave based on the report topics for that Wave and review and validation of the Reports Catalog will be repeated for each Wave.

Proviso Reports

As part of the General Appropriations Act¹, there are Proviso requirements for the Project to report on the design, development, and implementation of reporting functionality, and the status of legacy reports and data that will be retained in the Florida PALM system. The reports include:

- Quarterly Reporting Update – Beginning with the first quarter of Fiscal Year 2020-2021, the Project will provide an update to agencies on reporting, which includes counts and percentages for completion of key activities; and
- Reporting Assessment – By January 2021, the Project will provide an assessment that will summarize how reporting needs are met by Wave and the disposition of legacy reports. The Project will collaborate with the Reporting workgroup to prepare the Assessment and it will be provided to agencies, the Chair of the Senate Appropriations Committee, the Chair of the House of Representatives Appropriations Committee, and the Executive Office of the Governor’s Office of Policy and Budget.

¹ Chapter 2020-111, Laws of Florida