Reporting Approach

Overview

The Reporting Approach describes how agency reporting and data needs will be met during the implementation of Florida PALM. Oversight, enterprise partners, and agency end users 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. The Florida PALM reports are described in the Reports Catalog. The Catalog will be updated periodically to include reports for each Wave and changes made during design activities.

End users will access reports and data through standard reports, inquiries, or queries. Florida PALM information can be extracted for external use and analysis. Agencies will also be able to assign a limited number of Query Writer roles to manage agency-specific data needs.

Agencies are expected to adopt usage of Florida PALM reports and standard interfaces, as information is available in Florida PALM at each Wave. However, Florida PALM will continue to provide legacy-like information to maintain the Information Warehouse for legacy reporting needs until Departmental Wave. Then, Florida PALM reporting tools will fully replace the legacy reports and tools. Florida PALM Solution resources, such as reports and interfaces for chartfield values and crosswalk values are available for agency use.

Agency Collaboration

Agency feedback regarding reporting is solicited through Master Readiness Workbook tasks. Agencies review the Reporting Catalog and particpate in a survey about agency reporting processes, use of legacy reporting tools and sources, reporting roles, and specific reporting needs. Agencies also engage their Readiness Coordinator for reporting questions, and meetings are scheduled as necessary to address reporting questions.

For each Wave, a Reporting Workgroup is created, comprised of participants from representative agencies. The workgroup meetings include demonstrations and discussions of Florida PALM functionality, identification and analysis of reporting and data needs, and an assessment of the Reports Catalog. Reporting Workgroup membership will be rotated to maximize agency participation. Similar information for reporting functionality will be provided to each Workgroup, with discussions about reports specific to each Wave. Reporting Workgroup meeting materials are available for review and use by all agencies.

Agency feedback is used to confirm the Reporting Catalog and for considerations for specific report designs. Additionally, the information is used to support the analysis of Florida PALM reports for the Reporting Assessment, which is required to be provided to the Legislature, pursuant to Proviso requirements in the General Appropriations Act. Quarterly Reporting Updates are provided to agencies to keep agencies informed of reporting activities.