

<b>Project Team:</b>	Florida PALM Reporting and Data Services
<b>Period:</b>	October 1, 2020 – December 31, 2020
<b>Submission Date:</b>	January 8, 2021

# 1 - PROJECT STATUS OVERVIEW WITH KEY HIGHLIGHTS

## A. Overview of reporting activities for the current period:

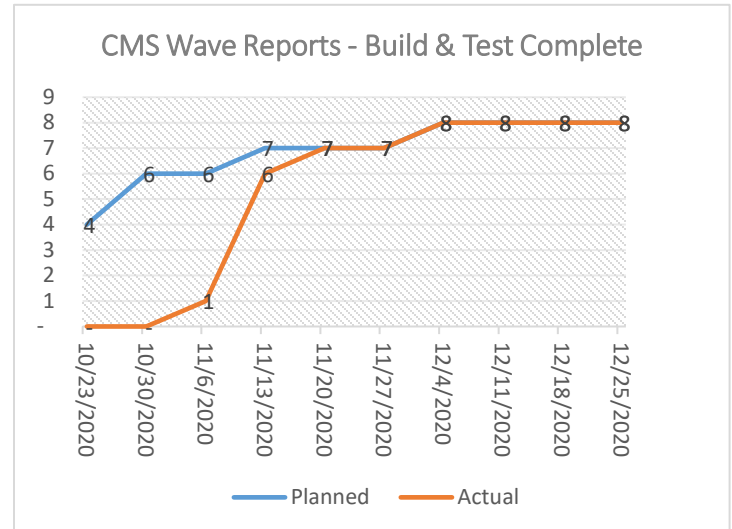
During the second quarter of the fiscal year 2020-21, the Reporting and Data Services team completed the following activities related to satisfying the Proviso requirements.

- The Project updated the [Reporting Approach](#) to remove CMS Wave-specific references for a comprehensive approach applicable to all Waves and to describe the availability of legacy information and reports. Florida PALM will provide information to support the use of the Information Warehouse until Departmental Wave.
- The Project updated the [CMS Reports Catalog](#) to describe the 50 reports planned for CMS Wave. The Catalog includes a description of each report and the key data elements. Information was added for sorting the reports by topic and the intended users. Other changes include the addition of a report for agency use and the removal of 10 Treasury reports (e.g., 7 reports were moved to a later Wave and 3 reports were determined to be not applicable due to business process design).
- The Project completed the series of four monthly Reporting Workgroup meetings to review and discuss the reports planned for CMS Wave. Shared samples of reports. [Workgoup materials](#) are available on the Florida PALM website, under the Meetings and Workshops tab. The Workgroup meetings included review of planned CMS Wave reports by topic, including available data elements, applicable business processes, and examples of expected users for each report. Then, each group of Florida PALM reports was discussed with the comparable legacy reports, and dispositions were shared for the legacy reports determined to be not applicable for Florida PALM. Reporting functionality and reporting roles were also discussed.
- The Project completed a [Reporting Assessment](#), as required by Proviso in the General Appropriations Act<sup>1</sup>, to provide the status of legacy reports and data that will be retained in Florida PALM. The Reporting Assessment describes the methodology and results for this review. Of 67 legacy reports, 55 reports had comparable reports planned for CMS Wave. Twelve legacy reports were determined not applicable for Florida PALM due to changes in the business processes and reporting functionality, and the retirement of the Cash Management System.
- The Project completed report designs for CMS Wave, and will be testing these reports through February 2021.
- The Project began design activities for the reports planned for Central Wave and will continue these activities through April 2021, and then conduct testing through July 2021.

<sup>1</sup> Chapter 2020-111, Laws of Florida

## 2 - PROJECT PROGRESS

CMS Wave Reports Status	
Wave	CMS
Total Number of Reports	50
Total Custom Reports	33
Report Design Progress	
Designs	33 completed
Report Development Progress	
Build and Unit Tests	8 completed
Report Implementation Progress	
Go-Live Date	July 2021



Central Wave Reports Status	
Wave	Central
Total Number of Reports	139
Total Custom Reports	105
Report Design Progress	
Designs	4 in progress
Report Development Progress	
Build and Unit Tests	0 started
Report Implementation Progress	
Go-Live Date	July 2022

