Overview

The Project completed a reporting assessment, as required by Proviso in the General Appropriations Act[1], to provide the status of legacy reports and data that will be retained in Florida PALM.

- More than 500 reports are planned for use when Florida PALM is fully implemented. Reports are identified during the design, development, and implementation activities for each wave. A status of the progress of the design, development, and implementation for reports is provided to agencies through Quarterly Reporting Updates.
- There are 50 reports planned for CMS Wave, as described in the Reports Catalog (Catalog). The Catalog will be updated with additional reports as work continues for Central Wave, Payroll Wave, and Departmental Wave.
- As described in the Reporting Approach, legacy reports and Information Warehouse data will continue to be available to users until Departmental Wave.
- Florida PALM provides online inquires and self-service queries to fulfill agency-specific reporting and data needs.

Methodology

The Reporting Assessment required multiple steps of analysis, research, and discussion with stakeholders.

- The Catalog was created and published to describe the planned reports for CMS Wave.
- All agencies were surveyed and provided feedback about reporting and data needs, current reporting processes, and the planned CMS Wave reports. Follow-up meetings were held with agencies as needed.
- Legacy reports were identified through a review of various legacy sources (e.g., Information Warehouse, Cash Management System), and inquiry of stakeholders. Specific reports were reviewed to identify key data elements and to gain an understanding of the report use.
- In September 2020, the Project created a Reporting Workgroup, comprised of 12 agencies. The Workgroup met monthly and discussed the survey results, Florida PALM reporting functionality, CMS Wave reports, and legacy reports.
- The Project completed report designs for CMS Wave in October 2020. Then, Florida PALM and legacy reports were reviewed, compared, and grouped by topic.
- The analysis of both Florida PALM and legacy reports was discussed and confirmed with the Workgroup. Workgroup materials are available on the Florida PALM website.

Results

Florida PALM will include the reports and data needed for CMS Wave. The Project identified 67 legacy reports, and determined the relevant status for each. Comparable reports and data are retained for 55 legacy reports. Twelve legacy reports were determined not applicable for Florida PALM due to changes in the business processes and reporting functionality, and the retirement of CMS.

Through completion of this Reporting Assessment, the Project validated the methodology used to identify reporting and data needs. These results also provided assurance that legacy reports are considered, and comparable reports planned as needed.

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[1] Chapter 2020-111, Laws of Florida

- Most reports were identified through planned tasks. Of the 50 planned reports, 44 were identified through design of business models. Of those 44, 21 were also identified in Executive Steering Committee approved requirements.
- Six reports were added based on stakeholder feedback. Stakeholders provided feedback throughout the process about existing reporting needs (i.e., based on legacy reports), unmet reporting needs, and expected reporting needs for the standardized business processes. Three of these reports tied to an existing legacy report.
- Of the 50 CMS Wave reports, 29 are comparable to 55 legacy reports. In some instances, a single Florida PALM report, with the use of data filters, provides information included in multiple legacy reports.
- Florida PALM will offer 21 new reports for which there are not comparable legacy reports, due to enhanced capabilities not available today or changes in business process.

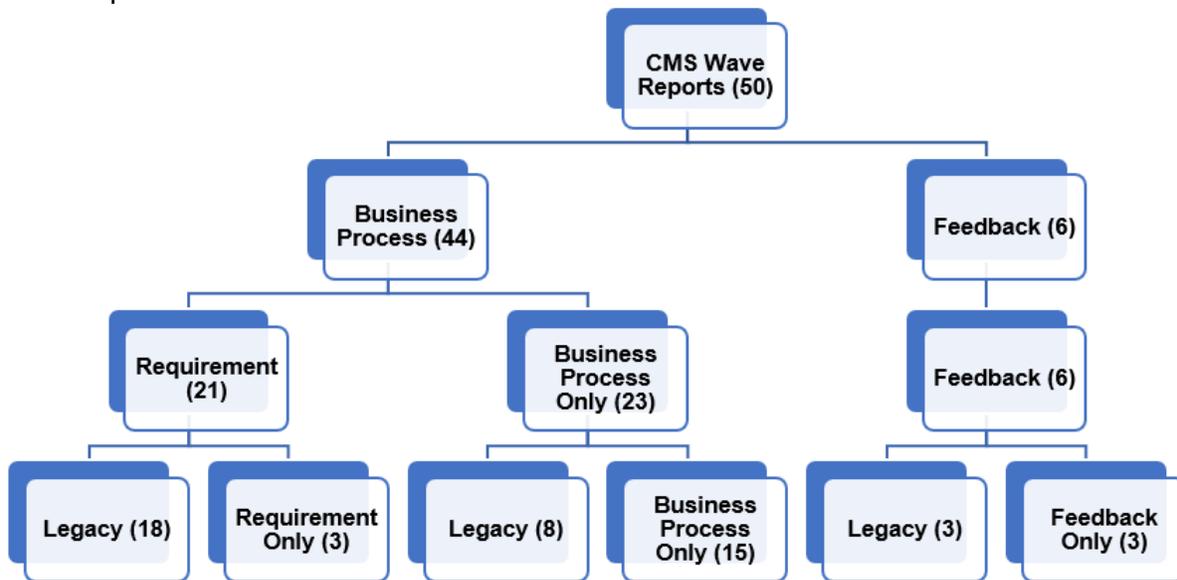Figure 1 Florida PALM CMS Wave Reports by Source describes the analyses results for the planned reports.

Figure 1 – Florida PALM CMS Wave Reports by Source

NEXT STEPS

An overview of the reports planned by wave is included in Table 1 – Report Summary by wave. This table includes estimates for reports planned for future Waves based on the work completed to date. Report totals may change as design, development, and implementation activities are completed.

Table 1 – Reports by wave as of December 2020

Wave	Planned Reports
CMS Wave	**50**
Central Wave	**139**
Payroll Wave	**38**
Departmental Wave	**347**
Total	**574**