



# LoFTS Provider Survey Report

## Background

After local governmental entities (LGEs) completed their required annual reporting in the Local Funds Tracking System (LoFTS) in October 2023, Local Funding (LF) surveyed LGEs about their reporting experience to gain insight to improve reporting in future years. LF sought feedback about the following areas:

- Training
- Registration
- Resources
- Reporting Period Length
- Customer Service
- General Concerns
- Positive Customer Experiences

LF sent the survey to all LGEs who were required to report (1,242). LF received 443 total responses, which were collected anonymously. Although anonymous, results and freeform comments received indicated that most of the responses came from the 930 local education agencies (LEAs) or independent school districts (ISDs). LF expected feedback from LGEs who participate in the School Health and Related Services (SHARS) program, as 2023 was the first year that they were required to report. LF is hopeful that next year's annual report will be more efficient as LGEs and LF learn from each other.

## Key Takeaways

- While most respondents reported a positive overall experience with annual reporting, there was much concern about the timing of the report and what they see as duplicative work:
  - For many respondents, the report fell during a time of year when either other reports were due or when they were in the middle of an audit.
  - Many respondents stated that they didn't understand why LF couldn't use data from reports LGEs submit to other governmental agencies.
- While respondents asked that LF's resources contain more detail and greater specificity, 80 percent of them reported that they were able to locate and access those resources when they needed them.
- Respondents would welcome a live chat option to get help during reporting.

- Most respondents took less than seven working days to complete reporting once started; however, some prefer a longer reporting window to help gather data accurately. It is unclear if this feedback is related to requests for changing the timing of reporting generally.
- LGEs reported that email remains the most effective form of communication, but respondents also indicated a reliance upon their consultants, vendors, or other contractors.
- Respondents expressed a desire for LF to work more closely with LGE consultants, vendors, or other contractors so that LF could better communicate and provide applicable examples/detail so they or their contracted entities could better support them.
- Respondents requested additional training times and LGE-specific materials.

## LF Plans to Address Concerns

### LoFTS Reporting

LGE Feedback	LF Action Items
LGEs had concerns about not having enough time to complete the report during a busy time of the year.	LF will create a workgroup and consult with Provider Finance Department (PFD) leadership to determine the feasibility of moving the reporting for LEAs to February after the completion of all Annual Financial Reports (AFRs).
LGEs requested data to be pulled from reports submitted to other governmental agencies.	<p>The same workgroup mentioned in the action item above will:</p> <ul style="list-style-type: none"> <li>• compare required reporting information to information reported in AFR, the Public Education Information Management System (PEIMS), and the SHARS cost report to see if it meets requirements for local funds reporting. Similar reviews for duplicate reports will be reviewed for other LGE types.</li> <li>• if the information meets those requirements, LF will work to pull the information from one of those sources.</li> </ul>

<b>LGE Feedback</b>	<b>LF Action Items</b>
<p>LGEs reported having trouble understanding the steps required to complete reporting.</p>	<p>LF will continue to assist with reporting questions via:</p> <ul style="list-style-type: none"> <li>• live calls, and</li> <li>• prompt email responses.</li> </ul> <p>LF will also work to develop:</p> <ul style="list-style-type: none"> <li>• a live chat option either within LoFTS or by an alternative method such as Microsoft Teams.</li> </ul> <p>To clarify required steps for LEAs, LF will work with Information Technology (IT) to potentially add an LEA-specific Funding Source Statement (FSS) in LoFTS.</p>
<p>LGEs requested increased consultant, vendor, or other contractor participation.</p>	<p>Third parties hired by or who otherwise support LGEs do not have a relationship with HHSC nor are those entities legally responsible for reporting. Therefore, while HHSC understands an LGE may engage external support, it is necessary for the LGE to directly and actively engage in the entirety of the reporting process, from training to report completion.</p>
<p>LGEs continued to request the pre-population of data from previous reporting periods.</p>	<p>LF continues to work on improving LoFTS to incorporate the pre-population of previously entered data.</p>

### **LoFTS Resources**

<b>LGE Feedback</b>	<b>LF Action Items</b>
<p>LGEs requested more specifics regarding information required in LoFTS.</p>	<p>LF will update the user guides to include the FAQs collected from the FFY 2023 reporting period. These will be made available prior to reporting via email and the LF website.</p>

<b>LGE Feedback</b>	<b>LF Action Items</b>
<p>LGEs requested that the differences between LGE types be accounted for in training.</p>	<p>To account for the differences between LGE types:</p> <ul style="list-style-type: none"> <li>• LF has formed a workgroup to improve the LGE reporting experience including potentially developing module-specific examples.</li> </ul> <p>LF is also considering developing LEA-specific trainings to be held at Regional Service Centers<sup>1</sup>.</p>
<p>LGEs requested that the differences between LGE types be accounted for in resources.</p>	<p>LF will create a module-specific flowchart or checklist as either a dashboard in LoFTS or a tool that can be downloaded from the LF website. This resource should allow each LGE to know ahead of time what information is required for reporting so that those responsible for data entry can be better prepared.</p>
<p>LGEs requested more step-by-step examples for completing the report.</p>	<p>If LF is unable to pull specific data from the AFRs or PEIMS for LEAs, LF will compare required local funds reporting information with data reported by LEAs in the AFR and PEIMS. LF will work to create a crosswalk between LoFTS items and data reported in those other sources. This crosswalk will be made available via email communication and posting on the LF website.</p>

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<sup>1</sup> LF has determined that the most efficient way to account for LGE type differences as requested by the LGEs, is at the module level.