

A number of factors, priorities, and circumstance can shape the reporting of services from a vendor to a funding source. In my experience, certain data elements are common to almost any information system designed to track services:

A description of what was provided. In a logic model, this data element would focus on the outputs that a vendor or grantee was obligated to offer or deliver. Where possible, the use of a dropdown list can enhance the reliability and efficiency of reporting

- A description of when the service was delivered (e.g. a start date & end date if needed)
- A description of duration of service (e.g. starts time and end time)
- A description of where the service was provided. The location's name and address (along with a contact person as appropriate) should be documented. If the event was web based, the URL would be appropriate.
- A description of who was served. The number and type of persons served may be minimally expected. If the recipients are members of a group, the name of a contact person who represents the recipients is often important. If reimbursement is based on number served, a list of those participating in an event may need at least to be available.
- A description of who provided the service by name of staff and organization. If volunteers or community partners were also involved, they may also be identified along with a summary of their roles.
- A description of impact is sometimes solicited as part of a monitoring process. If a standard evaluation is expected, a summary of the results can be archived to create norms regarding the impact of an event on participants (e.g. level of satisfaction, level of competency, level of activism etc...)

The process of designing, building, and disseminating the information system is critical to its acceptance and success. Once again, situational factors will shape the specific strategies that are needed for a project. In my experience, there is often a tension between getting the job done efficiently and encouraging stakeholder participation. The first stage may involve the formation of an advisory or steering committee that will oversee development of the system. Selecting members for their strengths and potential contributions is important. They should have a general knowledge about informatics, have a demonstrated interest in accountability and have the respect of stakeholders. Some of the critical tasks that could be addressed are:

- Within the context of a system's formal mandate, what should be the overarching goals of the information system? Who are the priority users? What are their information needs?
- What is the best way to meet the information needs of critical users? How should the information flow? Who should collect it? When should it be collected? How should it be passed on?

- What kinds of data gathering instruments are needed? Are specific data elements consistent with the overarching goals of the system? Are input formats easy to understand? How are forms or screen populated with data? Does the data processing design seem to make good operational sense?

Once a functional demo system has been developed, it may be useful to pilot the system with selected stakeholder. Depending on the complexity and novelty of the system to its perspective users, a pilot phase can be either simple and brief or intensive over an extended period. An important strategy of the pilot process is to engage leaders that will champion the system. Some of the issues that a pilot system can address are:

- How readily does the user master the mechanics of gathering data, inputting data, generating reports and/or using reports in the system?
- What is the impact of the information system on a user's organization and resources?
- How well does the 'help' system resolve the users' data processing concerns?
- Does the user have the technological resources to support the planned system?

Based on feedback from the pilot trials, the system should be further refined. It is often helpful to incorporate some recommended changes into the final system even if they are only cosmetic. It demonstrates that the users input was deemed worthwhile and encourages their support of the system. When a final system is ready for broad dissemination, a training program needs to be put in place. It is extremely useful to define the training objective and scope of work prior to making decisions about how the training should be offered. Training can help flesh out potential 'bugs' in a process before the system is live. It can help enhance the help documentation, prevent potential conflict in processing procedures, and educate critical personnel. For a new system introducing innovative data sets and tracking mechanisms, it may be important to train not only the person responsible for inputting data but also their managers, who will ensure their organization's compliance. Presentations may also be needed for executive level staff to advocate for their acceptance of the new system. The more support that users give to the system the less overhead is required to ensure the quality and integrity of the data.

After the system goes live, it is especially important in the first few months to monitor how well it is functioning. Are people using the system as intended? Is it meeting their needs? If a system represents a paradigm shift in the interaction between the vendor and state, a culture clash might occur for either or both parties. To meet their personal needs, work-arounds might develop that the new system more compatible with the old way of doing business. Whether they are useful or dysfunctional, it's important to know about them and troubleshoot their causes. They may point to areas where the system needs to be improved or to user issues (e.g. competency) that need to be addressed