Allotments Survey Questions

Overview – Survey

Our goal is to develop guidance and best practices for agencies to analyze and manage legacy data in preparation for implementation of Florida PALM. Through discussions and comparison of agency practices and needs, the group will:

- Identify and discuss current practices and state of legacy data;
- Develop and share expectations, tools, and guidance for analyzing and cleansing legacy data; and
- Provide input for creating or updating policies and best practices to support standardization of data and processes in Florida PALM.

Participants are asked to evaluate your agency for questions related to legacy data, data management, and future state expectations.

Legacy Data - *Please provide feedback to the questions below as they pertain to current legacy data.*

1. Agency and contact information
2. How does your agency manage allotments?
3. What level of detail does your agency set up allotments?
4. Did your agency identify any critical dependencies regarding allotments during your PAWS sessions or Florida PALM readiness tasks such as Task 324 or 327?

Data Management - *Please provide feedback to the questions below as they pertain to current data management practices within your agency.*

5. Has your agency started analyzing legacy allotment data?
6. Does your agency use specific reports or queries to analyze allotment data?
7. How does your agency identify allotment balances that are no longer valid?
8. What data cleansing procedures does your agency currently use for the cleaning up your data?
9. What is the frequency at which your agency reviews and manages allotment records?
10. What are common data issues for allotments?
11. What are your agency's concerns for the readiness of allotment records for use in Florida PALM?
12. What lessons have you learned through other projects (object code standardization) that could be applied for data management?
13. What tools or assistance is needed for your agency to analyze allotments more effectively in the future?
14. What best practices could we share with all agencies for managing allotment records?

Future State - *Please provide feedback to the questions below as they pertain to assumptions and expectations your agency may have for the future state of data as we transition into Florida PALM.*

15. What are standard practices that should be used across agencies for managing allotments, and what differences in practices are appropriate to maintain flexible business processes among agencies?
16. Are there any existing policies or procedures that your agency has that may be helpful with managing allotments?
17. Where are there current policy gaps?