Master Balance Files Workgroup Topics

# Overview

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.

# General:

Does your staff understand the impact of the transactions that they process on the Master Balance File(s) (MBF)?

What is your agency’s approach to managing your MBF?

How frequently do you review and verify the information in your MBF?

What practices do you feel are important for ensuring MBFs are accurate?

What should an agency consider before making corrections to the MBF?

What are common errors that you see among users that have a significant impact on the MBF?

What steps (and what order) should be considered to close out a MBF record for data elements that are becoming or are inactive? Example: Existing activities are being moved to a new BE or Grant.

Do you have any tips or tricks for MBFs for other agencies?

Do you have any specific questions about MBFs that you would like clarification on?

What are standard practices that should be used across agencies for managing MBF?

What closing criteria does your agency use when closing out a FLAIR account code?

# Change Management

What assumptions do we have about how the MBF will be used for conversion?

# Training Feedback:

What is your overall feedback for this training?

Was the information presented logically and detailed enough to capture the concept?

Were there any concepts or things that should be considered that the training did not cover?

What suggestions do you have to improve the training?