**Preparing Your Master Records for Renewal Period!**

**First year of project – 2020:**

Your county will need to tidy up your Master records by making sure they are all created, they are connected to Reference APO, the System Type is accurate, the Maintenance Provider is current, and the Owner is current.

**For subsequent years:**

Your county will need to make sure that your Master records are as tidy and as current as possible. Use these same tools for subsequent years.

**Use this checklist as a guide:**

1. Generate the ***Onsite Annual Service Audit*** report to locate any Permits are missing a Master record.
   1. For counties with a data conversion – Generate this after the data conversion. Create as needed.
   2. For counties hand-entering – Generate this to assist you in creating your Master records. Create as needed.
2. Generate the ***Onsite Annual Service Audit*** report to locate any Master records not connected to Reference APO.
   1. For counties with a data conversion – Generate right after the data conversion. Correct as needed.
   2. For counties hand-entering – Generate this to assist you in creating your Master records. Correct as needed.
   3. Everyone – Generate this report ongoing until your renewal letters are sent. Correct as needed.
3. Use the Record List Filter called ***Annual Service Master – Missing System Type*** to locate Master records missing the System Type.
   1. For counties with a data conversion – Generate right after the data conversion. Correct as needed.
   2. For counties hand-entering – Generate this to assist you in creating your Master records. Correct as needed.
   3. Everyone – Select this filter ongoing until your renewal letters are sent. Correct as needed.
4. Use the Record List Filter called ***Annual Service Master – Missing Maint. Provider*** to locate Master records missing the DEQ Installer/Maintenance Provider license.
   1. Everyone – Accela doesn’t have a tool to help you ensure the MP is accurate on the Master record. You will need to consult your own records to verify and correct as needed before renewal letters are sent.
5. A list will be emailed to you from Accela in November that lists Owners on Master records that do not match Reference Owners.
   1. Everyone – Correct as needed before renewal letters are sent.

***Optional***: Manage your O&M contract dates as you see fit using the date fields and Record List Filters available.