DATA LINKING STEPS BY PARTNERSHIP CONFIGURATION

	PARTNERSHIP CONFIGURATION		
	Single Program, Single Agency	Multiple Program, Single Agency	Multiple Program, Multiple Agency
STEP 1: Check Data			
Activities			
a. Check if data are available	●	●	●
b. Confirm data quality	●	●	●
STEP 2: Assess Partner Readiness			
Activities			
a. Jointly consider data linking opportunity	●	●	●
b. Formalize data linking use case	○	●	●
STEP 3: Formalize Data Linking Partnership			
Activities			
a. Develop data linking partnership management plan	○	◐	●
b. Develop data sharing agreement	○	◐	●
c. Implement partnership management plan and sharing agreement	○	◐	●
STEP 4: Link Data			
Activities			
a. Select record-matching approach	●	●	●
b. Identify data elements	●	●	●
c. Select data elements for use case	●	●	●
d. Select data elements for matching	●	●	●
e. Create matching algorithm	●	●	●
f. Establish business rules	●	●	●
g. Standardize data elements	●	●	●
h. Match records	●	●	●
i. Create joined data set and check data quality	●	●	●
j. Certify joined data set	○	◐	●
STEP 5: Analyze Data			
Activities			
a. Develop analysis plan	◐	●	●
b. Conduct analyses	●	●	●
STEP 6: Sustain Data Linking			
Activities			
a. Document process and suggest improvements	◐	●	●

ACTIVITY RECOMMENDATION KEY

● Required ◐ Recommended ○ Optional

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