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| DaSy Data Linking Toolkit Step 6: Sustaining Data Linking Checklist |  |
|  | May 2022 |

The DaSy Center developed this checklist as part of [Step 6 (Sustain Data Linking)](https://dasycenter.org/data-linking-toolkit/steps/6sustain/) in the [Data Linking Toolkit](https://dasycenter.org/data-linking-toolkit). The checklist supports discussions between two partners—whether those partners are within the same agency or in separate agencies—to support future data linking efforts. Data partners should add the completed checklist to Appendix C of their data partnership management plan. Provide enough detail that another technical staff can replicate the process in the future. Please contact with questions or requests for assistance: [Dasy-Center@sri.com](mailto:dasy-center@sri.com)

| Title of Data Linking: (insert title of data linking) | | | | |
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| Task | Date | Responsible | Notes | |
| 1. Initiate next iteration of data linking |  |  |  | |
| 1. Secure source data |  |  | Data location: *(insert data location)* | |
| 1. Transfer data |  |  | Destination: *(insert data location)* | Transfer process: *(insert process)* |
| 1. Review matching criteria |  |  | *(list tools, fields/items, and detail matching algorithms)* | |
| 1. Match records |  |  | *(insert process for matching and agreed upon matching probability)* | |
| 1. Resolve partial matches |  |  | *(insert process to handle partial matching records)* | |
| 1. Check data quality |  |  | *(insert process to spot-check records to make sure the linked elements in the new data set are identical to the elements in both original data sources)* | |
| 1. Certify joined data set |  |  | *(insert process for preliminary and final review and approval of matching work and overall data quality)*  *Note: In some cases, program or agency leadership will be comfortable with certifying the work before the analysis is conducted (Step 5) and the results made available. In other cases, especially when interested stakeholders are awaiting the results of the linked data, certification may need to wait until after the use case has been addressed (i.e., after the data are analyzed and possibly a report drafted for internal review). Eventually, all parties must agree that the data linking was conducted accurately and is complete.* | |
| 1. Analyze data |  |  | *(insert location of analysis plan)* | |
| 1. Prepare product(s) (if any) |  |  |  | |
| 1. Disseminate product(s) (if any) |  |  |  | |
| 1. Store data |  |  | Data location: *(insert data location)* | |
| 1. Other: |  |  |  | |
| 1. Other: |  |  |  | |