

# Matching and Verifying Client Data Using Linkages Across Benefits

Using the allowed data sharing linkages between benefit programs is a powerful, fundamental step to optimize effectiveness and opportunities when integrating benefits. It can also help individuals apply for and enroll in benefits they may not know about.

While the steps needed to share data across programs vary by linkage, taking advantage of them can allow applicants to become automatically eligible for enrollment or renewal in additional benefits, after having proven eligible for one. Linkages also create the capacity to match data and then conduct outreach to residents who are likely eligible to enroll in additional benefit programs.

Data linking is an important tool that lets benefits program administrators efficiently determine eligibility, and ensure that applicants receive all of the benefits for which they are eligible. This resource provides examples and practical guides that explain how to use existing regulations and data sharing agreements to transfer client information or eligibility status between benefit programs.

In this document you'll find:

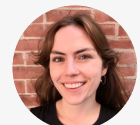
- + Key definitions for data sharing and data linking
- + Information on the advantages of matching and verifying client data by linking data across benefits programs



## Contributing Authors



**Sara Soka**  
Fellow



**Elizabeth Bynum Sorrell**  
Project Researcher



[Benefit] programs have a lot of connections to other programs within federal statute and regulations, and that allows you to take findings from one program and use it for the other... Some of these are automatic, others are waivers or options, some serve as a finding of income eligibility... It's a way to think about these connections not only to help the client, which is critically important, but also in a way that can really streamline and simplify things for eligibility staff.

**JENNIFER WAGNER**

Director of Medicaid Eligibility and Enrollment, Center on Budget and Policy Priorities

From the Beeck Center event, "Integrated Benefits: Going Further With ARP" on August 4, 2021.



**Key definitions and practices:**

Actionable Intelligence for Social Policy ([AISP](#)) at the University of Pennsylvania defines data sharing as “the practice of providing partners with access to information (in this case, administrative data) that they cannot access in their own data systems.” Data integration, by contrast, is a form of data sharing that involves linking records by joining datasets based on common fields. (Read more on data sharing and integration from AISP [here](#)). Data sharing can be used to conduct research by joining datasets from different agencies or studies. It can also be used to streamline eligibility verification processes, or identify participants from one program who may be eligible for another.

The specifics of data sharing practices and agreements vary, but involve multiple considerations, including legal, technical, and ethical questions. For information on how to establish, operate, and maximize the impact of data sharing, read the Beeck Center’s [resource](#) “Sharing Data for Social Impact: Guidebook to Establishing Responsible Governance Practices.”

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**i Find Out More on the Digital Benefits Hub**

Read more about conducting outreach for [benefits cross-enrollment](#).

## Maximize Opportunities for Improved Access and Delivery from Linked Benefit Data

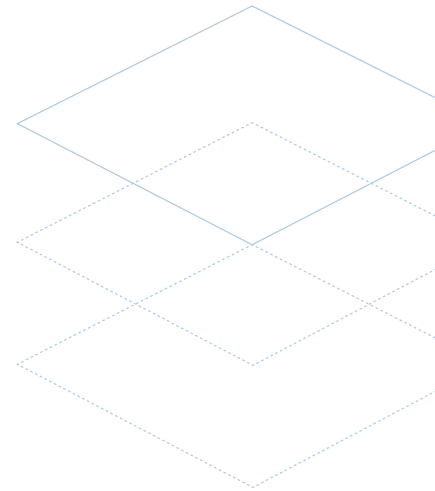
States can establish cross-program and cross-agency data linkages by first ensuring that existing data sharing initiatives are cataloged and known by interested agency staff, then by establishing data sharing agreements between programs where opportunities exist to improve client service and reduce burden.

The [Benefits Data Trust](#) and [Center on Budget and Policy Priorities](#) collaborated with four states (Colorado, Massachusetts, Montana, and Virginia) to pilot [data sharing](#) and text message outreach strategies to improve Women, Infants, and Children (WIC) program enrollment. Data matching efforts helped quantify enrollment gaps among WIC-eligible residents. In Colorado, 44 percent of WIC-eligible families participating in the Supplemental Nutrition Assistance Program (SNAP) were not enrolled in WIC. The gap was even larger in Massachusetts, with 77 percent of WIC-eligible recent Medicaid enrollees not enrolled in WIC. The organizations' [April 2021 report](#) outlines a template for initiating data sharing and questions that agencies should ask when considering a data-sharing program, including:

- + What data sources will be used?
- + How can data be shared securely?
- + How often will data be shared?
- + What data elements will be shared?
- + How can states incorporate data sharing into ongoing operations?

Alluma guidebook, [Maximizing Linkages: A Policymaker's Guide to Data Sharing](#), offers detailed information on technical and regulatory considerations of data sharing, particularly for Temporary Assistance for Needy Families (TANF), Medicaid, SNAP, and WIC programs. The report focuses on data sharing to streamline eligibility verifications and to connect program recipients with other benefits for which they are eligible. The report also includes recommendations for establishing data sharing agreements, which highlight the importance of clearly understanding the purpose and context in which data will be used, building necessary relationships and human capacity, establishing consistent processes, and ensuring technical and legal requirements are being met, among others.

The California Health and Human Services Agency also created an online [Data Playbook](#) to support their stakeholders in following recommendations like these when using their agency's [Open Data Portal](#).



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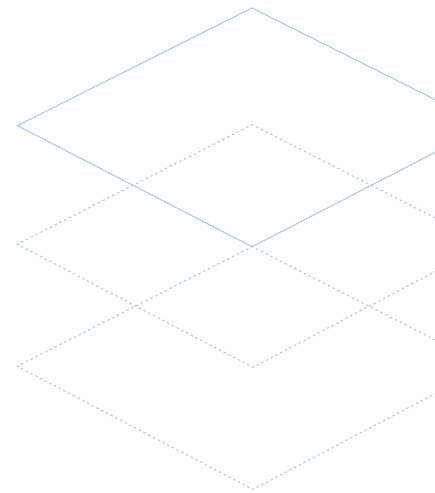
Learn more about using data linkages across programs:

- + [Maximizing Linkages: A Policymaker's Guide to Data Sharing.](#)
- + [Opportunities to Streamline Enrollment Across Public Benefit Programs and \(Interactive Graphic\) Linkages Across Public Benefit Programs Offer Opportunities for Streamlining.](#)
- + [Using SNAP Data for Medicaid Renewals Can Keep Eligible Beneficiaries Enrolled.](#)
- + [How Data Sharing Can Improve Equitable Access to Public Programs.](#)
- + [Fast Track: A Quicker Road to Medicaid Enrollment.](#)
- + [Express Lane Eligibility for Medicaid and CHIP Coverage.](#)
- + [Data Playbook: A Department's Toolkit to Using Data.](#)
- + [California Health and Human Services Open Data Portal.](#)

### **About this resource:**

This resource is part of a larger initiative by the Beek Center for Social Impact + Innovation at Georgetown University to document innovations in social safety net benefits delivery that are driven by human-centered service design, data-informed practices, and responsive technology. It also has the goal of spreading proven practices more widely. This resource was adapted from the report “Integrating Social Safety Net Benefits: Options for State and County Agencies Informed by Recent Integration Successes,” written by Sara Soka for the Beek Center for Social Impact and Innovation in January 2022.

Much of the content in this resource is derived from a 2021 workshop featuring government employees who were instrumental in their state's integrated benefits efforts. The workshop, which was part of a series on the historic funding opportunities in the 2021 American Rescue Plan Act (ARPA), showcased different approaches to invest in infrastructure, human capital, and projects that integrate benefit applications, outreach, renewal, and service delivery.



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### **Get in Touch**

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Please contact us with any thoughts, questions, or potential collaborations via email at [digitalbenefits@georgetown.edu](mailto:digitalbenefits@georgetown.edu)