

Resource:

# Considerations for Sharing and Matching Data



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## Data Source

When determining data sources, one key consideration is how the eligibility guidelines for another benefit align with WIC. Several means-tested programs, like Medicaid and SNAP, confer adjunctive income eligibility for WIC, making these programs excellent data sources for WIC outreach.

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## Outreach Method

There are several outreach methods to choose from, including text, phone, and mail. Determining outreach method(s) up front will inform what data need to be included in your data sharing agreement. For instance, addresses are critical for mail outreach, and mobile phone numbers are necessary to send text messages. For more information, see [Considerations for Different Outreach Media](#).

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## Data Structure

It is important to examine the structure of the data from different programs to understand how the data align with WIC. For example, Medicaid is an individual benefit while SNAP is a household benefit. Different programs may also collect different information; for instance, your state's Medicaid program may have an individual's home address, phone number, income, and demographics, while SNAP might have their name, home address, preferred language, and total family income. Understanding these differences will allow you to design an effective matching process that provides the information you will need for outreach and evaluation.

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## Personal Identifiers

Data matching relies on identifying data elements that the different programs have in common and can be used to compare datasets at the individual level. Unlike some other programs, WIC does not collect Social Security numbers from participants, so the data match needs to be completed using other personal identifiers. Since programs like SNAP and Medicaid collect similar information about beneficiaries as WIC, there are typically several options to choose from, such as first and last name, date of birth, address, and other contact information. You might need to experiment with matching criteria to address inconsistencies, such as spelling variations in names or transposed numbers in a birthday. In some states, a unique ID number is already used across benefit programs to identify enrollees, which simplifies the matching process and reduces the potential for error.

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## Date Range

It is important to determine up front the date range that your data will include. In other words, how recently must a family have enrolled in another benefit to be included in the outreach group? While many states choose to include all families enrolled in another benefit, regardless of

when they first became enrolled, some states have limited the outreach group to families who enrolled in another benefit more recently, such as within the past six months. States may wish to test whether they see a higher response rate when conducting outreach only to families who enrolled in another benefit recently. Alternatively, states may wish to conduct outreach to all enrolled families initially and subsequent outreach only to newly enrolled families.

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### Frequency of Data Transfer

Data used for outreach need to be recent. Otherwise, they may no longer be accurate: a family might have moved, changed phone numbers, or become ineligible. In addition, if the initial match is conducted too far in advance of outreach, the outreach group may accidentally include some families who enrolled in WIC on their own after the original match occurred; these families might find it bothersome and confusing to receive outreach. Determining at the outset of the project how often data will be shared between programs will help your team conduct outreach promptly once data are received. It will also help your team set up data matches to remove families who are already enrolled and temporarily remove families who have been contacted recently from the outreach group to avoid contacting them too often. When drafting a data sharing agreement, allowing for more frequent transfers (such as weekly) could be helpful, even if transfers at that frequency will not always be needed.

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### Data Security

When sharing data, it is necessary to ensure that program participants' information is kept secure in a way that is compliant with current regulations. There are several methods available for securely transferring files and encrypting or de-identifying datasets while enabling targeted outreach. A Secure File Transfer Protocol is a commonly used approach that most state agencies have the capacity to implement. Consulting legal or compliance professionals, as well as data experts, can help ensure a data sharing agreement is fully legally compliant and protects participants' privacy.

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### Using Match Finding to Inform Outreach

Reviewing the findings of the data match before conducting outreach can help inform your targeting strategy. Key questions include:

- Are there eligible groups (by race, age, gender, region, etc.) that have disproportionately low rates of WIC enrollment?
- What languages are most common (speaking and reading) among the groups with lower WIC enrollment? Can you use language fields when developing outreach to ensure people receive messages in their preferred language?