

# *Connections* **Unique Records Portfolio** *User Tools*

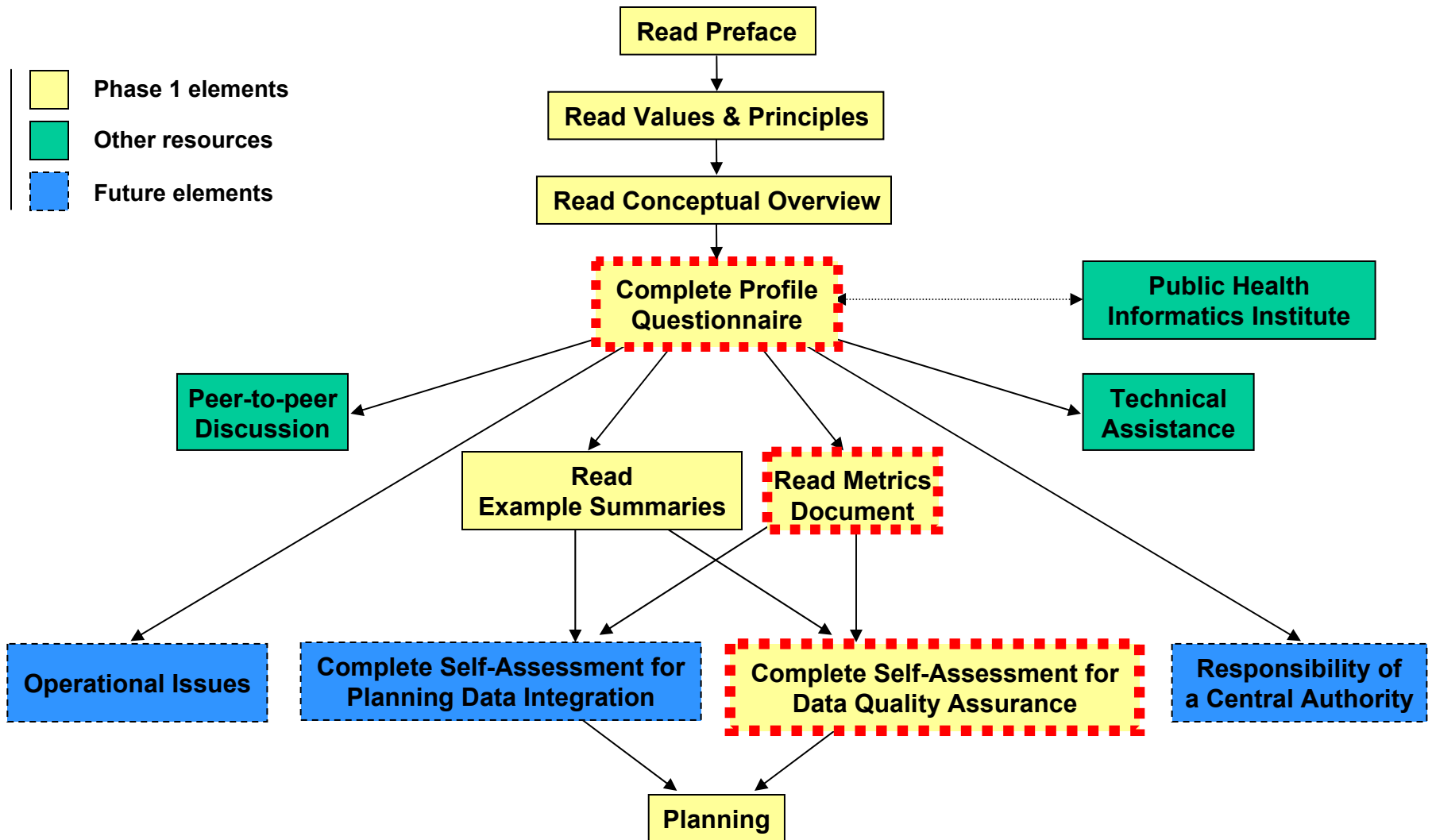
Mike Berry, BSE

*HLN Consulting, LLC*

*Consultant / Project Manager*

*Rhode Island KIDSNET*

# How to use the portfolio





# *Profile Questionnaire*

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- **Online survey**
- **Keyed to icons in Concepts document**
- **Dual Purpose**
  - **Tool to document current processes**
  - **Share with other organizations**



# *Profile Questionnaire*

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- **Basic organizational profile**
- **Degree of integration**
- **Methods of de-duplication**
- **De-duplication metrics**
- **Data model profile**
- **Future plans**



# *Profile Questionnaire*

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- **Important step before embarking on a de-duplication project**
- **Start the process by asking the right questions**
- **Understand where you stand**
  - **Use a common vocabulary**
  - **Apples-to-apples comparison**



# *Metrics and Testing document*

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- **How to evaluate whether matching, linking, and merging methods are working as expected**
- **An overview of testing principles, metrics**
- **How to get started on an evaluation procedure**



# *Metrics and Testing document*

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- **Principles**
- **Metrics**
  - **Specificity and sensitivity**
  - **Human review**
  - **Performance**
- **Methods**
  - **Blocking techniques**
  - **Sampling**
- **Example summaries**



# *Self-Assessment Checklist*

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- **Project internal use**
- **Help identify potential gaps in strategy or procedure**
- **Two parts**
  - **Data quality assurance**
  - **Data integration**



# *Self-Assessment Checklist*

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- **Documentation**
- **Metrics**
- **Follow-up capability**
- **Probabilistic matching**
  - **Standardization**
  - **Frequency analysis**
  - **Blocking**
  - **Clues**
  - **Human Review**



## ***Contact information***

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**Mike Berry**  
**(215) 568-3005**  
**[berrym@hln.com](mailto:berrym@hln.com)**

**Lorrie Alvin, *Connections***  
**(404) 592-1446**  
**[Lalvin@phii.org](mailto:Lalvin@phii.org)**