

Instructions to Staff Responsible for ARMS Data Cleanup

1. Regional and local staff are asked to undertake two types of tasks related to the interface of ARMS with CNDS:
 - Review
 - Clean-up

Providers need to go through the list of clients one client at a time to determine what, if any, data clean-up needs to be undertaken. Each provider list contains information from the trial run between ARMS and CNDS to help with decisions about changes that need to be made in ARMS.

2. Review – Note that there are three columns of information for LastName, MiddleInitial, FirstName, and ID or SSN. The TABLE column represents what is in the current ARMS database. For purposes of making a decision about whether or not an ARMS client record needs to be changed, compare the TABLE column to the CNDS column and just use the ARMS column as an “FYI.” The ARMS column documents any changes that have been made or will be made by the state via a batch update on behalf of the region/provider (such as eliminating spaces in a name).
3. Clean-up - Column U, Rec Type, indicates whether or not the trial integration of ARMS client records with CNDS Person IDs produced a match or not. The results of that trial run for each client are indicated in Column U as either, a New Create (no match), Match, or a Close Match. Column V, Reason, indicates why there was not an exact match and is the beginning point for identifying what the provider needs to do during the clean-up process.

New Creates (appears to be no match between ARMS and CNDS) – There are some clients in ARMS that do not exist in CNDS and will acquire a CNDS ID for the first time after ARMS is integrated with CNDS. Although providers do not need to make any changes to these client records, they are strongly encouraged and requested to review the records to assure that client records are complete and accurate and will not create duplicate records in CNDS. CNDS will assign a new Person ID to these names and then the core demographic information in ARMS will become part of the CNDS records available if/when other agencies in the community search for that person’s name. We ask for your cooperation in avoiding the creation of duplicate IDs in CNDS. There are so many New Creates on the ARMS lists statewide (many thousands!) that the CNDS staff feel we cannot process the lists until the ARMS network signs off on this information, i.e., certifies that to the best of their knowledge these records are accurate and will not create duplicate records.

Matches – This group represents existing CNDS names and IDs that appear to be matches with existing ARMS clients, based on 9-digit SSNs from old ARMS or a combination of first name, last name, gender, and date of birth. However, even

when there was a match, CNDS identified data clean-up issues. Please look at Column V, Reason, to see if anything has been identified for clean up.

- a. If there are no differences between the columns and nothing is listed in Column V for follow-up, the provider has no reason to open the client record in ARMS.
- b. If anything is listed in Column V for a particular client record, in almost all cases the appropriate follow-up is for the provider to make a change in the ARMS client record so that it matches the CNDS record. For example, if the Reason column says “Date of Birth”, then the ARMS record should be changed to match the CNDS DOB because that information has been confirmed in the Social Security Administration uploads performed when other agencies have verified people for benefits. The same type of follow-up would be needed if the Reason column says “Last Name” – change the ARMS record to match the CNDS Last Name (e.g., Wood needs to be changed to Woods).

Please make sure these changes are entered in ARMS. After these records are reconciled, the final ARMS/CNDS run will be undertaken at some point and an existing CNDS Person ID will be assigned to the ARMS client.

- c. If the provider looks at two records on the Match list and determines that they actually do NOT represent a real match, nothing needs to be done. On the final ARMS/CNDS run, the system will automatically treat them as New Creates and assign a new CNDS Person ID.

Close Matches – These names represent records that could NOT be clearly identified by the computer program as either no-match (New Create) or match. This list will take the most time for follow-up because local staff will have to compare the columns of information and make informed decisions about which way to go:

- a. Do the two records in ARMS and CNDS represent entirely different people? If yes, the ARMS record will be treated like a New Create and assigned a new CNDS Person ID because the new ID will not duplicate an existing CNDS record.
- b. Do the two records in ARMS and CNDS represent the same person? If yes, in most cases the ARMS record will need to be changed to match the information in CNDS.

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