

Data Matching

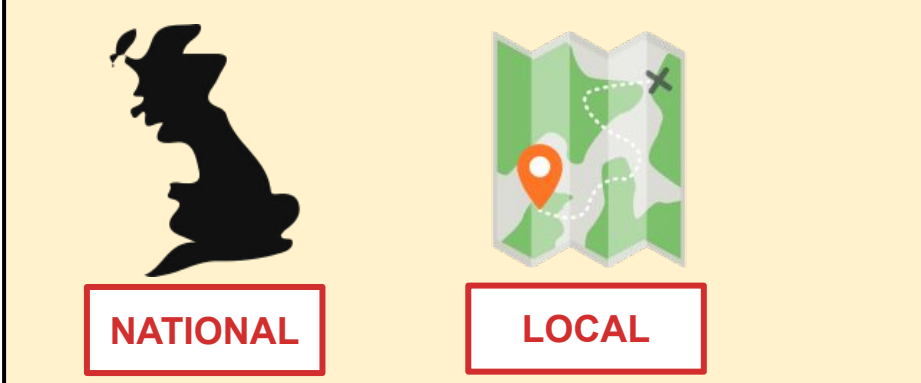
National and Local Data Matching

The Data Matching Process

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At the start of their canvass process each year, all EROs in Great Britain must complete a 'data matching step'. The purpose of this data matching step is to help EROs identify properties where the residents are more likely to have changed. This information will then be used to determine the method or 'route' that will be used to canvass the property.

- There are two categories of data matching:
- National data matching (required)
 - Local data matching (optional)



For national and local data matching, the match is linked to an individual. The exception to this is local data matching for empty properties.

Local datasets are available to EROs under their existing powers provided by Regulations 23, 35 and 35A of the Representation of the People (England and Wales) Regulations 2001 and the Representation of the People (Scotland) Regulations 2001.

Complete the mandatory national data match as above. Otherwise no other steps are required.

Whilst EROs can be confident that a match against DWP data means the elector is still residing in the property, a non-match only indicates a degree of uncertainty about whether the elector is still present.

NATIONAL For national data matching, EROs must send the information that they hold on registered electors including 16 and 17-year-olds to be checked against data held by the Department for Work and Pensions' (DWP) data warehouse.

Local data matching can be done either before or after national data matching. Please note that EROs should follow both arrows from this box separately (i.e. EROs will need to go through this section of the worksheet twice; once to see the outline of the national data match (above) and once to see the outline for the local data match (below)).

LOCAL EROs will have the discretion to match the data they hold on registered electors against local datasets (e.g. council tax records) in addition to matching against the national dataset.

Do EROs want to use local data matching?

When EROs upload their elector data, they are required to provide the following information for each elector:

- Full Name
- DoB (if present)
- UPRN (if present)
- String Address (including postcode)

The EMS will also request the following information:

- Elector Number (i.e. a unique elector reference number) or some other ID number
- Local Authority identifier code
- Previous name (if present)

EROs must decide their intended upload date to DWP (via the Individual Electoral Registration Digital Service), specifying how many elector records they will be uploading. NB - More information to be provided.

When choosing local datasets, EROs should focus on the quality and accuracy of the datasets, using the results of the Canvass Reform Data Test and/or previous data matches to do so.

Do EROs want to match the whole register against a local data set, or to use this selectively for individuals who do not match against DWP data?

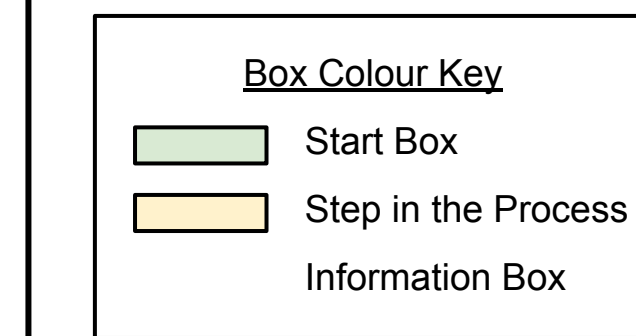
Which data sets would EROs like to use?
Is local data available in the correct format? If not, can it be reconfigured so that it is?

EROs must submit the data for the national data match.

National data match takes place (1-5 days turnaround time)

EROs must download the data. EROs will receive the automatic notification from the IERDS that confirms the completion of the national data match.

EROs conduct local data matching and receive results using their Electoral Management Software (EMS).



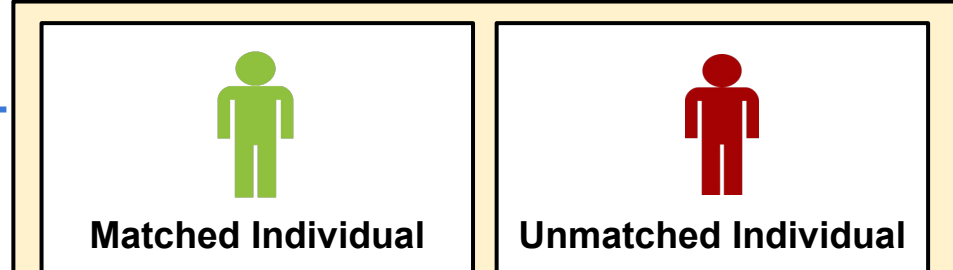
Data Matching

National and Local Data Matching

The Data Matching Process (cont.)

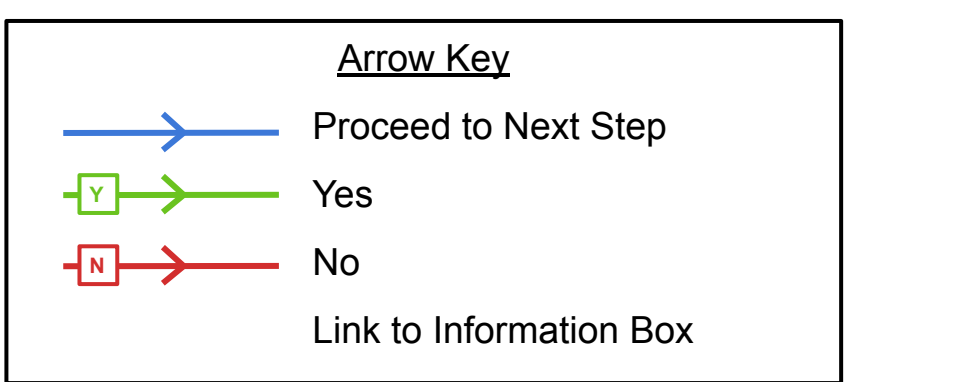
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The matches need to be aggregated to a property level because the canvass operates at the property level. For a property to be designated as 'matched', all the electors registered at the address will need to be matched at the individual level against either (or both) national or local data.

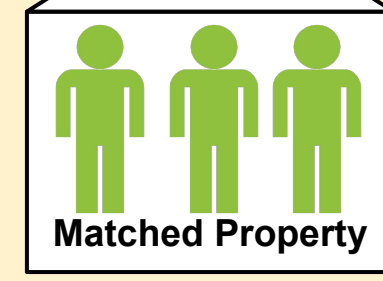


EROs should have checked the optional local data and mandatory national data matching steps before proceeding beyond this point. National and local data matching will return a result of either 'matched' or 'unmatched' for individual electors. A matched result is where an individual's information was successfully matched against either DWP or local data, or both.

There is no set hierarchy between national or local data matching results. So, if EROs choose to match their whole register against local data, and the result is different from the result of the national match, it will be for EROs to decide which of the match results they wish to use.

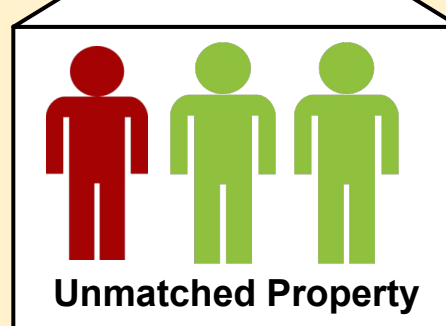


ROUTE 1 For properties that have been 100% matched at the individual level, the ERO can (but will not be required to) follow the Route 1 process. EROs can choose to send a property down Route 2 if they feel this might be more appropriate.



Individual level matches are then aggregated within each ERO's EMS for each residential property to create property level match rates. At this juncture, EROs should consider if they will want to apply any switches for properties from one route to another (e.g. matched properties that include a potential elector can be moved from Route 1 to Route 2. Worksheet 9 lists examples).

ROUTE 2 For properties where some or all of the registered occupants are unmatched, the ERO must follow the Route 2 process.



ROUTE 3 EROs will be doing work to identify their Route 3 properties prior to conducting data matching and/or as the process runs. The electors at those potential Route 3 properties will still go through data matching. At the property aggregation stage, the data matching results can be overridden at EROs' discretion for individuals who live in properties that have been selected for Route 3.