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| *Before making a request to obtain data from an outside entity, use this worksheet to prepare. Your responses will also be useful if you decide to develop a* [*data agreement*](https://npaihbdata.wpengine.com/wp-content/uploads/2021/09/Handout-9-Data-Agreements.pdf)*. This* [*example worksheet*](https://npaihbdata.wpengine.com/wp-content/uploads/2021/09/Handout-8.5-Making-a-Request-for-Data-Example-Worksheet.pdf) *shows an example of a completed worksheet.* |

**Purpose, Definitions, and Authority**

1. Describe what data you are requesting and why.

2. Explain your general legal authority and, if appropriate, your legal authority to obtain the data.

**Duration You Will Use the Data For**

3. Describe how long you will use the data. Sometimes this is called the “period of performance.” The time period should include a start and end date.

**Description of Data Use, Data Elements, and Scope of**

**Data Request**

4. Describe how the data will be used.

Tip: Be specific. This will help ensure that data are being used appropriately to benefit

your community.

5. Describe the specific data you want. Make sure to include:

a) Specific data variables that will be obtained

Tip: Data dictionaries, which list the names and definitions of different data variables, can help you understand what data is available.

b) The data time frame

c) The geographic area the data will cover

d) Who the data will include

**Data Access, Transfer, Storage, and Destruction**

6. Outline how (and how often) data will be accessed or transferred.

Tip: When you request to access data, you can ask for different kinds of access. “Live access” means you get to directly access the database and obtain new data as needed. “Static access” means you obtain a “snapshot” of the data from the database at one point in time.

7. Describe who will have access to the data from your Tribe or organization.

8. Describe how the data will be stored and kept safe.

Tip: Mention any specific trainings staff will need to go through to be able to access the data.

9. Detail how the data will be destroyed.

**Data Protection and Security**

10. Describe the way that data will be protected while being:

a) Accessed or transferred

b) Analyzed

c) Stored

d) Reported

e) Destroyed

11. Indicate how people with access to the data will protect the data.

Tip: Require people with access to the data to sign [confidentiality agreements or pledges](https://npaihbdata.wpengine.com/wp-content/uploads/2021/09/15-Confidentiality-Pledge-Sample.docx).

12. Detail who should be notified if data is lost, stolen, or accessed by someone who should not

have access.

**Release and Publication of Data**

13. Indicate what requirements will need to be met for review, approval, and authorship of any reports, presentations, and publications that use the data.

**Other Important Considerations**

One common question you will be asked is whether or not you are planning on using the data you are requesting for public health practice or for research. Learn more about the topic [here](https://npaihbdata.wpengine.com/wp-content/uploads/2021/09/Handout-7-Tips-for-Obt-Health-Data.pdf).

**Need Help?**

There are [several supports](https://npaihbdata.wpengine.com/wp-content/uploads/2021/09/Handout-3-Data-Supports-for-Tribes-and-Tribal-Entities.pdf) who can help. Consider getting legal counsel early on, so you can tackle any legal issues head on.

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| References:This handout was adapted from the Network for Public Health Law’s [Checklist of Information Needed to Address Proposed Data Collection, Access and Sharing](https://networkforphl.org/wp-content/uploads/2020/01/Checklist-of-Information-Needed-to-Address-Proposed-Data-Collection-Access-and-Sharing-final.docx).  |

