**NCDHHS Data Request Reviewer Worksheet**

*This document is meant for the Data Office, Data Owners, Data Stewards, Data Custodians, and Legal Counsel to help support you in your review of a data request.* This document is not designed to be exhaustive but a tool for considering whether this data request is legal, ethical, and a good idea for NCDHHS. This document will not be stored or archived. It is designed to help work through the data request process. Please see the [NCDHHS Data Sharing Guidebook](https://www.ncdhhs.gov/about/administrative-offices/data-office/data-sharing-guidebook) for more information.

| 1. | [Type of request](https://www.ncdhhs.gov/appendix-aquestions-guide-data-request-pathwaypdf/open) (operational, research, audit, public records, legislative, legal affairs, interdepartmental) and Name of Requestor (Last name of Recipient / Date of Request) [e.g. Research\_Young\_10/30/24] | | | |
| --- | --- | --- | --- | --- |
| 2. | Who will lead on this request? | | | |
| 3. | Priority level?  High  Medium  Exploratory  Unsure | | | |
| 4. | What divisions / offices / data sources are involved? | | | |
| 5. | Has anyone made a similar request in the past? | | | |
| 6. | Are there any legal protections that might apply to the data? If yes, is this data use already approved through the IMOU and your Division / Office specific Data Sharing Agreement?  If not, what are they and how will these legal protections be addressed? | | | |
| 7. | Does this request capture any personally identifiable information (PII) or potential identifiers (e.g., address, dates, ID numbers)? | | | |
| 8. | Is the request directed to a [HIPAA covered entity](https://policies.ncdhhs.gov/wp-content/uploads/NC-DHHS-COVERED-ENTITY-LIST-2023.pdf)? If yes, is a BAA with sufficient provisions in place? | | | |
| 9. | Data owners involved: | | | |
| 10. | Data stewards involved: | | | |
| 11. | Data custodians involved: | | | |
| 12. | How much effort would it take to fulfill this request? (low/med/high and ~hours) | | | |
| 13. | How will equity considerations and bias be considered in this request? | | | |
|  |  | **YES** | **NO** | **Notes** |
|  | **General** |  |  |  |
| 14. | Are there any concerns based upon the Data Request Form? |  |  |  |
| 15. | Does Communications need to be involved? |  |  |  |
|  | **Data Source** |  | | |
| 16. | Have the data stewards reviewed? Any concerns? |  |  |  |
| 17. | Have the data custodians reviewed? Any concerns? |  |  |  |
| 18. | Are there any data quality or data availability concerns? |  |  |  |
|  | **Legal** |  |  |  |
| 19. | Have the data owners approved use? |  |  |  |
| 20. | Will this request need a DUA? If yes, will template DUA be sufficient? |  |  |  |
| 21. | Has PSO been notified? |  |  |  |
| 22. | Is there a clear plan for de-identification and review of output prior to release? |  |  |  |