

3. Forming Partnerships

Identifying Primary Actors and Goals Guide

An important component of creating your agency's surveillance program is identifying the program's stakeholders, which may be individuals and organizations, as well as the information systems involved in the data exchange for your program, collectively referred to as "actors" in the program.

Some actors play an essential role in the surveillance program as primary players. Other secondary actors play a less essential role. While acknowledging these secondary actors, focus your efforts on clarifying the goals and responsibilities of the primary actors for your new surveillance program. Ultimately, your team must ensure the surveillance program supports the goals of all the primary actors.

The *Identifying Actors and Goals* worksheet provides questions your team, or a wider group of SMEs, can answer in a brainstorming session to help complete the worksheet. Ideally, your group will include both programmatic and technical staff.

When complete, the table will contain a comprehensive, initial list of the primary actors involved in the data exchange for your program, their roles and responsibilities within the surveillance program, and what their information needs and/or their data exchange goals are. This document can later serve as a launch pad for creating use case narratives and for focusing workflow analysis, among other downstream program planning activities.

Reference the example below of a completed table for a chronic disease surveillance program to aid the group in completing the exercise. Alternatively, you can complete the table as a draft to which SMEs can respond.

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Example of Primary actors, information needs and goals for chronic disease surveillance reporting*

Primary Actors	Roles and Responsibilities	Information Needs and/or Messaging Goals
Clinician(s)	<ul style="list-style-type: none"> Collect information from patient, observations, lab results, etc. Enter relevant information into EHR-S 	<ul style="list-style-type: none"> Accurate and complete information on patient status/condition An EHR that can faithfully capture/encode clinical information
Electronic Health Record System (EHR-S)	<ul style="list-style-type: none"> House a person's electronic health record Make person's record available to authorized users Apply business rules to identify chronic disease cases Extract a subset of data elements from records identified above and report as chronic disease cases Provide appropriate privacy and security safeguards 	<ul style="list-style-type: none"> Securely send chronic disease case reports to PHCDSIS Receive acknowledgements or other information from public health surveillance system
Public health surveillance staff	Analyze and act on surveillance information	Timely, accurate and complete information on chronic disease incidence, prevalence, burden
Public Health Chronic Disease Surveillance Information System (PHCDSIS)	<ul style="list-style-type: none"> Support aggregate reporting and analysis Support case finding Provide appropriate privacy and security safeguards 	<ul style="list-style-type: none"> Receive and store reports from EHR-S on persons with chronic disease diagnosis Send acknowledgement messages

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Primary Actors	Roles and Responsibilities	Information Needs and/or Messaging Goals
Master Person Index (MPI) or other identity broker	<ul style="list-style-type: none"> • Maintain a list of patients and identifiers for a set of persons • Supply identifiers for use by other systems • Serve as a central demographic supplier for participating systems • Provide cross-reference for identifiers for participating systems 	<ul style="list-style-type: none"> • Send identifier for an individual for use in a record request or record update • Receive request for person identifier • Return complete demographic data for an individual from central demographic store
Health Information Exchange (HIE)	Link information systems	Serve as secure message intermediary among information systems in disparate organizations

* This example represents a “push” scenario of traditional electronic public health case reporting. See [Alternative Models for Accessing Data for Surveillance](#) in the Actors and Goals Introduction section for other approaches to EHR-based surveillance activities.