The planning questions and table below enable you to document information about the data you will be collecting so you better understand the strengths and limitations of the data for surveillance purposes. They help you determine *who* is collecting *what* data for *what* purpose. The data elements for which you will address these questions and complete the table were determined when you completed the defining data elements step.

Not every data element will require a thorough examination using all six questions below. However, assuming that you know the clinical workflows and business processes for a given element may be unwise. Those working with EHRs have learned that EHR system products and how health care organizations use those products—even within a single organization—can vary tremendously.

For your selected data elements, work with your clinical partners to learn information about:

- Who collects the data?
- At what point in the clinical workflow are the data collected?
- Who enters the data in the EHR?
- How are the data obtained?
- Are the data structured or unstructured?
- For what purpose(s) are the data collected?

Fill in the table using the third column to highlight any implications of what you learned from the data's utility in surveillance. For instance, if Clinic A gets patient height and weight verbally from the patient, Clinic B weighs the patient but gets height verbally, and Clinic C measures height and weight, you may conclude that an aggregate BMI across the three sites may not be very accurate but will be consistent over time. If your surveillance purpose is to monitor trends over time, the differences in how this data element is recorded may still be acceptable for your project.

Healthcare Organization: _____

EHR system used: _____

Data element	Information learned	Potential impact on surveillance