

IDS Site Assessment Matrix

	Legal Issues	Technology	Data Quality	Ethical Use	Political Sustainability	Economic Sustainability
Meets none of the best practices of a mature integrated data system	No legal agreements are in place.	No technical system is in place.	There are no procedures in place to determine data quality.	There is no governance process.	No executive leader is fully behind the effort.	No funding is in place.
Meets some of the best practices of a mature integrated data system	One or more discrete MOUs between agencies. Ad hoc, no formal updates planned. Project by project approval processes.	Data are exchanged on an ad hoc or project-by-project basis.	Record linkage projects entail some systematic review of the linkage results and data quality checks. May or may not check validity through comparison of common data elements.	Data use agreements stipulate the procedures for IRB approvals and for vetting of results.	At least one executive leader is fully behind the effort.	Site has a planning grant and some demonstration projects.
Meets most of the best practices of a mature integrated data system	Three or more discrete MOUs with regular and planned data sharing, but no overarching and coordinated plan across the agencies. Research approval processes, done as necessary.	Data are imported, linked, and stored on a regular basis, but cohorts are constructed manually. Routines are in place to clean and process the data regularly.	Regular, but manual review of data linkage results and conducting audits of certain data elements.	There is some governance process in place, but it is not thoroughly defined. It meets irregularly. It may not have a process for disseminating results. It does not have an independent scientific advisory group.	Multiple agency executive leaders (3 or more) have agreed to provide support to the effort and receive periodic updates on its progress.	Demonstration projects have been completed. New projects are underway.
Meets the best practices of a mature integrated data system	There is an overarching MOUs or series of MOUs across three or more agencies and a regular plan for data updates and approval of research protocols.	Automated procedures for data transmissions, linkage, storage, and cohort construction.	Automated routines for checking consistency, completeness, and accuracy of records. Routine validity testing of common data elements from different data sources.	A governing board with a defined process for reviewing proposals and results. A research advisory board reviews projects for scientific integrity. Contains a community/stakeholder engagement component.	Operation is fully embedded within the executive branch. Successive administrators assume ongoing stewardship.	There is an ongoing funding stream (or streams) in place that includes operational and project expenses.