Optional appendix for tools 1 to 4: Toolkit overviews
[draft for the privacy management and data sharing (PMDS, or privacy) toolkit]
(Last updated 3 November 2026)

Overview of the privacy management and data sharing (PMDS, or privacy) toolkit
(draft released on 4 November 2026; final version to be released by the end of 2026)
Note that the hyperlinks will be added to the table once the final versions are available

Tools	Purpose	Description
Tool 1: Briefing on PMDS for OHT executives and governors (and OHT member organization executives)	Provides the context for and key actions involved in (& resources for) • **leading and governing** an effective PMDS program within & across member organizations	Three-plus page briefing IPC handbook from which the lists here & below were drawn
Tool 2: Briefing on PMDS for PCN Clinical Leads (and PCN leadership councils)	• **supporting** primary-care practices in building an effective PMDS program	Three-and-a-half page briefing
Tool 3: Privacy-management essentials for physicians, nurse practitioners and other professionals working in small primary-care practices and healthcare organizations	Lists the key actions involved in (& resources for) • **building** an effective PMDS program in primary care and other small healthcare organizations	Two-page table
Tool 4: Privacy-management essentials for staff of health and community care organizations	• **operationalizing** an effective PMDS program at the staff level	Two-page table
Tool 5: Privacy models for information sharing	Illustrates three privacy models for data sharing	One-page description
Tool 6: Use-case library	Describes how 14 OHTs have approached six PMDS use cases (e.g., primary-care access and attachment to chronic disease prevention & management, cancer screen participation, and secure messaging)	One-page overview and 14 one-page descriptions in a clickable format
Tool 7: Scenarios library	Describes two scenarios: 1) privacy breaches; and 2) third-part technology service providers and shared systems	One-page description Case of Note 1 and 2
Tool 8: OHT capabilities self-assessment survey	Provides 46 questions that allow an OHT – working in partnership with its member organizations – to assess its data sharing and privacy capabilities	Six-page document (originally available as an online survey)
Tool 9: Q&A addition	Provides an additional question and response	Half page that will be added to DSA tool 1 (see previous page)

Overview of the data-sharing agreement (DSA) template and related tools (released on 14 July 2026)

Template & tools	Purpose	Description & related links
Data-sharing agreement (DSA) template	Provides an editable and adaptable template for use by all OHTs and their member organizations	DSA template
Tool 1: Frequently asked questions (FAQ)	Answers questions about how data sharing works under the DSA template (and PHIPA)	4 pages in a clickable format with 18 questions & answers (primarily for use by OHTs and PCNs) See also: Guidelines: De-identifying data
Tool 2: Decision tree	Helps to select a 'lane' for sharing data under the DSA: 1) sharing PHI within the 'circle of care' 2) sharing PHI with express consent 3) sharing PHI to prevent harm 4) sharing de-identified data, including Indigenous data 5) sharing confidential business information	1 page printable flow chart, as well as a version that 'zooms in' on particular sections of the flow chart (primarily for use by HICs)
Tool 3: Roadmap for 'new project' data sharing and governance	Helps to operationalize data sharing – under the DSA template – with any 'new project' (e.g., improving chronic disease prevention and management, increasing primary-care access and attachment) in five phases	10-page document in a clickable format (primarily for use by OHTs and PCNs)
Tool 4: Data sharing 'role' decision framework	Helps to assess organizational readiness and other considerations for serving as: 1) HIC-agent (which is the most common model now being used and which involves one organization serving as an agent for one or more other HICs) 2) Health Information Network Provider (HINP, such as Ontario Health being a HINP for CHRIS) 3) managing member (who oversees an external organization that serves as a HINP)	5-page document in a clickable format listing questions to spur reflection before a decision and appropriate next steps (primarily for use by OHTs and PCNs supporting OHT members in taking on any of these three key roles) See also: Tips about providing electronic services

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Note from RISE: This appendix is meant to be read in conjunction with the privacy management and data sharing (PMDS) tools 1 to 4. RISE prepares both its own resources (like the RISE brief) that can support rapid learning and improvement, as well as provides a structured 'way in' to resources prepared by other partners and by the ministry. RISE is supported by a grant from Ontario Health to the McMaster Health Forum. The opinions, results and conclusions are those of RISE and are independent of Ontario Health and the Ontario Ministry of Health. No endorsement by Ontario Health or the ministry is intended or should be inferred.



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