

Partner and Integration Discovery Brief

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Information-gathering only. This worksheet is not an offer, contract, Statement of Work, NDA, DPA, BAA, authorization, or commitment. DSE review is not acceptance. Do not include PHI, credentials, secrets, production logs, controlled data, or personal consumer or patient data.

Use this brief to outline a potential partnership, integration, referral, research, or collaboration conversation with DSE before a relationship is established.

Section	Information to provide
For	Prospective partners, integration providers, collaborators, and organizations exploring a working relationship.
Use	Describe the shared use case and a practical first discussion.
Not for	An exclusivity commitment, revenue arrangement, partnership agreement, or authorization to access systems or data.

1. Organization and point of contact

Use business information and public links only.

Organization name and public presence

Business name, website, and a short description of the organization.

Primary contact

Name, role, business email, and the person leading this exploration.

Relevant teams or stakeholders

Business, technical, legal, security, product, or delivery roles likely to participate.

2. Shared opportunity

Keep this at the concept level. Do not include customer-identifying details, secrets, private code, or controlled data.

Shared use case or customer need

What problem might be better solved together?

Proposed integration or collaboration outline

What would connect, who would use it, and what is the smallest useful first step?

Roles to explore

Possible responsibilities, ownership boundaries, and dependencies to discuss. This is non-binding.

Data and security context

Broad data categories, hosting or access constraints, and any known security review needs. Do not include data samples or credentials.

3. Decision path

Identify the next conversation, not commercial commitments.

Desired next step

Discovery call, technical architecture discussion, mutual NDA request, or another limited next action.

Decision makers and timing

Who needs to participate and what timing matters?

Next step

DSE will review the brief for a fit conversation. Any mutual NDA, integration agreement, commercial terms, or production access requires separate written review and approval.

Use a DSE-provided controlled channel for any completed workbook. Do not send sensitive material or PHI through this worksheet, the public website, or an initial inquiry.