



Complex Care Startup Toolkit

nationalcomplex.care/startup-toolkit | June 2021

Program operations: Participant identification and triage

This document is part of the *Complex Care Startup Toolkit*, a practical collection of guides, templates, and other tools to launch and grow a new complex care program. Find the full toolkit at www.nationalcomplex.care/startup-toolkit.

Targeting and identifying the right populations is critical to the success of complex care interventions and programs. These resources will help organizations to identify and triage populations through a variety of data sources, provide tips on risk stratification, and present examples on exclusion and inclusion criteria.

Key considerations

1. How is your organization identifying the target population for your complex care intervention?
2. Risk stratification allows for the grouping of individuals with similar complexity and care needs. Segmented populations can be targeted with tailored interventions in order to focus the right amount of resources to the right level of need.
3. Consider how other complex care programs have identified their population of interest.

Below, find resources you can use as you work through each of these key considerations.



Resources

Key consideration # 1: How is your organization identifying the target population for your complex care intervention?

- **Identify patients with quantitative and qualitative criteria**
This introductory resource helps you to identify the right criteria for targeted population, identify the individuals that meet the criteria, review and validate referrals, and enroll and track participants.
- **Tips for identification of high-risk patients**
This comprehensive overview of risk stratification from the perspective of Federally Qualified Health Centers helps you to identify your target population.
- **Operational guide to identify, understand, and treat high-need patients**
This step-by-step guide and set of open-source implementation tools helps safety-net health systems to tailor the NYC Health + Hospitals approach to meet their own unique needs.

Key consideration # 2: Risk stratification allows for the grouping of individuals with similar complexity and care needs. Segmented populations can be targeted with tailored interventions in order to focus the right amount of resources to the right level of need.

- **Population health management: Risk stratification**
This risk stratification guide helps you to identify and target specific populations.
- **Population stratification considerations**
This example of stratification, risk scoring, and care intensity planning in the context of palliative care helps you to inform your risk stratification.

Key consideration # 3: Consider how other complex care programs have identified their population of interest.

- **Inclusion and exclusion criteria for complex care programs: Survey of approaches**
This survey helps you to gain familiarity with descriptions of each program's inclusion, exclusion, and program graduation criteria from around the country.
- **High-need, high-cost patient personas**
These deep dives into the lived experience of individuals with complex needs and their caregivers helps you to inform your target population.
- **The Camden Core Model: Patient selection and triage methodology**
This example helps you to inform your inclusion and exclusion criteria for a target population for a complex care management program (this example is no longer in use).



- **MemorialCare: Identification and risk stratification of high-risk patients**

This example helps you to inform your detailed risk stratification and participation selection methodology.

About the Camden Coalition of Healthcare Providers

We are a multidisciplinary nonprofit working to improve care for people with complex health and social needs in Camden, NJ, and across the country. The Camden Coalition works to advance the field of **complex care** by implementing person-centered programs and piloting new models that address chronic illness and social barriers to health and well-being. Supported by a robust data infrastructure, cross-sector convening, and shared learning, our community-based programs deliver better care to the most vulnerable individuals **in Camden** and **regionally**.

The **National Center for Complex Health and Social Needs** (National Center), an initiative of the Camden Coalition, connects complex care practitioners with each other and supports the field with tools and resources that move complex care forward. The National Center's founding sponsors are the Atlantic Philanthropies, the Robert Wood Johnson Foundation, and AARP.