



# Complex Care Startup Toolkit

[nationalcomplex.care/startup-toolkit](https://nationalcomplex.care/startup-toolkit) | June 2021

## Community mapping and collaboration: **Referrals**

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](https://www.nationalcomplex.care/startup-toolkit).

Individuals with complex needs often rely on a community of organizations providing holistic services to meet their diverse needs. Management and tracking of referrals between organizations is key to improving access and service delivery.

### Key considerations

1. Identifying and verifying community resources will help develop referral pathways and create connections and partnerships with supporting providers and organizations. Creating and tracking referrals is an important component of complex care management and coordination.
2. What is your process for making and tracking referrals to internal and external service providers throughout your community?

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



## Resources

**Key consideration # 1:** Identifying and verifying community resources will help develop referral pathways and create connections and partnerships with supporting providers and organizations. Creating and tracking referrals is an important component of complex care management and coordination.

- **Community resource referral platforms: A guide for health care organizations**  
This overview helps you to gain familiarity with the functionality of commonly used platforms currently operational in the field. Pages 16-18 provide a succinct summary.
- **Resource referral guide & template**  
This guide helps you to create and maintain high-quality resource listings for clients — including the steps these organizations can take to better understand and proactively address barriers to access.
- **Referral tracking & care coordination**  
This webinar helps you to initiate referral tracking and cooperation/relationship building between primary care clinics and specialists, social services, dental, and other community health partners.

**Key consideration # 2:** What is your process for making and tracking referrals to internal and external service providers throughout your community?

- **Referral management**  
This toolbox and set of templates help you create basic referral forms, referral agreements, and referral tracking spreadsheets.
- **Case conference flowchart**  
This example helps you to conduct your cross-continuum team case conferences.
- **Complex case conference script**  
This example helps to discuss successes and barriers encountered during care delivery with individuals with complex needs both within and between organizations.



## 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.