Initiating Health Care Data Sharing with a Social Service Organization

Access to a health care data-sharing platform can help social service providers better understand and address issues that lie at the intersection of their clients' social and medical wellbeing. It can: (1) provide insight into relevant details of the medical situation that their client is facing; (2) help the social service organization identify clinicians who may be valuable partners in the individual's care; and (3) enable them to access documentation that can help them better advocate for the client.

The goal of this play is to help health systems provide access to health-related data to social service organizations in their community.

What is a Play?

If you are not a sports fan, then the concept of a "play" may be unfamiliar. Yet the idea is simple: a play is a plan designed to help deliver a win through highly coordinated teamwork. This idea can be applied to help redesign systems to better serve individuals with complex health and social needs. Explore additional plays on the *Better Care Playbook* at **bettercareplaybook.org**.

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1 Identify a partner organization.

2 Co-design the workflow with the partner organization.

3 Work through questions of privacy, data security, and technical implementation.

4 Pilot the workflow on a small number of patients.

How to Run the Play

1. **Identify a partner organization** that serves a meaningful number of patients with complex health and social needs.

2. **Co-design the workflow with the partner organization.** Use principles of **human-centered design**, drawing on challenges and opportunities where access to data could help to facilitate patient care. Develop a clear scope of work to attach as an exhibit to the legal agreements, outlining roles, responsibilities, and workflow specifics.

3. **Work through questions of privacy, data security, and technical implementation.** Use your standard Business Associates Agreements and **Data-Sharing Agreements** as baselines.

4. **Pilot the workflow on a small number of patients**, and maintain regular contact to assess progress and troubleshoot barriers. As you expand access with patient permission, remember to track the patient cases — especially success stories — and highlight them for the stakeholders who are using the data-sharing platform. This not only reminds the provider of the extended care team and the ecosystem surrounding the patient, but it also opens the door to further communication and coordination between providers.

Tips and Tricks

- **Identify a champion from the partner organization who is interested in trying a new, creative solution and is not intimidated by the idea of piloting a new workflow**. Ideally, the champion should be an influencer within the organization with confidence in the ability to activate their team.

- **As you co-design the workflow with the partner organization, stay focused on the opportunity to improve the experience for people with complex health and social needs**. Hold off on discussing technical and data-sharing logistics until the project goals and associate workflow are pinned down.

- **Stay focused on *how* the data will be shared, *not if* the data will be shared.** As possible, separate the workflow design from the data, legal, and technical logistics conversations to maintain momentum for the project, and to ensure that the legal and technical work is in service of patient-driven care.

- **The legal and technical conversations, and stakeholder education about these realities may take longer than anticipated**. Stay patient and focused on why health care data-sharing is important for improved patient care. Take time to educate stakeholders.

- **Try to design a simple workflow that responds to challenges that are faced by both clients and staff**. The data should replace some of the heavy lifting that the staff were doing. In addition, patients should feel less burdened to share information multiple times with multiple providers.

- **Remember that less can be more!** Sometimes a lean data set, such as a list of active patients with unique identifiers, can be enough to get started without needing to integrate and share large quantities of information.

- **In the early implementation period, hold in-person meetings no less frequently than once a month, and check in by phone or drop in between meetings**. Adoption of a new system can be an overwhelming and intimidating experience. To prevent new partners from losing interest in the data-sharing effort and possibly withdrawing altogether, health care organizations must maintain high-touch relationships with new partners and troubleshoot problems in a timely manner.

Additional Resources

- **Sample Data-Sharing Agreements** - These sample data-sharing agreements were used as part of Camden ARISE, which linked data from criminal justice, health care, and housing in Camden, NJ. The agreements can be adapted for use by other cross-sector groups seeking to share data.

- **Cross-Sector Collaboration for Data-Sharing** - This set of webinars and briefs cover the importance of building trust when embarking on data-sharing partnerships, navigating legal parameters for cross-sector data-sharing, and activating shared data.

- **Better Care Play: Use Human-Centered Design Methods to Develop Your Care Model** - Organizations can use this play to help use human-centered design in developing a data-sharing approach.

This Better Care Play is part of a series developed in partnership with the Camden Coalition of Healthcare Providers to share practical lessons in serving complex populations.

- **Forging Health Care and Social Service Partnerships through Data-Sharing: The Camden Coalition Health Information Exchange** - This blog post explores the Camden Coalition of Healthcare Providers Health Information Exchange, a web-based application that gives providers across health systems real-time access to medical information for patients with complex needs.

- **Building Shared Outcomes with Community-Based Organizations: Navigating Challenges to Address Social Needs** - This interview with Victor Murray, Director of Field Building and Resources for the Camden Coalition of Healthcare Providers, explores the tension between health systems and community-based organizations and discusses strategies for successfully navigating it.

- **Better Care Play: Building Shared Outcomes with Community-Based Organizations** - This play outlines steps to help health systems and community-based organizations build relationships that draw on each other's strengths, put patients first, and support ecosystem development in local communities.

About the Better Care Playbook

The Better Care Playbook is an online resource center designed to help health care stakeholders find the best in evidence-based practices and promising approaches to improving care for people with complex health and social needs. It is made possible by six leading health care foundations — The Commonwealth Fund, The John A. Hartford Foundation, Milbank Memorial Fund, Peterson Center on Healthcare, the Robert Wood Johnson Foundation, and The SCAN Foundation — that are working together to accelerate health system transformation. To learn more, visit **bettercareplaybook.org**.