

# Conduct a Three-Part Data Review to Understand Patient Needs

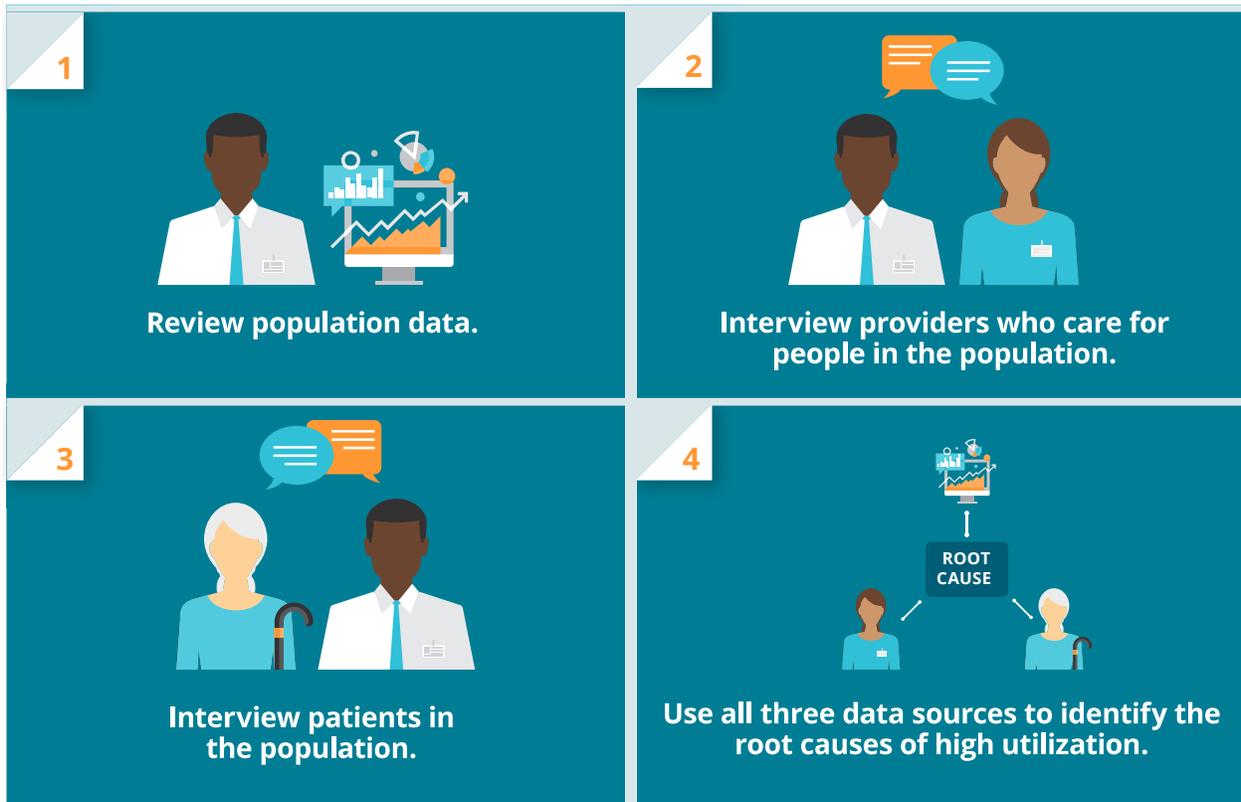
Understanding the needs and assets of people with complex needs is critical to designing an effective and sustainable care model. The Three-Part Data Review is a systematic process for understanding the root cause of high utilization.

The goal of this play is to help you choose your population, and it can also help you engage patients and families in person-centered co-design.

## Conducting a Three-Part Data Review to Understand Patient Needs

### 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](http://bettercareplaybook.org).



## How to Run the Play

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1. Review available population data to identify overall patterns (e.g., utilization, diagnosis codes, age, health insurance coverage) that may also impact the chosen population segment.
2. Interview care providers to learn their perspective on the population's greatest needs and assets. Consider asking providers questions such as:
  - Which patient groups have complex needs and are likely to have high health care costs (e.g., frail older adults, children with three or more health conditions)?
  - What are the needs and assets of people who are not well-served by the current health care system?
  - What are the biggest challenges your organization faces in fostering good patient outcomes?
  - What individual or community assets help patients get their needs met?
3. Interview 10 to 15 patients in the chosen population segment to learn their perspectives on assets and needs. Consider asking patients questions such as:
  - What is most important to you about your health and health care?
  - What are your health goals?
  - What are the challenges you face in managing your health, health care, and living situation?
  - What would help you with these challenges?
4. Use all three data sources to identify the root causes of high utilization and poor health outcomes.

## Tips and Tricks

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- Knowing the characteristics of your chosen population is the start to understanding and selecting your population segment with complex needs and high costs.
- There are several methods that you can use to learn about the needs and assets of your target population. Consider conducting a small series of narrative case studies or using standardized assessment instruments.
- When you choose patients to interview, be sure to include those identified through population data as well as those identified by providers.

## Additional Resources

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- [Choose Your Population of Focus and Learn about Root Causes and Assets: Data Review Worksheet](#) – This worksheet offers a systematic way to record your team's learning as you perform a data review to understand the needs and assets of your patients so you can determine the root cause of high utilization and identify assets to leverage.

- **[Patient Activation Measure](#)** (PAM) – This standardized assessment instrument assesses a patient’s underlying knowledge, skills, and confidence necessary to managing their own health and health care.
- **[CareOregon’s Experience in Conducting a Three-Part Review](#)** – This presentation examines CareOregon’s strategy in finding the root causes of high utilization and findings on how the design of a care model could make an impact.

## **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](https://bettercareplaybook.org).