



Palliative Bed Level Matching Training Guide

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Palliative Bed Level Matching Training Guide

Introduction

This training document introduces new functionality added to the Palliative Care pathway. Clinicians will continue to send electronic referrals to Palliative Care Units as they currently do, with some changes to the selection of the Palliative Care Units of choice.

The addition of the Bed Level Matching functionality allows the Palliative Care Units to create vacancies in RM&R and match those vacancies to the next appropriate patient in the system.

This guide is broken down between Sending and Receiving specific changes.

New Features

Sending Organizations

Sending organizations will see a new tab for Client Choice.

Selecting the Palliative Care Units to send the referral to is now done on the **Client Choice Tab**.


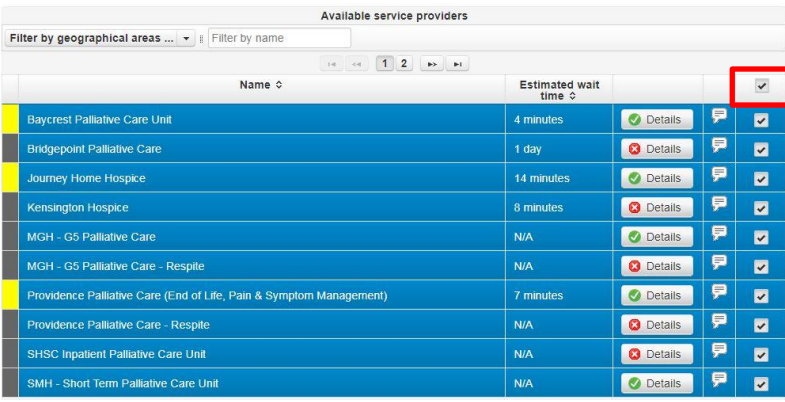



On this tab, users will see a list of all available Palliative Care Units when they scroll down. The display will show the first 10 units with the remainder appearing on a 2nd page.

A screenshot of the 'Available service providers' table. The table has columns for Name, Estimated wait time, and a 'Details' button. The 'Client Choice' tab is highlighted with a red box. The table lists 10 Palliative Care Units with their respective wait times and details buttons. The 'Details' button for the first unit is highlighted with a red box.

Name	Estimated wait time	Details
Baycrest Palliative Care Unit	4 minutes	✓ Details
Bridgepoint Palliative Care	1 day	✗ Details
Journey Home Hospice	14 minutes	✓ Details
Kensington Hospice	8 minutes	✗ Details
MGH - G5 Palliative Care	N/A	✓ Details
MGH - G5 Palliative Care - Respite	N/A	✗ Details
Providence Palliative Care (End of Life, Pain & Symptom Management)	7 minutes	✓ Details
Providence Palliative Care - Respite	N/A	✗ Details
SHSC Inpatient Palliative Care Unit	N/A	✗ Details
SMH - Short Term Palliative Care Unit	N/A	✓ Details

Client Choice Screen Details

Item	Description	RM&R View
1	<p>If the Details button has a green checkmark, all requirements match the Palliative Unit.</p> <p>If the Details button has a red x, there is an item in the matching profile that does not match with the Palliative Care Unit. This does not prevent the user from sending a referral to this location.</p> <p>*Clicking on the Details button will generate the pop-up (to the right) showing the matching criteria</p>	 <p>The screenshot shows a 'Details' button with a green checkmark. To its right is a pop-up window titled 'Baycrest Palliative Care Unit'. Below the title is a table labeled 'Client Matches' with columns for Category, Criteria, and Client. The table lists several criteria such as Application Status, Reason For Admission, Resuscitation Status, Anticipated Prognosis, and Functional Status.</p>
2	<p>Selecting the checkbox will Select All Providers</p>	 <p>The screenshot shows a list of 'Available service providers'. The list includes providers like Baycrest Palliative Care Unit, Bridgepoint Palliative Care, Journey Home Hospice, etc. Each row has a 'Details' button and a checkbox. The checkbox in the top right corner of the list is highlighted with a red box and is checked.</p>
3	<p>Estimated wait time – The estimated time from when the patient is accepted to when they are admitted to a PCU. The accuracy of this feature will improve as more beds are created and filled.</p>	 <p>The screenshot shows a dropdown menu for 'Estimated wait time'. The menu is open, showing three options: 'N/A', '31 minutes', and '10 minutes'.</p>

Completing the Client Choice Tab


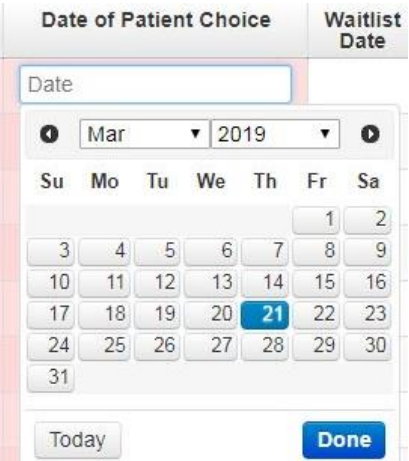
Once you have selected the desired locations and added them, they will move up to the Rated Service Providers section and appear as below.

Rated service providers							
Name	Geographical areas	1 Rating	2 Category	3 Date of Patient Choice	Waitlist Date		<input type="checkbox"/>
Baycrest Palliative Care Unit	02 - Toronto Central LHIN	1	Community	March 21, 2019			<input checked="" type="checkbox"/>
Bridgepoint Palliative Care	02 - Toronto Central LHIN	2	Community	March 21, 2019			<input type="checkbox"/>
Journey Home Hospice	02 - Toronto Central LHIN	3	- select one -	March 21, 2019			<input type="checkbox"/>
Kensington Hospice	02 - Toronto Central LHIN	4	- select one -	Date			<input type="checkbox"/>
MGH - G5 Palliative Care	02 - Toronto Central LHIN	5	- select one -	Date			<input type="checkbox"/>
Providence Palliative Care - Respite	02 - Toronto Central LHIN	6	- select one -	Date			<input type="checkbox"/>
SHSC Inpatient Palliative Care Unit	02 - Toronto Central LHIN	7	- select one -	Date			<input type="checkbox"/>
SMH - Short Term Palliative Care Unit	02 - Toronto Central LHIN	8	- select one -	Date			<input type="checkbox"/>
Providence Palliative Care (End of Life, Pain & Symptom Management)	02 - Toronto Central LHIN	9	- select one -	Date			<input type="checkbox"/>

Available service providers			
Filter by geographical areas ...	Filter by name		
1			
Name	Estimated wait time		<input type="checkbox"/>
MGH - G5 Palliative Care - Respite	N/A		<input type="checkbox"/>
Test Palliative Care Unit	31 minutes		<input type="checkbox"/>

The providers not selected will remain at the bottom in the Available service providers area. When completing the Client Choice Sheet, there are 3 main pieces of data that are required to be filled in.

Item	Description	RM&R View
1	Service Provider Rating This allows patients to rank their choices for Palliative Care Units. Patients can have multiple locations with the same ranking. If a patient has "No Preference" the user can just select 1 for all choices.	

<p>2</p>	<p>Patient Category</p> <p>This indicates where the patient will be waiting for the Palliative bed. Users have 3 options here. The priority of the options are:</p> <ol style="list-style-type: none"> 1. Community 2. Hospital 3. PCU <p>This selection impacts the position of the patient on the waitlist. Patients in the Community get higher priority than those currently in a PCU.</p>	
<p>3</p>	<p>Date of Patient Choice</p> <p>The date a patient selects the PCUs they wish to go to and the referral is completed. This date impacts the position of the patient on the waitlist.</p>	

Send and Manage referrals

Once all of the necessary information has been completed, the user can then move to the Send and Manage Referrals tab. The system will automatically check all of the units that the patient matches to and the user can click on the Send Referral button at the bottom of the screen. **1**

Send and Manage Referrals

Active Referrals Referral History Report

Service Provider	Status	Referral Date	Referral Information	Referral Management
No Active Referrals Found				

Referrals To Be Sent Select All Deselect All

Service Provider	Rating	Accept Wait	Admit Wait	Match Status	
Baycrest Palliative Care Unit	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
Bridgepoint Palliative Care	1	0 days	1 day	✓ Details	<input checked="" type="checkbox"/>
Journey Home Hospice	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
Kensington Hospice	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
MGH - G5 Palliative Care	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
MGH - G5 Palliative Care - Respite	1	0 days	0 days	✗ Details	<input type="checkbox"/>
Providence Palliative Care (End of Life, Pain & Symptom Management)	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
Providence Palliative Care - Respite	1	0 days	0 days	✗ Details	<input type="checkbox"/>
SHSC Inpatient Palliative Care Unit	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
SMH - Short Term Palliative Care Unit	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>

Select All Deselect All Send Referral

Sites that a patient does not match to will **not** automatically be selected at this point **2**. Users will have to click the Select All button **3**. This will prompt the user to enter an Override Reason to send the referral to the desired location (below).

Bridgepoint Palliative Care		1	0 days	1 day	✗ Details	<input checked="" type="checkbox"/>
Jo	<input type="text"/> <ul style="list-style-type: none"> --select an override reason-- Override Palliative Request: Consultation with Unit/ Hospice Override Palliative Request: Patient / SDM / POA / PGT Request 	1	0 days	0 days	✓ Details	<input checked="" type="checkbox"/>
Ke	<input type="text"/> <ul style="list-style-type: none"> Resend Palliative: Additional Information Provided via Fax Resend Palliative: Additional Information Provided via RM&R Resend Palliative: Deny Reason has been Addressed (Specify) 	2	0 days	0 days	✗ Details	<input checked="" type="checkbox"/>

Once the Override reason has been captured, the user can click on the Send Referral button. At this point, all referrals will be sent to the selected Palliative Care Units and appear in a **Pending** Status.

Send and Manage Referrals

Active Referrals Referral History Report

Service Provider	Status	Referral Date	Referral Information	Referral Management
Baycrest Palliative Care Unit	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
Bridgepoint Palliative Care	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
Journey Home Hospice	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗
Kensington Hospice	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
MGH - G5 Palliative Care	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
Providence Palliative Care (End of Life, Pain & Symptom Management)	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
Providence Palliative Care - Respite	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
SHSC Inpatient Palliative Care Unit	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral
SMH - Short Term Palliative Care Unit	Pending	March 25, 2019 10:22	(0 of 0) Details Print	✗ View Referral

Receiving Organizations

Receiving organizations will continue to Accept new referrals using current processes. The new features will be the Bed Level Matching functionality. This provides PCUs the ability to create vacancies in the Serve Provider module. Once a vacancy is created, they will then be able to match the next eligible patient in RM&R to the available bed.

Viewing Referrals

The Palliative Care Units will have additional information available to them when looking at a patient referral. Users will now see the **Client Choice** tab in the patient referral. Here, the user can see what the patient rated their site as in their list of choices.

The screenshot displays the 'View Referral' page in the Strata Pathways system. The left sidebar lists four referrals, with the first one selected. The main content area shows the details for the selected referral, including a 'Client Choice' tab (highlighted with a red box) and a table of 'Current client ratings'.

Current client ratings				
Service provider	Rating	Category	Date of Patient Choice	Comment
Bridgepoint Palliative Care 02 - Toronto Central LHIN	1	Community	April 5, 2019	

Users will also see a new option to **Edit client**. Selecting this button enables receiving organizations access to the patient referral in Assessment. All access to patient information in RM&R is logged.

Creating a Vacancy

When a Service Provider logs in, they will land on the new tab labelled Vacancies.

Service Provider > **Bridgepoint Palliative Care** Go Back Help Dashboard Home Switch to Log Out

Referrals Reports **Vacancies** Manage Search

New Vacancy

*Match made in Transition
Filter: - Status -
Sort: Available Date (ascending)
Search:

test-test-test Available
Date Available: Mar 07, 2019
Last User: Diagne, Serigne

New Vacancy

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From this screen, they will be able to create a New Vacancy by clicking the **New Vacancy** button. This will take them to a **Client Search** screen.

Service Provider > **Discharge Search** Go Back Help Dashboard Home Switch to Log Out

Referrals Reports **Vacancies** Manage Search

New Vacancy

*Match made in Transition
Filter: - Status -
Sort: Available Date (ascending)
Search:

test-test-test Available
Date Available: Mar 07, 2019
Last User: Diagne, Serigne

New Vacancy

Search for a client to Discharge

Enter client details

Client Surname: Doe
Client Given Name(s): John

Search Clients

Here, the user can enter any name (if the patient was not from RM&R). Once they click on the **Search Clients** button, they will be taken to the screen below to create a Discharge Notice. All fields with an exclamation point (!) are mandatory fields and must be completed.

Please create a discharge notice

Discharged Notice	
Service Provider:	Kensington Hospice
1 Client Surname:	Doe !
2 Client Given Name(s):	John !
Date Of Birth:	- Month - ▾ - Day - ▾
3 Health Card Number:	111111111 !
4 Discharged / Deceased Date:	Apr 03, 2019 14:45 !
Discharged Destination:	- no selection - ▾
5 Reason For Discharged:	Patient no longer end of life or have become ALC ▾ !
6 Vacancy Name:	Floor 3-Room 3-Bed 3 !

[Send Discharge Notice](#)

The required information here is as follows:

Item	Data Field	Required Information
1	Client Surname	The last name of the patient being discharged
2	Client Given Name(s)	The first name of the patient being discharged
3	Health Card Number	This number can be any sequence of 10 digits provided it does not match a valid Health Card Number
4	Discharged/Deceased Date	Date that the patient is being discharged from the bed
5	Reason for Discharge	The reason the bed has become available
6	Vacancy Name	This is the name of the vacancy that will appear in the system. The only requirements that the system is looking for are the 2 hyphens (-) separating the 3 identifiers.

If the user is discharging a patient that was admitted through RM&R, they can search for that patient on the *Search for a client to Discharge* page. If the patient has a profile in RM&R, they will be taken to the page below. The search will pull all names that match the information entered (in the event more than 1 patient has the same name).

Referrals	Reports	Vacancies	Manage	Search																		
*Match made in Transition Filter: - Status - ▾ Sort: Available Date (ascending) ▾ Search: <input type="text"/>		Please select a client for Discharge Discharge Client Not In List																				
Floor 2-Room 2-Bed 2 Internal Last User: McNeil, Tom New Vacancy		<table border="1"> <thead> <tr> <th>Surname</th> <th>Given Name(s)</th> <th>Date Of Birth</th> <th>Health Card Number</th> <th>Discharged</th> <th></th> </tr> </thead> <tbody> <tr> <td>999Test999</td> <td>Tom Pall BLM-1</td> <td></td> <td>No Identifier</td> <td>No</td> <td>Discharge</td> </tr> <tr> <td>999Test999</td> <td>Tom</td> <td></td> <td>No Identifier</td> <td>No</td> <td>Discharge</td> </tr> </tbody> </table> <p style="text-align: right;">2 Client(s)</p>			Surname	Given Name(s)	Date Of Birth	Health Card Number	Discharged		999Test999	Tom Pall BLM-1		No Identifier	No	Discharge	999Test999	Tom		No Identifier	No	Discharge
Surname	Given Name(s)	Date Of Birth	Health Card Number	Discharged																		
999Test999	Tom Pall BLM-1		No Identifier	No	Discharge																	
999Test999	Tom		No Identifier	No	Discharge																	

Selecting one of the patients will bring the user to the screen below where some of the information is completed. Only fields with an exclamation point are required.



Referrals	Reports	Vacancies	Manage	Search
-----------	---------	-----------	--------	--------

Match made in Transition

Filter: - Status -

Sort: Available Date (ascending)

Search:

New Vacancy

Please create a discharge notice

Discharged Notice	
Service Provider:	Baycrest Palliative Care Unit
Client Surname:	999Test999
Client Given Name(s):	Tom
Date Of Birth:	
Health Card Number:	No Identifier
Discharged / Deceased Date:	Apr 18, 2019 13:55
Discharged Destination:	- no selection -
Reason For Discharged:	Patient Deceased
Vacancy Name:	Floor 3-Room 3-Bed 3

[Send Discharge Notice](#)

If they enter the *Reason for Discharge* as Patient Deceased, this will mark the patient record as deceased.

Once all information has been entered and the user clicks on the Send Discharge Notice button, the following information will appear.

Referrals	Reports	Vacancies	Manage	Search
-----------	---------	-----------	--------	--------

i Please remember to save your vacancy before trying to find matches.

Match made in Transition

Filter: - Status -

Sort: Available Date (ascending)

Search:

New Vacancy

Floor 2-Room 2-Bed 2 (Internal) [Delete](#) [Change to Available](#)

Vacancy Details	Vacancy Comments	Discharge Notice
------------------------	-------------------------	-------------------------

Care Profile	
Name:	Floor 2-Room 2-Bed 2
ID:	#53ca
Status:	Internal
Date Available:	Apr 18, 2019 11:40
Restriction:	- none -
Place On Hold:	- none -
Select all services available for this particular vacancy.	
Gender	
<input checked="" type="checkbox"/> Male <input checked="" type="checkbox"/> Female <input checked="" type="checkbox"/> Other	

[Print](#) [Save](#)

Here you will notice the tile on the left with the Vacancy Name, and that it is marked as Internal. This means that the bed is currently unavailable to match to a patient. On the right hand side, you will see the details of the Vacancy. It is here that users will enter the date that the bed will be available for a patient. You can also indicate the preferred gender for the bed.

Once you have entered the necessary information, you can click on the **Save** button. The banner at the top will turn green with the message "Vacancy has been saved" (below).

Referrals	Reports	Vacancies	Manage	Search
-----------	---------	-----------	--------	--------

i Vacancy has been saved

To make the bed available to match with a patient in RM&R, the user will click on the **Change to Available** button. Once this is done, the bed will appear in the Daily Bed Census report and the user is taken to the following screen.

The screenshot shows the Strata Pathways interface. At the top, there are tabs for Referrals, Reports, Vacancies, Manage, and Search. Below the navigation, there are search filters: "Match made in Transition", "Filter: - Status -", "Sort: Available Date (ascending)", and a search box. A "New Vacancy" button is visible. The main content area shows a vacancy for "Floor1-Room1-Bed1 (Available)" with a "Delete" and "Change to Internal" button. Below this, there are tabs for "Vacancy Details", "Vacancy Comments", "Matches", and "Discharge Notice". A table shows clients matching the vacancy:

Rating	Status	Location	Age
1	Pending - Match Found	TEST - Referral Sender	0
1	Complete Sent	TEST - Referral Sender	0

At the bottom right, it says "2 Client(s)". A disclaimer at the bottom states: "The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with HIPAA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information. Strata Pathways is copyright © 2001-2019 Strata Health Solutions."

Placing a Vacancy on Hold

If, for any reason, you need to put a Hold on a vacancy and make it so that the bed will not match, you can do so on the **Vacancy Details** tab and select the Hold Reason that applies.

The screenshot shows the Strata Pathways interface with a yellow warning banner: "Please remember to save your vacancy before trying to find matches." The navigation menu is the same. The search filters are: "Match made in Transition", "Filter: - Status -", "Sort: Available Date (ascending)", and a search box. A "New Vacancy" button is visible. The main content area shows a vacancy for "-- (Available)" with a "Delete" and "Change to Internal" button. Below this, there are tabs for "Vacancy Details", "Vacancy Comments", "Matches", and "Discharge Notice". The "Vacancy Details" tab is active, showing a "Care Profile" section with fields for Name, Status, Date Available, and Restriction. The "Place On Hold" dropdown menu is highlighted, showing "Outbreak" as the selected option. Below this, there is a "Select all services available for this particular vacancy." section with a "Gender" section containing checkboxes for Male, Female, and Other. "Print" and "Save" buttons are visible at the bottom right.

Once you select the Hold reason, you can click on the Save button to remove the vacancy from the matching process. The status of the vacancy will now read **Available (On Hold:Hold Reason)**

Referrals Reports Vacancies Manage Search

i Vacancy has been saved

New Vacancy -- (Available (On Hold: Outbreak)) Delete Change to Internal Resume

*Match made in Transition
 Filter: - Status -
 Sort: Available Date (ascending)
 Search:

PCU-Bed-2 Date Available: Apr 04, 2019 Last User: Sterling, Kim	Available
PCU-Bed-3 Date Available: Apr 04, 2019 Last User: Sterling, Kim	Available
-- Date Available: Apr 05, 2019 Last User: McNeil, Tom	Available On Hold
P-C-U Matched To: G, RM&R Date Available: Apr 05, 2019 Last User: Sterling, Kim	Pending - Match Found
--1 Date Available: Apr 08, 2019	Available

Vacancy Details | Vacancy Comments | Matches | Discharge Notice

Care Profile Print Save

Name: --
 Status: Available (On Hold: Outbreak)
 Date Available: Apr 05, 2019 15:06
 Restriction: None

Select all services available for this particular vacancy.

Gender
 Male Female Other Print Save

To remove the Hold, click on the Resume button (above). Clicking on this button will remove the hold on the room, and bring the user back to the Matches tab, showing the next available patient (below).

Referrals Reports Vacancies Manage Search

New Vacancy **Floor 3-Room 3-Bed 3 (Available)** Delete Change to Internal

*Match made in Transition
 Filter: - Status -
 Sort: Available Date (ascending)
 Search:

test-test-test Date Available: Mar 07, 2019 Last User: Diagne, Serigne	Available
Floor 3-Room 3-Bed 3 Date Available: Mar 28, 2019 Last User: McNeil, Tom	Available

Vacancy Details | Vacancy Comments | **Matches** | Discharge Notice

Clients matching vacancy: Floor 3-Room 3-Bed 3

Rating	Status	Location	Age	
-	Complete Sent	TEST - Referral Sender	0	Select

1 Client(s)

New Vacancy

Clicking on the **Select** link will match your vacancy to the next eligible patient.

Here, the vacancy shows on the left in a *Pending - Match Found* status, as well as the match on the right. By clicking on the Select link, the patient will be taken to the Client Profile. Here, they can see the patient that was matched to the bed from RM&R.

Best Practice – When you match a patient to a vacancy, the user should review the client details and see if the patient has other PCUs ranked higher than the current match. If so, it is recommended that the user call the other PCU as soon as possible to see if there is a chance that the patient could be admitted to their unit within the next 2-3 days. This will prevent admitting a patient to a unit just to have a transfer when a bed becomes available at a higher ranked PCU.

After reviewing the client profile, the user has 2 options. They can Proceed to the Bed Offer and contact the patient to be admitted, or they can Bypass this patient.

Referrals	Reports	Vacancies	Manage	Search
-----------	---------	-----------	--------	--------

New Vacancy

*Match made in Transition

Filter:

Sort:

Search:

test-test-test	Available
Date Available: Mar 07, 2019 Last User: Diagne, Serigne	
Floor 3-Room 3-Bed 3	Pending - Match Found
Matched To: 999Test999, Tom - Palliative BLM Date Available: Mar 28, 2019 Last User: McNeil, Tom	

New Vacancy

Floor 3-Room 3-Bed 3 (Pending - Match Found)

Vacancy Details
Vacancy Comments
Client Profile
Match Comments
Discharge Notice

Client Details	
Profile Report:	View Client Profile Report
Service Provider Comment:	
Client Comment:	
Responsible Person(s):	McNeil, Tom
Current Location:	TEST - Referral Sender
Status:	Pending - Match Found
Date Of Birth:	

Demographics [\(Click To View Page\)](#)

Supplementary Information [\(Click To View Page\)](#)

Referral Information [\(Click To View Page\)](#)

Health Assessment Information [\(Click To View Page\)](#)

Proceed to Bed Offer

If the patient is appropriate for the bed and the PCU is planning to admit them, they can select the **Proceed to Bed Offer** button. This will prompt them to enter a Planned Admission Date as seen below.

Floor 3-Room 3-Bed 3 (Bed Offered)

Vacancy Details
Vacancy Comments
Client Profile
Match Comments
Discharge Notice

Client Details		<input type="button" value="Save"/>
Profile Report:	View Client Profile Report	
Planned Admission Date:	<input type="text"/>	<input type="button" value="!"/>
Service Provider Comment:		
Client Comment:		
Responsible Person(s):	McNeil, Tom	
Current Location:	TEST - Referral Sender	
Status:	Bed Offered	
Date Of Birth:		

Demographics [\(Click To View Page\)](#)

Supplementary Information [\(Click To View Page\)](#)

Referral Information [\(Click To View Page\)](#)

Health Assessment Information [\(Click To View Page\)](#)



Once the Planned Admission Date is entered and the user saves the record, they will see a green bar appear at the top of the page indicating that the Client Profile has been saved.

The next step is to click on the Accept Bed Offer button to indicate that the patient has accepted the offer and will be admitted to the bed. Once this has been done, the below text will appear at the top.

i This match has been changed to bed offer accepted.

Once the patient arrives at the PCU, the user will go back in to RM&R and enter the Admission Date and any other comments regarding this patient's admission.

The screenshot shows the RM&R interface with a navigation bar (Referrals, Reports, Vacancies, Manage, Search). On the left, a list of vacancies is shown. The selected vacancy is 'Floor 3-Room 3-Bed 3' with a status of 'Bed Offer Accepted'. On the right, the 'Admission Notice' form is displayed for this vacancy. The form includes fields for Service Provider (Bridgepoint Palliative Care), Vacancy Name (Floor 3-Room 3-Bed 3), Client (999Test999, Tom - Palliative BLM), Health Card Number (No Identifier), Admission Date (Mar 28, 2019 14:20), and Attending Physician. A 'Send Admission Notice' button is at the bottom right.

Once completed, the Admission Notice will be sent and the patient is Admitted with the Vacancy disappearing from the list on the left.

The screenshot shows the RM&R interface after the admission notice is sent. A green notification bar at the top reads 'Admission Notice Has Been Sent'. The left sidebar shows the vacancy list, with 'test-test-test' now marked as 'Available'. The 'Admission Notice' form on the right is now in a 'Save' state, with a 'Save Admission Notice' button at the bottom right. The form fields are populated with the same information as in the previous screenshot, but the 'Admission Date' is now 'Mar 29, 2019' and the 'Source of Admission' is 'TEST - Referral Sender'.

Decline/Bypass a Patient

If a patient is contacted and they decline to accept the bed, the user has the ability to note this in RM&R. They can select the Deny/Bypass button which will bring up the screen below.



Referrals	Reports	Vacancies	Manage	Search
-----------	---------	-----------	--------	--------

*Match made in Transition

Filter: - Status -

Sort: Available Date (ascending)

Search:

test-test-test	Available
Date Available: Mar 07, 2019 Last User: Diagne, Serigne	
Floor 3-Room 3-Bed 3	Pending - Match Found
Matched To: 999Test999, Tom - Palliative BLM Date Available: Mar 28, 2019 Last User: McNeill, Tom	

New Vacancy

Floor 3-Room 3-Bed 3 (Pending - Match Found)

Decline/ Bypass Client Vacancy Match

Note: If the match is being declined/ bypassed, please contact the LTCH

Vacancy Name:	Floor 3-Room 3-Bed 3
Client Name:	999Test999, Tom - Palliative BLM
Reason For Decline / Bypass:	- none -

Comment:

Decline/ Bypass Match

The user is required to enter the reason for the Deny or Bypass with a comment. A list of the Deny Match Reasons is included in the Appendix.

Declining/Bypassing a patient puts the individual back on the waiting list for another available bed. The user will then be presented with a new match for the vacancy to review. If the patient is appropriate, they will then follow the previous steps for proceeding with a bed offer and admitting the patient.

Reporting

With the addition of Bed Level Matching, users will now have access to new reports. These reports can be accessed from the **Reports** module on the Home Page.

Menu	Gateway > Navigation	Go Back	Help	Dashboard	Home	Switch To	Log Out
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MAIN

Modules


PERSONAL

Messages


Change Password

Contact Information


Welcome to Resource Matching & Referral (RM&R).




Transition
Manage client requirements and placement choice.



Assessment
Send, Assess and Manage Referrals.



Service Provider
Receive client referrals and manage vacancies.



Reports
View and analyze each step of the placement process.

Selecting the Reports icon will take the user to a page showing the reports available to them.

Menu Reports > Custom Reports Go Back Help Dashboard Home Switch To Log Out

REPORTS
Custom Reports

- TCLHIN Palliative Bed Matching Report - Vacancy Census - Detail
- TCLHIN Palliative Bed Matching Report - Vacancy Census - Summary
- TCLHIN Palliative Bed Matching Report - Waitlist (Baycrest Palliative Care Unit)

Each site will only be able to view the Waitlist Report for their location, however all users that send and receive Palliative Referrals will have access to the Vacancy Census reports (Summary and Detail).

Vacancy Census Reports

There are two options for the Vanancy Census reports. These are Detail and Summary. Clicking on the **Vacancy Census – Detail** Report brings the user to the screen below.

Reports > TCLHIN Palliative Bed Matching Report - Vacancy Census - Detail

Page orientation

Portrait Landscape

Save View in browser Print

Here the user choose the Page orientation, and the file type they want the report to be saved as. They also have the option to view the report in the browser.

Reports > TCLHIN Palliative Bed Matching Report - Vacancy Census - Detail

Page orientation

Portrait Landscape

Save View in browser Print

- Save as PDF
- Save as CSV

The information displayed must be stored and destroyed in accordance with your organization's privacy policies, or contact your Privacy Resource, for practices you should apply to protect this information.

Generating the report as a PDF creates a static image of the data, while saving as CSV allows users to sort and filter the data generated.

Below is a sample of the **Bed Census – Detail** report. Here you will see the following information:

Data Field	Description
Reporting Group	This is the Organization that the Palliative Care Unit is located within
Vendor	This is the name of the Palliative Care Unit



Total Beds	The total number of beds that are available at the designated PCU
Vacancy	The name of the vacant bed that is available
Available Date	The date that the bed is available for a patient to be admitted.

TCLHIN Palliative Bed Matching Report - Vacancy Census - Detail

1 of 1

Reporting Group	Vendor	Total Beds	Vacancy	Available Date
Baycrest	Baycrest Admissions	31	Floor 2-Room 2-Bed 2	04/03/2019
Baycrest	Baycrest Admissions	31	Floor1-Room1-Bed1	04/16/2019
Baycrest	Baycrest Admissions	31	flor 2-room2-bed1	04/04/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	--	04/05/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	--1	04/08/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	P-C-U	04/05/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	PCU-Bed-1	04/04/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	PCU-Bed-2	04/04/2019
Bridgepoint Health	Bridgepoint Admitting Office	32	PCU-Bed-3	04/04/2019

For the **Vacancy Census – Summary** report, you will have to select the date range that you want to review for the summary. If you want to view the report for a single day, enter the same date for the Start and End dates.

Reports > TCLHIN Palliative Bed Matching Report - Vacancy Census - Summary

Page orientation

Portrait Landscape

Start Date

End Date

Save View in browser Print

Once again, you have the option to save the report as a PDF or a CSV file. The Summary Report appears below:

TCLHIN Palliative Bed Matching Report - Vacancy Census - Summary

1 of 1

Reporting Group	Vendor	Total Beds	No of Vacancies	Beds filled
Baycrest	Baycrest Admissions	31	0	1
Bridgepoint Health	Bridgepoint Admitting Office	32	0	0
Journey Home Hospice	Hospice Toronto	4	0	0
Kensington Hospice	Kensington Hospice	10	0	0
Providence Healthcare	Providence Admitting Office	33	0	0
Toronto Grace Health Centre	Toronto Grace Admitting	0	0	0
University Health Network	TRI Palliative Care Services	0	0	0

The main difference with this report is that it does not show the individual beds, and allows users to see how many beds have been filled in the time period selected on the previous screen.



Waitlist Report

At any time, users are able to generate a **Waitlist** report for their location. The waitlist report will show users their list of patients that they have Accepted in RM&R. Like previous reports, the user will be able to select the Page layout of the report, as well as which format they want to save the report as.

Reports > **TCLHIN Palliative Bed Matching Report - Waitlist (Baycrest Palliative Care Unit)**

Page orientation

Portrait Landscape

Save View in browser Print

Once the report is generated, it will appear as below.

TCLHIN Palliative Bed Matching Report - Waitlist (Bridgepoint Palliative Care) 1 of 1

OHIP	Last Name	First Name	Gender	Current Location	Rated Service Provider	Rating	Category	Waitlist Date	Bypasses	Count
No Identifier	999Test999	Palliative BLM Apr 5	Male	TEST - Referral Sender	Bridgepoint Palliative Care	1	Community	04/05/2019		
No Identifier	999test999	Arthur April 1	Female	Bridgepoint - 2N	Bridgepoint Palliative Care	1	Community	04/05/2019	19-04-12: Bypass - Patient not ready for admission, 19-04-18: Bypass - Patient not ready for admission	
No Identifier	999Test999	Tom Test Apr 18	Female	TEST - Referral Sender	Bridgepoint Palliative Care	1	Hospital	04/18/2019		
2819201903	G	RMRG	Male	TSH - IP - General Campus - H2C-NEPH	Bridgepoint Palliative Care			07/03/2017	19-04-04: Bypass - Updates Unavailable, 19-04-05: Client/Family Refused, 19-04-12: Bypass - For higher/lower ranked choice	
Count										4

The list of patients will appear in the order of their priority. As [mentioned previously](#) in this training document, the Category and Waitlist Date are the key pieces of data that will determine a patient's position on the waitlist.