Transitional Care Unit (TCU)/ Reintegration Care Unit (RCU) Referral Training Guide

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1. Introduction

Background

The Transitional Care Units (TCUs), which are also known as Reintegration Care Units (RCUs), have been set up within the regional healthcare system to provide patients with a short-term, safe, community based supportive place where they can go for recuperation post-hospital discharge.

This document is primarily for TCU Service Providers and referral senders, who are transitioning from a fax/email based centralized referral management process to RM&R (Resource Matching & Referral) application. The document guides users in sending and managing TCU referrals via RM&R.

This transition will significantly automate the referral process and boost productivity. It will also introduce new features. For example, receiving organizations will be able to post their bed availability using the Vacancy module. This will allow sending organizations to quickly check bed availability within the region at any given time.

General Guidelines

The TCU Program has suggested guidelines for sending and receiving referrals including number of units a referral can be sent to simultaneously.

Referral senders should typically refer to no more than 2 sites closest to the patient's home postal code or anticipated home discharge destination. If the receiving organizations are unable to admit within 2 days, apply to 2 additional sites.

Sections

This training guide is organized in two sections - Sending referrals and Receiving Referrals.

- **Sending Referrals:** This section for clinical staff who will use RM&R to send referrals to service providers.
- **Receiving Referrals:** This section is for Service Providers. This is where TCU/RCU will see the referrals that have been sent to them. This is also where they will review the application, get response to their questions and concerns, and admit/deny the application.

The guide will focus on key steps in completing, sending and receiving referals for the Transitional Care Unit pathway. For more detailed information on specific steps, you can refer to quick guides available on our public website:

[Quick Guides – Resource Matching & Referral (resourcematchingandreferral.com)]

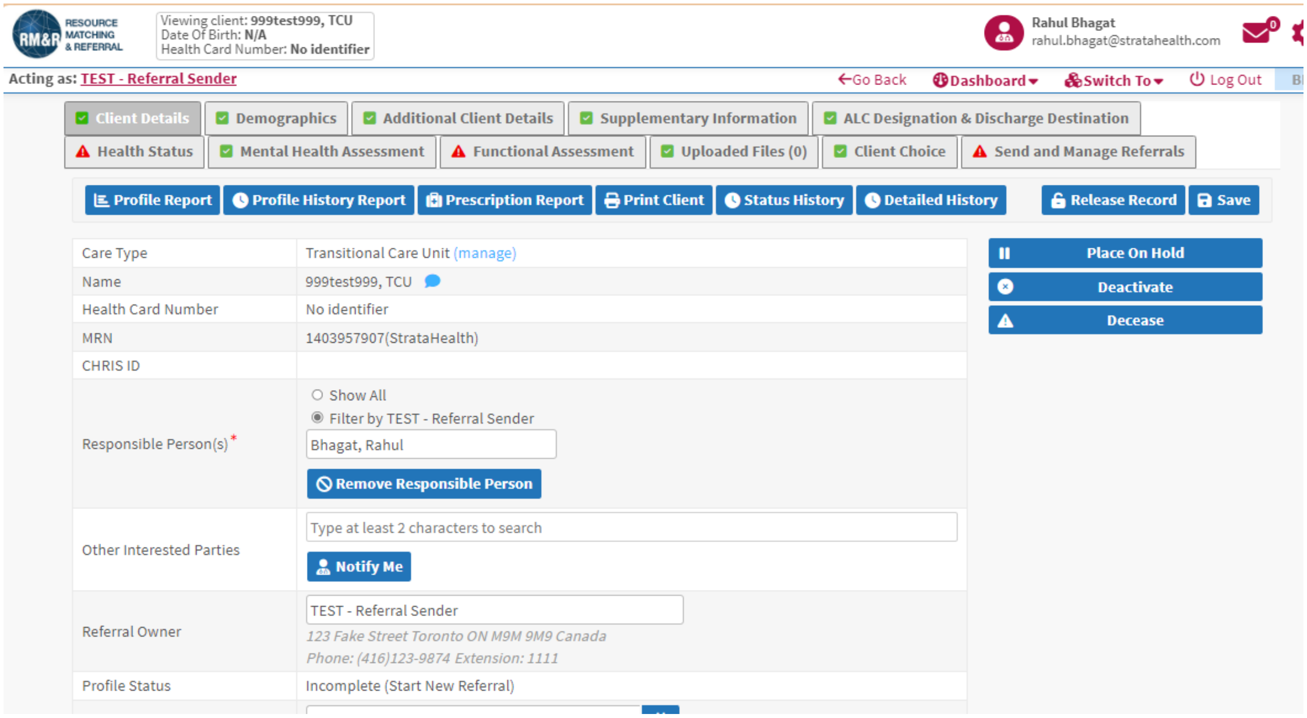
2. Sending Referrals

Overview

When a user initiates a new referral, they will see something similar to the image below.

Scroll to the bottom of the page and select Transitional Care Unit Referral type.

Clicking on “Start New Referral” button will take the user to the TCU referral form which is divided into multiple sections.



The TCU pathway is broken down into 11 separate tabs. As a user completes any of the mandatory information on each tab, the icon will change from 

to 

with the green checkmark indicating you can proceed with the referral.

The following table provides a brief description of the information found on each of the tabs in the referral form.

Page	Description
Client Details	High level patient information. Users will assign the referral to themselves on this page.
Demographics	Client details including Health Card Number, MRN, contact information and current location.
Additional Client Details	Additional client information not captured in the previous page.
Supplementary Information	Supplementary informaiton about the client that will assist with referral decision. This includes language skills, acuity, aids used, contacts and supports.
ALC Designation and Discharge Destination	Client's ALC status, prior TCU/RCU visits, and post discharge plans.
Health Status	Hospital admission details and physical health status of the client.
Mental Health Assessment	Cognitive status, behavioral issues, and substance dependence details.

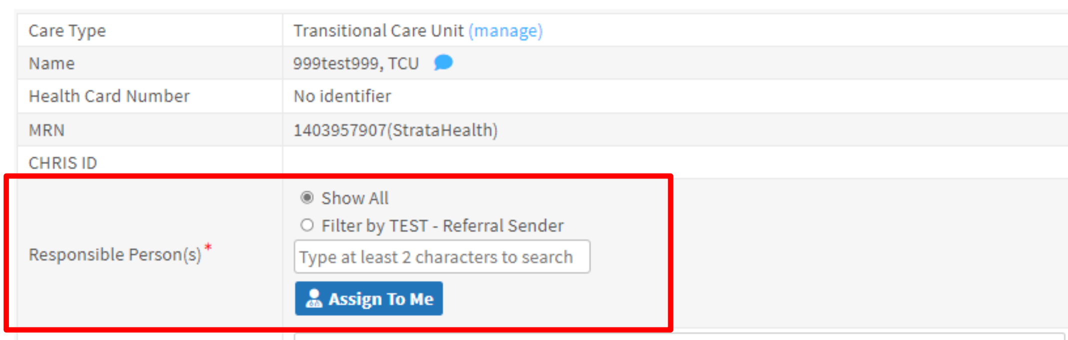
Functional Assessment	Client’s mobility assessment and status, grooming, tolieting, feeding, medication status and assistance needs. iALDS status.
Consent & Sign Off	Consent informaiton and details of clinician making submission.
Uploaded Files	Supporting documents shared by the referral sender to assist with decision.
Client Choice	TCU matched for client’s needs and record of client’s choices where the referral is sent.
Send and Manage Referrals	Send and monitor the status of a referral.

Tab Details

The following section provides an overview of key data elements in each tab that are required for a referral to be completed.

Client Details

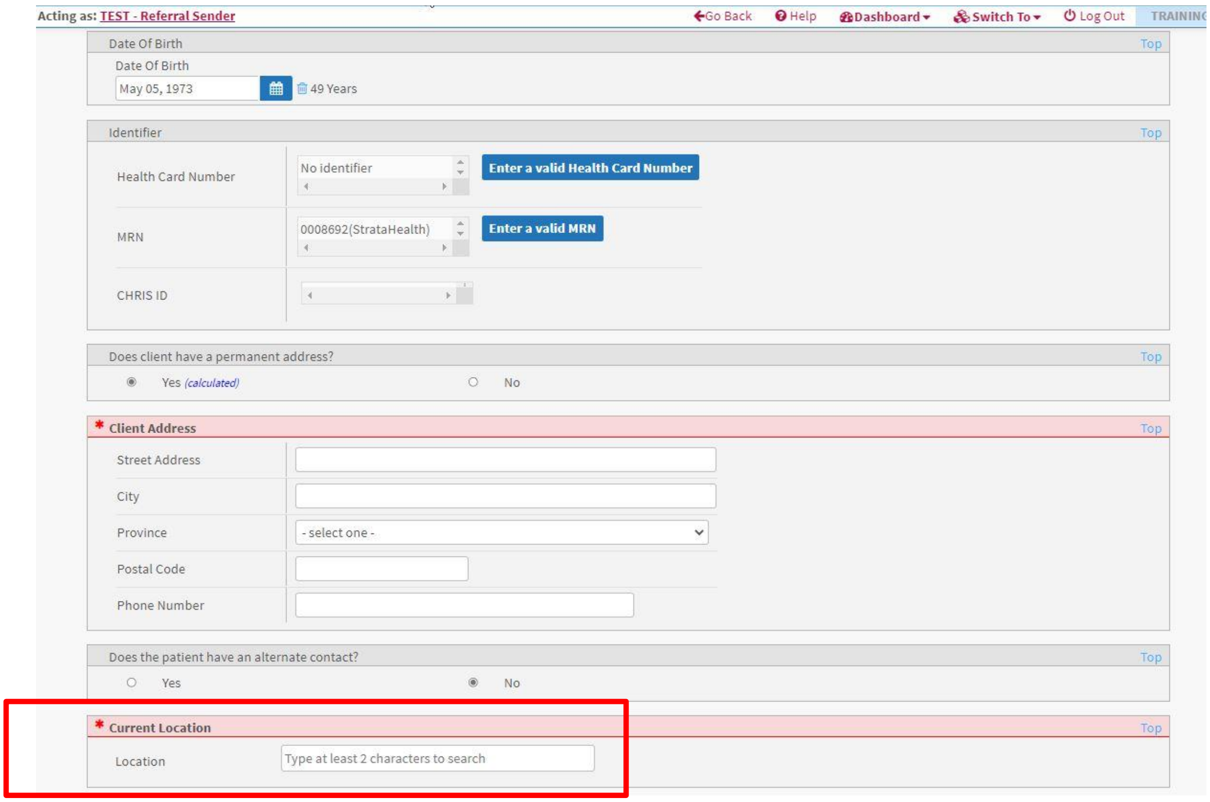
On this tab, users are required to enter the Responsible Person for the referral. This is normally the individual initiating and completing the referral. Clicking on the Assign to Me button will populate the field with the user’s name and complete the tab.



Care Type	Transitional Care Unit (manage)
Name	999test999, TCU
Health Card Number	No identifier
MRN	1403957907(StrataHealth)
CHRIS ID	
Responsible Person(s)*	Show All Filter by TEST - Referral Sender Type at least 2 characters to search Assign To Me

Demographics

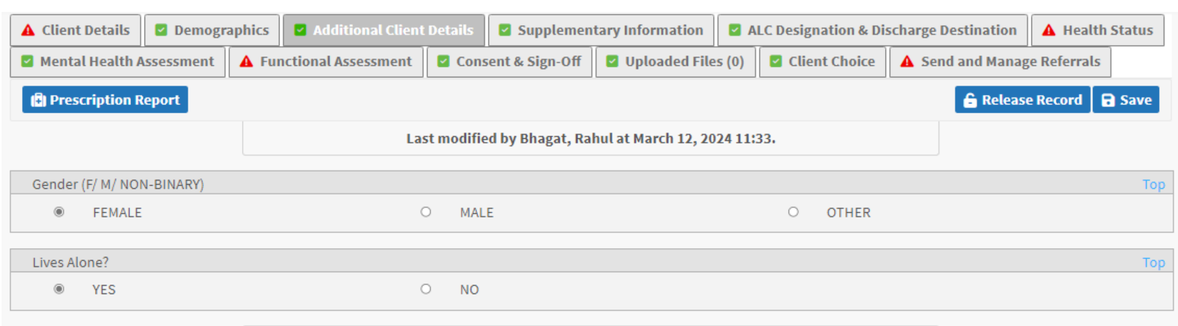
This tab contains contact information about the patient including address and alternate contact information. If accessing the patient through your Electronic Patient System, some of these fields will be prepopulated. Key pieces of information on this tab are Date of Birth, Client Address, Alternate Contact information and Current Location.



- Fields that are in red are mandatory and are required to complete the tab.

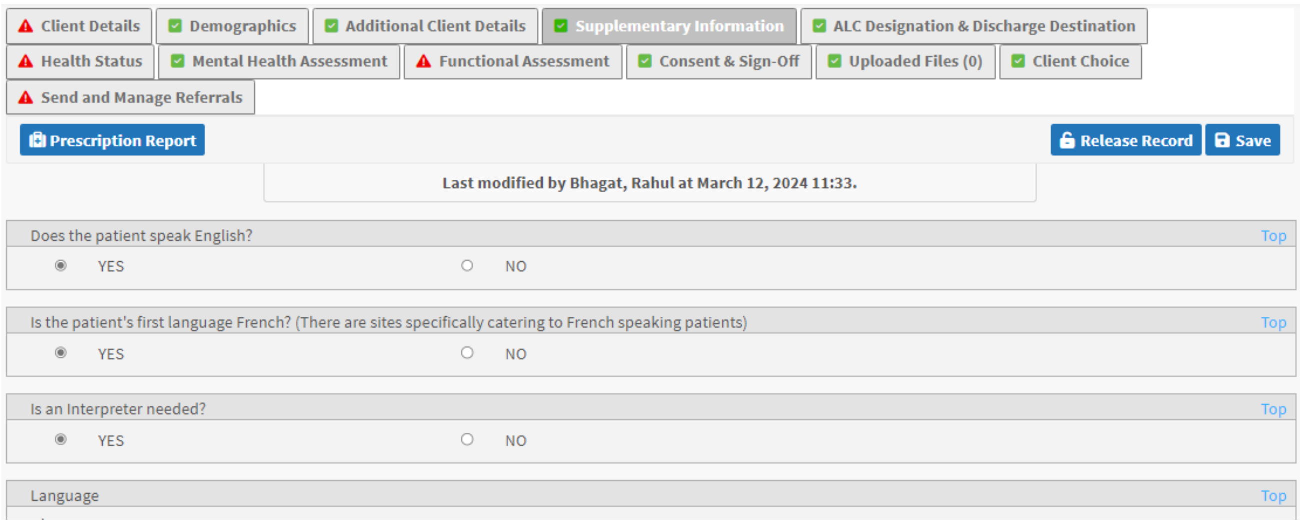
Additional Client Details

This tab contains gender of the patient and whether the patient lives alone.



Supplementary Information

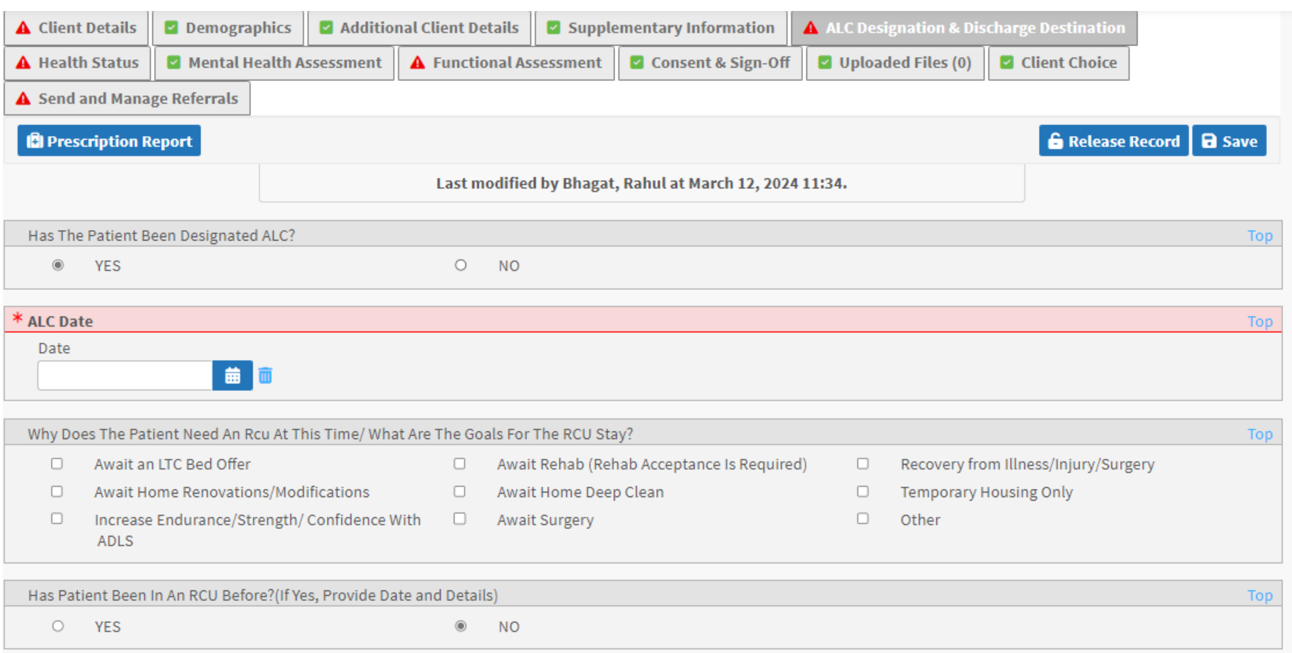
This tab contains some general referral information such as patient's language skills, acuity, aids used, contacts and supports.



ALC Designation and Discharge Destination

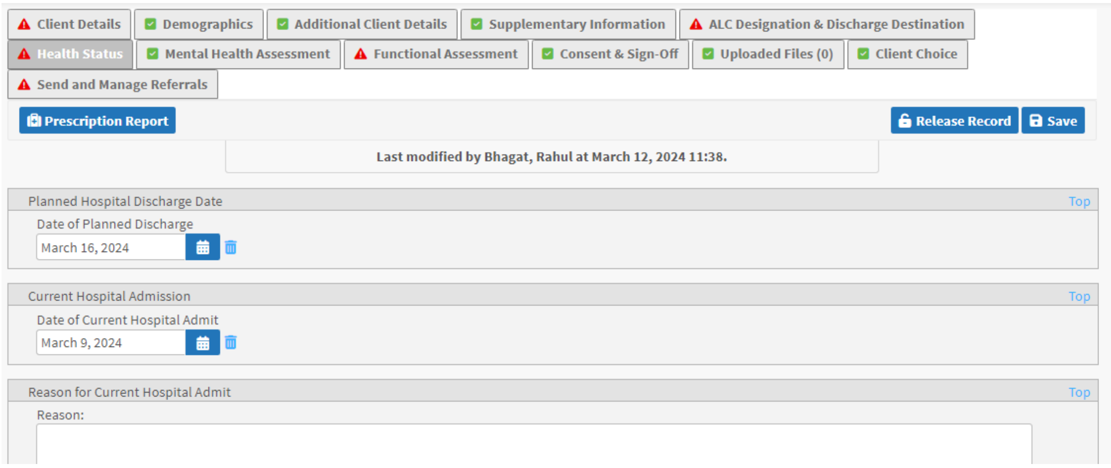
This tab contains all the information about ALC status, prior TCU/RCU visits, and post discharge plans of the patient. Some of the questions are displayed only when the patient has been designated as ALC.

If a relevant option is selected, the form will automatically display additional follow up questions. If a follow up question is mandatory, it will be highlighted in red.



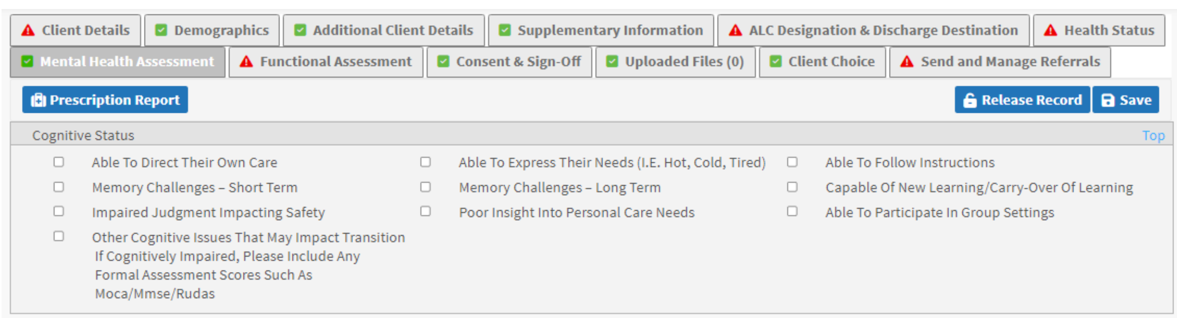
Health Status

This tab contains details of patient’s current hospital stay. It also has a lot of details related to patient’s physical health status like allergies, infections and care needs among other details.



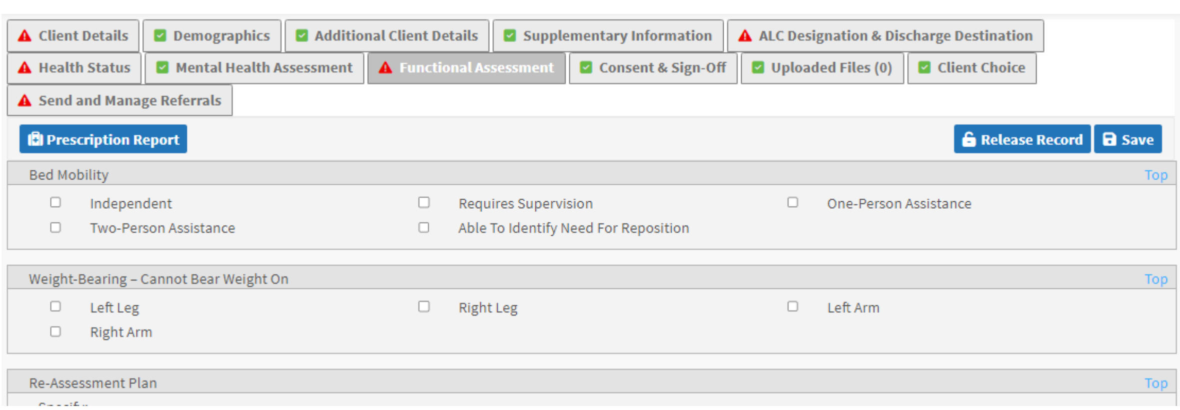
Mental Health Assessment

Mental Health assessment tab contains questions which help clinicians assess the mental health status of the patient and specific care needs around mental health.



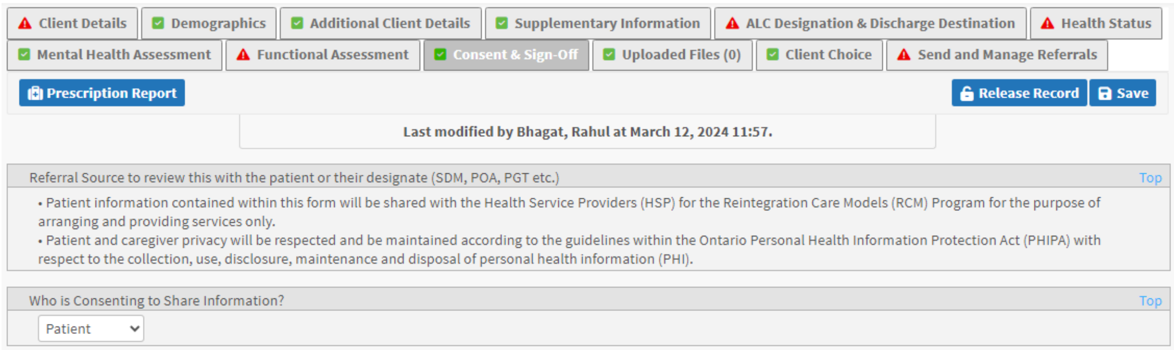
Functional Assessment

This tab has multiple mandatory fields around the patient’s functional status. Each of these will need to be completed in order to send the referral.



Consent & Sign Off

This tab is required to ensure patient consent has been received to share information for TCU referral.

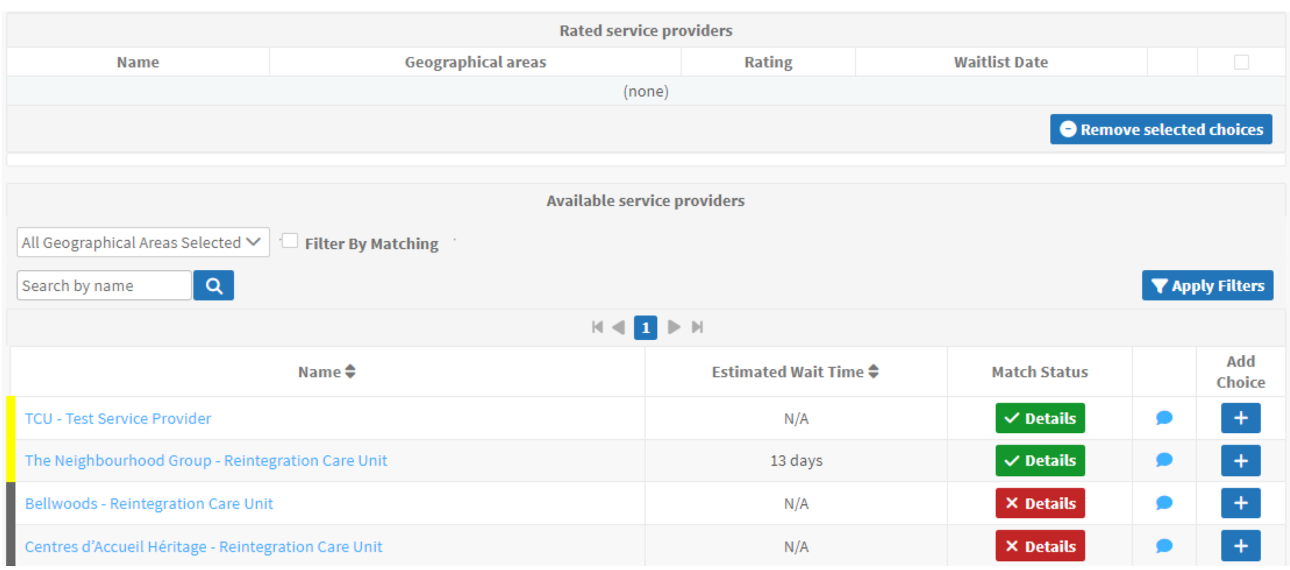


Uploaded Files

On this tab, you can upload any additional documents that may be necessary for the referral. To review this functionality, please refer to our Quick Guide: [How do I attach a referral?]

Client Choice

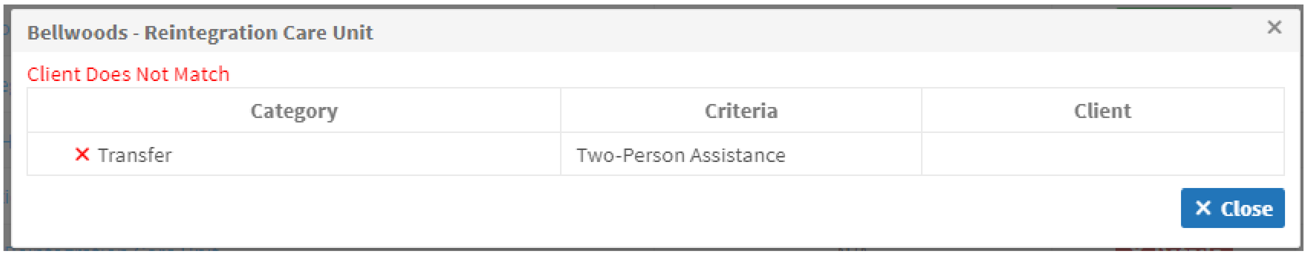
This is where users will select the TCU/RCU Service Provider that they are sending the referral to. Users will need to provide some details before they can send the referral. An overview of the Client Choice tab is below.



Depending on the Rehab destination that the user selected on the *Supplementary Information* tab, the patient will match to the appropriate level of care.

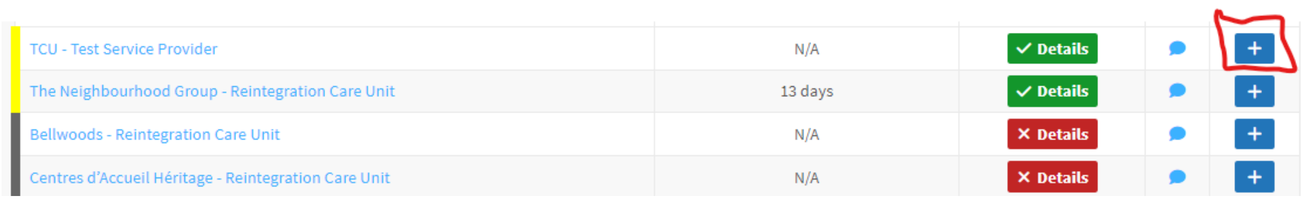
Patient matches referral destination	Patient does not match referral destination
	

Clicking on the Details button will provide details on why a patient didn’t match a specific Service Provider.

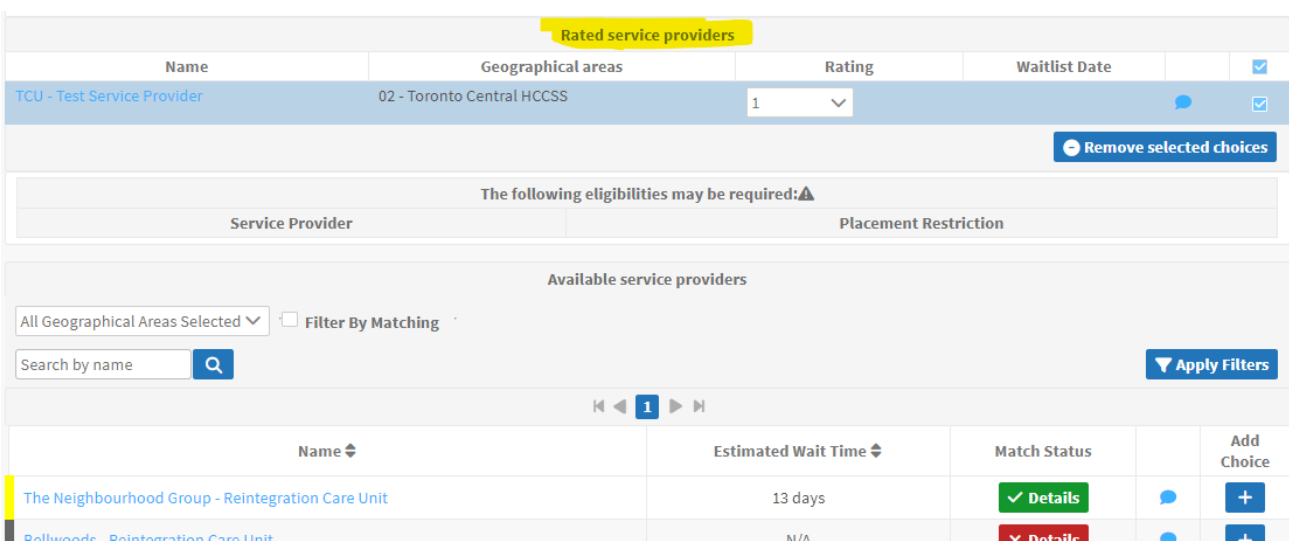


Completing the Client Choice Tab

The user will select the service providers to send the referral to, by clicking on the “+” button to the far right of the Provider name as shown in the image below.

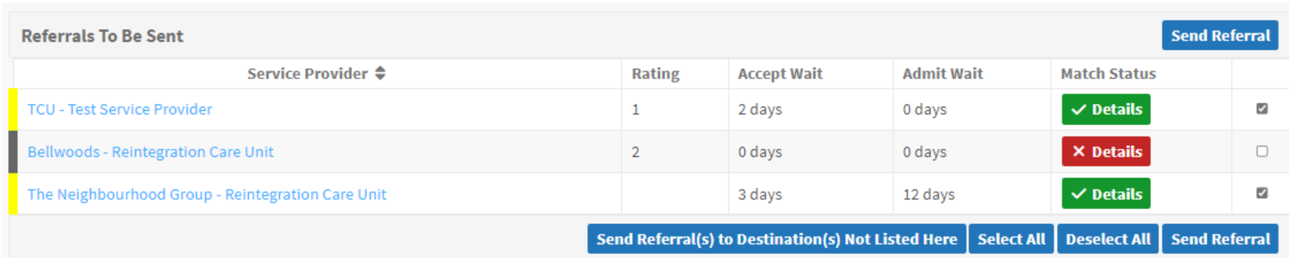


This will automatically move the selected provider to “**Rated Service Providers**” section.This is the list of providers that the referral will be send to in the next tab.

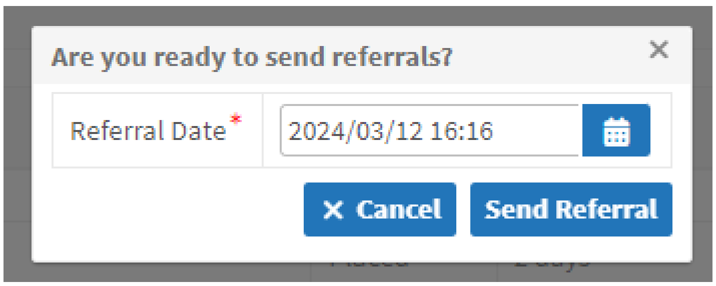


Send and Manage referrals

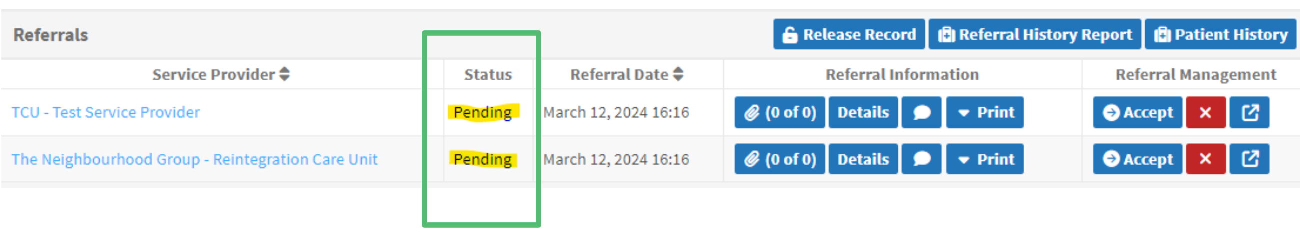
Once all of the necessary information has been completed, the user can then move to the *Send and Manage Referrals* tab. The system will automatically check all of the units that the patient matches to and the user can click on the Send Referral button at the bottom of the screen.



Clicking on the Send Referral button will display a pop up to confirm and provide the Referral date.



Clicking on the Send Referral botton again will send the referral to selected Service Providers, and the dashboard status will change to "Pending" as shown below.



As the receiver actions the referral, the status will change on this page. The 4 statuses that you will see are **Pending**, **Request for Information**, **Accept** and **Deny**.

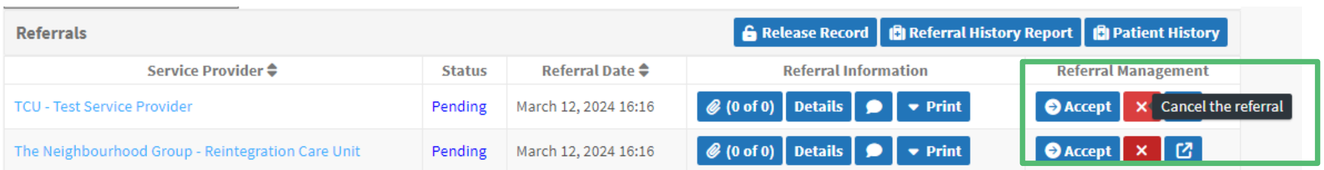
For more information on how to respond to each of these statuses, please refer to our Quick Guides: [How do I respond to a denied referral] and [How do I respond to a request for information].

Canceling and Deactivating Referrals

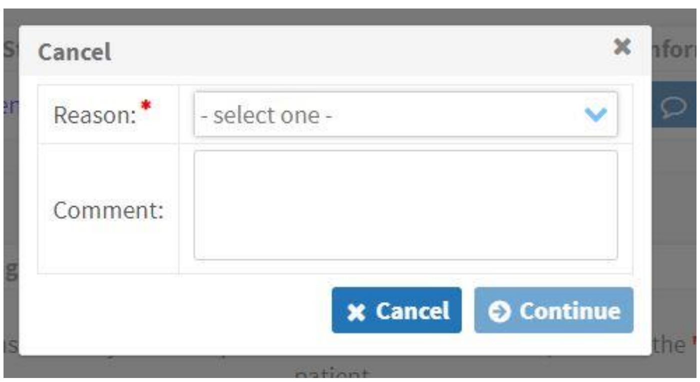
In the event that you need to cancel a referral (patient changes their choice of facility) or need to deactivate a referral (patient doesn't need the service), this can be done in two separate locations.

Cancel a Referral

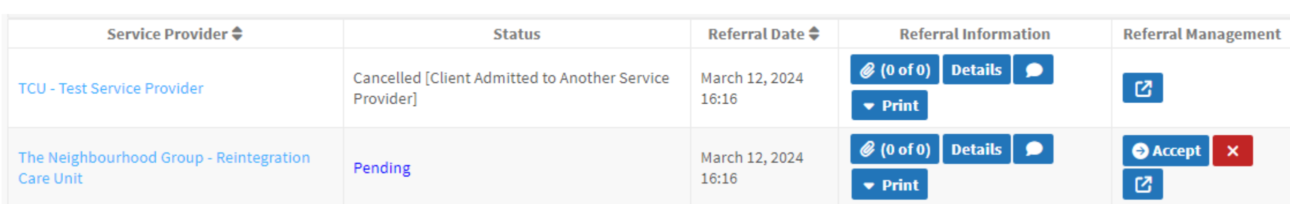
To cancel a referral to a Service Provider, navigate to the *Send and Manage* tab in the patient record. On this page, you will click on the red X next to the service provider.



Once you click on the X, a pop-up will appear. Here, you will select the reason you are canceling the referral and add any additional comments.



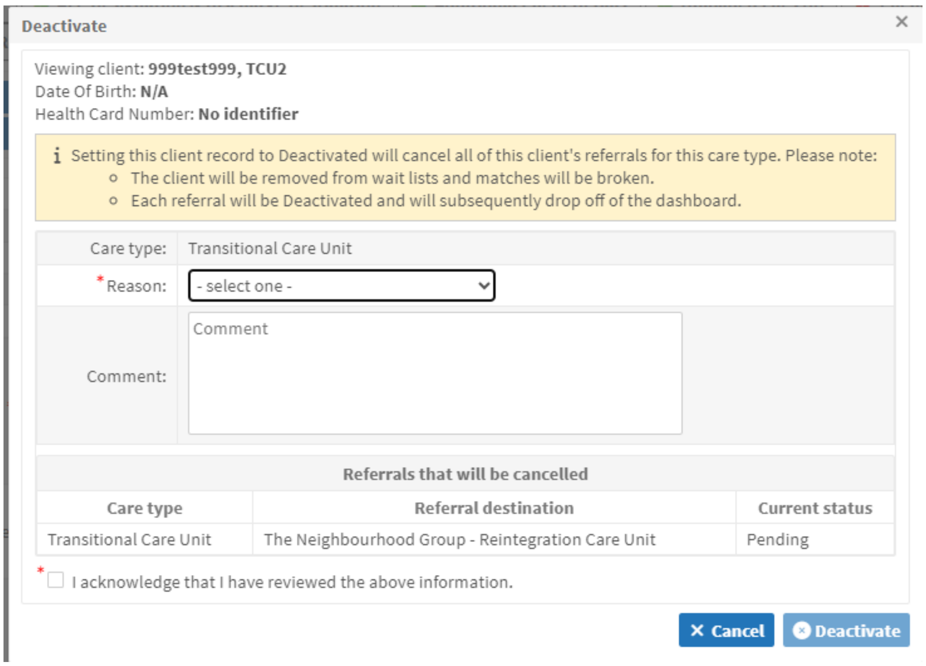
Once you click on Continue, the service provider will no longer be active on the Send and Manage tab and there will be no options under the Referral Management column.



Deactivate a Referral

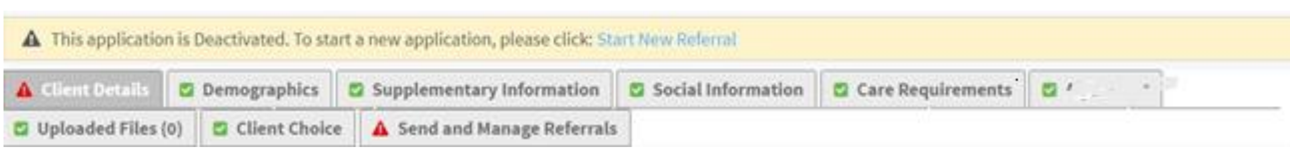
If a patient is being discharged, you will need to deactivate the referral. To do this, navigate to the *Client Details* tab. On this page, you will see a button on the right hand side labeled Deactivate.

Clicking this button will bring up a new pop up window giving you details on the actions that will happen when you confirm the deactivation. When doing this, include the Estimated Discharge Date for the patient from your facility, or if they have already been discharged, include that date.



Note: It is the responsibility of the sending organization to ensure that all referrals on their dashboard are active and awaiting a facility. If the patient is no longer waiting, the sender needs to cancel or deactivate the referrals to remove the patient from the Receiving waitlist.

If the referral has successfully been deactivated, the following message will appear at the top of the screen and the Client Details and Send and Manage Referrals tabs will both be red.

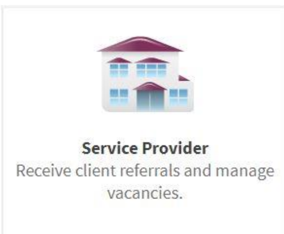


3. Receiving Referrals (Service Provider)

The Service Provider module is primarily for receiving and processing referrals. The main users of this module are service providers who manage Transitional Care Units across the region. They will be able to view incoming referrals through the RM&R web application and take actions like accept, admit, request for more information or deny the application for Transitional Care.

Users have the option of printing the electronic referral through printable PDF reports or viewing the referrals online. Once an admission decision has been made, staff must input this decision into the application to notify senders at the corresponding acute care site.

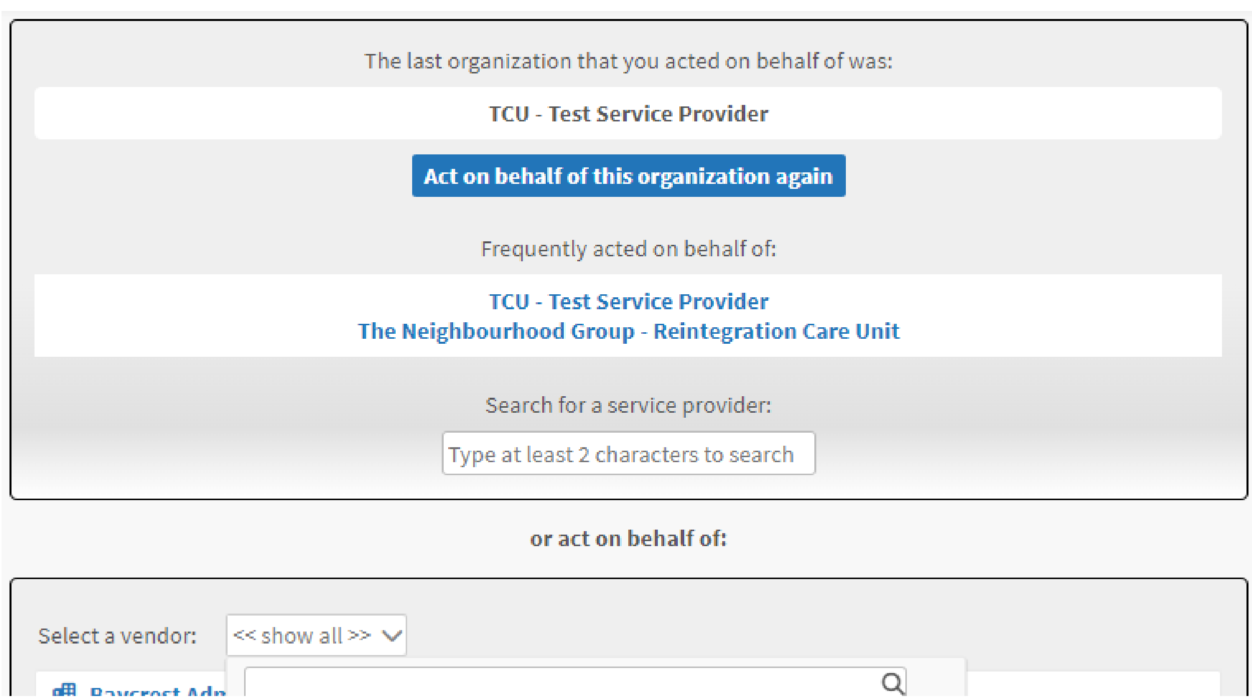
To manage TCU referrals sent to a Service Provider, the user will log into RM&R application and click on the Service Provider icon (below) on the dashboard.



(Note: Please refer to this guide for assistance with logging into RM&R)

The user will then see a list of Service Providers that they can choose to act on behalf of. User will click on their organization name to proceed.

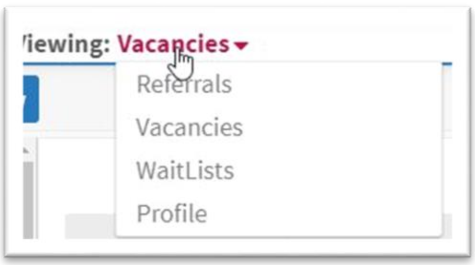
The Service Provider list that a user sees depends on their configuration. If you don't see your organization, please get in touch with RM&R Program.



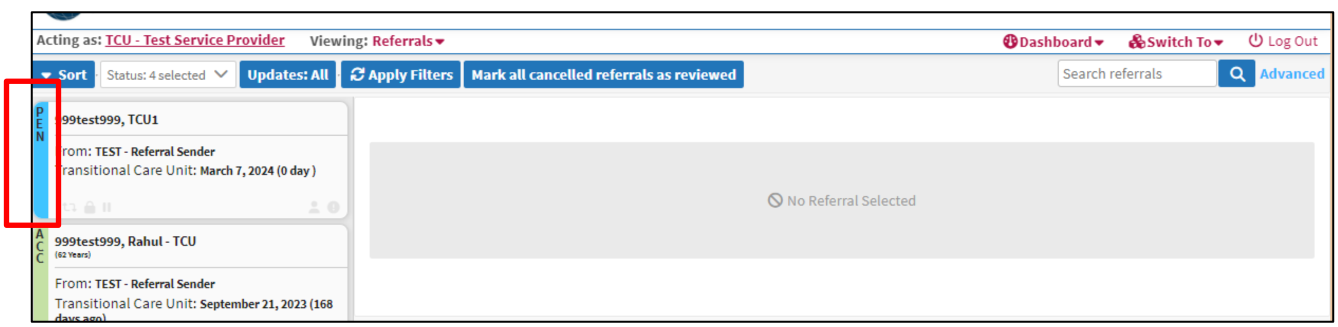
Monitoring the Referral Queue

When a user first logs in, they will be dsiplayed the Vacancies list by default. To view referrals that have been sent, they will need to switch to Referrals section.

To view Referrals, the user will need to click on the dropdown menu at the top of screen that says "**Vacancies**" in purple letters. By clicking a list of options will be displayed (below). The user will select "**Referrals**" to go to the referrals section.

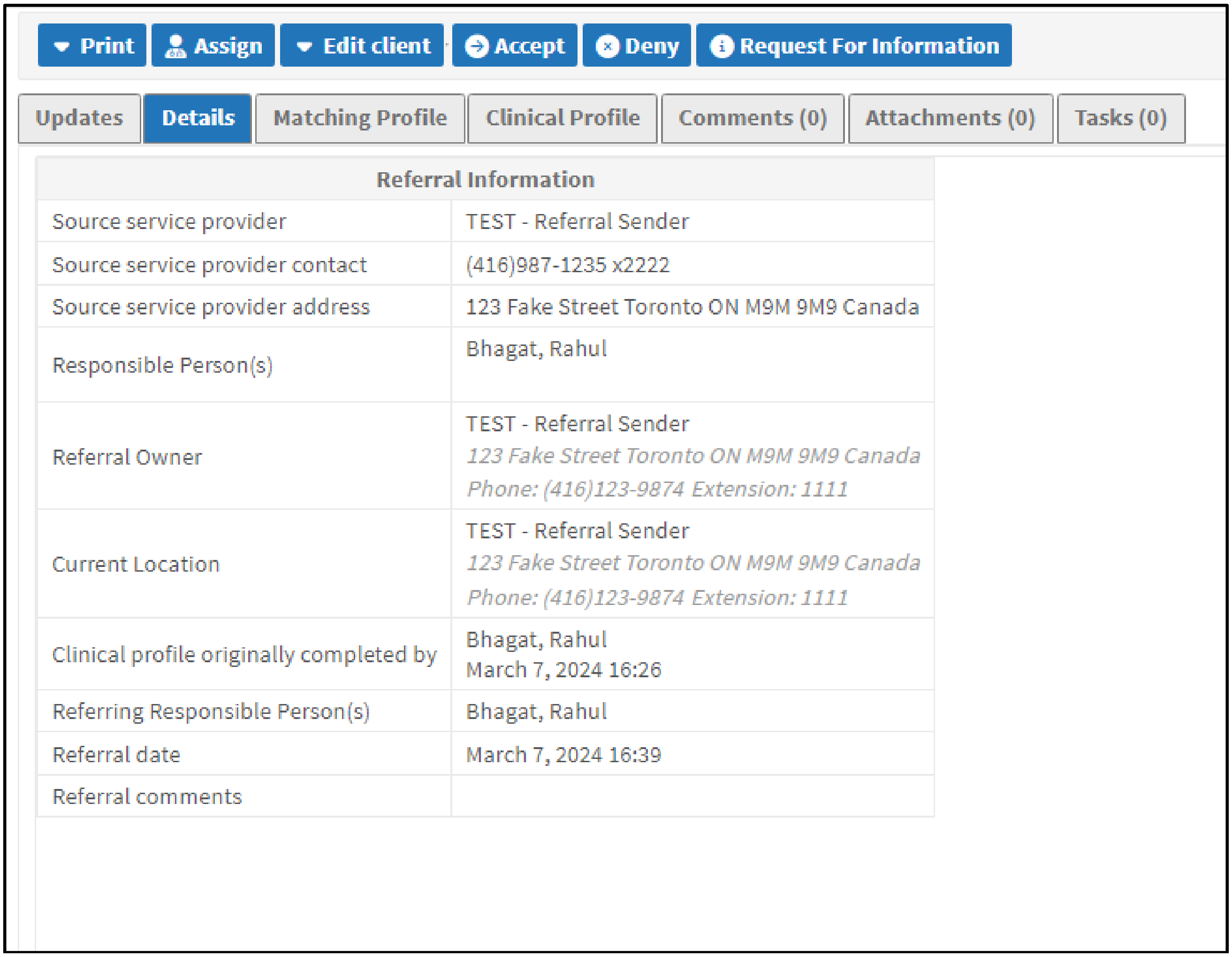


Once they select Referrals, they will be taken to the Referrals Dashboard. Here they will see all active referrals for their site (below).



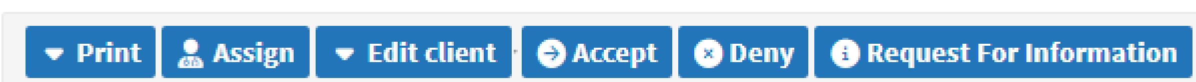
All received referrals are in the pending status initially. This is indicated by a left Blue bar and letters PEN (horizontally). For more information regarding Referral Tiles, please review the associated Quick Guide*: What is a referral tile?*.

To view details of a specific referral, click on the associated tile on the left pane of the screen. The right pane of the screen will fill up with details for that referral (see below).



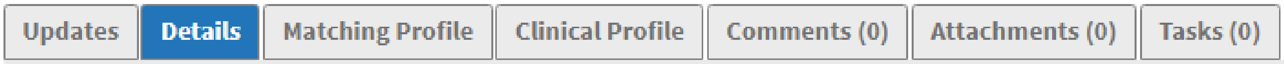
Referral Information	
Source service provider	TEST - Referral Sender
Source service provider contact	(416)987-1235 x2222
Source service provider address	123 Fake Street Toronto ON M9M 9M9 Canada
Responsible Person(s)	Bhagat, Rahul
Referral Owner	TEST - Referral Sender *123 Fake Street Toronto ON M9M 9M9 Canada* *Phone: (416)123-9874 Extension: 1111*
Current Location	TEST - Referral Sender *123 Fake Street Toronto ON M9M 9M9 Canada* *Phone: (416)123-9874 Extension: 1111*
Clinical profile originally completed by	Bhagat, Rahul March 7, 2024 16:26
Referring Responsible Person(s)	Bhagat, Rahul
Referral date	March 7, 2024 16:39
Referral comments	

In the details pane of the referral, the user will see a row of action buttons across the top of the screen.



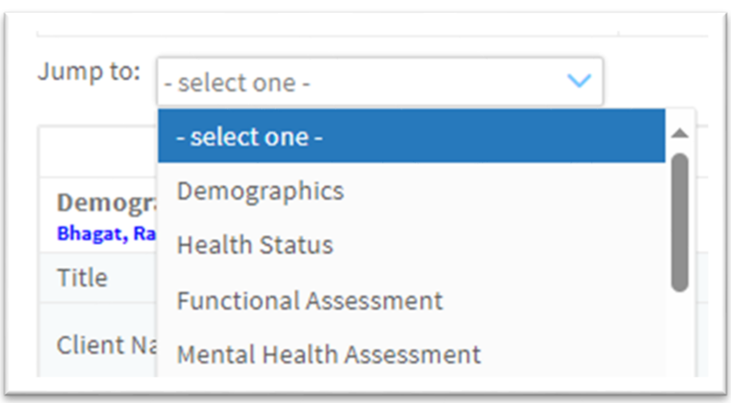
- **Accept** – Clicking on this button will allow the Service Provider to accept the patient to their site. It also indicates they are able to provide the requested service.
- **Deny** – By clicking on this button Service Provider will indicate they are unable to provide the service, hence denying the request.
- **Request for Information** – The service provider will click on this button to request additional details from the sending organization regarding the patient and application.

Below the row of action buttons, there is a row of tabs to view specific information about the received referral request.



- **Updates** – This is a log of all the activities related to this referral, inlcuding status changes.
- **Details** – Displays all the informaiton about the sender of the referral including name, location and contact details.
- **Matching Profile** – a list of criteria used to match the patient to the service provider.
- **Clinical Profile** – This displays all the informaiton in the application, including patient status, care requirements etc.
- **Comments** – this is a repository of comments both from the sender and the receiver regarding the patient/ referral.
- **Attachments** – any additional documents that are attached by the sending organization.
- **Tasks** – Not Applicable. Functionality currently not used.

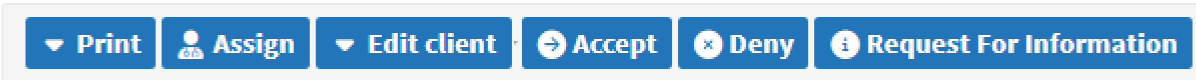
To review the details of the application, the user will click on the *Clinical Profile* tab. This will bring the user to the details of the application. To make it easier for users to review a referral, there is the *"Jump to:"* section on the clinical profile tab. To view a specific section of the application, click on the **Jump to:** drop down menu and select one of the options (see below).



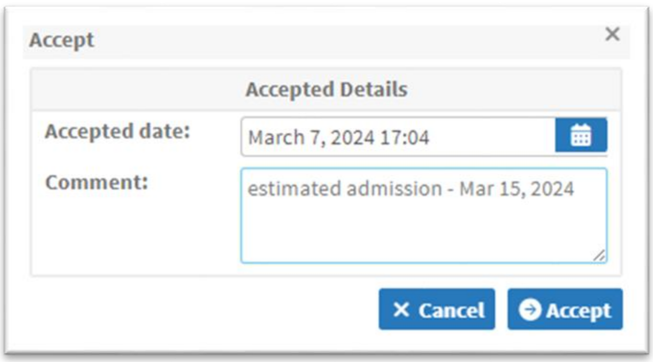
After a review of the information provided, the user can act on the referral by clicking on one of the Actions buttons described earlier.

Accepting a referral

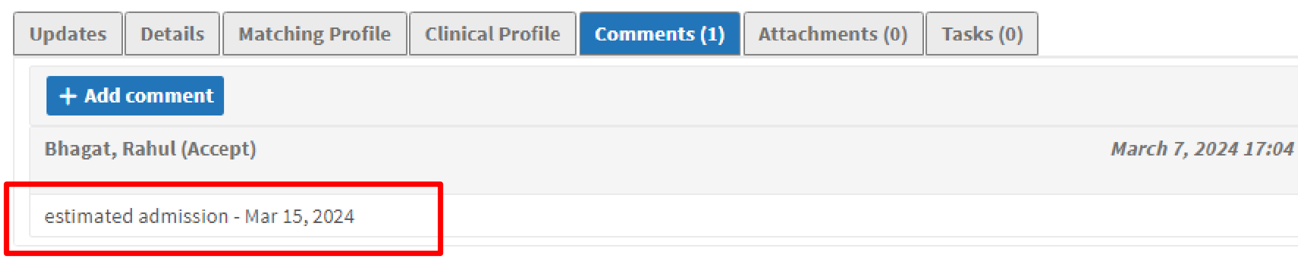
After reviewing the information the user can act on the referral by clicking on one of the action items at the top of the details pane.



If a decision is made to accept the referral, the user will click on “Accept” button. This will display the Accept pop up screen requesting the user to enter **estimated admission date** and any related comments (see below).



Once the referral is accepted, the sending site is informed of the decision. They are also able to view the estimated admission date in the Comments tab.

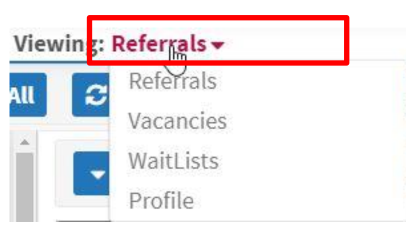


Once a referral is accepted, the user will need to find or create a vacancy in the system to admit the patient.

Find vacancy and admitting the patient

To find vacancy and admit the patient, the user will click on the top drop down menu where it says **Referrals** and select **Vacancies**.

This will bring the user to the Vacancies dashboard. This is where all available vacancies for that site can be seen. If there are no vacancies, the user can create additional vacancies or discharge an existing patient to create vacancy.



If there are existing vacancies, the user can click on one of the vacancies and proceed with admitting the patient. However, if there are no vacancies, the user can either discharge an existing patient to create a vacancy or create a new vacancy.

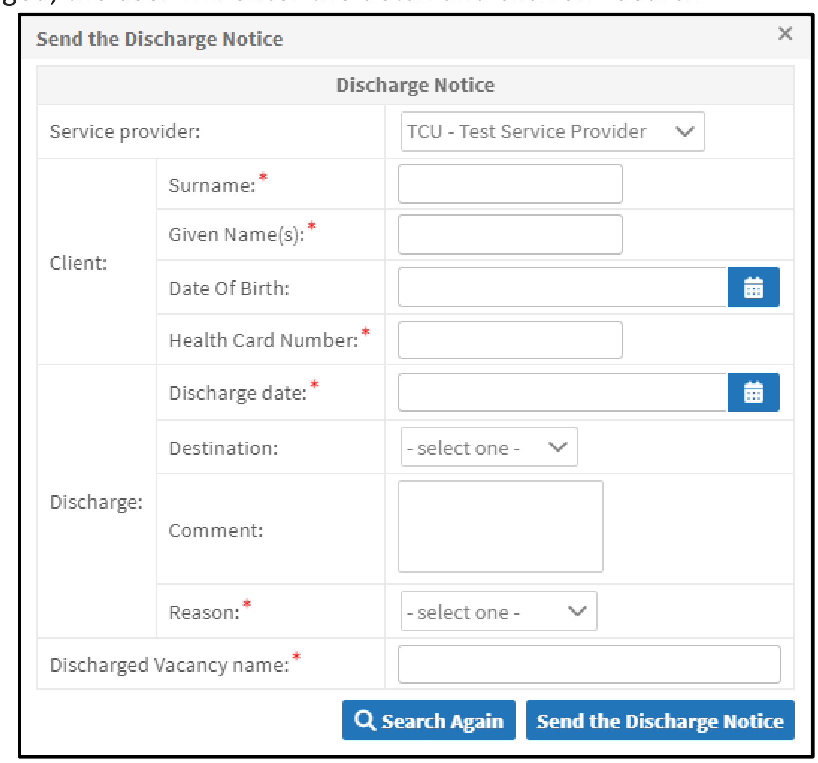
The user will next click on the “New” button to bring up the search pop up screen (below). Even if there are no patients to discharge, the user will need to go through the dischange process to create a vacancy.

If there is a patient that can be discharged, the user will enter the detail and click on “Search clients” button. The user will select the patient in the search result and click on “Discharge selected client”.

If there is no patient to discharge, the user will click on “Discharge client not in list” button.

In both the cases, Send Discharge Notice pop up screen will be displayed (see screenshot). Sending the discharge notice is what creates the vacancy.

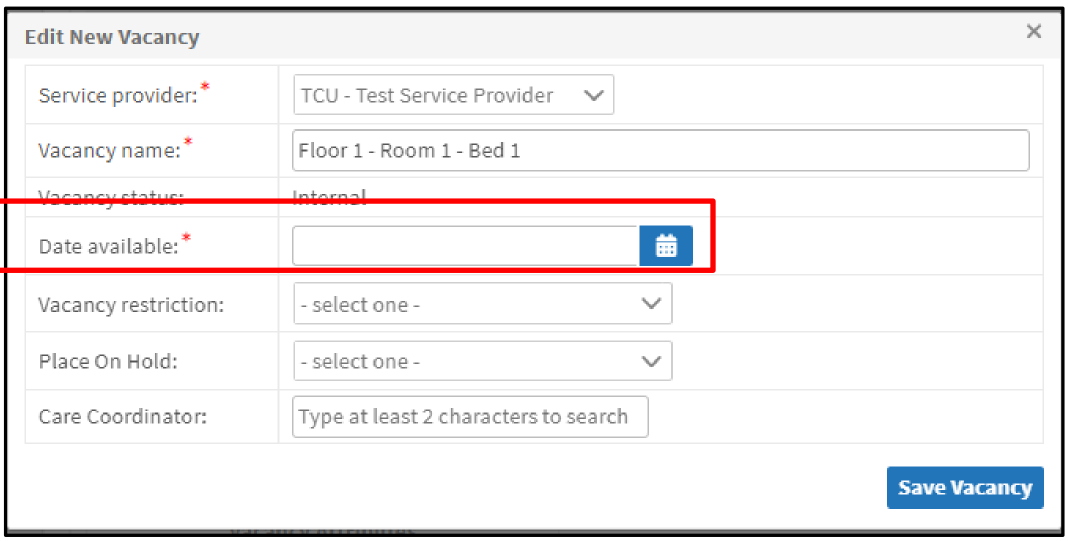
The user will fill the details.



The user will complete the fields. Please note that fields marked with red asterisk are mandatory fields. They are as below:

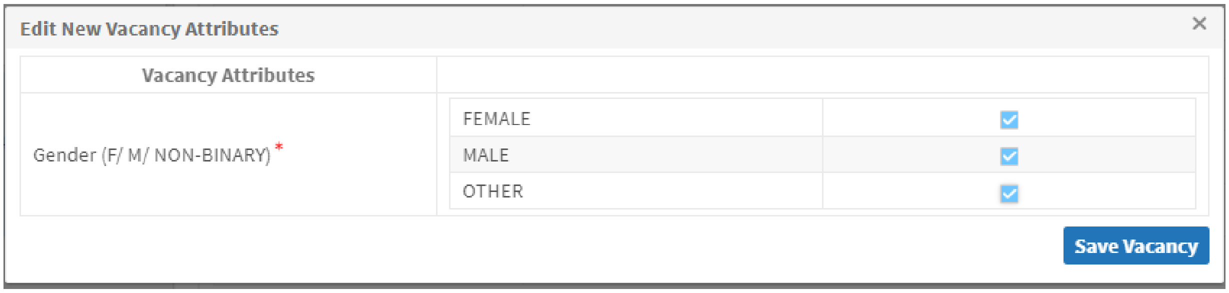
- Surname
- Given Name(s)
- Healthcard Number
- Discharge Date
- Reason
- Discharged Vacancy Name (It has to be in the format "Floor -1, Room - 1, Bed - 1")

Once all of the information is completed, the user will click on the "*Send the Discharge Notice"* button. This will display another window (below) where the user will indicate when the vacancy is available. The user will click on the calendar icon next to "Date Available" field to indicate to sender when the Service provider is able to accept the patient.

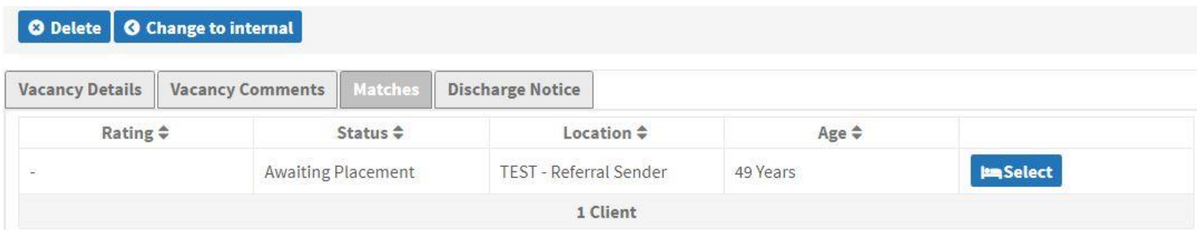


The user will click on the button "Save Vacancy". This will bring up another pop up screen for new vacancy attributes. Here Service Providers can define attributes that a patient must meet to be admitted to that vacancy.

The default vacancy attribute is gender (see below) and the user can select all checkboxes to open the vacancy to anyone.

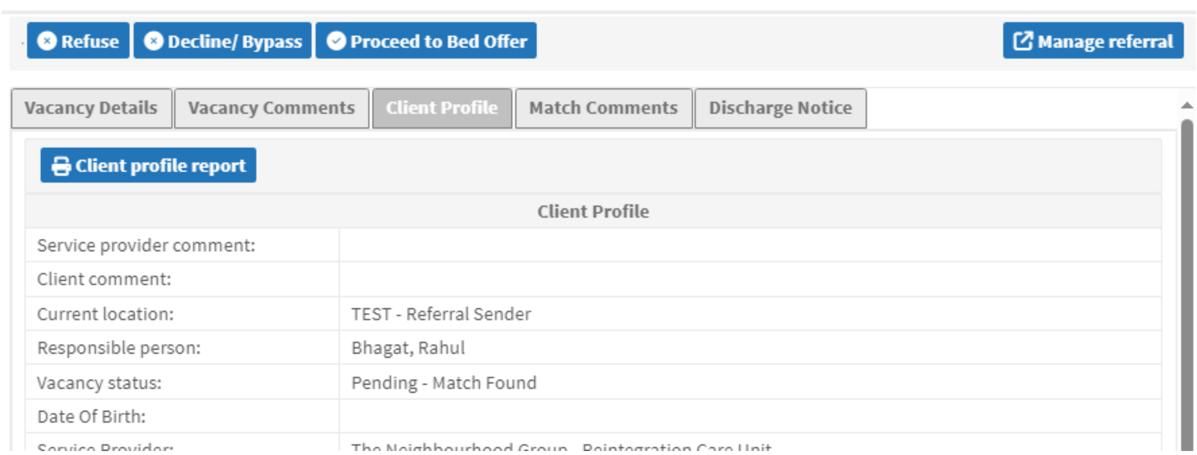


On clicking "Save Vacancy" on the last screen, a vacancy is created. If there are patients that match the vacancy, user will be automatically taken to the "Matches" tab for that vacancy (see below).

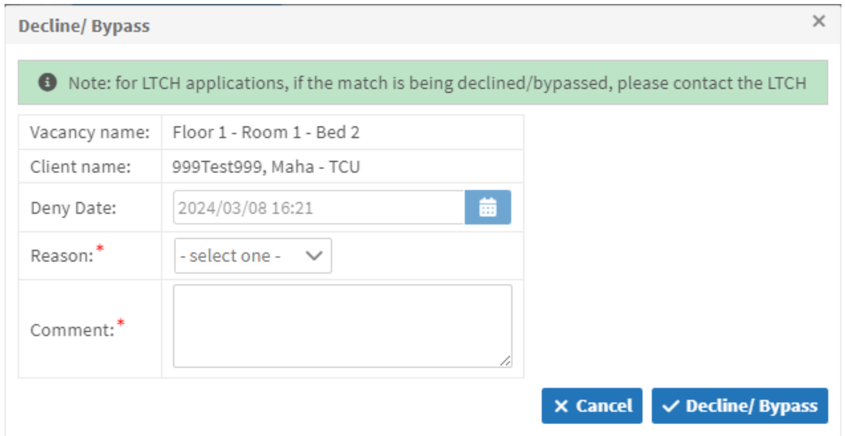


If there are more than one matches, user will select the appropriate referral to fill that vacancy by clicking on the appropriate "Select" button.

The system will display client profile (below) of the patient that was assigned to the vacancy. To proceed with the admission process, the user will click on "**Proceed to Bed Offer**" button.



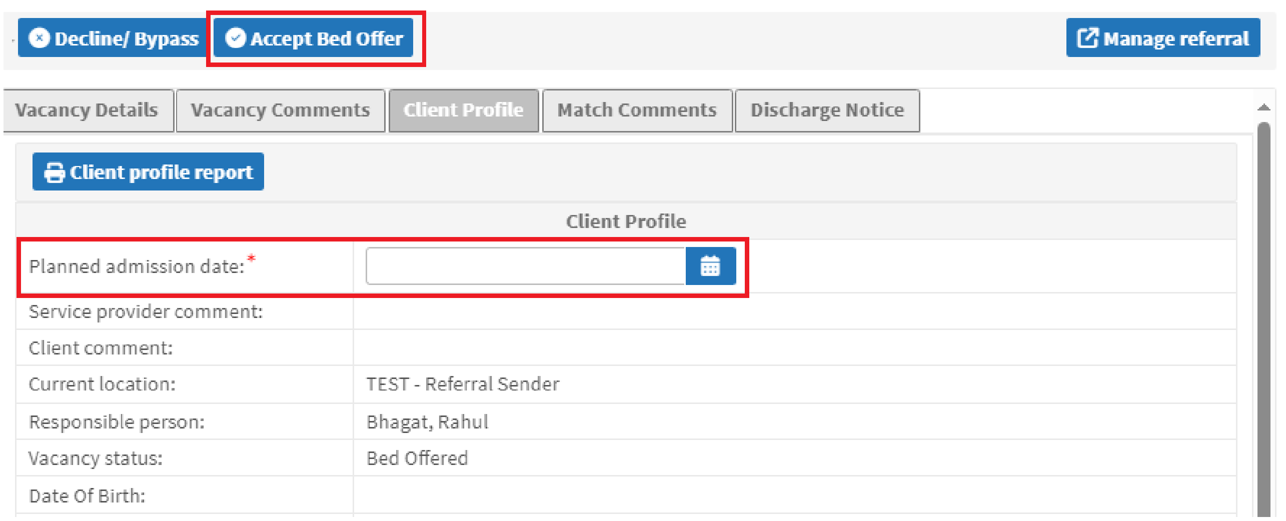
If this is not the correct patient, the user can select the "**Decline/Bypass**" button. The following pop-up (below) will appear where user can select the appropriate Reason, add a comment and click Decline/Bypass. The patient will continue to remain on the waitlist.



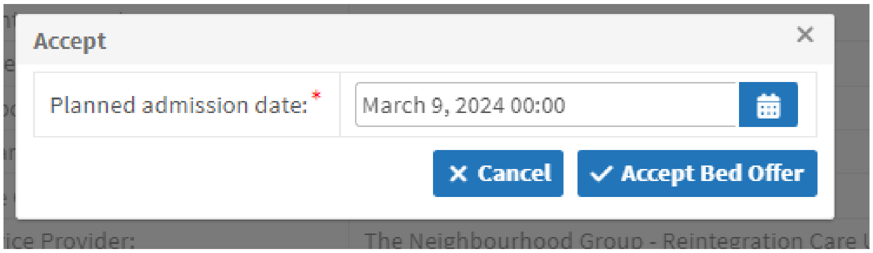
This will take user back to the *Matches* screen where next available patient can be selected.

To proceed with the Bed Offer, after clicking on "**Proceed to Bed Offer**" button the screen will change and the botton will be replaced by another botton called "**Accept Bed Offer**". Also, the selected patient's client profile page will be displayed.

At this point the user should get in touch with the referral sender and confirm if the patient wants to accept the offer. If yes, the user should confirm "Planned Admission Date" and enter the same in the client profile (see below).



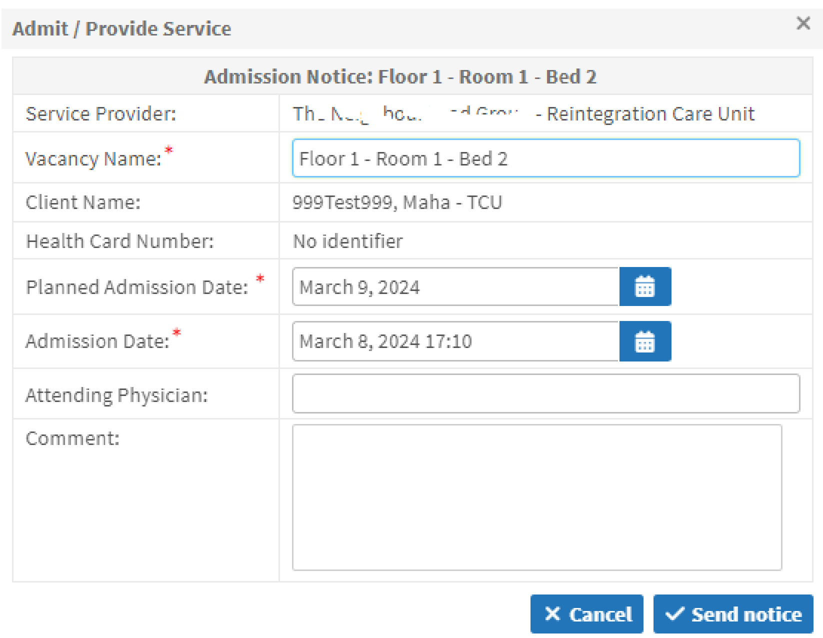
The user can now click on the **Accept Bed Offer** button which confirms that the patient wants to go to the user's facility. A pop up screen will require another confirmation of the planned admission date. Click "Accept Bed Offer".



The “Accept Bed Offer” button will change to “Admit/Provide Service”

Note: At any time during this process, up to clicking the Admit/Provide Service button, if the patient changes their mind, you can select the Decline/Bypass and move to the next available patient.

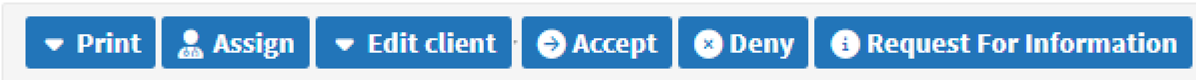
When the user clicks on the Admit/Provide Service a new pop-up will appear for the user to confirm the Admission Date and add any comments related to the admission.



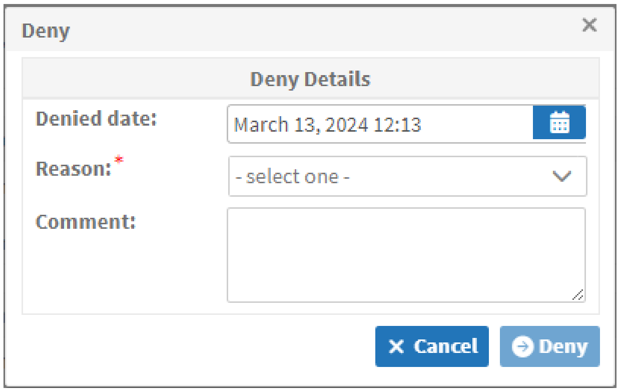
At this point, the patient has now been admitted and the referral closed.

Denying a referral

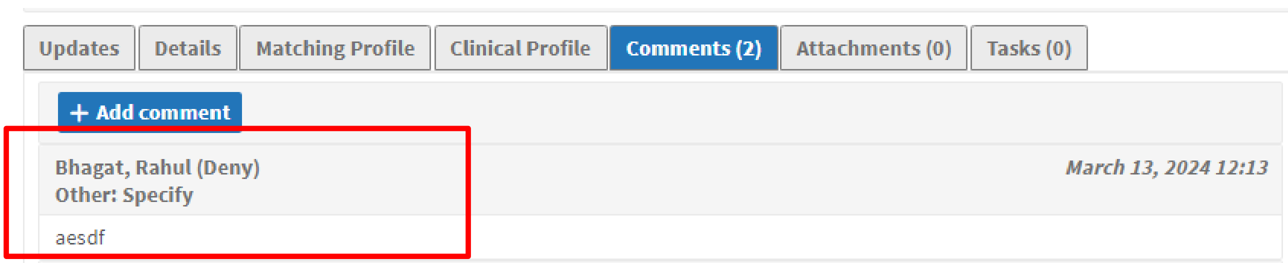
After receiving a referral and reviewing the information, the user can act on the referral by clicking on one of the action items at the top of the details pane.



If a decision is made to deny the referral, the user will click on the “Deny” button. This will display the Deny pop up screen requesting the user to enter Denied date, Reason and any related comments (see below).



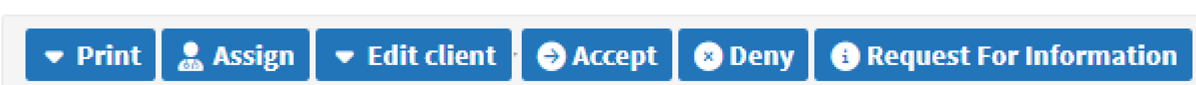
Once the referral is denied, the sending site is informed of the decision. They are also able to view the denial reason in the Comments tab.



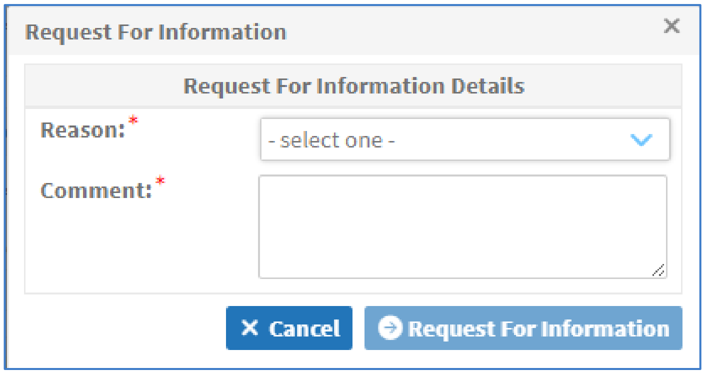
Note: Alternatively the Service Provider can request the sender to cancel the referral from their end. This will remove the request from the referral queue.

Requesting for more Information regarding a referral

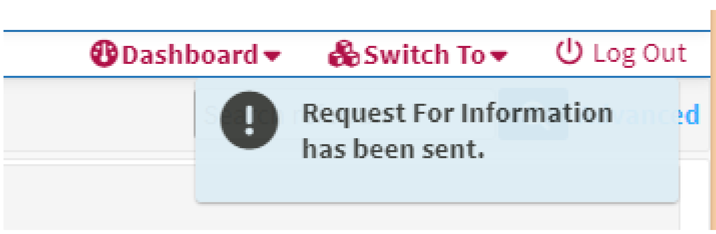
After receiving a referral and reviewing the information, the user may have more questions before making a decision. The user can send a request to the sender for more information through the application.



To request for more information or for further clarification, the user will click on the "Request For Information" button. This will display the pop up screen requesting the user to enter Reason and any related comments (see below).



A temporary banner on the right hand side will confirm that the request for informaiton has been sent to the sender (see below).



The sender will be notified of the request and once it has been actioned, the referral will show up again in service provider's dashboard. The Provider can check "Updates" tab for the status.