



**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 referrals 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 \(resourcemattingandreferral.com\)](http://resourcemattingandreferral.com)

2. Sending Referrals

Overview

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

Existing Care Types

Care type	Status
This client does not currently have any care types defined.	

Other Care Types

Search

Care type	Description
-----------	-------------

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

Toronto Seniors Helpline	*To refer a patient, please call 416-217-2077. This care type is currently unavailable in the RM&B a	<input type="button" value="Start New Referral"/>
Transitional Care Unit		<input type="button" value="Start New Referral"/>



All Care Types

Client Profile (Non-Care Type Specific)

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA 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 © 2001-2024 Strata Health Solutions.

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  Client Details to  Client Details 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 information about the client that will assist with referral decision. This includes language skills, acuity, aids used, contacts and supports.

Page	Description
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, toileting, feeding, medication status and assistance needs. iALDS status.
Consent & Sign Off	Consent information 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) *	<input checked="" type="radio"/> Show All <input type="radio"/> Filter by TEST - Referral Sender <input type="text" value="Type at least 2 characters to search"/> <input type="button" value="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.

Acting as: TEST - Referral Sender

Go Back Help Dashboard Switch To Log Out TRAINING

Date Of Birth
Date Of Birth
May 05, 1973 49 Years

Identifier
Health Card Number No identifier Enter a valid Health Card Number
MRN 0008692(StrataHealth) Enter a valid MRN
CHRIS ID

Does client have a permanent address?
 Yes (calculated) No

* Client Address
Street Address
City
Province - select one -
Postal Code
Phone Number

Does the patient have an alternate contact?
 Yes No

* Current Location
Location Type at least 2 characters to search

- 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.

Client Details Demographics Additional Client Details Supplementary Information ALC Designation & Discharge Destination Health Status
Mental Health Assessment Functional Assessment Consent & Sign-Off Uploaded Files (0) Client Choice Send and Manage Referrals

Prescription Report Release Record Save

Last modified by Bhagat, Rahul at March 12, 2024 11:33.

Gender (F/ M/ NON-BINARY)
 FEMALE MALE OTHER

Lives Alone?
 YES NO

Supplementary Information

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

Client Details	Demographics	Additional Client Details	Supplementary Information	ALC Designation & Discharge Destination	
Health Status	Mental Health Assessment	Functional Assessment	Consent & Sign-Off	Uploaded Files (0)	Client Choice
Send and Manage Referrals					
Prescription Report			Release Record Save		
Last modified by Bhagat, Rahul at March 12, 2024 11:33.					
Does the patient speak English? Top					
<input checked="" type="radio"/> YES <input type="radio"/> NO					
Is the patient's first language French? (There are sites specifically catering to French speaking patients) Top					
<input checked="" type="radio"/> YES <input type="radio"/> NO					
Is an Interpreter needed? Top					
<input checked="" type="radio"/> YES <input type="radio"/> NO					
Language Top					

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.

Client Details	Demographics	Additional Client Details	Supplementary Information	ALC Designation & Discharge Destination	
Health Status	Mental Health Assessment	Functional Assessment	Consent & Sign-Off	Uploaded Files (0)	Client Choice
Send and Manage Referrals					
Prescription Report			Release Record Save		
Last modified by Bhagat, Rahul at March 12, 2024 11:34.					
Has The Patient Been Designated ALC? Top					
<input checked="" type="radio"/> YES <input type="radio"/> NO					
* ALC Date Top					
Date <input type="text"/>					
Why Does The Patient Need An Rcu At This Time/ What Are The Goals For The RCU Stay? Top					
<input type="checkbox"/> Await an LTC Bed Offer	<input type="checkbox"/> Await Rehab (Rehab Acceptance Is Required)	<input type="checkbox"/> Recovery from Illness/Injury/Surgery			
<input type="checkbox"/> Await Home Renovations/Modifications	<input type="checkbox"/> Await Home Deep Clean	<input type="checkbox"/> Temporary Housing Only			
<input type="checkbox"/> Increase Endurance/Strength/ Confidence With ADLS	<input type="checkbox"/> Await Surgery	<input type="checkbox"/> Other			
Has Patient Been In An RCU Before?(If Yes, Provide Date and Details) Top					
<input type="radio"/> YES <input checked="" type="radio"/> NO					

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.

▲ Client Details ✓ Demographics ✓ Additional Client Details ✓ Supplementary Information ▲ ALC Designation & Discharge Destination

▲ Health Status ✓ Mental Health Assessment ▲ Functional Assessment ✓ Consent & Sign-Off ✓ Uploaded Files (0) ✓ Client Choice

▲ Send and Manage Referrals

📄 Prescription Report 🔒 Release Record 💾 Save

Last modified by Bhagat, Rahul at March 12, 2024 11:38.

Planned Hospital Discharge Date [Top](#)

Date of Planned Discharge

March 16, 2024 📅 🗑️

Current Hospital Admission [Top](#)

Date of Current Hospital Admit

March 9, 2024 📅 🗑️

Reason for Current Hospital Admit [Top](#)

Reason:

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.

▲ Client Details ✓ Demographics ✓ Additional Client Details ✓ Supplementary Information ▲ ALC Designation & Discharge Destination ▲ Health Status

✓ Mental Health Assessment ▲ Functional Assessment ✓ Consent & Sign-Off ✓ Uploaded Files (0) ✓ Client Choice ▲ Send and Manage Referrals

📄 Prescription Report 🔒 Release Record 💾 Save

Cognitive Status [Top](#)

<input type="checkbox"/> Able To Direct Their Own Care	<input type="checkbox"/> Able To Express Their Needs (I.E. Hot, Cold, Tired)	<input type="checkbox"/> Able To Follow Instructions
<input type="checkbox"/> Memory Challenges – Short Term	<input type="checkbox"/> Memory Challenges – Long Term	<input type="checkbox"/> Capable Of New Learning/Carry-Over Of Learning
<input type="checkbox"/> Impaired Judgment Impacting Safety	<input type="checkbox"/> Poor Insight Into Personal Care Needs	<input type="checkbox"/> Able To Participate In Group Settings
<input type="checkbox"/> Other Cognitive Issues That May Impact Transition If Cognitively Impaired, Please Include Any Formal Assessment Scores Such As Moca/Mmse/Rudas		

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.

Client Details (warning) Demographics (check) Additional Client Details (check) Supplementary Information (check) ALC Designation & Discharge Destination (warning) Health Status (warning) Mental Health Assessment (check) Functional Assessment (warning) Consent & Sign-Off (check) Uploaded Files (0) (check) Client Choice (check)

Send and Manage Referrals

Prescription Report Release Record Save

Bed Mobility [Top](#)

Independent Requires Supervision One-Person Assistance
 Two-Person Assistance Able To Identify Need For Reposition

Weight-Bearing - Cannot Bear Weight On [Top](#)

Left Leg Right Leg Left Arm
 Right Arm

Re-Assessment Plan [Top](#)

Consent & Sign Off

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

Client Details (warning) Demographics (check) Additional Client Details (check) Supplementary Information (check) ALC Designation & Discharge Destination (warning) Health Status (warning) Mental Health Assessment (check) Functional Assessment (warning) Consent & Sign-Off (check) Uploaded Files (0) (check) Client Choice (check) Send and Manage Referrals (warning)

Prescription Report Release Record Save

Last modified by Bhagat, Rahul at March 12, 2024 11:57.

Referral Source to review this with the patient or their designate (SDM, POA, PGT etc.) [Top](#)

- Patient information contained within this form will be shared with the Health Service Providers (HSP) for the Reintegration Care Models (RCM) Program for the purpose of arranging and providing services only.
- Patient and caregiver privacy will be respected and be maintained according to the guidelines within the Ontario Personal Health Information Protection Act (PHIPA) with respect to the collection, use, disclosure, maintenance and disposal of personal health information (PHI).

Who is Consenting to Share Information? [Top](#)

Patient

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?](#)

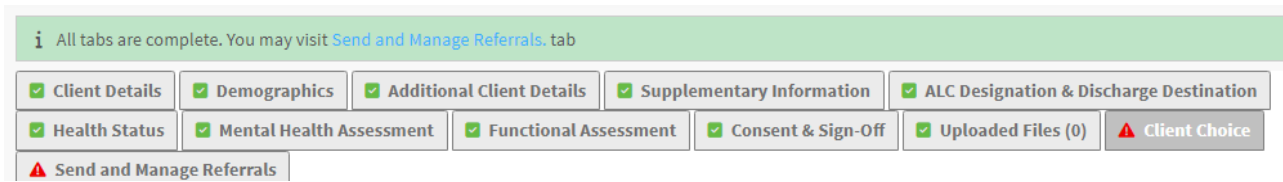
Client Choice

This is where users will select the TCU/RCU Service Provider that they are sending the referral to. Users will need to complete all the required fields before the system will allow them to send the referral. To check if there are incomplete fields, take a look at the tabs; complete tabs will have a green checkmark next to them, whereas tabs with incomplete fields will have a red warning sign.

Client Details (check) Demographics (check) Additional Client Details (check) Supplementary Information (check) ALC Designation & Discharge Destination (check) Health Status (check) Mental Health Assessment (check) Functional Assessment (warning) Consent & Sign-Off (check) Uploaded Files (0) (check) Client Choice (check)

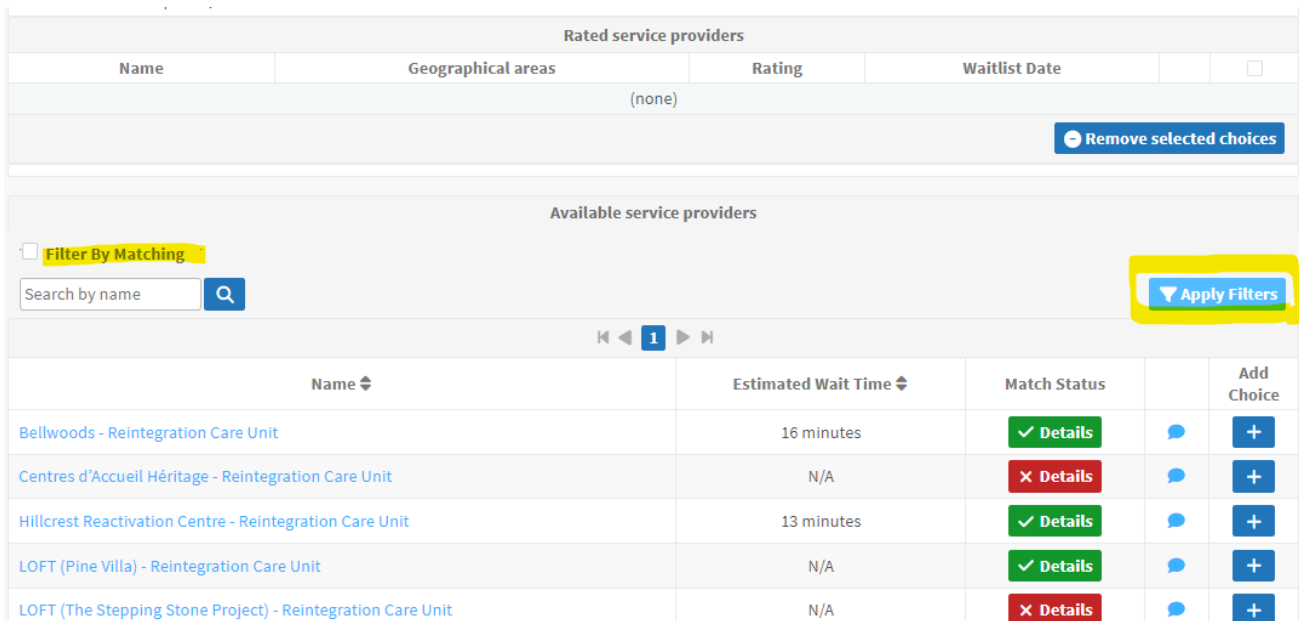
Send and Manage Referrals

Once all the tabs are complete (display green checkmark), a banner will be displayed at the top confirming that the user can now select service providers where the referral should be sent to.



Depending on the information provided in the form, the system will match the patient to available service providers and display a list of matched providers who can accept the patient. By default the system displays only those Service Providers whose selection criteria matches with the patient.

To display all Service Providers (even those that the patient doesn't match with), the user will need to unselect "Filter By Matching" checkbox and click on "Apply Filters" button (see screenshot below). This will display a list of all available service providers and indicate where the patient meets the acceptance criteria and where the patient doesn't.



Patient matches referral destination	Patient does not match referral destination

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

<p>▼ ✓ All of:</p> <p>✓ Responsive Behaviours (Note: Include Current and Behaviours Noted in the Last 2 Months)</p>	<p>NOT Requires Locked Unit for Exit S</p> <p>NOT Broda or Geri Chair Required f</p> <p>NOT Other Behaviours That May Im</p> <p>NOT Requires 24/7 Supervision/ Ob</p> <p>NOT Requires Bed Alarms or Wheel</p> <p>NOT Requires Private Room Due to</p> <p>NOT Self-Harm</p>	None
<p>▼ ✓ All of:</p> <p>✓ Other Special Needs</p>	<p>NOT Methadone – patient must be</p> <p>NOT Suctioning – long standing tra</p>	Not Applicable
<p>▼ ✗ All of:</p> <p>✗ Infectious Risks</p>	<p>NOT MRSA+, Colonized</p> <p>NOT MRSA+, Not Colonized</p>	MRSA+, Not Colonized

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.

TCU - Test Service Provider	N/A	✓ Details	🗨️	+
The Neighbourhood Group - Reintegration Care Unit	13 days	✓ Details	🗨️	+
Bellwoods - Reintegration Care Unit	N/A	✗ Details	🗨️	+
Centres d'Accueil Héritage - Reintegration Care Unit	N/A	✗ Details	🗨️	+

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.

Rated service providers

Name	Geographical areas	Rating	Waitlist Date	
TCU - Test Service Provider	02 - Toronto Central HCCSS	1		🗨️

[Remove selected choices](#)

The following eligibilities may be required: ⚠️

Service Provider	Placement Restriction

Available service providers

All Geographical Areas Selected ▼
 Filter By Matching

Apply Filters

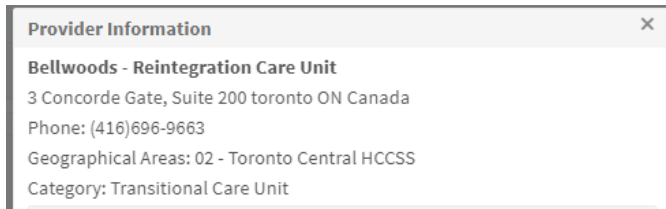
⏪ 1 ⏩

Name	Estimated Wait Time	Match Status		Add Choice
The Neighbourhood Group - Reintegration Care Unit	13 days	✓ Details	🗨️	+
Bellwoods - Reintegration Care Unit	N/A	✗ Details	🗨️	+

Override Matching Criteria: Sending Referral to a Service Provider where the patient doesn't match

There could be special situations where a patient doesn't match the acceptance criteria of a Service Provider but the user believes the patient can be accommodated by the provider. In such situations:

- The user should reach out to the service provider to confirm if the patient can be accepted by the provider. Service Provider details can be found by clicking on the name of the provider, which will display the details in a pop up box.



- Once confirmed, the user can add the unmatched Service Provider by clicking on the corresponding “+” button. This will move the selected provider to “Rated Service Providers” section.
- Then, on the next tab (Send and Manage referrals), the user will include the reason for override and provide details before sending the referral.



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.

Referrals To Be Sent					Send Referral
Service Provider	Rating	Accept Wait	Admit Wait	Match Status	
TCU - Test Service Provider	1	2 days	0 days	✓ Details	<input checked="" type="checkbox"/>
Bellwoods - Reintegration Care Unit	2	0 days	0 days	✗ Details	<input type="checkbox"/>
The Neighbourhood Group - Reintegration Care Unit		3 days	12 days	✓ Details	<input checked="" type="checkbox"/>

Send Referral(s) to Destination(s) Not Listed Here Select All Deselect All Send Referral

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

Are you ready to send referrals?

Referral Date * 2024/03/12 16:16

✗ Cancel Send Referral

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

Referrals					Release Record	Referral History Report	Patient History	
Service Provider	Status	Referral Date	Referral Information		Referral Management			
TCU - Test Service Provider	Pending	March 12, 2024 16:16	(0 of 0)	Details	Print	Accept	✗	
The Neighbourhood Group - Reintegration Care Unit	Pending	March 12, 2024 16:16	(0 of 0)	Details	Print	Accept	✗	

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.

Referrals				Release Record	Referral History Report	Patient History
Service Provider	Status	Referral Date	Referral Information		Referral Management	
TCU - Test Service Provider	Pending	March 12, 2024 16:16	(0 of 0)	Details	Print	Accept X Cancel the referral
The Neighbourhood Group - Reintegration Care Unit	Pending	March 12, 2024 16:16	(0 of 0)	Details	Print	Accept X

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.

Cancel ✕

Reason: *

Comment:

✕ Cancel
↻ Continue

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.

Service Provider	Status	Referral Date	Referral Information		Referral Management
TCU - Test Service Provider	Cancelled [Client Admitted to Another Service Provider]	March 12, 2024 16:16	(0 of 0)	Details	
The Neighbourhood Group - Reintegration Care Unit	Pending	March 12, 2024 16:16	(0 of 0)	Details	Accept X

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.

Care Type	Transitional Care Unit (manage)	Find a Match
Name	999test999, TCU2	Place On Hold
Health Card Number	No identifier	Deactivate
MRN	0000044(StrataHealth)	Decease
CHRIS ID		

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.

Deactivate ✕

Viewing client: 999test999, TCU2
Date Of Birth: N/A
Health Card Number: No identifier

i Setting this client record to Deactivated will cancel all of this client's referrals for this care type. Please note:

- The client will be removed from wait lists and matches will be broken.
- Each referral will be Deactivated and will subsequently drop off of the dashboard.

Care type: Transitional Care Unit

* Reason:

Comment:

Referrals that will be cancelled		
Care type	Referral destination	Current status
Transitional Care Unit	The Neighbourhood Group - Reintegration Care Unit	Pending

I acknowledge that I have reviewed the above information.

✕ Cancel ⏸ Deactivate

***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.

This application is Deactivated. To start a new application, please click: [Start New Referral](#)

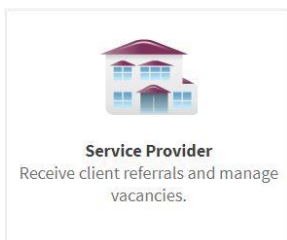
Client Details Demographics Supplementary Information Social Information Care Requirements Send and Manage Referrals

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.

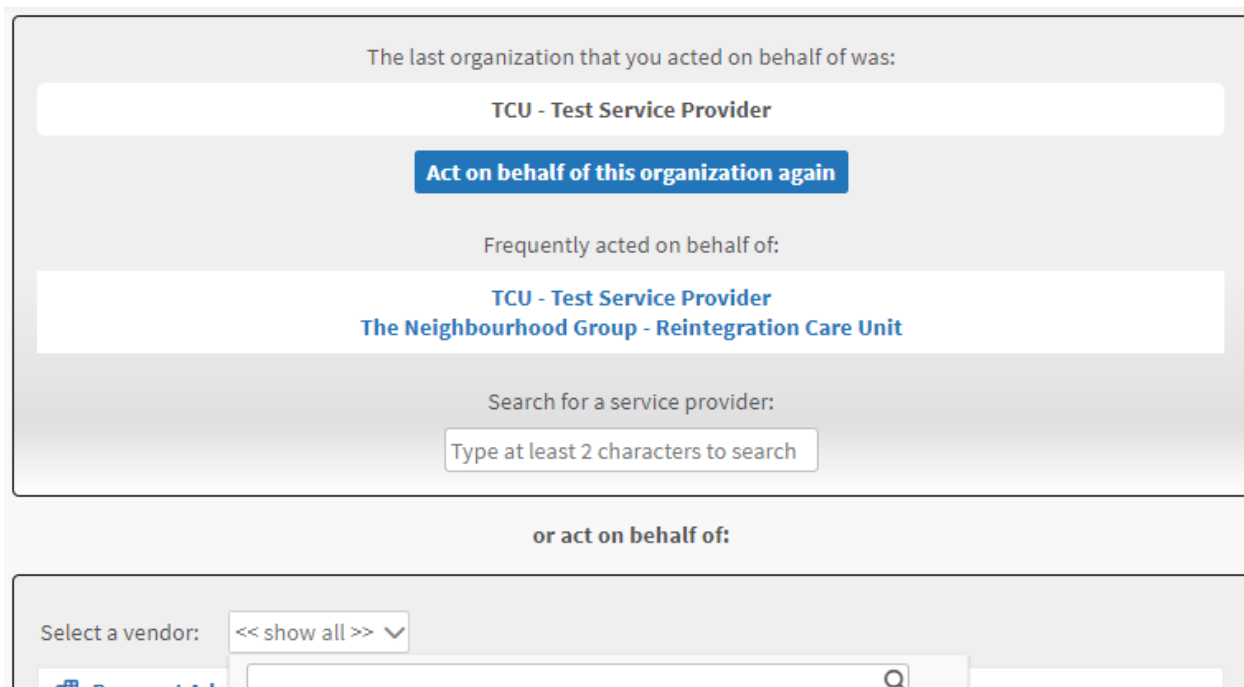
To manage TCU referrals sent to a Service Provider, the user will log into RM&R application and click on the Service Provider icon (below) on the dashboard.



(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.

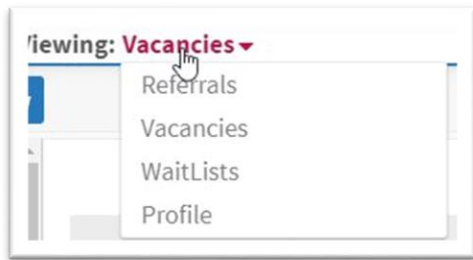
The Service Provider list that a user sees depends on their configuration. If you don't see your organization, please get in touch with RM&R Program.



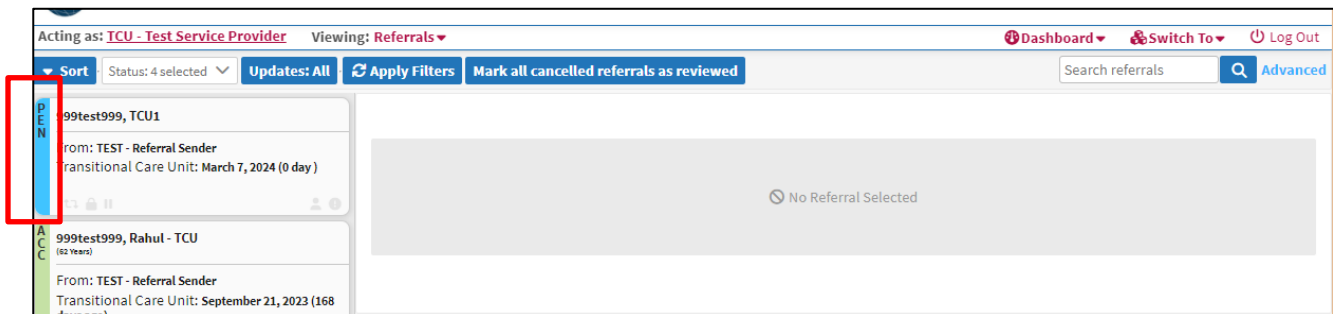
Monitoring the Referral Queue

When a user first logs in, they will be displayed 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).

[Print](#)
[Assign](#)
[Edit client](#)
[Accept](#)
[Deny](#)
[Request For Information](#)

[Updates](#)
[Details](#)
[Matching Profile](#)
[Clinical Profile](#)
[Comments \(0\)](#)
[Attachments \(0\)](#)
[Tasks \(0\)](#)

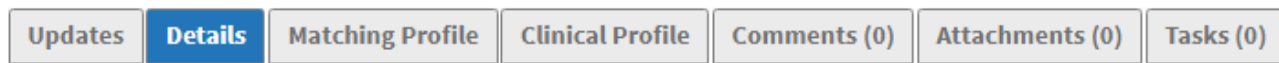
Referral Information	
Source service provider	TEST - Referral Sender
Source service provider contact	(416)987-1235 x2222
Source service provider address	123 Fake Street Toronto ON M9M 9M9 Canada
Responsible Person(s)	Bhagat, Rahul
Referral Owner	TEST - Referral Sender 123 Fake Street Toronto ON M9M 9M9 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.

[Print](#)
[Assign](#)
[Edit client](#)
[Accept](#)
[Deny](#)
[Request For Information](#)

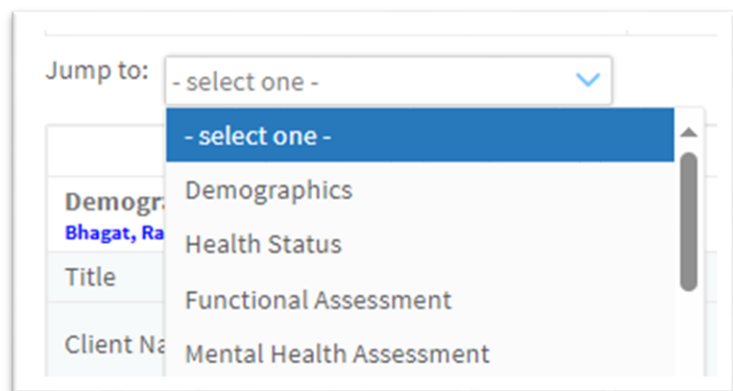
- **Accept** – Clicking on this button will allow the Service Provider to accept the patient to their site. It also indicates they are able to provide the requested service.
- **Deny** – By clicking on this button Service Provider will indicate they are unable to provide the service, hence denying the 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, including status changes.
- **Details** – Displays all the information 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 information 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.

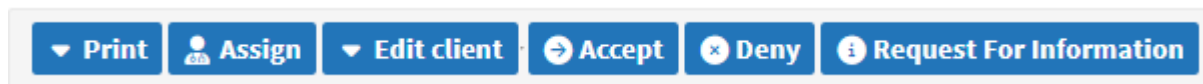
To review the details of the application, the user will click on the *Clinical Profile* tab. This will bring the user to the details of the application. To make it easier for users to review a referral, there is the “Jump to:” section on the clinical profile tab. To view a specific section of the application,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



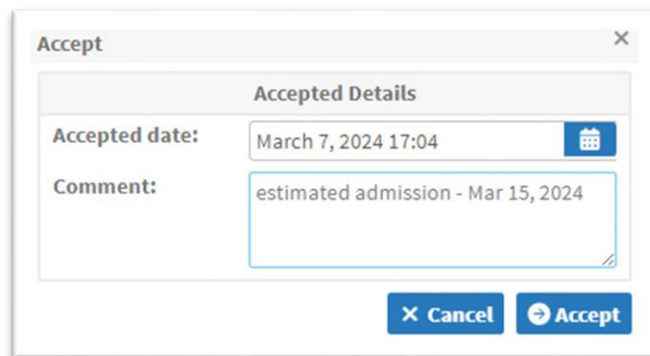
After a review of the information provided, the user can act on the referral by clicking on one of the Actions buttons described earlier.

Accepting a referral

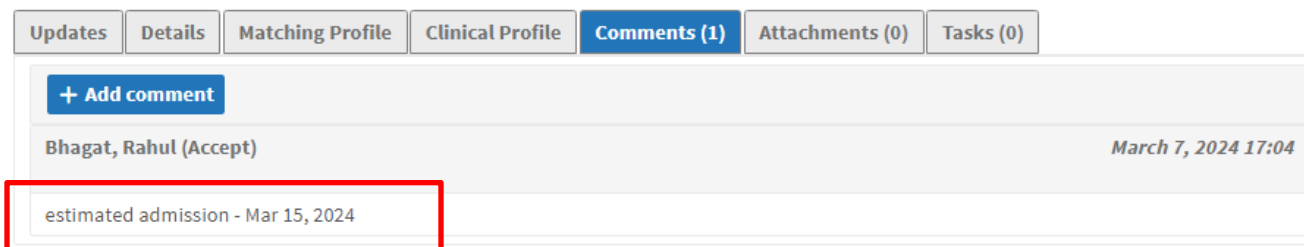
After reviewing the information the user can act on the referral by clicking on one of the action items at the top of the details pane.



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).

A modal window titled 'Accept' with a close button. It contains a section titled 'Accepted Details'. Under this section, there is a label 'Accepted date:' followed by a text input field containing 'March 7, 2024 17:04' and a calendar icon. Below that is a label 'Comment:' followed by a text area containing 'estimated admission - Mar 15, 2024'. At the bottom right of the modal are two buttons: 'Cancel' and 'Accept'.

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.

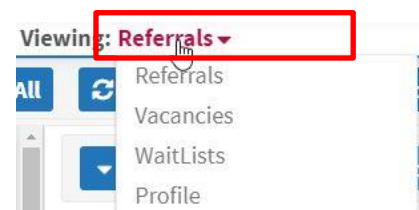


Once a referral is accepted, the user will need to find or create a vacancy in the system to admit the patient.

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 discharge process to create a vacancy.

The screenshot shows a search interface titled "Search for a client to discharge". It includes three input fields: "Surname:" with the value "testing", "Given Name(s):", and "Health Card Number:". A blue button with a magnifying glass icon and the text "Search clients" is located to the right of the input fields. Below the input fields is a table with columns: "Surname", "Given Name(s)", "Date Of Birth", "Health Card Number", "Last Discharge", and "Last Admission". The table content is "(none)". Below the table, it displays "0 Clients 1 of 1" with navigation arrows. A blue button at the bottom right says "Discharge client not in list".

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 screenshot shows a form titled "Send the Discharge Notice". It has a sub-header "Discharge Notice". The form includes several fields: "Service provider:" with a dropdown menu showing "TCU - Test Service Provider"; "Client:" section with "Surname:", "Given Name(s):", "Date Of Birth:" (with a calendar icon), and "Health Card Number:"; "Discharge:" section with "Discharge date:" (with a calendar icon), "Destination:" with a dropdown menu showing "- select one -", "Comment:" with a text area, and "Reason:" with a dropdown menu showing "- select one -"; and "Discharged Vacancy name:" with a text field. At the bottom, there are two blue buttons: "Search Again" and "Send the Discharge Notice".

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 screenshot shows a web form titled "Edit New Vacancy" with a close button (X) in the top right corner. The form contains several fields:

- Service provider:** * TCU - Test Service Provider (dropdown menu)
- Vacancy name:** * Floor 1 - Room 1 - Bed 1 (text input)
- Vacancy status:** Internal (text input)
- Date available:** * (text input with a calendar icon to its right, highlighted by a red box)
- Vacancy restriction:** - select one - (dropdown menu)
- Place On Hold:** - select one - (dropdown menu)
- Care Coordinator:** Type at least 2 characters to search (text input)

A blue "Save Vacancy" button is located at the bottom right of the form.

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.

Edit New Vacancy Attributes
✕

Vacancy Attributes							
Gender (F/ M/ NON-BINARY) *	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px 5px;">FEMALE</td> <td style="text-align: center; padding: 2px 5px;"><input checked="" type="checkbox"/></td> </tr> <tr> <td style="padding: 2px 5px;">MALE</td> <td style="text-align: center; padding: 2px 5px;"><input checked="" type="checkbox"/></td> </tr> <tr> <td style="padding: 2px 5px;">OTHER</td> <td style="text-align: center; padding: 2px 5px;"><input checked="" type="checkbox"/></td> </tr> </table>	FEMALE	<input checked="" type="checkbox"/>	MALE	<input checked="" type="checkbox"/>	OTHER	<input checked="" type="checkbox"/>
FEMALE	<input checked="" type="checkbox"/>						
MALE	<input checked="" type="checkbox"/>						
OTHER	<input checked="" type="checkbox"/>						

Save Vacancy

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).

✕ Delete
↩ Change to internal

Vacancy Details

Vacancy Comments

Matches

Discharge Notice

Rating ↕	Status ↕	Location ↕	Age ↕	
-	Awaiting Placement	TEST - Referral Sender	49 Years	Select
1 Client				

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.

✕ Refuse
✕ Decline/ Bypass
✔ Proceed to Bed Offer
📄 Manage referral

Vacancy Details

Vacancy Comments

Client Profile

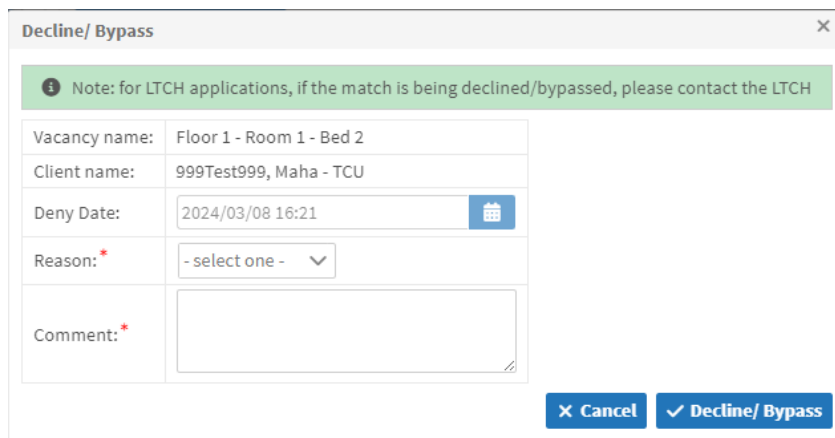
Match Comments

Discharge Notice

📄 Client profile report

Client Profile	
Service provider comment:	
Client comment:	
Current location:	TEST - Referral Sender
Responsible person:	Bhagat, Rahul
Vacancy status:	Pending - Match Found
Date Of Birth:	
Service Provider:	The Neighbourhood Group - Reintegration Care Unit

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.

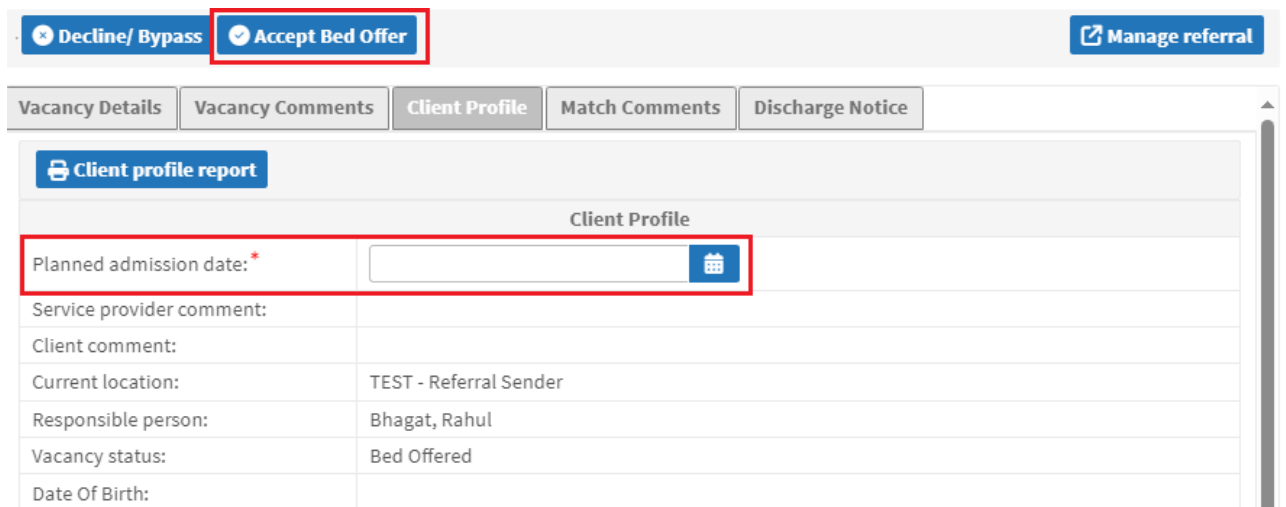


The image shows a 'Decline/ Bypass' pop-up window. At the top, there is a green banner with an information icon and the text: 'Note: for LTCH applications, if the match is being declined/bypassed, please contact the LTCH'. Below this, the form contains the following fields: 'Vacancy name:' with the value 'Floor 1 - Room 1 - Bed 2'; 'Client name:' with the value '999Test999, Maha - TCU'; 'Deny Date:' with a date picker set to '2024/03/08 16:21'; 'Reason: *' with a dropdown menu showing '- select one -'; and 'Comment: *' with a text area. At the bottom right, there are two buttons: 'Cancel' and 'Decline/ Bypass'.

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

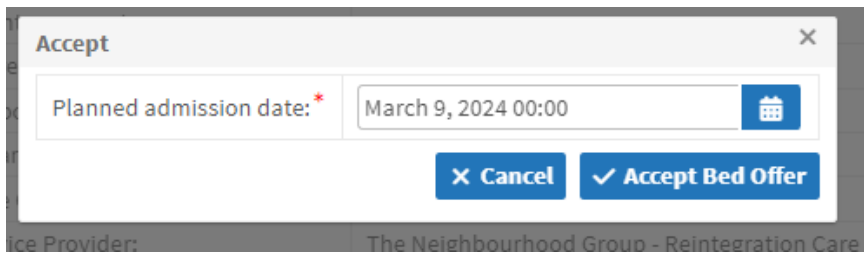
To proceed with the Bed Offer, after clicking on “**Proceed to Bed Offer**” button the screen will change and the botton will be replaced by another botton called “**Accept Bed Offer**”. Also, the selected patient’s client profile page will be displayed.

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 image shows a screenshot of the 'Client Profile' form. At the top, there are three buttons: 'Decline/ Bypass', 'Accept Bed Offer' (highlighted with a red box), and 'Manage referral'. Below these are tabs for 'Vacancy Details', 'Vacancy Comments', 'Client Profile', 'Match Comments', and 'Discharge Notice'. The 'Client Profile' tab is active, showing a 'Client profile report' button and a 'Client Profile' section. The 'Planned admission date: *' field is highlighted with a red box and has a date picker icon. Other fields include 'Service provider comment:', 'Client comment:', 'Current location:' (TEST - Referral Sender), 'Responsible person:' (Bhagat, Rahul), 'Vacancy status:' (Bed Offered), and 'Date Of Birth:'.

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”.



Accept

Planned admission date: * March 9, 2024 00:00

Cancel Accept Bed Offer

Service Provider: The Neighbourhood Group - Reintegration Care

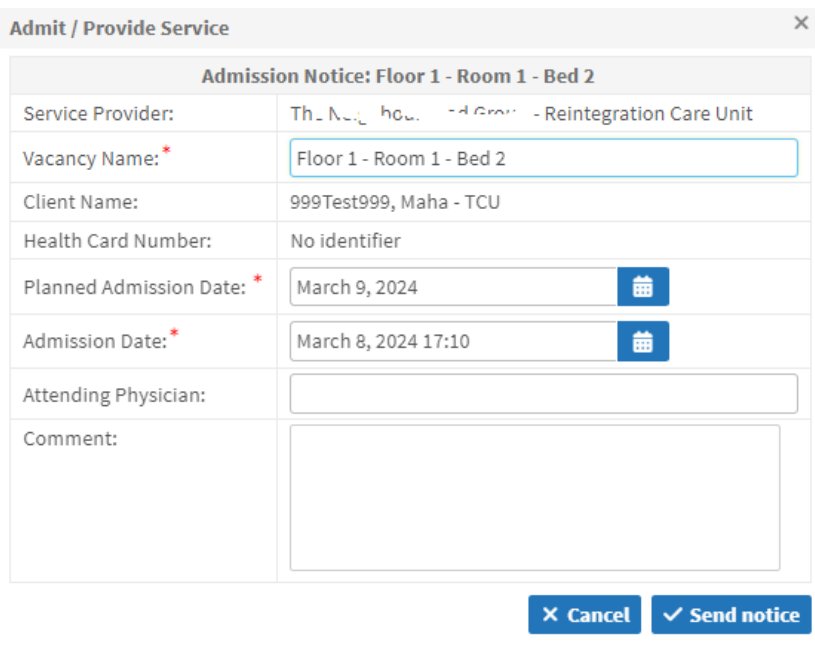
The “Accept Bed Offer” button will change to “Admit/Provide Service”



Decline/ Bypass 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.



Admit / Provide Service

Admission Notice: Floor 1 - Room 1 - Bed 2

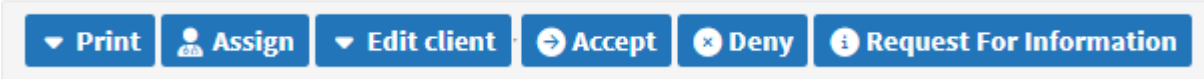
Service Provider:	The Neighbourhood Group - Reintegration Care Unit
Vacancy Name: *	Floor 1 - Room 1 - Bed 2
Client Name:	999Test999, Maha - TCU
Health Card Number:	No identifier
Planned Admission Date: *	March 9, 2024
Admission Date: *	March 8, 2024 17:10
Attending Physician:	
Comment:	

Cancel Send notice

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.



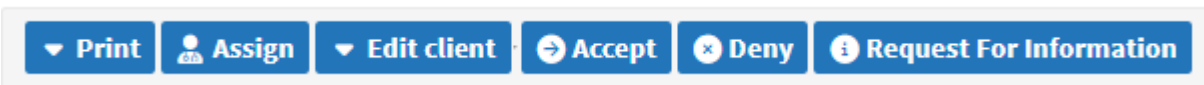
If a decision is made to deny the referral, the user will click on the “Deny” button. This will display the Deny pop up screen requesting the user to enter Denied date, Reason and any related comments (see below).

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.

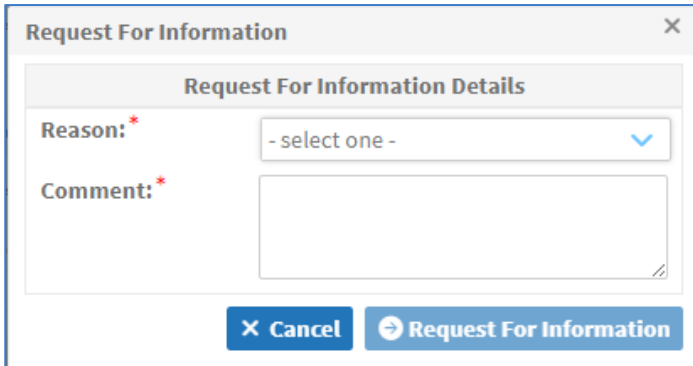
Note: Alternatively the Service Provider can request the sender to cancel the referral from their end. This will remove the request from the referral queue.

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.

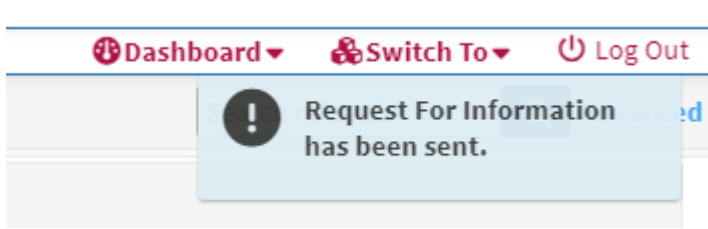


To request for more information or for further clarification, the user will click on the “Request For Information” button. This will display the pop up screen requesting the user to enter Reason and any related comments (see below).



The image shows a pop-up window titled "Request For Information" with a close button (X) in the top right corner. Inside the window, there is a section titled "Request For Information Details". Below this title, there are two fields: "Reason:" followed by a dropdown menu currently showing "- select one -" with a downward arrow, and "Comment:" followed by a large text area with a small icon in the bottom right corner. At the bottom of the pop-up, there are two buttons: "Cancel" with an X icon and "Request For Information" with a right-pointing arrow icon.

A temporary banner on the right hand side will confirm that the request for information 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.



The image shows a dashboard section with several tabs: "Updates", "Details", "Matching Profile", "Clinical Profile", "Comments (2)", "Attachments (0)", and "Tasks (0)". The "Updates" tab is active. Below the tabs, there are two buttons: "Referral History Report" and "Patient History". Below these buttons, there is a list of updates. The first update is highlighted in yellow and shows a checkmark icon, the text "Information Request Completed", and a red flag icon followed by "Requires Review". Below this update, the name "Bhagat, Rahul" is listed on the left and the date and time "March 13, 2024 12:28" is listed on the right.