



**NEPHROLOGY PROGRAM  
DEPARTMENT POLICIES AND PROCEDURES**

**Renal Transplant Program – Section 2 – RTP Neph 2.02  
Referral and Evaluation of the Potential Renal Transplant Recipient**

**No.: 01704** (TOH Standardized Policy Number)

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<b>ISSUED BY:</b> Renal Transplant Steering Committee	<b>DATE OF APPROVAL:</b> 2005/03
<b>APPROVED BY:</b> Program Clinical Director and Division Head Medical Director Renal Transplant Program Dr. Stephanie Hoar Signature: <i>S. Hoar</i> Date: 2018/03_____	<b>LAST REVIEW/REVISION DATE:</b> 2018/03
<b>CATEGORY:</b> Clinical Practice	<b>IMPLEMENTATION DATE:</b> 2005/03

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**POLICY STATEMENT:**

To describe the protocol initiated by the Nephrologist, Care Facilitator/Delegate, RN and Clerk when referring and evaluating a potential Renal Transplant recipient to the Renal Transplant Program at The Ottawa Hospital.

**DEFINITION(S): N/A**

**ALERTS: N/A**

**PROCEDURE:**

**SECTION A: Referring Nephrologist**

All dialysis and pre-dialysis patients require documentation by the Nephrologist of discussion about the option of kidney transplantation and living kidney donation.

Dialysis Nephrologist reviews the NephroCare (NC) Transplant Status on their roster. All dialysis patients should be included in the report and must have a Transplant Status to be included in the report. No patient should have an “**Uncertain**” status longer than the first three months of dialysis.

The Nephrologist upon discussion of transplant and living kidney donation as a treatment option with the patient, proceeds with one of the following:

1. **Not a candidate, the Nephrologist:**
  - a. Documents in NephroCare (NC) progress notes, patient not suitable for renal transplant using phrase titled “Transplant Ref No” and indicates reason for this decision.
  - b. Initiates NC frequently prescribed order “Transplant No”.
  - c. If workup previously initiated, cancel evaluation process, document in NC progress notes and notify transplant office.
2. **Not suitable at this time, or not ready to consider transplant as a treatment option at this time, the Nephrologist:**
  - a. Documents in NC progress notes patient not ready/suitable for transplant assessment at this time using phrase titled “Transplant Ref Later”.
  - b. Initiates NC frequently prescribed order “Transplant Later”.

3. Orders reevaluation of patient's readiness/suitability for transplant assessment in 1 year or length of time at physician's discretion. (Prompts reminder to be put into appointment screen by Clerk or RN delegate). Interested in obtaining information only, not starting transplant work-up, the Nephrologist:
  - a. Documents in NC Progress Notes, Patient requests pre-transplant education only using phrase titled "Transplant Ref Ed".
  - b. Completes SPO 48A form "New Referrals to the Renal Transplant Program", and sends completed form to Transplant Office so education may be booked.
  - c. ABO blood type must be ordered or on file in electronic health record.
  - d. Initiates in NC frequently prescribed order "Transplant Pre Education" indicating patient is/is not a candidate for group teaching, and indicating patient language.
  - e. Follows-up on patient's decision for transplant investigation after education session within 3 months.
  - f. Documents in NC progress note if patient not interested in pre transplant investigation.
  - g. Initiates "Transplant Ref Later" as per #2; or proceeds to Step 4.
  
4. **Patient considered a potential transplant candidate and work-up to be initiated, the Nephrologist:**
  - a. Obtains Pre Renal Transplant Investigation package from TL/CF/Liaison Nurse, or clerk.
  - b. Initiates NC frequently prescribed order "Transplant Investigation".
  - c. Orders and completes SPO 48 B "Potential Recipient Evaluation for Renal Transplantation" and SPO 48 A "New Referrals to the Renal Transplant Program"- **if updated from Education only**
    - **Must resend copy of SPO 48A when full work-up initiated to ensure Transplant program aware of new full work-up status.**
  - d. Enters all patient information and initiates orders for Recipient Evaluation tests/consults based on patient's age, gender and conditions.
  - e. Enters or completes **CPOE** as required for Recipient Evaluation consult/diagnostic requisitions.
  - f. Orders ABO blood type, if not on OACIS
  - g. Orders Baseline cytotoxic antibody level to be drawn and sent to Tissue Typing
  - h. Provides education on Living Donation. Provides recipient with information sheet entitled "Who can be a Living Donor?" and requests potential donors call the Living Donor Coordinator with their ABO blood type
  - i. Document progress note in NC using phrase titled "Transplant Investigations Ordered" indicating pre transplant investigations initiated.
  - j. Reviews progress of pre transplant investigations monthly or more frequently as required.
  - k. Orders additional diagnostic tests and consultations if the Transplant Evaluation test results abnormal.
  - l. Initials appropriate section of "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B, documents problems/follow-up in NC progress notes including word "transplant" in text of note.
  - m. Reviews and completes Potential Recipient Evaluation Investigations package and verifies it is complete for Transplant team.
  - n. Orders it copied and sent to Transplant Office. Documents in NC progress notes using phrase titled "Transplant Referral Potential".
  - o. Orders Potential Recipient Evaluation to be stopped due to: \_\_\_\_\_" if necessary. Documents in NC progress notes using phrase titled "Transplant Inv stopped due to: \_\_\_\_\_". Frequently prescribed order "Transplant Inv stopped due to: \_\_\_\_\_" to be sent to the Transplant office

**SECTION B Referring unit/area Team Leader/Clinical Facilitator/ Liaison Nurse or Delegate**

1. When the "New Referrals to Transplant Program" SPO 48 A is ordered by the Nephrologist:
  - a. Updates the Transplant Status in NephroCare (refer to Neph 8-0-7):

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- i. "Education Only" if patient is being referred for education
    - ii. "Work-up New" for full evaluation
    - iii. "Transplant being considered"
    - iv. "No" if patient is not considered suitable for transplant based on the physician's progress note.
    - v. "Later" if transplant evaluation discussion not appropriate at that time, for example acute dialysis start, recovery of function expected.
  - b. Processes physician's order "Transplant Investigation" in NC.
  - c. Enters "Potential Transplant" as an allergy in Problem /Allergy list in NC, so all nephrology staff are made aware patient is being investigated for potential transplant.
2. Ensures Transplant office receives completed "New Referrals to the Renal Transplant Program" SPO 48 A.
    - a. If patient has potential living donors, asks patient to have the potential donors call the Living Donor Coordinator with their ABO blood type and provides the recipient with education on Living Donation and provides information sheet entitled "Who Can be a Living Donor?" Document name of potential donors on SPO 48A if known.
  3. Initiates Medical Directive for Mantoux TB testing if patient did not have a Mantoux test within last 12 months.
  4. Organizes patient's dialysis treatment times to facilitate pre transplant investigation appointments.
    - a. Asks patient for dates/times of appointments booked by the patient and puts information on the "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form and into NC appointments section.
    - b. Follows up with patient that appointments and consultations have been attended, and when missed or not attended ensures rebooking and/or discuss with patient if additional supports required to attend appointments.
  5. Completes monthly and prn reviews of pre-transplant investigation test results with Nephrologist and updates "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form. Includes word "transplant" in text of any NC progress note so notes can be filtered by this word.
    - a. Informs Nephrologist of concerns, abnormal results or missed appointments as patient progresses through Pre Transplant Investigations.
    - b. Print the NephroCare Transplant Status report regularly for the unit and review the status of each patient. All patients should be included in the report (must have a Transplant Status to be included in the report). No patient should have an "Uncertain" status longer than the first three months of dialysis.
  6. If patient transfers to another unit or center – reports to be given to receiving unit Team Leader/Care Facilitator with evaluation to date forwarded to receiving area.

**SECTION C: Referring unit/area primary care RN or delegate**

1. If patient has potential living donors, confirms patient requested potential donors called the Living Donor Coordinator with their ABO blood type and provides recipient education on Living Donation and provides information sheet entitled "Who Can be a Living Donor?"
2. Reminds patient to attend appointments when prompt displayed on R68.
3. Informs TL/CF if patient reports missing a pre transplant investigation appointment and writes NC progress note including word "transplant" in text of note so progress notes can be filtered by this word.
4. Ensures appointment has been rebooked and updates appointments, location and details in NC Admin Appointments section, enters dates onto "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form.

#### **SECTION D Referring unit/area clerk**

1. Schedules the Pre Transplant Investigation appointments. Some diagnostic areas will contact patient directly with appointment date/ time. Some areas have limited days and times dedicated to pre transplant investigation appointments.
  - a. Enter all appointments, location and details in the NC Admin Appointments section and write dates onto "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form.
  - b. For hemodialysis patients enter additional appointments in NC for dialysis date following any appointment so RN can ask patient if he/she attended appointment and inform clerk of answer.
2. Receive dates of appointments that patient has been notified of directly and puts dates in NC Admin Appointments section, writes dates onto "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form.
3. Updates NC Transplant Status Summary screen, select "Work-up new" as transplant status.
4. Prepares appointment slips and appointment letter for patient, attaches to patient's R68.
5. Ensure patients chart has a Transplant Section, as applicable for pre-dialysis areas, charts flagged as Transplant work-up.
6. Files "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form in the front of Transplant Section of chart.
7. Receives all Pre Renal Transplant Investigation results, stamps the result "Transplant Workup", ensures the physician/RN has reviewed the results and files all Pre Renal Transplant Investigation results in Transplant Section of chart in same sequence as appear on order sheet.
8. Copies "Potential Recipient Evaluation for Renal Transplantation" SPO 48 B order form and all pre transplant investigation results (including all tests/consults/results ordered in response to abnormal findings) when all of investigations are completed and reviewed by the Nephrologist.
9. Sends the copy (do not fax) to Renal Transplant office, includes updated list of patient medications and latest monthly blood work/lab results.
10. If the patient transfers to another modality or dialysis unit within the Ottawa Hospital program the chart is sent to the site to the attention of the receiving Team Leader/Care Facilitator.
11. If the patient transfers out of the Ottawa Hospital, example Renfrew Victoria Hospital or Ottawa Carleton Dialysis Clinic, the clerk will photocopy the Pre Renal Transplant Investigation items: physician orders SPO 48 A and B, and all diagnostic test results. The copies will be packaged and given to the patient. The patient will deliver this package to their new dialysis unit. The package cannot be faxed. It must be photocopied. A release of information must be signed. **Ensure transfer of documents whether patient has completed or partially completed evaluation process.**

#### **Section E: Transplant Program (Refer to RTP 2-03 TOH 01592)**

1. New referral to renal transplant order received (SPO 48A) in transplant office, Recipient clerk/delegate prepares potential recipient chart, provides copy of SPO 48A to Living Donor program, and schedules Transplant Companions Education session within two months of receiving referral. Invitation letter mailed to patient, and copy sent to referral unit/area. If patient referred for Full Transplant work-up, recipient clerk creates TGLN record and notes TGLN # on file. If the referral form is incomplete, it is returned to the unit for completion.
2. Upon receiving copy of potential recipient's abdominal ultrasound and lower extremity arterial Doppler's (LEAD), recipient clerk/delegate schedules appointment with Transplant surgeon within one month, as appropriate.
3. Evaluation for Potential Renal Transplant Recipient Package (as per SPO 48 B) received in Transplant Office – mailed not faxed.
  1. Recipient clerk reviews package for completeness within 2 weeks of receipt in transplant office.
    - i. If complete: to RTRC/delegate for further review.
    - ii. If incomplete: fax requesting missing information sent to referring unit.
      - Copy of fax placed on front of potential recipient chart to ensure completeness

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- Reminder placed in clerk calendar to follow-up with referring unit in 1 month, if missing reports not received.
2. Chart reviewed by Renal Transplant Recipient RN Coordinator (RTRC) or RN delegate within 2 weeks of initial review.
    - i. If complete: return to Recipient Clerk to book Transplant Team assessment. Letter of appointments mailed to patient, faxed to referring unit and entered in Nephrocare (NC). Appointments are booked within one month but may not occur for three to four months based on consultant availability.
  4. Upon completion of Transplant Team assessment, and Transplant Nephrologist consult, recipient clerk/delegate updates Transplant Status in Nephrocare as applicable to:
    - i. Active
    - ii. Hold
    - iii. On-hold for living donation (LD)
    - iv. No (if patient is not a candidate for kidney transplantation)
    - v. Transplanted (after transplantation occurs).
  5. Transplant program notifies the patient and referral unit when a patient placed on the deceased donor waitlist, potential date for living donor transplantation surgery, on hold status, or when patient is not a candidate for kidney transplantation as applicable.
  6. Transplant program provides the patient and referral unit with written notification if found ineligible for kidney transplantation.

**RELATED POLICIES / LEGISLATION:**

1. Nephrology Policies and Procedures – Hemodialysis – Section 08 – Documentation – Neph 8-0-7 (#000763) Entering and Updating Transplant Status in Nephrocare.
2. NC Directives/Orders.
3. RTP 2-03 TOH 01592 Renal Transplant Recipient Evaluation Procedure.

**REFERENCES:**

1. NC Progress Notes: include the word “transplant” in the text of the note so that the progress notes can be filtered by this word.
2. SPO 48 A – New Referrals to the Renal Transplant Program.
3. SPO 48 B - Potential Recipient Evaluation for Renal Transplantation

**COMMENTS / SIGNIFICANT REVISIONS:**

Insert here