

ASSISTED LIVING OPERATING PROCESS MOVE-IN PROCESS

Assumptions

A client has reached the top of the waitlist and has a RAI assessment completed within the past 6 months.

The client is eligible and suitable for Assisted Living and the appropriate Health Care Professionals (Home Health, AL Clinician, Access Care and Transitions (ACT) Coordinator) confirms that Assisted Living is the most appropriate living environment for the client.

The client still wishes to move into Assisted Living.

Process (All timelines are a guideline to ensure transitions occur in a timely manner)

1. The Assisted Living Provider creates and configures a vacancy in Strata PathWays when a suite becomes vacant.
2. Pathways will match the vacancy with client on the waitlist. The AL Provider reviews the client's RAI assessment (client's name or demographic information are not included) to determine the site's ability to manage the client's care.
3. If the client appears to be suitable for the vacant suite, the AL Provider will move the client to "Pending Accept" in Pathways and can then access the client's demographic information.
4. The AL Provider calls the client to arrange for a tour of the Assisted Living site. The client must agree to tour within 5 days. The AL Clinician may or may not attend the tour.
 - The AL Provider may bypass the client at the top of the waitlist if AL Clinician becomes aware of another client with more urgent needs and will need to collaborate with the provider, AL Leadership team, and ACT to bump another client up the waitlist (e.g., client and or family member/support person is in hospital or acutely ill. The client will remain on the waitlist in chronological order).
5. During the tour, if the AL Provider and the client determine that the client's care needs can be provided safely at their site, the AL Provider will offer the suite to the client. The client must accept or decline the offered suite within 48 hours.
 - If the Provider has concerns about the client's ability to manage in the Assisted Living site, the AL Provider calls the AL Clinician or ACT Coordinator who will follow up with the referring Community Clinician. The Community Clinician will respond to the AL Clinician, ACT Coordinator or AL Provider with the information requested in a timely manner. When the AL Provider reviews the additional information and determines that the client is appropriate and support and service needs can be accommodated, the AL Provider will call

the client to offer them the suite. The client must accept or decline the suite within 48 hours.

6. Once the client accepts the suite, a pre-occupancy meeting will be arranged with the client, AL Provider and AL Clinician within 5 days of the acceptance.
7. The pre-occupancy meeting will take place at the Assisted Living site where:
The Client:
 - will bring their current Notice of Assessment, cheque for the damage deposit and a void cheque for automatic withdrawal for rent payment
 - will read and sign the Tenancy Agreement
 - will agree to their monthly Assisted Living rate
 - will understand and agree to the exit criteria for Assisted Living
 - will participate in the development of their care plan**The AL Provider:**
 - will review the Tenancy Agreement with the client
 - will provide information about site rules and regulations
 - will provide the client with the Tenant Handbook
 - will review mandatory and optional charges
 - will complete the BC Housing forms
 - will participate in the development of the Short Term Service Plan**The AL Clinician:**
 - will review Assisted Living policies with the client
 - will confirm or update the financial information and will calculate the monthly rent for the client
 - will develop an Assisted Living Service Plan in collaboration with the client and AL Provider
8. The AL Provider and client will arrange an agreeable move-in date-within 10 days of the pre-occupancy meeting. This time may be extended if there are extenuating circumstances.
9. The AL Provider will advance the client to “Accepted” in PathWays with an entry date.
10. The AL Provider will enter the client “As Admitted” in PathWays when the client moves into the Assisted Living site and will inform AL Clinician.
11. The AL Clinician will complete an AL Case Management Referral in Paris and allocate the client to their caseload. The AL Clinician will link the Assisted Living referral to the AL Screening Referral to ACT and send notification to the Assisted Living ACT Coordinator who will then discharge the AL Screening Referral from Paris.

Exceptions

If the client declines the suite before or following the tour:

1. The AL Provider will contact the referring/AL Clinician to follow up with the client/family and Assisted

Living ACT Coordinator who will either leave the client at the bottom of the waitlist or remove the client from the waitlist completely.

2. The AL Provider will make a note in Pathways to decline the client.
3. The Assisted Living ACT Coordinator will inform the Community Clinician that the client has declined the vacancy.

If the AL Provider declines the client because the care needs are too light or too heavy or they are not a good match for the site:

1. The AL Clinician should have reviewed the RAI, Paris Case Notes, MediTech reports, etc. and have some familiarity with a client that has been matched with a vacancy. The AL Provider and AL Clinician should discuss this beforehand.
2. The AL Provider will discuss with the referring clinician the reason(s) they are being declined for that Assisted Living site and referring clinician informs the client/family.
3. The AL Provider will notify the Assisted Living ACT Coordinator to discuss the reasons for declining the client and make a note in Pathways.
4. The Assisted Living ACT Coordinator will remove the client from the waitlist.
5. The Assisted Living ACT Coordinator notifies the Community Clinician when the client has been declined.
6. The Assisted Living ACT Coordinator discharges the Assisted Living screening referral from Paris.
7. The referring Community Clinician notifies the client they have been declined for Assisted Living and have been removed from the waitlist.
8. The Community Clinician will work with the client to discuss other options.