



Checklists for Organ Listing in OATS

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Checklist – Create Recipient Profile

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
DEMOGRAPHICS	
First Name	
Last Name	
Date of Birth (DD-MM-YYYY)	
Ethnicity	
Sex	
Insurance Type	
CONTACT INFORMATION	
Country	
Province	
Street Address	
City	
Postal Code	
GENERAL CLINICAL INFORMATION	
Blood Type	
RH Factor	
<i>SAVE RECIPIENT – (this will generate TGLN #)</i>	
Blood Type Verified Checkbox	
Height	
Weight - (Once height and weight are entered is saved, BMI will calculate automatically)	
Measurement Date	
<i>ADD REQUIRED ORGAN – (the selected organ journey page will display)</i>	

Heart Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL - Heart	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH HEART REFERRAL - (this will create the Heart journey)</i>	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - ("Referral Accepted" from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - ("Consultation Completed" from drop down menu)	
Recipient Coordinator	
Consultation Date	
<i>SAVE CONSULTATION DECISION</i>	
MEDICAL ASSESSMENT	

Assessment Date	
Recipient Coordinator	
Assessment Decision - “Recipient to be Listed” from drop down menu	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Add details regarding recipient, donor organ or other requirements that should appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly (Click ‘Reports’ from the top page menu bar and generate a “Waitlist List Report – Heart and Heart Clusters” to verify information)

User Tip: Once you have registered the patient as a status 4S – you MAY indicate a secondary status based on their medical acuity if you wish

User Tip: If the HLA lab has not entered a serum for the patient, the waitlisted heart journey will be placed on hold until a serum entry is saved in the system (except for medical status 4 patients ≥ 19 years of age, which are exempt from serum hold rules for the first 180 days of waitlisting without HLA antibody test results). Patients are required to submit an HLA serum sample every 180 days to prevent the journey from being placed on a Serum Hold.

SPECIAL CONSIDERATIONS FOR PAEDIATRIC RECIPIENTS....

- 1. Within the Donor Acceptability Section – you can indicate:**
 - Accept ABO Incompatible
 - Min and Max Donor Weight
- 2. For Fetal Registration:**
 - You can indicate Fetal blood type within the General Clinical Information section using the Blood Type drop down menu
 - You can enter the Referral Received Date as the anticipated DOB and update when baby is born
- 3. Serum Hold:**
 - If recipient is <19 years old but ≥ 1 year old, recipient is exempt from serum hold rules for first 180 days
 - If recipient is <1 year old (12 months), recipient is not subject to any serum rules

Kidney Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL - Kidney	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH KIDNEY REFERRAL</i> - (this will create the Kidney journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - ("Referral Accepted" from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - ("Consultation Completed" from drop down menu)	
Recipient Coordinator	
Consultation Date	
<i>SAVE CONSULTATION DECISION</i>	
MEDICAL ASSESSMENT	

Assessment Date	
Recipient Coordinator	
Assessment Decision - "Recipient to be Listed" from drop down menu	
<i>User Tip: For Adult patients, at least one dialysis procedure must be saved to record Assessment Decision of "Recipient to be Listed"</i>	
SAVE MEDICAL ASSESSMENT DECISION	
KIDNEY SPECIFIC DETAILS	
Dialysis Type	
Dialysis Access Mode	
Dialysis Location	
Dialysis Provider	
Dialysis Start Date	
<i>User Tip: If your patient is part of the KPD program, this can be indicated using the "Kidney Paired Donation" checkbox within the General Kidney Details subsection</i>	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Add details regarding recipient, donor organ or other requirements that should appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly (Click 'Reports' from the top page menu bar and generate a "Waitlist List Report – Kidney, PAK and KP" to verify information)

User Tip: If the HLA lab has not entered a serum for the patient, the waitlisted kidney journey will be placed on hold until a serum entry is saved in the system. Patients are required to submit an HLA serum sample every 180 days to prevent the journey from being placed on a Serum Hold

User Tip: *If the patient requires a Medically Urgent wait list status for kidney – please complete required paperwork and submit to TGLN to have case reviewed by Special Case Committee at oh-tgln_specialcasecommittee@ontariohealth.ca*

HSP ELIGIBILITY... (For recipients with cPRA ≥ 95)

1. *Recipients must have HLA Typing and Antibodies entered to be considered for HSP eligibility by CTR.*
2. *Recipient Height and Weight must be entered in the General Clinical Information section of the patient profile*
3. *Indicate whether recipient is willing to accept Hep B Core Ab Positive or Hep C Positive donor organ by checking appropriate box(es) in the Donor Acceptability Criteria section*
4. *Enter Dialysis information in the Kidney Specific Details section*
5. *Assign a medical status*

If CTR sets the journey as HSP, and OATS-CTR sync has finished successfully, then OATS should show an HSP flag for the journey within the Recipient Summary Bar.

SPECIAL CONSIDERATIONS FOR PAEDIATRIC RECIPIENTS....

1. *Wait time will accrue from the earliest date of dialysis or listing for paediatric patients. Paediatric candidates do not require a dialysis start date to accrue wait time.*

Liver Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL - Liver	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH LIVER REFERRAL</i> - (this will create the Liver journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>User Tip: The patient's primary diagnosis should be reflective of any exception points they are accumulating</i>	
SAVE REFERRAL DETAILS	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - ("Referral Accepted" from drop down menu)	
SAVE REFERRAL DECISION	
CONSULTATION	
Consultation Decision - ("Consultation Completed" from drop down menu)	
Recipient Coordinator	
Consultation Date	
SAVE CONSULTATION DECISION	

MEDICAL ASSESSMENT	
Assessment Date	
Recipient Coordinator	
Assessment Decision - "Recipient to be Listed" from drop down menu	
SAVE MEDICAL ASSESSMENT DECISION	
LIVER SPECIFIC DETAILS	
Enter required blood work values for NaMELD/PELD, HCC and Therapies	
SAVE each respective Liver Specific Section	
NaMELD/PELD and SMC Scores are automatically calculated after saving	
<i>User Tip: To list a fulminant patient (3F / 4F), skip this section and proceed directly to Donor Acceptability Criteria</i>	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Enter details regarding recipient, donor organ or other requirements that should appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: If the patient's medical acuity is higher than their SMC score, please complete appropriate paperwork and submit to TGLN to have the case reviewed by the Special Case Committee. Send forms via email here: oh-tgln_specialcasecommittee@ontariohealth.ca

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click 'Reports' from the top page menu bar and generate a "Waitlist List Report – Liver and Liver Clusters" to verify information)

User Tip: NaMELD data is required to be updated every 90 days and HCC data is required to be updated every 120 days in OATS to prevent the patient from being put on Suspension, and thus excluded from allocations

SPECIAL CONSIDERATIONS FOR PAEDIATRIC RECIPIENTS....

1. For paediatric patients, NaMELD/PELD must be reported to TGLN every 90 days for patient to continue to receive SMC points otherwise paediatric exception points only are awarded.

Lung Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL - Lung	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH LUNG REFERRAL</i> - (this will create the Lung journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - ("Referral Accepted" from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - ("Consultation Completed" from drop down menu)	
Recipient Coordinator	
Consultation Date	
<i>SAVE CONSULTATION DECISION</i>	
LUNG SPECIFIC DETAILS	

Secondary Specification – (Select from dropdown)	
SAVE LUNG SPECIFIC DETAILS	
MEDICAL ASSESSMENT	
Assessment Date	
Recipient Coordinator	
Assessment Decision - “Recipient to be Listed” from drop down menu	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Enter details regarding recipient, donor organ or other requirements that should appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click ‘Reports’ from the top page menu bar and generate a “Waitlist List Report – Lung and Heart/Lung” to verify information)

Pancreas (Whole) Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL – Pancreas (Whole)	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH PANCREAS (WHOLE) REFERRAL</i> - (this will create the Pancreas (Whole) journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - (“Referral Accepted” from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - (“Consultation Completed” from drop down menu)	
Recipient Coordinator	
Consultation Date	

SAVE CONSULTATION DECISION	
MEDICAL ASSESSMENT	
Assessment Date	
Recipient Coordinator	
Assessment Decision - "Recipient to be Listed" from drop down menu	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Details regarding recipient, donor organ or other requirements that will appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click 'Reports' from the top page menu bar and generate a "Waitlist List Report" to verify information)

User Tip: If the HLA lab has not entered a serum for the patient, the waitlisted Pancreas (Whole) journey will be placed on hold until one is entered. Patients are required to submit an HLA serum sample every 180 days to prevent the journey from being placed on a Serum Hold

Small Bowel Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory) For urgent listings, refer to this Help Page: Urgent Listings	Completed
REFERRAL – Small Bowel	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH SMALL BOWEL REFERRAL</i> - (this will create the Small Bowel journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - (“Referral Accepted” from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - (“Consultation Completed” from drop down menu)	
Recipient Coordinator	
Consultation Date	

SAVE CONSULTATION DECISION	
MEDICAL ASSESSMENT	
Assessment Date	
Recipient Coordinator	
Assessment Decision – (“Recipient to be Listed” from drop down menu)	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Details regarding recipient, donor organ or other requirements that will appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click ‘Reports’ from the top page menu bar and generate a “Waitlist List Report” to verify information)

Islets Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory)	Completed
REFERRAL – Pancreas (Islets)	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH PANCREAS (ISLETS) REFERRAL</i> - (this will create the Pancreas (Islets) journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - (“Referral Accepted” from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - (“Consultation Completed” from drop down menu)	
Recipient Coordinator	
Consultation Date	
<i>SAVE CONSULTATION DECISION</i>	
MEDICAL ASSESSMENT	

Assessment Date	
Recipient Coordinator	
Assessment Decision – (“Recipient to be Listed” from drop down menu)	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Details regarding recipient, donor organ or other requirements that will appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click ‘Reports’ from the top page menu bar and generate a “Waitlist List Report” to verify information)

User Tip: If the HLA lab has not entered a serum for the patient, the waitlisted Pancreas (Islets) journey will be placed on hold until one is entered. Patients are required to submit an HLA serum sample every 180 days to prevent the journey from being placed on a Serum Hold

VCA Checklist - Listing a Patient for Transplant

Data fields (*fields with red asterisks are mandatory)	Completed
REFERRAL – VCA	
Transplant Program	
Recipient Coordinator	
<i>PROCEED WITH VCA REFERRAL</i> - (this will create the VCA journey)	
REFERRAL	
Referral Received Date	
Primary Diagnosis	
Referring Organization Name	
Referring Organization Type	
Referring Health Care Professional Type	
First Name	
Last Name	
Office Street Address	
City	
Postal Code	
Country	
Province	
<i>SAVE REFERRAL DETAILS</i>	
VCA SPECIFIC DETAILS	
Add data in appropriate fields, where applicable	
<i>SAVE VCA SPECIFIC DETAILS</i>	
REFERRAL	
Referral Decision Date	
Recipient Coordinator	
Referral Decision - ("Referral Accepted" from drop down menu)	
<i>SAVE REFERRAL DECISION</i>	
CONSULTATION	
Consultation Decision - ("Consultation Completed" from drop down menu)	
Recipient Coordinator	

Consultation Date	
SAVE CONSULTATION DECISION	
MEDICAL ASSESSMENT	
Assessment Date	
Recipient Coordinator	
Assessment Decision - "Recipient to be Listed" from drop down menu	
SAVE MEDICAL ASSESSMENT DECISION	
DONOR ACCEPTABILITY CRITERIA	
Add data in appropriate fields, where applicable	
Donor Acceptance Comments - (Details regarding recipient, donor organ or other requirements that will appear on allocation reports)	
SAVE DONOR ACCEPTABILITY CRITERIA	
WAITLIST	
Medical Status - (from drop down)	
ADD TO WAITLIST	
Modify and save changes as needed	

User Tip: Once you have added the patient to the waitlist, you can run a wait list report to verify that they are appearing correctly - (Click 'Reports' from the top page menu bar and generate a "Waitlist List Report" to verify information)

User Tip: If the HLA lab has not entered a serum for the patient, the waitlisted VCA journey will be placed on hold until one is entered. Patients are required to submit an HLA serum sample every 150 days to prevent the journey from being placed on a Serum Hold