

## KCC Patient Orientation Checklist for Staff

### Purpose:

To ensure all Kidney Care Clinic (KCC) patients receive the correct education materials and resources at the right time in their early kidney care journey (first few months).

### Overview of Checklist:

- The checklist outlines the key steps and timing for providing orientation and early education to new KCC patients. It is designed to help staff ensure that each patient receives consistent, timely and complete information to support understanding of their kidney condition, promote self-management and build confidence in their care team.
- The checklist is organized into five stages reflecting the patients early journey through KCC. Each step includes: purpose, timing and patient resources/information to provide.
- Staff can use the checklist to track completion of each step and ensure consistent delivery of materials.

#	Step	Purpose	Timing	Patient Resources/Information to Provide
<b>1</b>	<b>Welcome &amp; Orientation (Before or At 1<sup>st</sup> Visit)</b>			
1a	Before first visit	Introduce the clinic, explain the role of the kidney care team.	Mailed before first appointment	Welcome Package: <ul style="list-style-type: none"> <li><input type="checkbox"/> Welcome letter</li> <li><input type="checkbox"/> About BC Kidney Care Clinics brochure</li> <li><input type="checkbox"/> “Kidney Care and You” questionnaire – patient completes and brings to first visit</li> </ul>
1b	Initial Visit	Reinforce key information about the kidney care clinic, review the questionnaire and help the patient prepare for upcoming visits.	At first visit	<ul style="list-style-type: none"> <li><input type="checkbox"/> Patient guide: Your first few months with the kidney care clinic</li> </ul> Link sheet or printed QR codes for: <ul style="list-style-type: none"> <li><input type="checkbox"/> Chronic Kidney Disease overview</li> </ul> Optional additional resource: <ul style="list-style-type: none"> <li><input type="checkbox"/> Kidney Foundation of Canada Book #1 (Living with Reduced Kidney Function) – Chapters 1 &amp; 2</li> </ul>
<b>2</b>	<b>Education &amp; Lifestyle (Months 1-2)</b>			
2a	Eating Well	Support patients in understanding how diet affects kidney health and how to personalize their nutrition plan.	Usually early in care Dietitian visit	Provide at or before dietitian visit: <ul style="list-style-type: none"> <li><input type="checkbox"/> Healthy Eating for Your Kidneys (BC Renal)</li> <li><input type="checkbox"/> How to Read Nutrition Labels</li> </ul> Later (follow-up visit): <ul style="list-style-type: none"> <li><input type="checkbox"/> Protein &amp; Your Kidney Health</li> <li><input type="checkbox"/> Mediterranean Diet &amp; Kidney Disease</li> <li><input type="checkbox"/> Kidney Wellness Hub link for cooking classes</li> </ul> Optional additional resource: <ul style="list-style-type: none"> <li><input type="checkbox"/> Kidney Foundation Book #1 – Chapter 5</li> </ul>
2b	Staying Active	Promote physical activity for strength, mood and cardiovascular health.	During first 1-2 months usually 2 <sup>nd</sup> or 3 <sup>rd</sup> visit; after initial adjustment	Provide when discussing exercise goals: <ul style="list-style-type: none"> <li><input type="checkbox"/> Staying Active (Wellness Hub)</li> <li><input type="checkbox"/> Being Active (HealthLink BC 8-1-1)</li> <li><input type="checkbox"/> Exercised to Do at Home (BC Renal)</li> <li><input type="checkbox"/> KidneyFit Video Series (Manitoba Renal Program)</li> </ul>

#	Step	Purpose	Timing	Patient Resources/Information to Provide
2c	Taking Medications	Ensure patient understands medication purpose, changes and safety with kidney disease.	1 <sup>st</sup> or 2 <sup>nd</sup> visit Nurse or pharmacist review	<input type="checkbox"/> Medication Changes When You Are Sick <input type="checkbox"/> Non-Prescription Medications and Your Kidneys <input type="checkbox"/> QuitNow BC (smoking/vaping) <input type="checkbox"/> Vaccinations (BCCDC link) Optional additional resource: <input type="checkbox"/> Kidney Foundation Book #1 – Chapter #4
2d	Building a Support System	Address emotional well-being, coping and social supports for living with a chronic condition.	Within first 2-3 months Social working or interdisciplinary follow-up	Provide during or after social worker visit: <input type="checkbox"/> About BC Kidney Care Clinics <input type="checkbox"/> Kidney Wellness Hub poster and sign-up link <input type="checkbox"/> Encourage participation in Kidney Wellness Hub classes or peer groups
<b>3 Supporting Self-Management (Months 2-4)</b>				
3a	Taking an Active Role in Care	Promote self-management, goal-setting and active participation.	Once the patient understands the basic disease concepts	Provide at self-management or nurse follow-up: <input type="checkbox"/> BC Renal Self-Management Tools & Resources <input type="checkbox"/> Kidney Wellness Companion Journal (link or printed sample) Optional additional resource: <input type="checkbox"/> Kidney Foundation Book #1 – Chapter 6
3b	Monitoring Kidney Function	Encourage patients to track kidney health indicators such as blood pressure and lab results.	Mid-program or when patient is stable with routine follow-up	Provide when discussing home monitoring: <input type="checkbox"/> Getting a BP device <input type="checkbox"/> Measuring Your BP at Home <input type="checkbox"/> Home BP Monitoring Log <input type="checkbox"/> Get to Know Your Lab Work info sheet <input type="checkbox"/> Diabetes Canada – Just the Basics (if applicable) <input type="checkbox"/> Kidney Wellness Hub Companion Journal (optional tracking) Optional additional resource: <input type="checkbox"/> Kidney Foundation of Canada Book #1 – Chapter 6 <input type="checkbox"/> My personal log
<b>4 Managing Symptoms (as needed)</b>				
4a	Managing Symptoms	Help patients recognize and manage symptoms (physical or emotional) associated with kidney disease.	Mid-journey after patient understands basics and begins reporting symptoms	<input type="checkbox"/> Common Symptom Guides (BC Renal) <input type="checkbox"/> My Kidneys My Health – Symptoms <input type="checkbox"/> Mental Wellbeing (Kidney Wellness Hub) <input type="checkbox"/> Mental Health Resources (BC Renal)
<b>5 Long-Term Planning (as needed)</b>				
5a	Long-Term Planning	Support transition into ongoing kidney care, prepare for potential future changes and reinforce self-management habits.	After first 3-4 months or when care plan stabilizes.	<input type="checkbox"/> Education materials on treatment options (as appropriate) <input type="checkbox"/> Follow-up schedule and clinic contact summary Optional additional resource: <input type="checkbox"/> Kidney Foundation Book #1 – Chapter 7 (If Your Kidneys Fail)