Step 1: Identify a patient who is likely to require Renal Replacement Therapy (RRT)/conservative care in the near future - eGFR < 25 mL/min/1.73m² &/or is at risk of rapidly progressing.

➡️ On the Modality Selection page, enter:
   i. Modality Selection Start Date: Date the team identifies that transplant education is needed or, if not a potential candidate for transplant, date that modality education is identified as needed
   ii. Reason for Modality Selection (e.g., eGFR < 25, eGFR > 25 and progressive decline, eGFR > 25 and symptomatic)

Step 2: Identify suitable RRT/conservative care options to present to the patient:
   • If patient is a potential candidate for transplant, transplant education is provided prior to modality education.
   • Goal is provide transplant education when eGFR = 25 mL/min/1.73m² and declining and modality education when eGFR = 20 mL/min/1.73m² and declining.

   a. Identify potential candidates for Transplant (preferred choice) and Independent Therapies (2nd choice)

   ➡️ On the Modality Selection page, enter:
      i. Potential Candidate for Transplant: Yes or no
         • If no, enter Reason for Transplant Unsuitability
      ii. Candidate for Independent Therapies (PD, PD Assisted, HD Home): Yes or no
         • If no, enter Reason for Independent Therapy Unsuitability
      iii. Assessment date: Date that the items above were determined (i.e., candidate or not)
b. Identify all treatments suitable to present to the patient (PD Independent, PD Assisted, HD Home, HD Community/HD in-centre, Conservative Care)

Note: Patients who are potential candidates for Transplant are also expected to select a dialysis option as "back-up."

➤ On the Modality Selection page, enter the following for each treatment option:
   i. Suitable (more correctly stated, suitable to pursue): Yes or no
   ii. Assessment Date: Date that the item above was determined (i.e., suitable or not)
   iii. If not suitable, enter Medical Reason Not Suitable

<table>
<thead>
<tr>
<th>TREATMENT OPTIONS</th>
<th>SUITABLE</th>
<th>ASSESSMENT DATE</th>
<th>MEDICAL REASON NOT SUITABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD Independent</td>
<td>Yes</td>
<td>18-Jun-2018</td>
<td>Limited mobility or manual dexterity</td>
</tr>
<tr>
<td>PD Assisted</td>
<td>Yes</td>
<td>18-Jun-2018</td>
<td></td>
</tr>
<tr>
<td>HD Home</td>
<td>Yes</td>
<td>18-Jun-2018</td>
<td>Limited physical abilities</td>
</tr>
<tr>
<td>HD Community/HD in-centre</td>
<td>Yes</td>
<td>18-Jun-2018</td>
<td></td>
</tr>
<tr>
<td>Conservative Care</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 3: For patients identified in Step 2a as potential candidates for Transplant, make appointment to provide education about transplant and living donation (goal: eGFR = 25 mL/min/1.73m² and declining). Document patient's decision.

➤ On the Modality Selection page, enter:
   i. Education provided: Enter Transplant Education/Discussion completed, the session type (individual or group) and the date.

   Education
   View ➤ ADD EDUCATION

   * EDUCATION PROVIDED: Transplant Education/Discussion
   * SESSION TYPE: Individual
   * EDUCATION DATE: 29-Aug-2018

   ii. Patient Transplant Decision: Yes or no and the date the decision was made. If patient changes their mind, enter the updated decision on a new line.

   Patient Transplant Decision
   * PATIENT TRANSPLANT DECISION DATE: 29-Aug-2018
   * PATIENT TRANSPLANT DECISION: Undecided
   * NOTES: 

   * PATIENT TRANSPLANT DECISION DATE: 18-Oct-2018
   * PATIENT TRANSPLANT DECISION: Yes
   * NOTES: 

   iii. If interested in Transplant, identify whether a living donor discussion has occurred and identify if a potential living donor has been identified. Update as appropriate.
Step 4: As per the suitability identified in step 3b, provide education on modality/conservative care options (goal: eGFR = 20 mL/min/1.73² and declining). Document decision.

Note: Patients who are potential candidates for Transplant are also expected to select a dialysis option as "back-up."

⇒ On the Modality Selection page, enter:
  i. Education provided: Enter the modalities for which education was provided, the session type (individual or group) and the date.

  ![Education Table]

  ii. Patient Dialysis Decision: Decision (PD, HD, conservative care), date decision was made and reason for patient decision. If patient changes their mind, enter the updated decision on a new line.

  ![Modality Selection Status]

Step 5: When patient transfers to RRT/conservative care, document the start date and whether the patient started on their chosen modality.

⇒ On the Modality Selection page, enter:
  i. Chronic dialysis start date:
     • PD: 1st day of PD training or 1st day of intermittent PD (IPD), whichever is first.
     • HD community/HD in-centre: 1st day of long-term HD.
     • Home HD: 1st day of HHD training or when patient starts "test runs" in-centre, whichever is first.
  ii. Started Modality Choice: Yes or no (e.g., if patient selected PD Independent and started on PD Independent, enter "yes"; if patient selected HD Community/HD in-centre and started on in-centre HD, select "yes"; if patient selected PD Independent and started on HD Home, select "no").
iii. If no, enter Reason(s) for Not Starting Modality Choice

Refer to the PROMIS 4 Support Manual for details.