



CENTRALIZED CLINICAL NAVIGATION AND REFERRAL MANAGEMENT TO TRANSFORM BEHAVIOURAL SUPPORTS THROUGH STANDARDIZED DATA AND INDICATOR CAPTURE

Sophia Kim, MSW RSW, Clinician Leader, Laura Harrison, MSc OT Reg. (Ont.), Clinician Leader, Lauren Masci, Research Coordinator, Leslie Shafran, BSW, MSW, RSW, MHSc, CHE, Manager

Introduction

- Since 2020, Baycrest's Toronto Region Behavioural Supports Ontario (BSO) Coordinating Office has served as a centralized access point for behavioural support services across the Toronto region. Through centralized intake, clinical triage, and standardized referral pathways, the office supports patients, caregivers, health care providers, and regional partners in navigating behavioural support services.
- To improve access, coordination, and performance monitoring, the Coordinating Office implemented standardized referral processes, centralized referral management, and data-informed reporting tools to support system planning and quality improvement.

Coordinating Office Functions

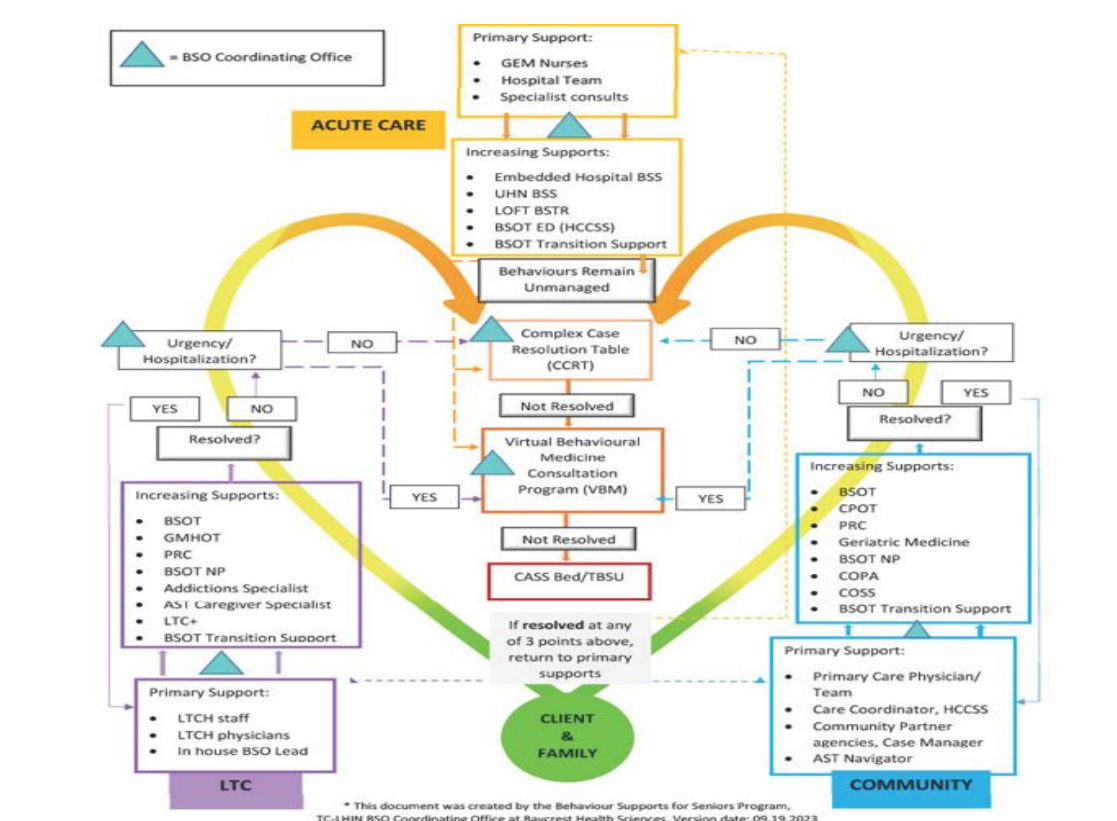
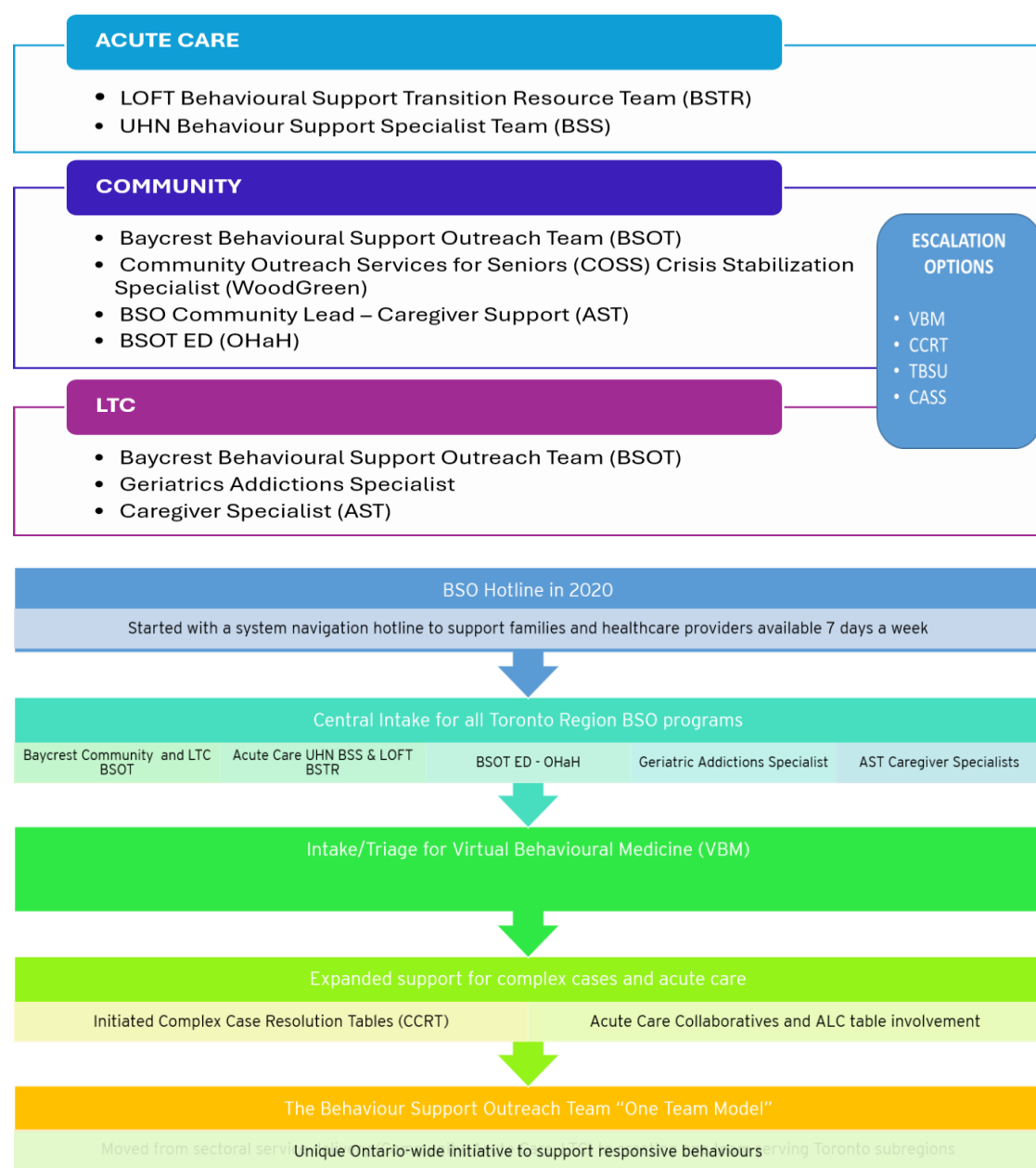
Centralized intake: Coordinates referrals across 11 programs, including a common referral form for 9 programs.

Clinical triage: Reviews referral information, including referral documentation, ConnON information, and direct communication with referral sources.

Urgency identification: Flags urgent concerns to support timely response and prioritization.

Program matching: Identifies complementary programs and recommends appropriate service pathways.

Clinical information sharing: Provides clinical teams with an information package and concise clinical snapshot to support coordinated care.

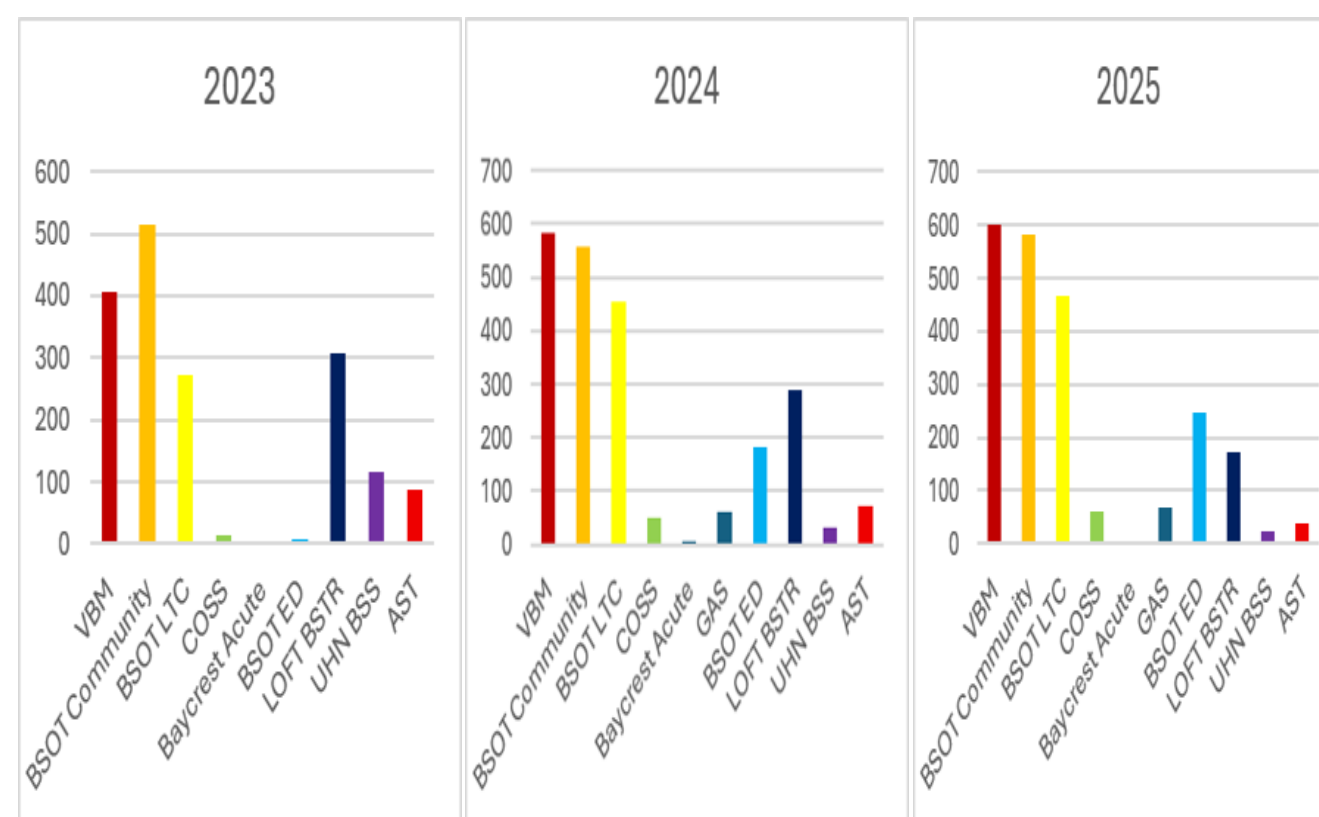


Methods

- Standardized referral pathways and intake processes to promote equitable access and consistent referral management.
- Centralized referral intake, triage, program matching, and care coordination.
- Established reporting and data infrastructure using SharePoint, EMR, and Power BI to track referral patterns, monitor performance indicators, and support operational decision-making.
- Conducted ongoing monitoring and analysis of referral activity, service utilization, and system performance to identify trends, inform quality improvement initiatives, and support resource planning.

Referral Analytics and Reporting: Leveraging EMR, Power BI, and SharePoint

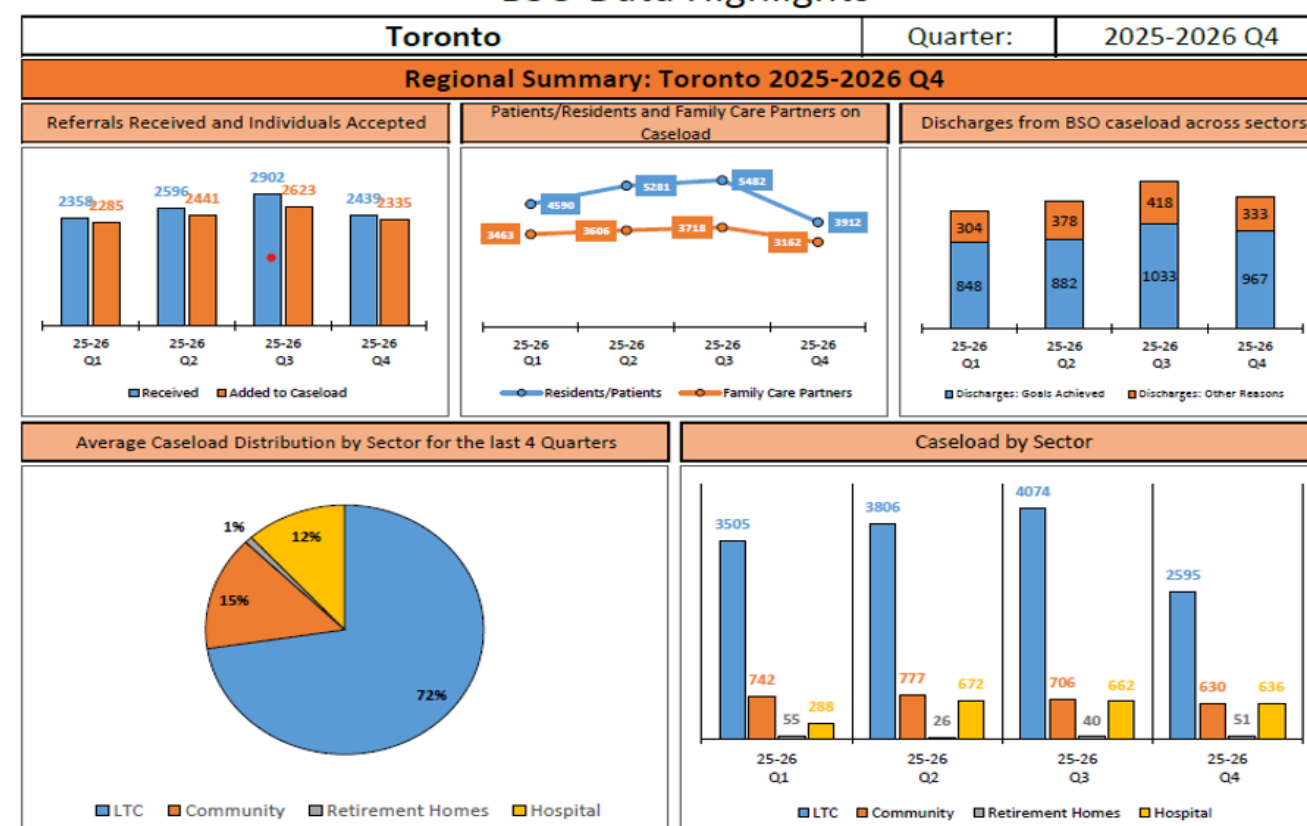
Referral tracking expanded over time, with more programs captured and increasing referral volumes for most of programs from 2023 to 2025, reflecting broader program participation and improved visibility into referral pathways and service demand.



Leading the Toronto Region's Participation in the BSO Provincial Data Portal Pilot

- Participated in the BSO Provincial Data Portal Pilot Initiative, supporting the implementation of a standardized, web-based platform for collecting, tracking, and reporting BSO program metrics across the Toronto Region.
- The portal enables monitoring of key service indicators, including referrals received, individuals accepted, average caseload distribution, and caseload volumes by sector, providing greater visibility into service demand and program activity while strengthening data quality, accountability, performance monitoring, planning, and system-level decision-making.

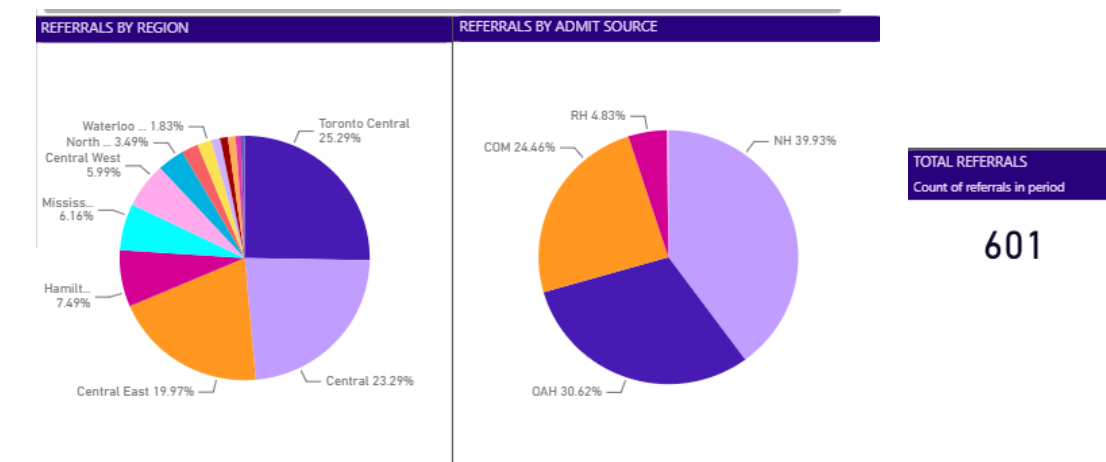
BSO Data Highlights



Behavioural Supports Ontario
Soutien en cas de troubles du comportement en Ontario

Power BI Utilization

- The Power BI dashboard for VBM/CASS referrals transforms referral data into meaningful, actionable insights by providing a comprehensive view of VBM/ CASS referral activity.
- Enables monitoring of referral volumes, acceptance and decline rates, provider and sector engagement, and regional utilization patterns.
- By tracking these key indicators, we can monitor progress toward annual targets, optimize referral flow between VBM sites, identify underserved regions, and guide outreach and quality improvement initiatives.
- Data captured below from January 2025-December 2025.



Results

- The Coordinating Office expanded from approximately 500 annual referrals for one specialized program in 2020 to centralized triage across 11 specialized programs of over 2,000 referrals annually by 2026.
- Implemented SharePoint, EMR, and Power BI reporting tools to support referral tracking, performance monitoring, and data collection.
- Previously, referral tracking was limited to capturing the total number of referrals for a single program. Following the expansion, we developed a range of reporting tools to strengthen referral management and performance monitoring.
- These tools track key metrics such as total referrals received, referrals accepted, processing times, wait times, and initial contact dates. The enhanced reporting capabilities provide valuable insights into referral trends, including referral sources by sector and specific hospital sites. This data enables us to identify opportunities for capacity building, strengthen partnerships, and support continued growth in referral volumes.

Key Outcomes

- BSO Coordinating Office expanded from 1 program to 11 specialized programs between 2020-2026
- Increased from ~500 referrals/year to 2,000+ referrals annually.
- Centralized intake and triage across 11 programs
- Implemented SharePoint, EMR, and Power BI reporting tools to support referral management and performance monitoring.

Conclusion

- The centralized referral management model strengthened coordination of behavioural support services across sectors while enhancing the collection and monitoring of referral, program data and performance metrics.
- Intake processes and multiple reporting tools improved visibility into referral trends, service utilization, and quality improvement opportunities, supporting increased referral volumes, more efficient care navigation, and stronger regional system integration.

BSO COORDINATING OFFICE

Phone: 416-785-2500 x2005

Fax: 647-788-4883

E-mail: behaviouralsupport@baycrest.org

Website: <https://toronto.behaviouralsupportsontario.ca/>