

Resource Matching & Referral Release 9.26



General Information:

! End of life for browsers— The recent upgrade to the RM&R Application may not function optimally with the browsers listed below.

- Microsoft Internet Explorer 10 and older
- Mozilla Firefox 50 and older
- Google Chrome 49 and older

It is recommended that sites update their browsers in order to optimize the functionality of RM&R. Please contact your local IT Support to assist with this if necessary.

New Feature—Referral Comments display in descending order

Before	After												
Referral Comments	Referral Comments												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment comment) <i>October 10, 2018 14:12</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 1</td> </tr> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment comment) <i>October 10, 2018 14:17</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 2</td> </tr> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment comment) <i>October 10, 2018 14:21</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 3</td> </tr> </table>	McNeil, Tom (Assessment comment) <i>October 10, 2018 14:12</i>	Test referral comment 1	McNeil, Tom (Assessment comment) <i>October 10, 2018 14:17</i>	Test referral comment 2	McNeil, Tom (Assessment comment) <i>October 10, 2018 14:21</i>	Test referral comment 3	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment) <i>October 10, 2018 14:31</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 3</td> </tr> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment) <i>October 10, 2018 14:26</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 2</td> </tr> <tr> <td style="padding: 2px;">McNeil, Tom (Assessment) <i>October 10, 2018 14:22</i></td> </tr> <tr> <td style="padding: 2px;">Test referral comment 1</td> </tr> </table>	McNeil, Tom (Assessment) <i>October 10, 2018 14:31</i>	Test referral comment 3	McNeil, Tom (Assessment) <i>October 10, 2018 14:26</i>	Test referral comment 2	McNeil, Tom (Assessment) <i>October 10, 2018 14:22</i>	Test referral comment 1
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Test referral comment 1													

New Feature—The Select Care Type screen has been updated

The Select Care Type screen now allows for a description to be added, as well as the option to update Client Demographic information only.

Care type	Description	
CLHIN - Request for Home and Community Care Services		Start New Referral
Community Services		Start New Referral
Convalescent Care		Start New Referral
LHIN - Home and Community Care	This care type was formerly known as "CCAC Referral".	Start New Referral
LTCH Application		Start New Referral
Outpatient Rehab - TJR		Start New Referral
Palliative Care		Start New Referral
Rehab/CCC		Start New Referral
Retired-Rehab/CCC Application	Long Term Care	Start New Referral
Sandbox	Sandbox caretype for testing purposes.	Start New Referral

All Care Types

Care type	
Client Profile (Non-Care Type Specific)	Edit Client

New Feature – Drag and drop is now supported for multiple file uploads.

Upload files ✕

File selection

+ Select Files - OR -

Drag and drop file here to upload.

Referrals

	Destination Service Provider
<input type="checkbox"/>	Test-LTC1 Testing Home
<input type="checkbox"/>	Test-LTC2 Testing Home
<input type="checkbox"/>	Test-LTC3 Testing Home

Users can also select the *Destination Service Provider* to share the files with from this screen.

New Feature—Add Category and Description in File Upload screen

The File Upload pop-up allows the user to enter file related information directly within the upload screen.

Upload files ✕

Uploaded files

File name	Category	Description	
Medical Orders.docx	Assessment	Medical Orders	Delete

New Feature – Service Providers can access an updated referral directly from the Assessment module

A button has been added to *View Referral* in the *Send and Manage Referrals* tab. This button allows a user with access to both Assessment and Service Provider to jump directly to the referral in Service Provider.

Active Referrals Referral History Report

Service Provider	Status	Referral Date	Referral Information	Referral Management
Test-Toronto Seniors Helpline - PRINT & FAX	Admitted Updates sent	August 16, 2018 11:23	🔗 (0 of 0) Details ▼ Print	View Referral
Test-Toronto Seniors Helpline Testing Agency	Pending	August 16, 2018 11:23	🔗 (0 of 0) Details ▼ Print	✕ View Referral

Enhancement—The default setting for Uploaded files is set to descending order

The Uploaded column will now include the date and time that the file was uploaded.

Uploaded Files

By using the file upload functionality, the user is responsible for ensuring that they comply with RM&R policies and procedures

Uploaded Files					
Name	Category	Uploaded	Description	Uploaded By	Actions
RAI Assessment.docx	Assessment	August 20, 2018 11:10	RAI Assessment	McNeil, Tom	
Consent.docx		August 20, 2018 11:10	Supporting Documentation	McNeil, Tom	
LTCH Choice Sheet.docx	Supplementary	August 17, 2018 11:41		McNeil, Tom	

Upload Files

Enhancement—Deleted Files show in a separate table.

Uploaded Files

By using the file upload functionality, the user is responsible for ensuring that they comply with RM&R policies and procedures

Uploaded Files					
Name	Category	Uploaded	Description	Uploaded By	Actions
Release 9.26 Sender.docx		August 16, 2018 11:47		McNeil, Tom	

Deleted Files Upload Files

Deleted Files					
Name	Category	Uploaded	Description	Uploaded By	Deleted on
Sticky Notes.docx		August 16, 2018 11:36		McNeil, Tom	August 16, 2018 11:48

Enhancement—Additional Criteria added to Client Search

Along with new search criteria (condition), users are now able to use multi-select when searching for a patient.

***Note:** Searching by *Gender* will not provide any results as this is currently not a mandatory field.

Search clients by Status

Status: no status selected

Condition

Current location:

- Admitted
- Bed Offer Accepted
- Bed Offered
- Complete Sent
- Deactivated
- Interimly Placed
- On Hold
- Pending - Match Found
- Start New Referral

Search clients by Condition

Condition

Current location:

- no condition selected -

- Deceased
- Non-Deceased

Search clients by Current Location.— Allows for multi select

Current location:

Acute

Acute - Rehab - XC01

Acute - Rehab - XC02

Acute - Rehab - XC03

Acute - Rehab - XM02

Acute - Rehab - XN01

Acute - Rehab - XN02

Acute - Rehab - XR01

Acute - Rehab - XR02

Acute - Rehab - XR03

Acute - Rehab - XR04

Acute - Rehab - XR05

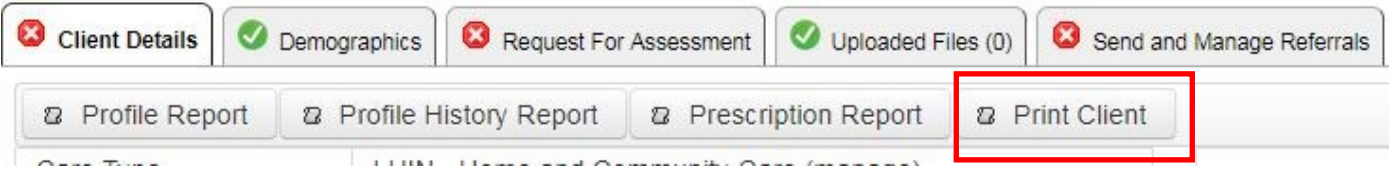
Acute - Rehab - XM01

Acute - Rehab - XM03

Acute - Rehab - X56

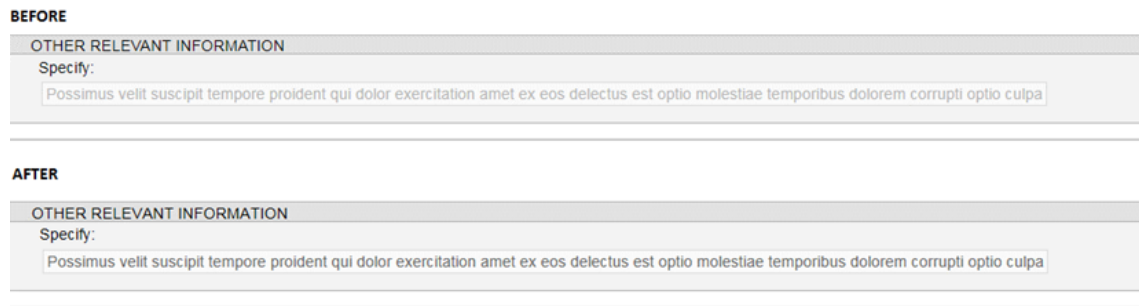
Enhancement – *Print Client* button has been added to *Client Details* tab

The Print Client button will allow the user to print the Client Details tab.



Enhancement – Text boxes are more defined when in View mode

Entered text appears in a darker font to make it easier for users to read.



Enhancement—Additional information in Client Search tab

When selecting a client in Client Search, the Health Card Number, CHRIS ID and MRN now appear below the client name.



Enhancement—Current Location now includes the address and phone number in the display.



Enhancement—Improved usability for *Assign User* option

Within a referral, if a client is currently assigned to a user, the Assign button will change to *Reassign* to be more intuitive to users.



If the referral is assigned to the currently logged in user, Assign to me button will not appear and the *Dissociate* button will be present.



While attempting to search for a user to reassign a referral to, the widget will display *Select user* instead of Assigned User.

Enhancement – Dropdown labels have been renamed to reflect improved logic to the filter for Updates

The items that are Review Required are notifications that a user MUST clear before they can admit a patient. Anything that is Review Not Required will not prevent the user from admitting the patient if it is not looked at/acted on.

BEFORE	AFTER
Reviewed = There are updates; all updates have been reviewed	Review Not Required = There are updates; all updates from the sender have been reviewed
Unreviewed = There are updates that have not been reviewed	Review Required = There are updates from the sender that have not been reviewed

The table below indicates which update actions require review and which actions do not.

Review Not Required	Review Required
Status Changed (Accepted, RFI, Denied)	Clinical Profile Updated
Request for Information Sent	Client Choice Updated
Comment (from Receiver)	Comment (from Sender)
Attachment Added/Removed (from Receiver)	Attachments Added/Removed
Task Updated	RFI Completed

Enhancement – New format to Updates tab in Service Provider queue

Updates that require a review before admitting a client will be flagged with 🚩 Requires Review

Updates
Details
Matching Profile
Clinical Profile
Comments (1)
Client Choice
Attachments (0)

Tasks (0)

☰ Client Choice Updated
🚩 Requires Review

Aboaset, Matt July 3, 2018 11:31

✖ Information Request Cancelled

Aboaset, Matt June 28, 2018 16:07

💬 Receiver Comment Added

Aboaset, Matt June 28, 2018 16:06

Testing RFI comment

Clicking on the [hyperlink](#) will take the user directly to the associated update. Once reviewed, the update will not disappear from the list, but the *flag will be removed*.

Updates
Details
Matching Profile
Clinical Profile
Comments (1)
Client Choice
Attachments (0)

Tasks (0)

☰ Client Choice Updated

Aboaset, Matt July 3, 2018 11:31

✖ Information Request Cancelled

Aboaset, Matt June 28, 2018 16:07

💬 Receiver Comment Added

Aboaset, Matt June 28, 2018 16:06

Testing RFI comment

Enhancement—More descriptive terms for Referral Status

Changes were made to the Referral Status for TC LHIN—Home and Community Care to provide more relevant description of the state of a referral.

BEFORE

Status: 4 selected ▾ Updates: All ▾

- Accepted (ACC)
- Admitted (ADM)
- Cancelled (CAN)
- Denied (DEN)
- Pending (PEN)
- Request For Information (RFI)

AFTER

Status: 4 selected ▾ Updates: All ▾

- Received by LHIN (ACC)
- Placed in LHIN Service Plan (ADM)
- Cancelled (CAN)
- Denied (DEN)
- Sent to LHIN (PEN)
- Request For Information (RFI)

Enhancement—More descriptive options for sorting referrals

Small changes to the terminology used for sorting referrals in the Provider Dashboard.

The image shows two side-by-side screenshots of a sorting dropdown menu. The left screenshot shows the current state with 'Priority (highest to lowest)' selected and checked. The right screenshot shows the updated state with 'Criteria (highest to lowest)' selected. An orange arrow points from the left to the right, indicating the change.

Current State	Updated State
Date sent (earlier to later)	Date sent (earlier to later)
Date sent (later to earlier)	Date sent (later to earlier)
Client name (A-Z)	Client name (A-Z)
Client name (Z-A)	Client name (Z-A)
Priority (lowest to highest)	Criteria (lowest to highest)
<input checked="" type="checkbox"/> Priority (highest to lowest)	<input checked="" type="checkbox"/> Criteria (highest to lowest)
Source location (A-Z)	Source location (A-Z)
Source location (Z-A)	Source location (Z-A)
Latest update (earlier to later)	Latest update (earlier to later)
Latest update (later to earlier)	Latest update (later to earlier)

Graphic User Interface Improvement—Completed fields are now more visible in View Only mode.

Before

Is Patient a Veteran?		
<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Cognitive Function		
<input checked="" type="radio"/> Unimpaired	<input type="radio"/> Mild Impairment	<input type="radio"/> Moderate Impairment
<input type="radio"/> Severe Impairment		

After

Is Patient a Veteran?		
<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Cognitive Function		
<input checked="" type="radio"/> Unimpaired	<input type="radio"/> Mild Impairment	<input type="radio"/> Moderate Impairment
<input type="radio"/> Severe Impairment		

Graphic User Interface Improvement—Search and view Admission Notices.

Before—Users had to click on *Select* to bring up the Service Providers to search.

Admission Notice Search	
Client Surname:	<input type="text"/>
Client Given Name(s):	<input type="text"/>
Service Provider:	Select
Date Range:	<input type="text"/> to <input type="text"/>
<input type="button" value="Search Admission Notices"/>	

After—Users are now able to search service providers on the same screen, and add them to the Selected Service Providers box. It is also possible to search for an Admission Notice by patient’s Health Card Number.

Search And View Admission Notices	
Surname:	<input type="text"/>
Given Name(s):	<input type="text"/>
Health Card Number:	<input type="text"/>
Service Provider(s):	<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input type="text" value="Searchable Service Providers (Total 1,573)"/> <ul style="list-style-type: none"> ABI Network - Bridgepoint ABI Network - Bridgepoint_5052 ABI Network - TRI ABI Network - West Park Alzheimer Society of T.O. - Active Living </div> <div style="width: 35%; text-align: center;"> <input type="text" value="Selected Service Providers"/> </div> </div>
From:	<input type="text"/> <input type="button" value="🗓"/>
To:	<input type="text"/> <input type="button" value="🗓"/>
<input type="button" value="🔍 Search"/>	

Graphic User Interface Improvement—Search and view Discharge Notices.

Before—Users had to click on *Select* to bring up the Service Providers to search.

Discharge Notice Search	
Client Surname:	<input type="text"/>
Client Given Name(s):	<input type="text"/>
Health Card Number :	<input type="text"/>
Service Provider:	Select
Date Range:	<input type="text"/> to <input type="text"/>
<input type="button" value="Search Discharge Notices"/>	

After—Users are now able to search service providers on the same screen, and add them to the Selected Service Providers box. It is also possible to search for an Admission Notice by patient’s Health Card Number.

Search And View Discharge Notices	
Surname:	<input type="text"/>
Given Name(s):	<input type="text"/>
Health Card Number:	<input type="text"/>
Service Provider(s):	<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <input type="text" value="Test"/> <ul style="list-style-type: none"> Searchable Service Providers (Total 1,573) Test-LHIN2 Office Test - Placement office - Short Stay Respite Care Test - Rehab_PRS Test-Rehab 2 Testing Program Test-Rehab2 Testing Program-Retired </div> <div style="width: 35%; text-align: center;"> <input type="text" value="Selected Service Providers"/> <ul style="list-style-type: none"> Test-LTC1 Testing Home Test-LTC2 Testing Home Test-LTC3 Testing Home </div> </div>
From:	<input type="text"/> <input type="button" value="🗓"/>
To:	<input type="text"/> <input type="button" value="🗓"/>
<input type="button" value="🔍 Search"/>	

Known Issue —Print sections not selected by default

When using the Print Clinical Profile Comparison in the Service Provider module, users will either have to use the Invert Selection button to include all sections, or select the individual items they want to compare. The default setting is to have all options deselected. This will be corrected in a future release of RM&R.

Service Provider > **Profile comparison report**

Output settings

Insert a page break after every section

Print sections

Invert selection

Demographics

Supplementary Information

Referral Information

Health Assessment Information

Print updates only

 Save



 View in browser

 Print