

Patient Not Matching to a Service Provider



Overview

Service Providers listed for referrals in RM&R are based on whether a patient matches a set of Service Provider criteria. This guide will assist users to navigate and use the **matching criteria information tool**, to quickly check the reasons why a patient does not match a particulate service provider.

Instructions

Upon editing or updating a referral, the RM&R application will identify you as the last modifier. Your name, clinical designation, along with the date and time will be stamped on the referral.

Step 1
Access *denied* patient referral
 For more details on how to access existing patient profile, please review the **Edit or Update guide**.

Welcome to Resource Matching & Referral (RM&R).

Assessment: Send, Assess and Manage Referrals.

Service Provider: Receive client referrals and manage vacancies.

Reports: View and analyze each step of the placement process.

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Step 2
Click on *Send and Manage Referrals* tab

Acting as: TEST - Referral Sender

All tabs are complete.

Client Details, Demographics, Supplementary Information, Referral Information, Social Information, Care Requirements, Acute Care Medical Assessment, Functional Assessment, Archive, Uploaded, Send and Manage Referrals

Step 3
Click on *Send Referral(s)* link located on the bottom right corner of the page

Service Provider	Status	Referral Date	Referral Information	Referral Management
Providence Healthcare - Geriatric and Medical (Rehab-LI)	Pending [Rehab/CCC Override: Family Request] Updates sent	October 15, 2020 15:27	(0 of 0) Details Print	✖
Runnymede Healthcare Centre - General (Rehab-LI)	Pending [Rehab/CCC Override: Family Request] Updates sent	October 15, 2020 15:27	(0 of 0) Details Print	✖
UHN - Toronto Rehab - General (Rehab-LI)	Pending [Rehab/CCC Override: Family Request] Updates sent	October 15, 2020 15:27	(0 of 0) Details Print	✖
Test-Rehab New caretpe 1	Pending	October 24, 2020 06:45	(0 of 0) Details Print	✖
Test-Rehab New caretpe	Denied [Rehab/CCC Behavioural care needs cannot be met (specify:)] Updates sent	October 24, 2020 06:45	(0 of 0) Details Print	✖ Send Referral Again

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Step 4

Select *Service Provider* Option

- Uncheck *Filter By Matching*
- More Service Provider Options will appear
- Navigate to the category of interest
- Click on the arrow to expand and view list of Service Providers

Step 5

View *Matching Criteria*

- Click on Information Tool icon
- In the pop-up window that appears:
 - Scroll down to Matching Criteria category table
 - Service Provider Category and Criteria are listed
 - Patient information is listed under the Client field
 - Category item(s) that does not match to that Service Provider will be indicated in red 'Client Does Not Match'

Category	Criteria	Client
One of:		
Wandering Risk	Exit Seeker No Wander Guard	Wander Guard
One of:		