

Resource Matching and Referral (RM&R) – Tip Sheet

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BACKGROUND

Resource Matching and Referral (RM&R) is a web based electronic referral system that offers healthcare providers an easy, patient-centric tool to manage referrals by linking patient needs to available services. The application has been in service for well over a decade, and is the most widely used system for patient referrals in Ontario.

RM&R application has been integrated with multiple external systems, including Epic at University Health Network to streamline workflow and reduce the burden of duplicate data entry by healthcare workers. The current integration between Epic and RM&R facilitates automatic user login when the application is launched from Epic, and pre-population of some demographic & clinical information in RM&R.

****NOTE****

The following guide is for clinical areas that are currently using EPR to send referrals to RM&R.

For all other areas that use faxed paper copies, please continue to do so.

If you wish to switch from sending referrals via paper to doing it in Epic, please complete the **Service Provider Request form** at the end of this guide and email it to rmr_program@uhn.ca

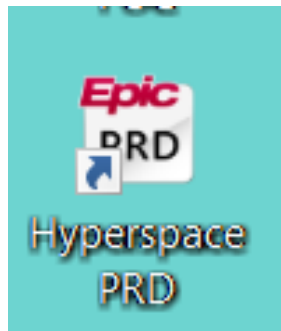
CREATING, COMPLETING, SENDING REFERRALS

Workflow for:

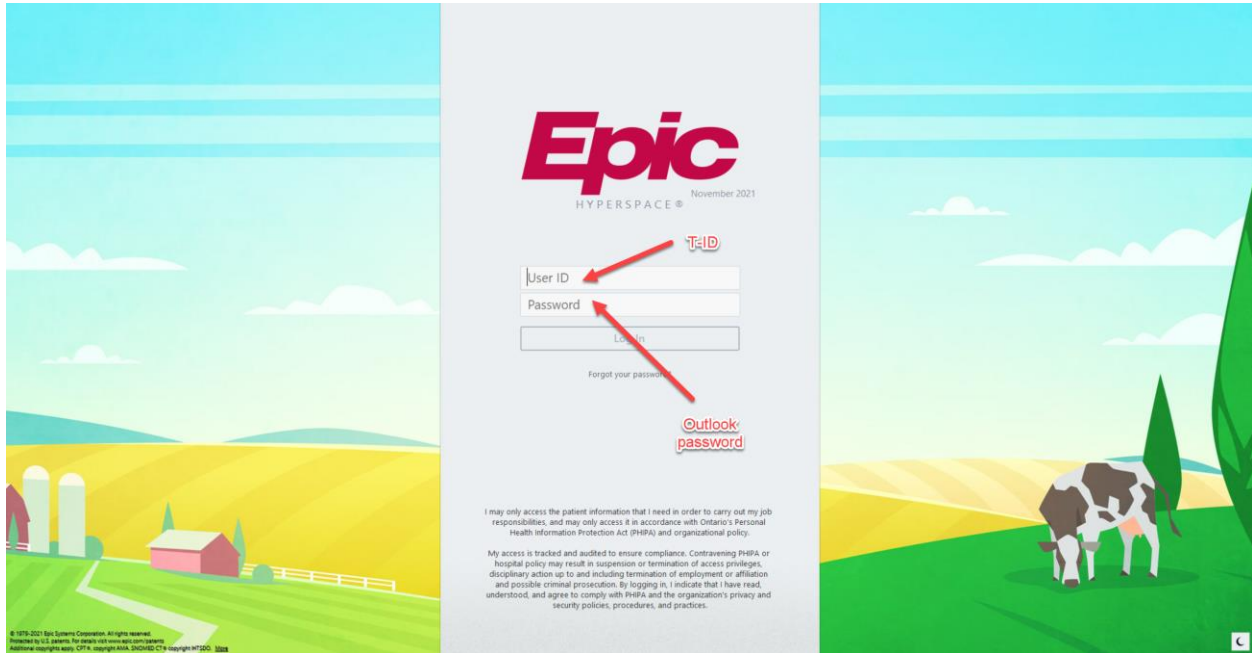
- **Home and Community Care**
- **IP Rehab/ Complex Continuing Care**
- **Integrated Care**
- **Palliative Care**
- **Outpatient Rehab – Total Joint Replacement**

CREATING A REFERRAL

1. Launch Epic from Desktop



2. Log In





HOME AND COMMUNITY CARE, IP REHAB/CCC, INTEGRATED CARE,
PALLIATIVE CARE, OUTPATIENT REHAB – TOAL JOINT REPLACEMENT: CREATING A REFERRAL

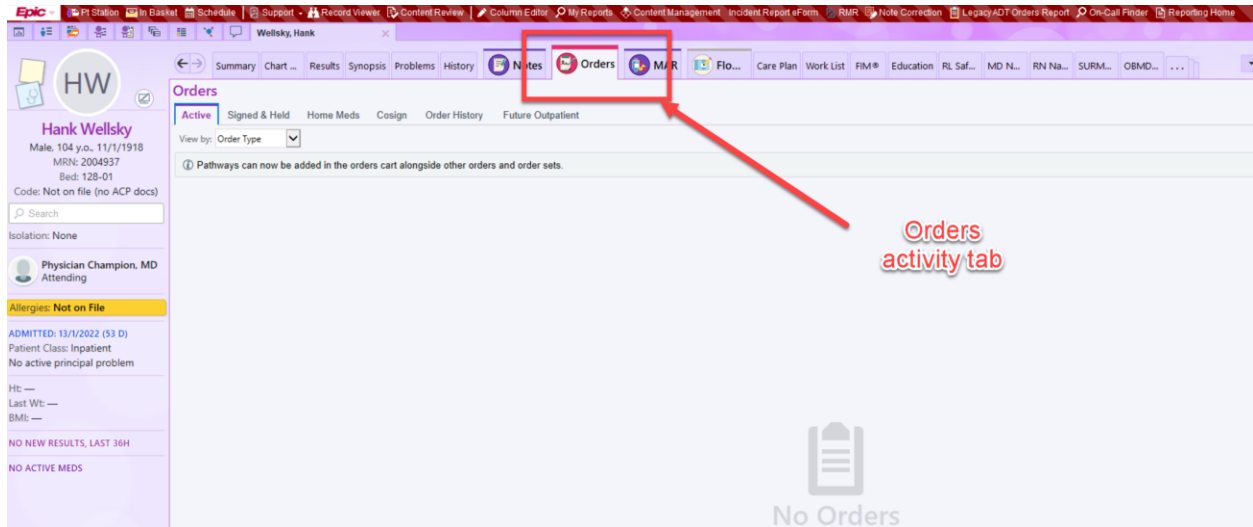
3. Enter Patient's Chart

The screenshot shows the Epic EMR interface. On the left, there are navigation menus for 'My Lists' and 'Available Lists'. The main area displays a table of patients under the heading 'TW-8A FELL PAVILION 10 Patients'. The table has columns for Patient Photo, Bed, Patient Name, MRN, CSN, Age/Gender, Service, and Attending. The patient 'Welsky, Hank' is highlighted in a red box. A red arrow points from the text 'Double-Click patient's name to enter chart' to the highlighted name. Below the table, the patient's chart is partially visible, showing 'Welsky, Hank' and 'Unit: TW-8A Room: TW-8A 128 Bed: 128-01'. On the right side of the interface, there is a message: 'You have no default dashboard defined. Click here to open My Dashboards.'

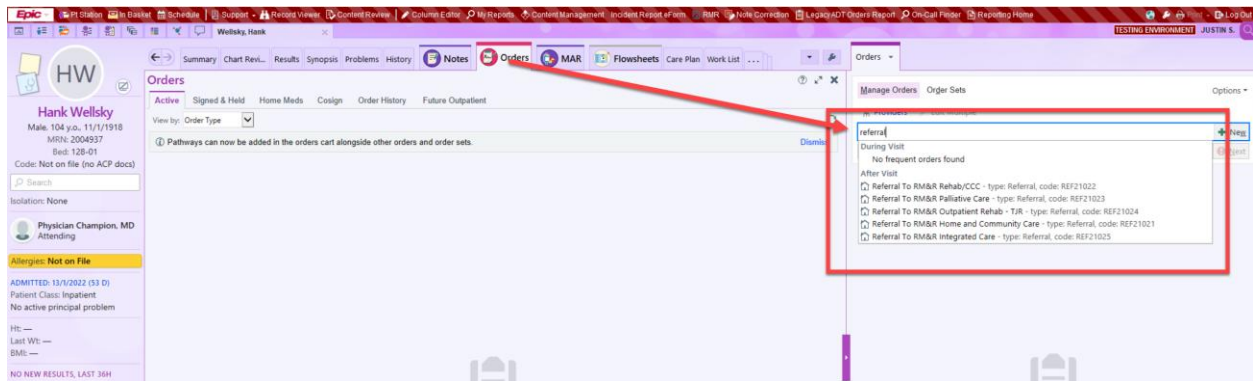
Patient Photo	Bed	Patient Name	MRN	CSN	Age/Gender	Service	Attending	Isolation/Infection
	110-01	Clindoc, Cathy	2000917	100010003953	63 y.o. / F	Medicine-GIM	Attending Physician Inpatient, MD	---
	110-02	ChargeTesting, Tw-Eightafellpavilion One	2002575	100010007907	22 y.o. / F	Day Surgery	Attending Physician Inpatient, MD	---
	112-01	ChargeTesting, Tw-Eightafellpavilion Two	2002576	100010007908	27 y.o. / F	Day Surgery	Attending Physician Inpatient, MD	---
	112-02	ChargeTesting, Tw-Eightafellpavilion Three	2002577	100010007909	22 y.o. / ND	Day Surgery	Attending Physician Inpatient, MD	---
	114-02	ClindocTest, IPSocialWork	2002781	100010008137	54 y.o. / F	Medicine-GIM	Physician Internal Medicine, MD	---
	116-01	ClindocTest, HeldMedis	2002839	100010008517	32 y.o. / F	Medicine-GIM	Physician Surgery, MD	---
	118-01	Grand Central, Sarah	2000106	100010034194	49 y.o. / F	Medicine-GIM	Ana Carolina Alba, MD	---
	126-01	GrandCentral, InterunitTransferOne	2002854	100010008616	7 m.o. / F	Medicine-GIM	Attending Physician Inpatient, MD	---
	128-01	Welsky, Hank	2004937	100010024283	104 y.o. / M	Medicine-GIM	Physician Champion, MD	---
	132-01	AcuteTraum, Rehab	2002987	100010008806	41 y.o. / F	Medicine-GIM	Physician Internal	---

*HOME AND COMMUNITY CARE, IP REHAB/CCC, INTEGRATED CARE,
PALLIATIVE CARE, OUTPATIENT REHAB – TOAL JOINT REPLACEMENT: CREATING A REFERRAL*

4. Go to “Orders” activity tab



5. Search for “Referral to RM&R” in orders search bar and select the care type that you wish to launch.



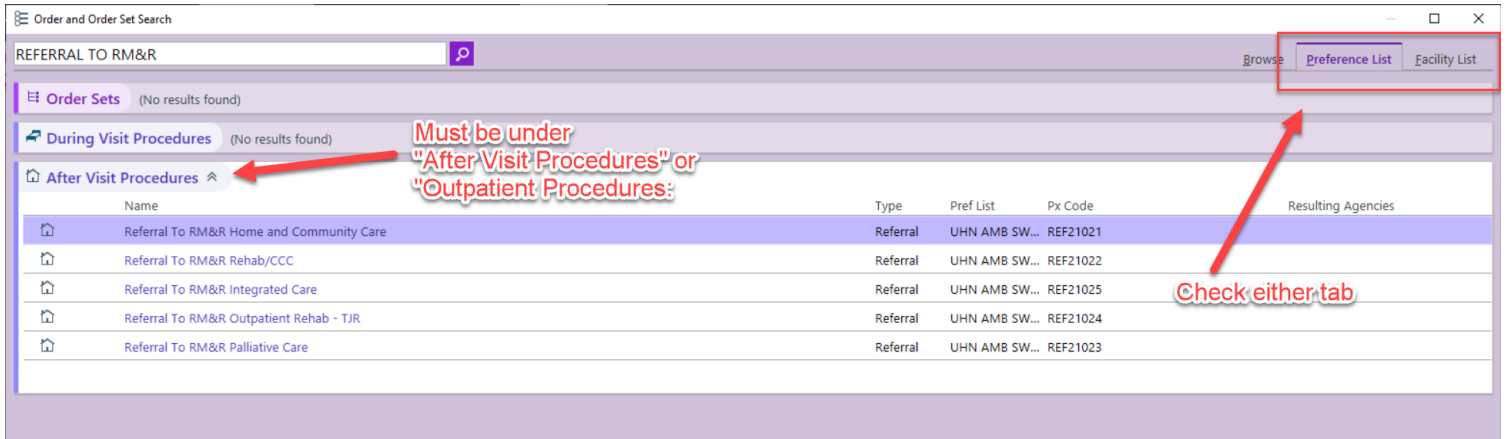
6. Click the order, ensuring it's placed as an:

- “After Visit Procedure”
- Or
- “Outpatient Procedure”



Not as an:

- “During Visit Procedure
- Or
- “Hospital Procedure”

Order and Order Set Search

REFERRAL TO RM&R

Order Sets (No results found)

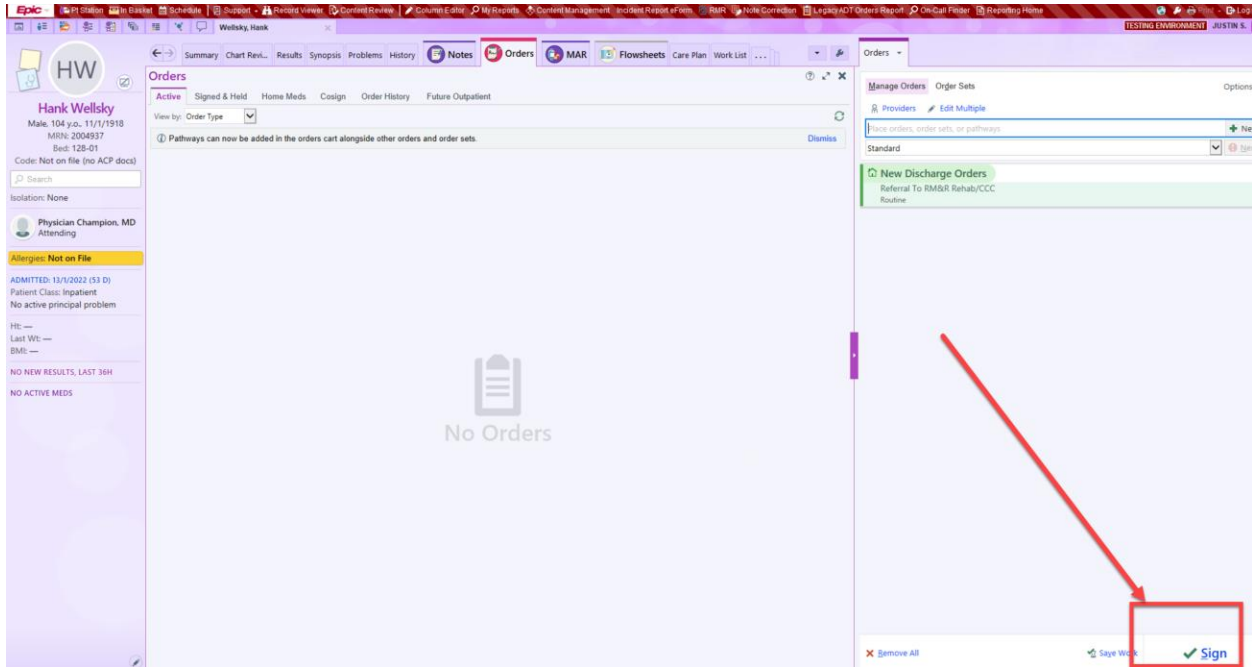
During Visit Procedures (No results found)

After Visit Procedures

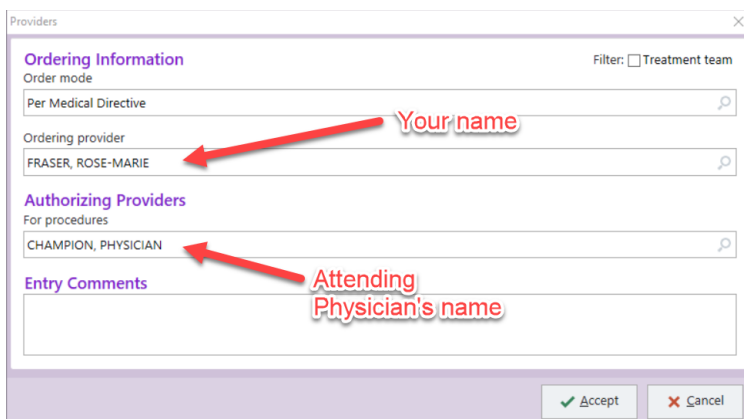
Name	Type	Pref List	Px Code	Resulting Agencies
Referral To RM&R Home and Community Care	Referral	UHN AMB SW...	REF21021	
Referral To RM&R Rehab/CCC	Referral	UHN AMB SW...	REF21022	
Referral To RM&R Integrated Care	Referral	UHN AMB SW...	REF21025	
Referral To RM&R Outpatient Rehab - TJR	Referral	UHN AMB SW...	REF21024	
Referral To RM&R Palliative Care	Referral	UHN AMB SW...	REF21023	

*If either “After Visit Procedures” or “Outpatient Procedures” are not visible, try selecting both the Preference List and Facility List tabs. If the order is still not visible, proceed to Troubleshooting on page 26

7. Sign the Order



*If the following pop-up shows up

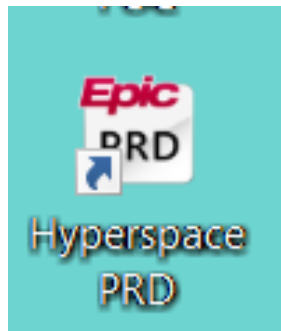


Entering your name in the “Ordering Provider” field and the attending physician’s name in the “Authorizing Providers” field

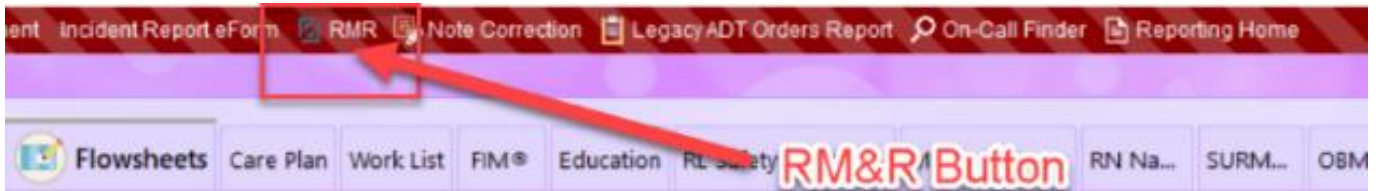
COMPLETING A REFERRAL

Once the referral is creating the clinical details regarding the referral need to be completed.

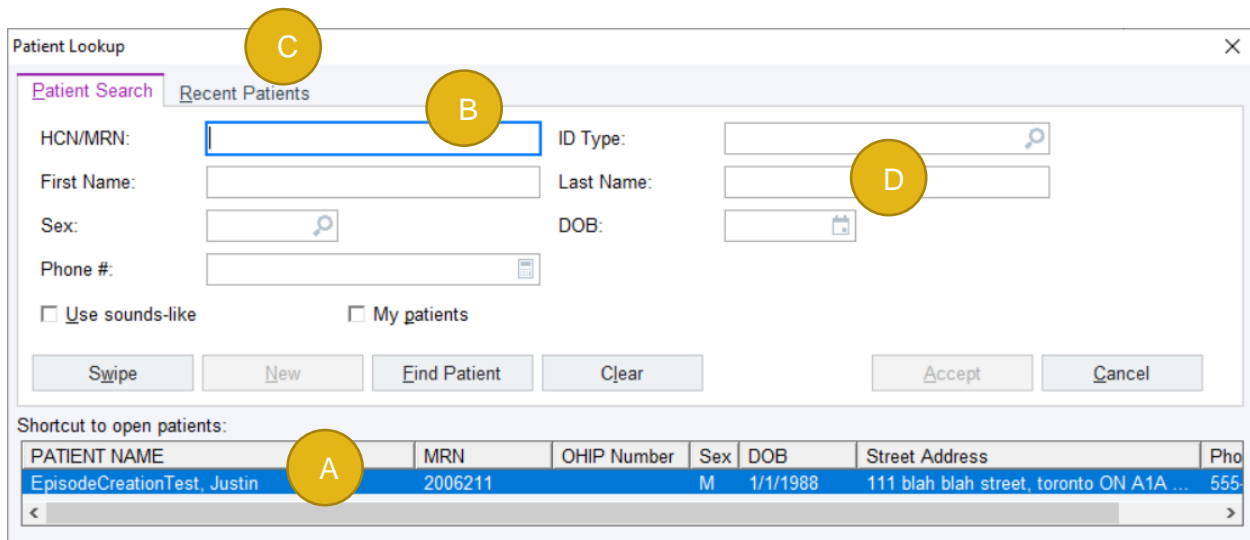
1. Launch Epic from Desktop



3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:
 - A. Clicking in the “Shortcut to open patients” list
 - B. Typing “=” in the HCN/MRN field
 - C. Clicking on the “Recent Patients” tab and finding them there
 - D. Entering demographic information manually



Patient Lookup

Patient Search | Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for EpisodeCreationTest, Justin

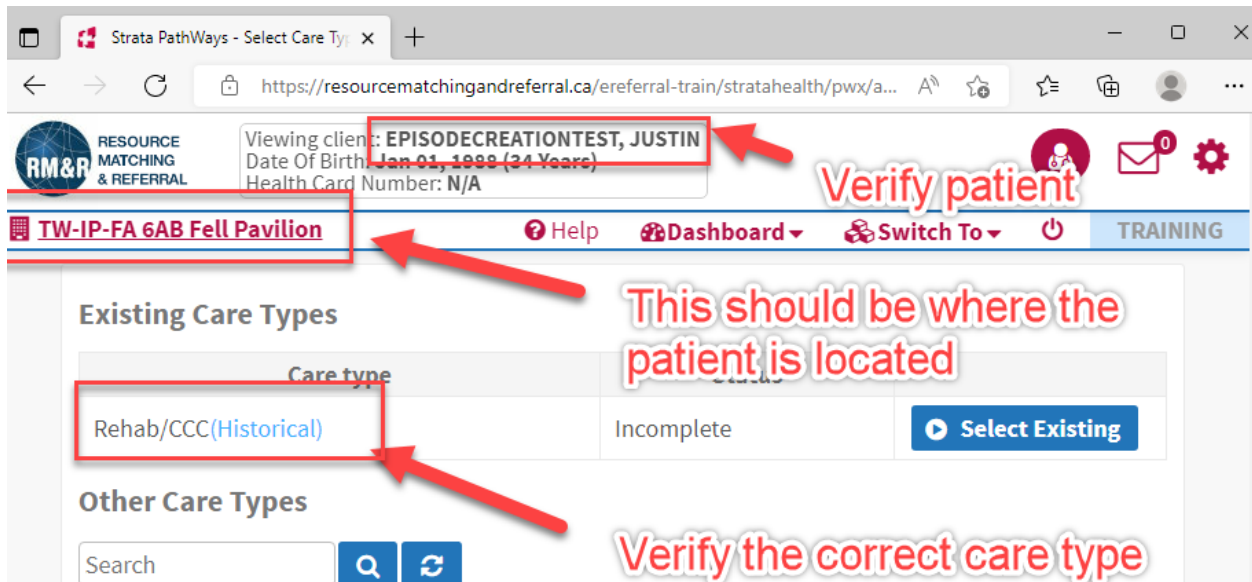
Selected record: EpisodeCreationTest, Justin

Number	Contact Date	Contact Type
9	7/4/22	Appointment
8	6/4/22	Appointment
7	6/4/22	Appointment
6	5/4/22	Appointment
5	10/3/22	Wait List
4	10/3/22	Appointment
2	9/3/22	Hospital Encounter
1	9/3/22	Registration

Buttons: New, Search >>, More, Accept, Cancel

Encounter Information: 12 loaded.

A new browser should open up and you should land here. Double check the highlighter info.



Strata PathWays - Select Care Type

Viewing client: EPISODECREATIONTEST, JUSTIN
Date Of Birth: Jan 01, 1998 (34 Years)
Health Card Number: N/A

Verify patient

TW-IP-FA 6AB Fell Pavilion

Help Dashboard Switch To TRAINING

Existing Care Types

Care type	Status	Action
Rehab/CCC(Historical)	Incomplete	Select Existing

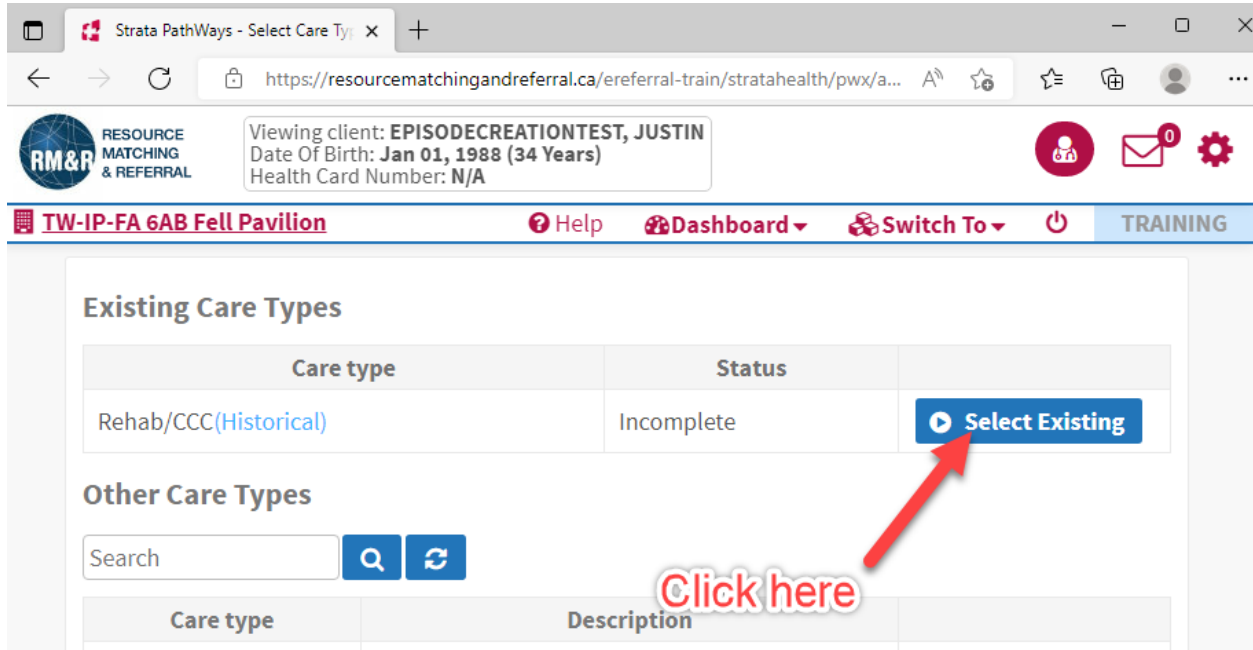
This should be where the patient is located

Other Care Types

Search

Verify the correct care type

6. Click the “Select Existing” box



The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/a...>. The page header includes the 'RM&R RESOURCE MATCHING & REFERRAL' logo and client information for 'EPISODECREATIONTEST, JUSTIN' (DOB: Jan 01, 1988, 34 Years, Health Card Number: N/A). The navigation bar shows 'TW-IP-FA 6AB Fell Pavilion', 'Help', 'Dashboard', 'Switch To', and 'TRAINING'.

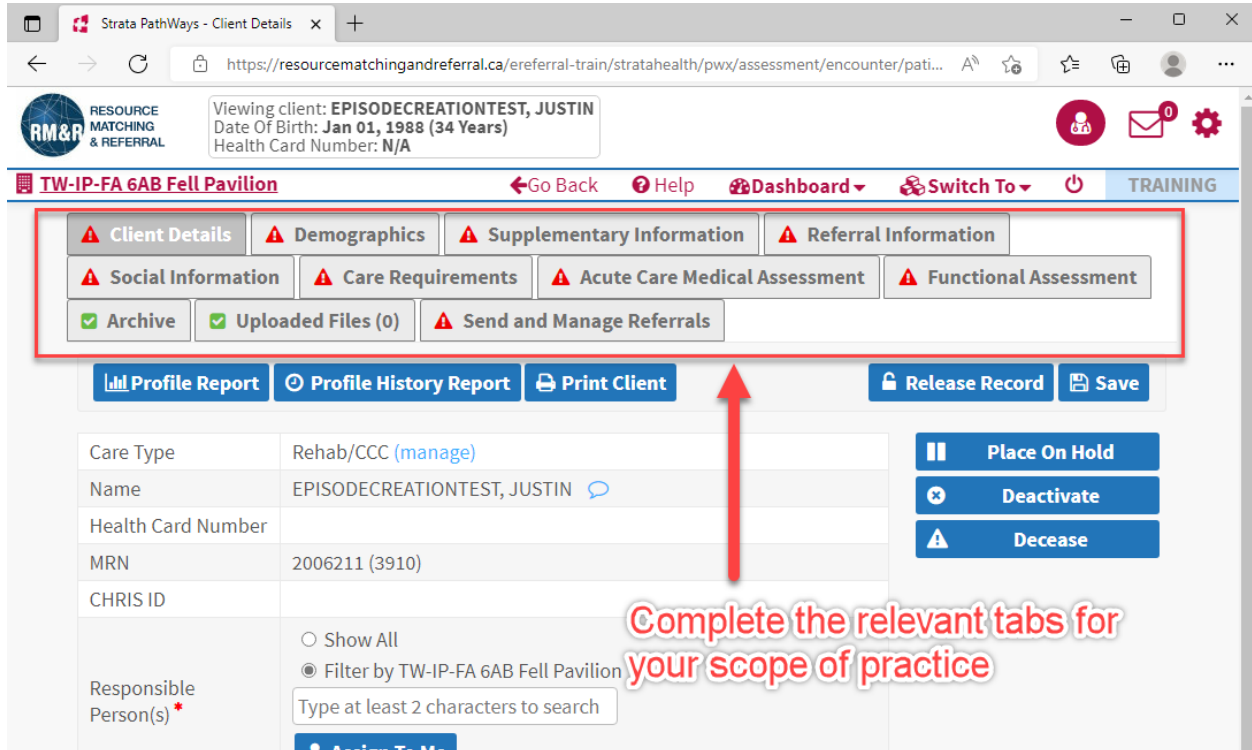
The main content area is titled 'Existing Care Types' and contains a table with the following data:

Care type	Status	
Rehab/CCC(Historical)	Incomplete	▶ Select Existing

Below the table is a section for 'Other Care Types' with a search input field and a refresh button. A red arrow points to the 'Select Existing' button with the text 'Click here' overlaid on it.

HOME AND COMMUNITY CARE, IP REHAB/CCC, INTEGRATED CARE,
 PALLIATIVE CARE, OUTPATIENT REHAB – TOAL JOINT REPLACEMENT: COMPLETING A REFERRAL

7. Complete the relevant tabs for your scope of practice



Strata PathWays - Client Details

Viewing client: EPISODECREATIONTEST, JUSTIN
 Date Of Birth: Jan 01, 1988 (34 Years)
 Health Card Number: N/A

TW-IP-FA 6AB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details Demographics Supplementary Information Referral Information
 Social Information Care Requirements Acute Care Medical Assessment Functional Assessment
 Archive Uploaded Files (0) Send and Manage Referrals

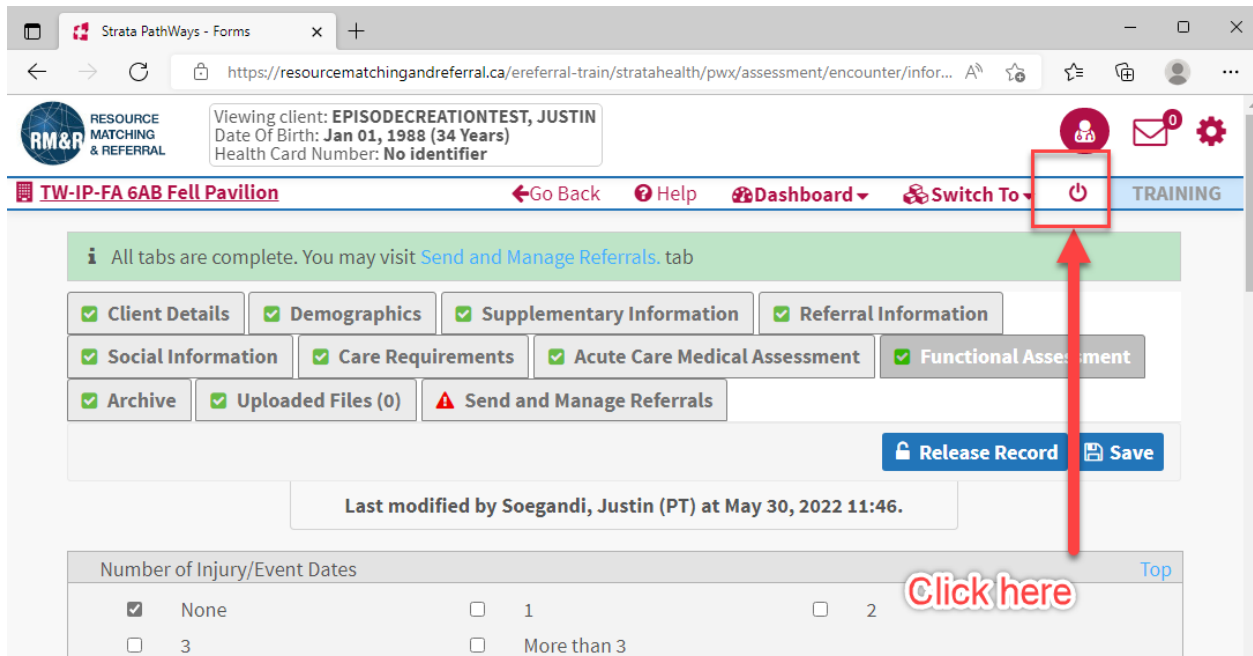
Profile Report Profile History Report Print Client Release Record Save

Care Type	Rehab/CCC (manage)	Place On Hold
Name	EPISODECREATIONTEST, JUSTIN	Deactivate
Health Card Number		Decease
MRN	2006211 (3910)	
CHRIS ID		
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 6AB Fell Pavilion <input type="text" value="Type at least 2 characters to search"/> <input type="button" value="Assign To Me"/>	

Complete the relevant tabs for your scope of practice

HOME AND COMMUNITY CARE, IP REHAB/CCC, INTEGRATED CARE,
PALLIATIVE CARE, OUTPATIENT REHAB – TOAL JOINT REPLACEMENT: COMPLETING A REFERRAL

8. Log Out



The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assessment/encounter/infor...>. The page header includes the RM&R logo, client information for EPISODECREATIONTEST, JUSTIN (DOB: Jan 01, 1988, Health Card Number: No identifier), and navigation links like Go Back, Help, Dashboard, Switch To, and TRAINING. A red box highlights the log out button (power icon) in the top right corner, with a red arrow pointing to it and the text "Click here" overlaid.

Viewing client: EPISODECREATIONTEST, JUSTIN
Date Of Birth: Jan 01, 1988 (34 Years)
Health Card Number: No identifier

TW-IP-FA 6AB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

All tabs are complete. You may visit [Send and Manage Referrals](#). tab

Client Details Demographics Supplementary Information Referral Information

Social Information Care Requirements Acute Care Medical Assessment Functional Assessment

Archive Uploaded Files (0) Send and Manage Referrals

Release Record Save

Last modified by Soegandi, Justin (PT) at May 30, 2022 11:46.

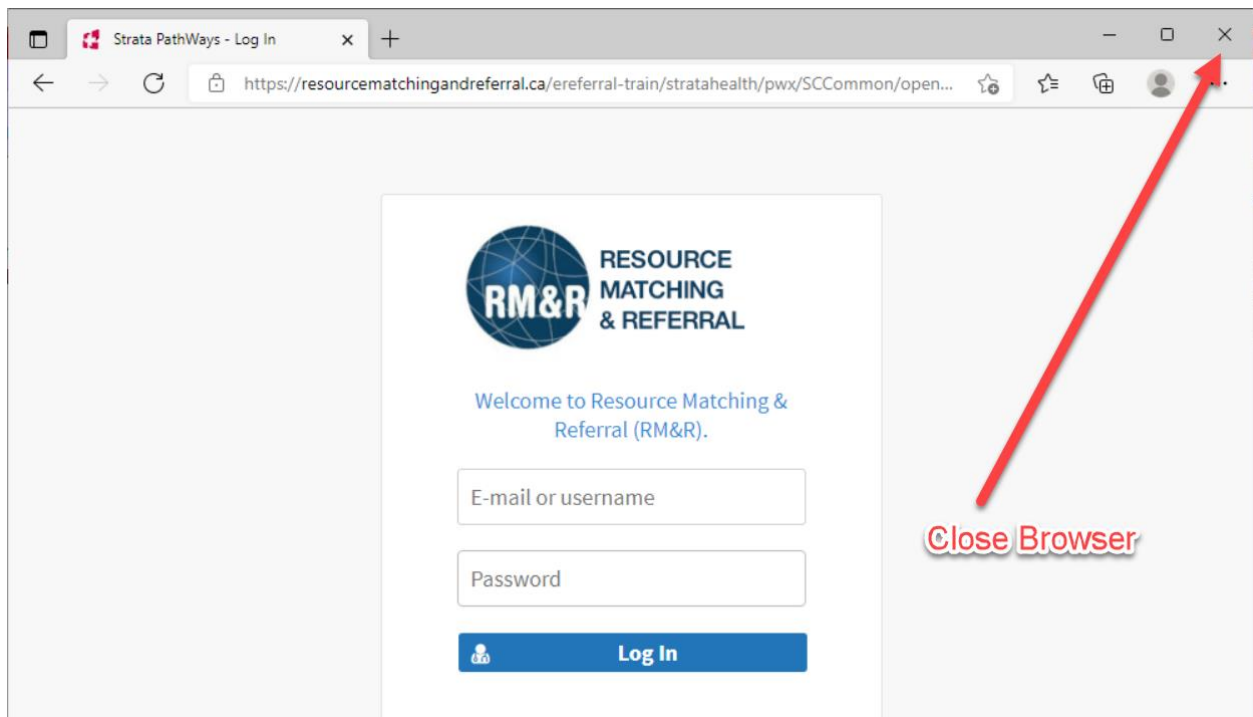
Number of Injury/Event Dates

<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	1	<input type="checkbox"/>	2
<input type="checkbox"/>	3	<input type="checkbox"/>	More than 3		

Click here

*HOME AND COMMUNITY CARE, IP REHAB/CCC, INTEGRATED CARE,
PALLIATIVE CARE, OUTPATIENT REHAB – TOAL JOINT REPLACEMENT: COMPLETING A REFERRAL*

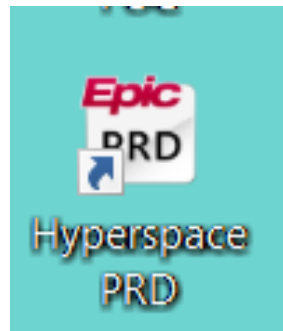
9. Close the browser



SENDING A REFERRAL

Once the referral is completed, it needs to be sent to receiving organization(s)

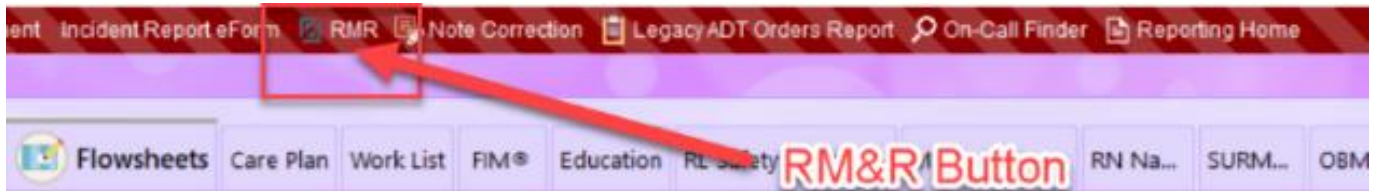
1. Launch Epic from Desktop



2. Log In

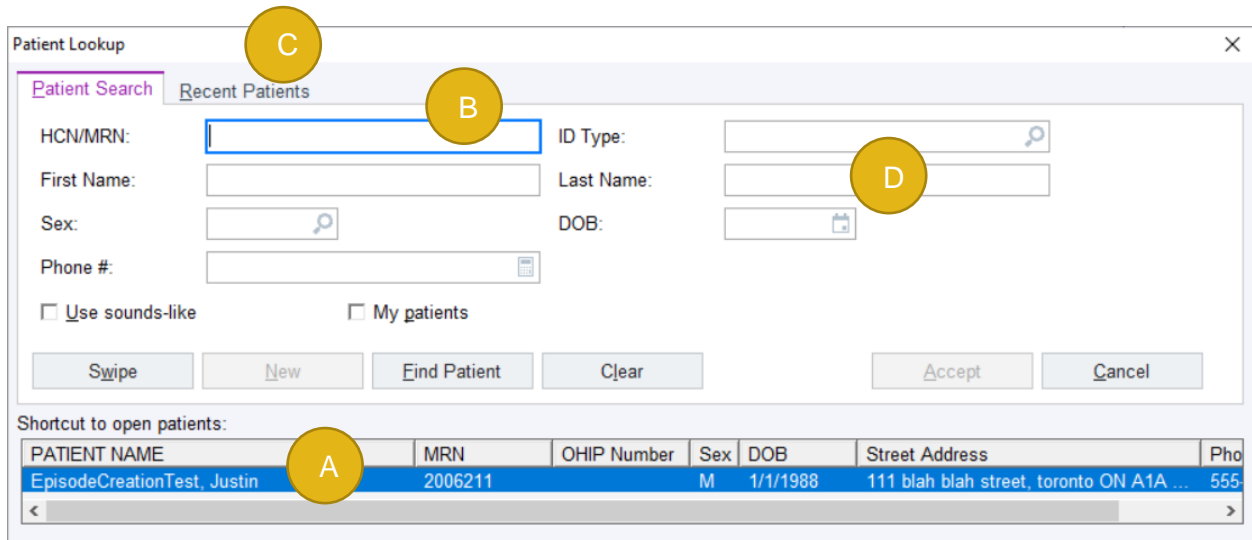


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- E. Clicking in the “Shortcut to open patients” list
- F. Typing “=” in the HCN/MRN field
- G. Clicking on the “Recent Patients” tab and finding them there
- H. Entering demographic information manually



Patient Lookup

Patient Search | **Recent Patients**

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

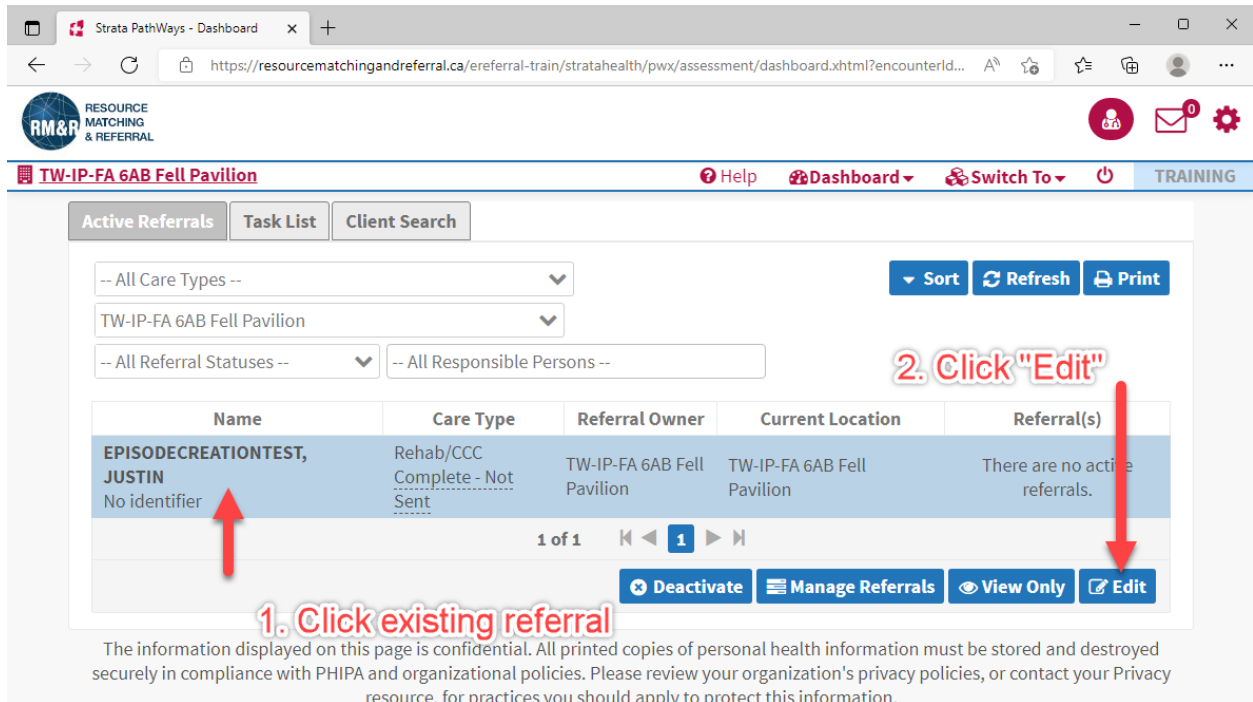
Encounter Selection for EpisodeCreationTest, Justin

Selected record: EpisodeCreationTest, Justin

Number	Contact Date	Contact Type
9	7/4/22	Appointment
8	6/4/22	Appointment
7	6/4/22	Appointment
6	5/4/22	Appointment
5	10/3/22	Wait List
4	10/3/22	Appointment
2	9/3/22	Hospital Encounter
1	9/3/22	Registration

Encounter Information: 12 loaded.

6. In the new browser, select the existing referral and click “Edit”



The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assessment/dashboard.xhtml?encounterId...>. The page title is "TW-IP-FA 6AB Fell Pavilion". The main content area displays a table of active referrals. The first row is highlighted in blue and contains the following information:

Name	Care Type	Referral Owner	Current Location	Referral(s)
EPISODECREATIONTEST, JUSTIN No identifier	Rehab/CCC Complete - Not Sent	TW-IP-FA 6AB Fell Pavilion	TW-IP-FA 6AB Fell Pavilion	There are no active referrals.

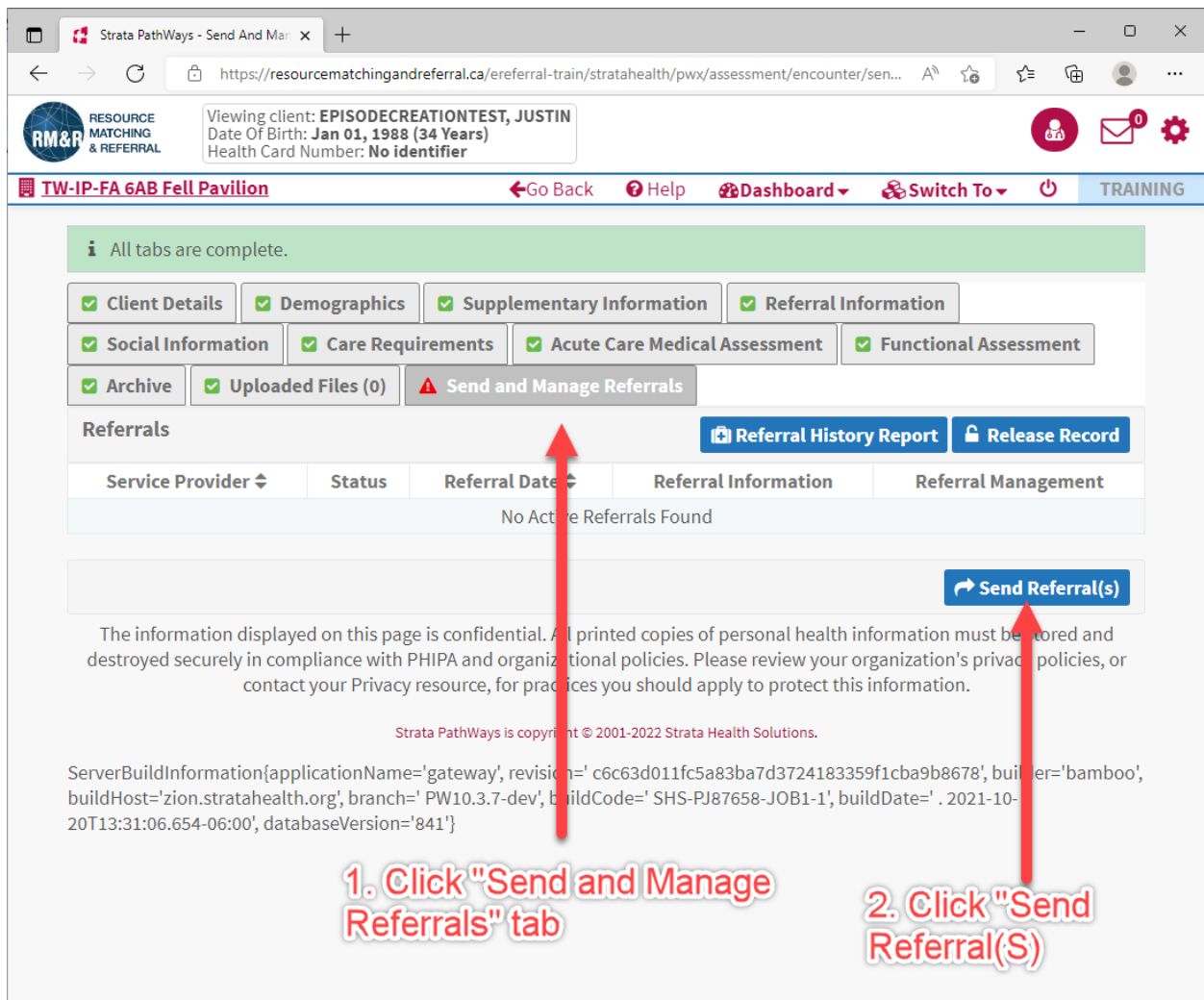
Annotations on the screenshot include:

- A red arrow pointing to the name "EPISODECREATIONTEST, JUSTIN" with the text "1. Click existing referral".
- A red arrow pointing to the "Edit" button at the bottom right of the table with the text "2. Click 'Edit'".

Below the table, there is a pagination control showing "1 of 1" and a "1" in a box. At the bottom of the table, there are four buttons: "Deactivate", "Manage Referrals", "View Only", and "Edit".

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

7. Click on the “Send and Manage Referrals” tab and click on the “Send Referral(s)” button



The screenshot shows the Strata Pathways web application interface. The browser address bar displays the URL: <https://resourcemattingandreferral.ca/ereferral-train/stratahealth/pwx/assessment/encounter/sen...>. The page header includes the RM&R logo and client information: "Viewing client: EPISODECREATIONTEST, JUSTIN", "Date Of Birth: Jan 01, 1988 (34 Years)", and "Health Card Number: No Identifier". The navigation bar shows "TW-IP-FA 6AB Fell Pavilion" and various utility buttons like "Go Back", "Help", "Dashboard", "Switch To", and "TRAINING".

The main content area features a series of tabs: "Client Details", "Demographics", "Supplementary Information", "Referral Information", "Social Information", "Care Requirements", "Acute Care Medical Assessment", "Functional Assessment", "Archive", "Uploaded Files (0)", and "Send and Manage Referrals". A red arrow points to the "Send and Manage Referrals" tab, with the instruction: "1. Click 'Send and Manage Referrals' tab".

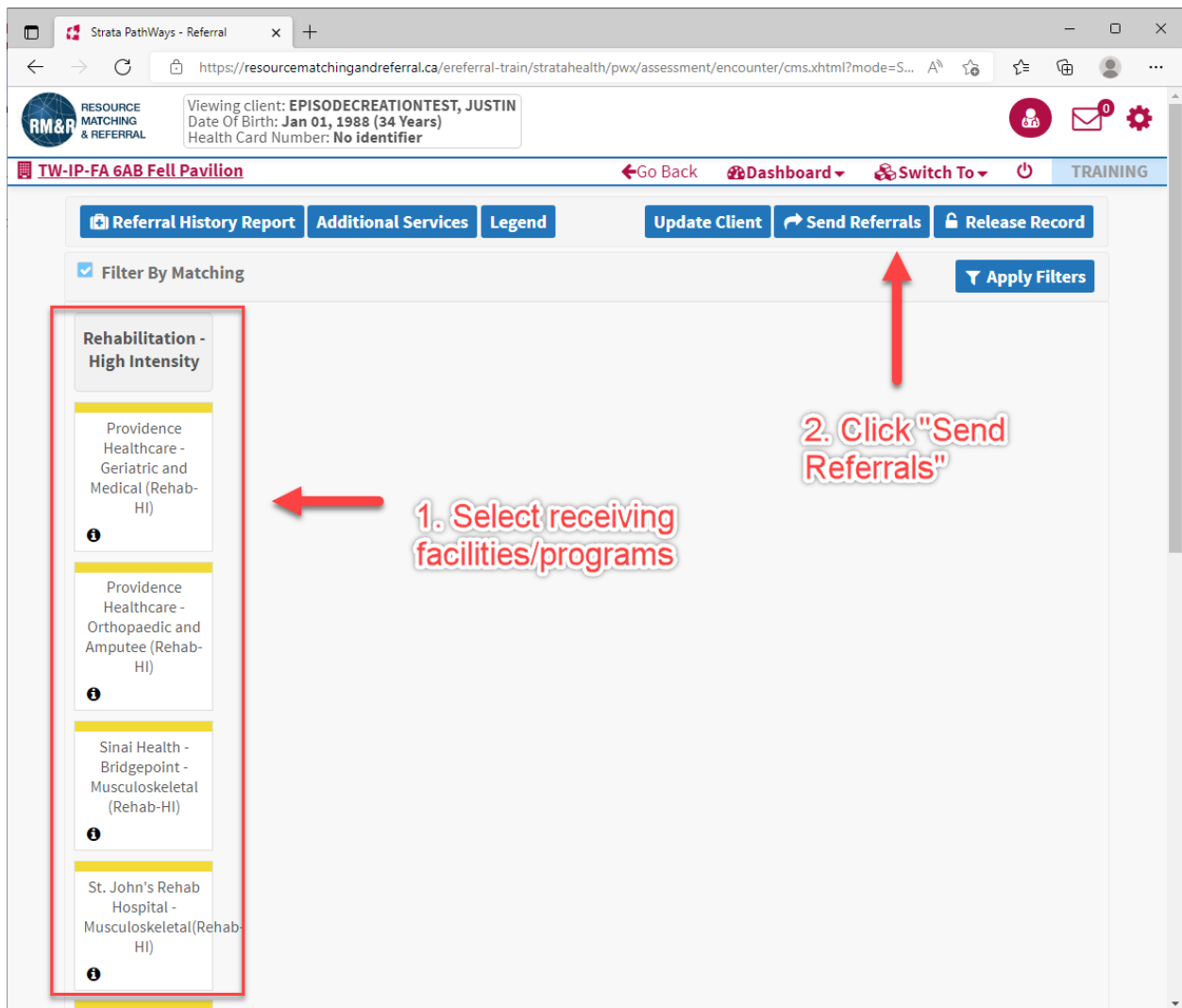
Below the tabs is a "Referrals" section with a table. The table has columns for "Service Provider", "Status", "Referral Date", "Referral Information", and "Referral Management". The table content shows "No Active Referrals Found". To the right of the table are buttons for "Referral History Report" and "Release Record".

At the bottom right of the "Referrals" section is a blue button labeled "Send Referral(s)". A red arrow points to this button, with the instruction: "2. Click 'Send Referral(s)'".

Below the table is a confidentiality notice: "The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information."

At the bottom of the page, there is a copyright notice: "Strata Pathways is copyright © 2001-2022 Strata Health Solutions." and a server build information block: "ServerBuildInformation{applicationName='gateway', revision='c6c63d011fc5a83ba7d3724183359f1c9b8678', buildNumber='bamboo', buildHost='zion.stratahealth.org', branch='PW10.3.7-dev', buildCode='SHS-PJ87658-JOB1-1', buildDate='2021-10-20T13:31:06.654-06:00', databaseVersion='841'}".

8. Some Care Types will take you to a facility selection screen like below. If so, select the desired facilities to receive this referral and click the “Send Referrals” button. If not, then proceed to page 30.



9. Enter any comments (if necessary). Click “Send Referrals” when done

Selected Destination Providers ✕


+ Sinai Health - Bridgepoint - Musculoskeletal (Rehab-HI)

Comments

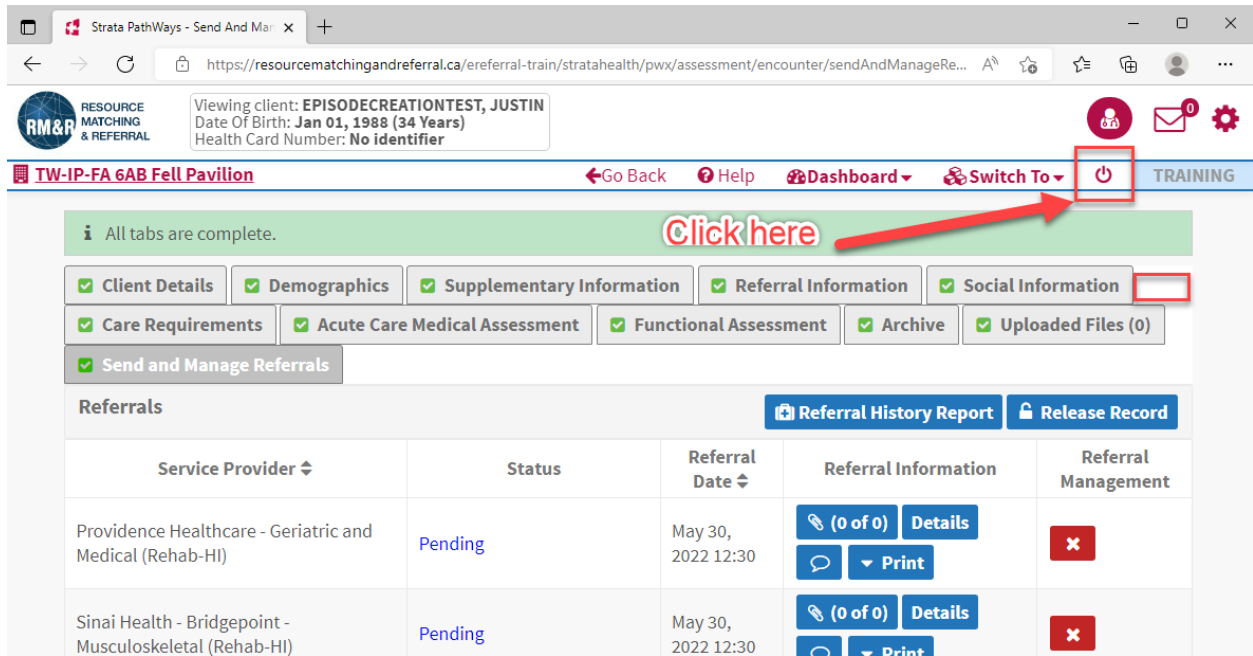
+ Providence Healthcare - Geriatric and Medical (Rehab-HI)

Comments

✕ Close ➡ Send Referrals



10. Log Out



The screenshot shows the Strata Pathways web application interface. At the top, there is a navigation bar with several icons: a home icon, a help icon, a dashboard icon, a switch icon, and a power icon (Log Out). The power icon is highlighted with a red box and a red arrow pointing to it from a green banner that says "Click here".

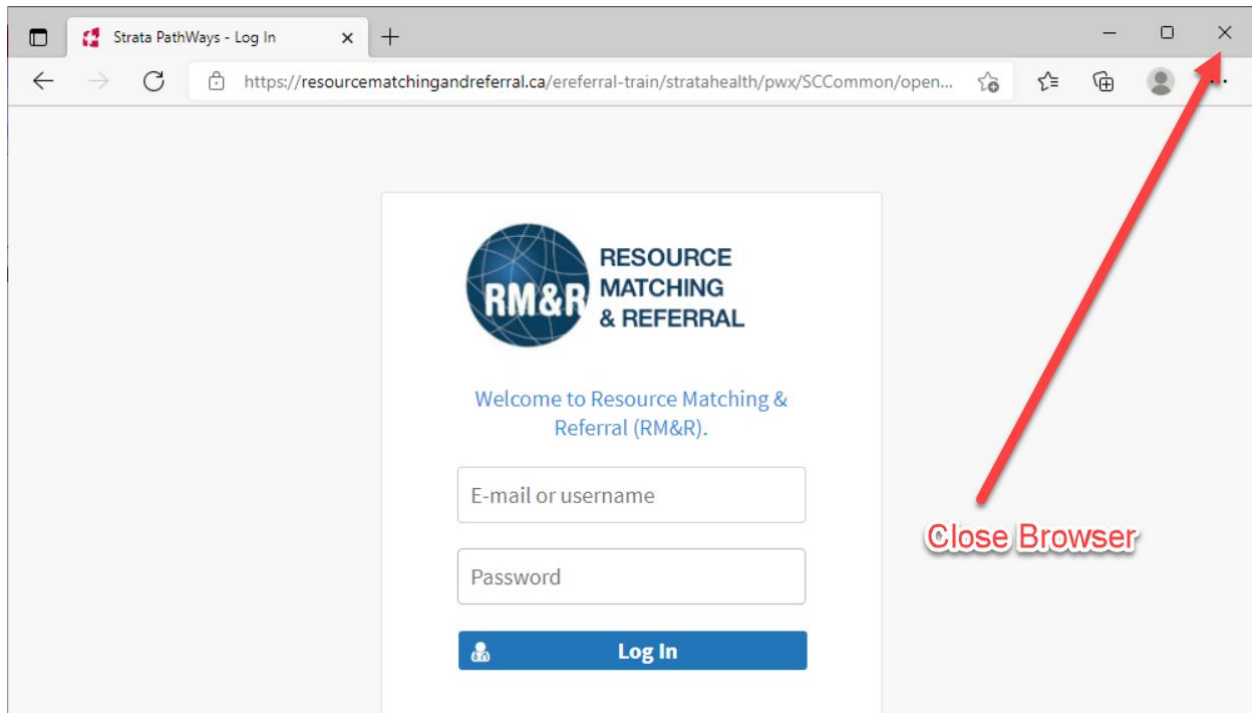
Below the navigation bar, there is a client information section with the following details:

- Viewing client: EPISODECREATIONTEST, JUSTIN
- Date Of Birth: Jan 01, 1988 (34 Years)
- Health Card Number: No identifier

Below the client information, there is a section for "Referrals" with a table of pending referrals:

Service Provider	Status	Referral Date	Referral Information	Referral Management
Providence Healthcare - Geriatric and Medical (Rehab-HI)	Pending	May 30, 2022 12:30	(0 of 0) Details Print	✕
Sinai Health - Bridgepoint - Musculoskeletal (Rehab-HI)	Pending	May 30, 2022 12:30	(0 of 0) Details Print	✕

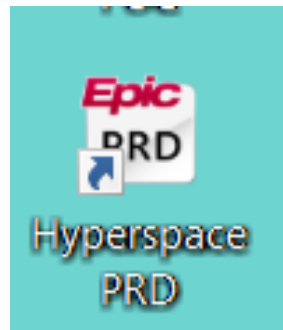
11. Close the browser



Workflow for eStroke

CREATING A REFERRAL

1. Launch Epic from Desktop



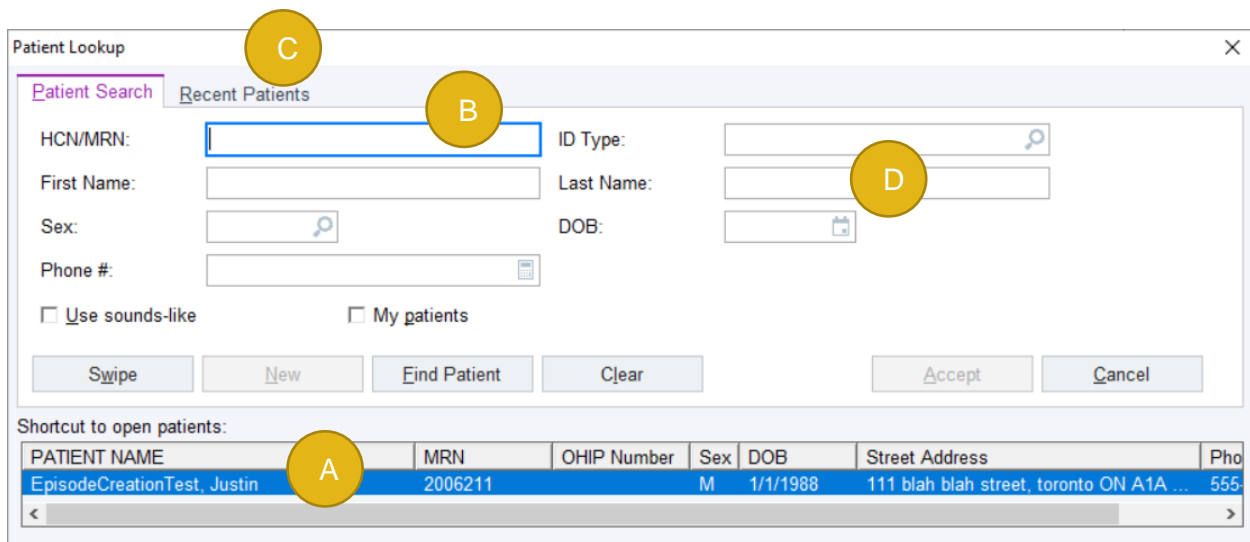
2. Log In



3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:
 1. Clicking in the “Shortcut to open patients” list
 2. Typing “=” in the HCN/MRN field
 3. Clicking on the “Recent Patients” tab and finding them there
 4. Entering demographic information manually



Patient Lookup

Patient Search | Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for DeStrokan, DeMar ✕

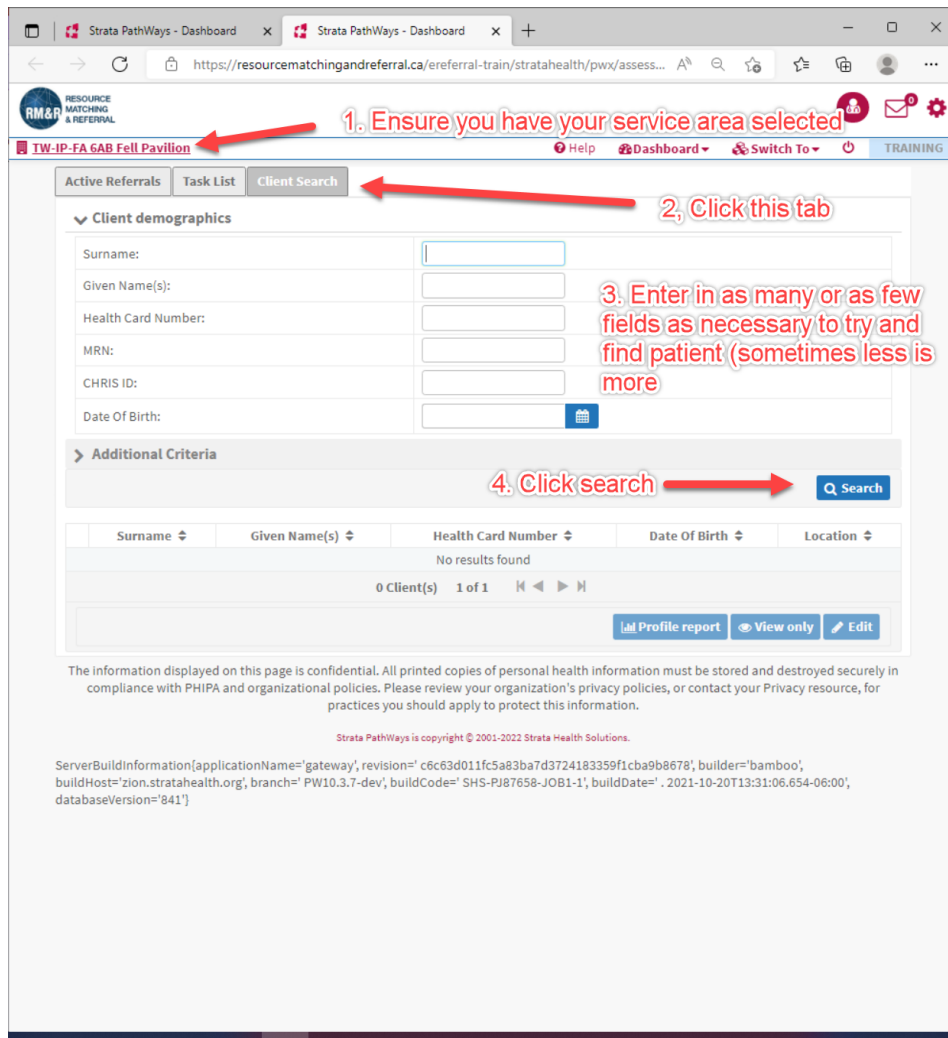
Selected record: DeStrokan, DeMar

Number	Contact Date	Contact Type
2	27/5/22	Hospital Encounter
1	27/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

1. 1. Ensure you have your service area selected
2. 2. Click on the “Client Search” tab
3. 3. Enter as many or as few fields to try and find your patient. **If using MRN, include “[space] (3910)” after the 7-digit number for example “2223333 (3910)”**
4. 4. Click “Search”

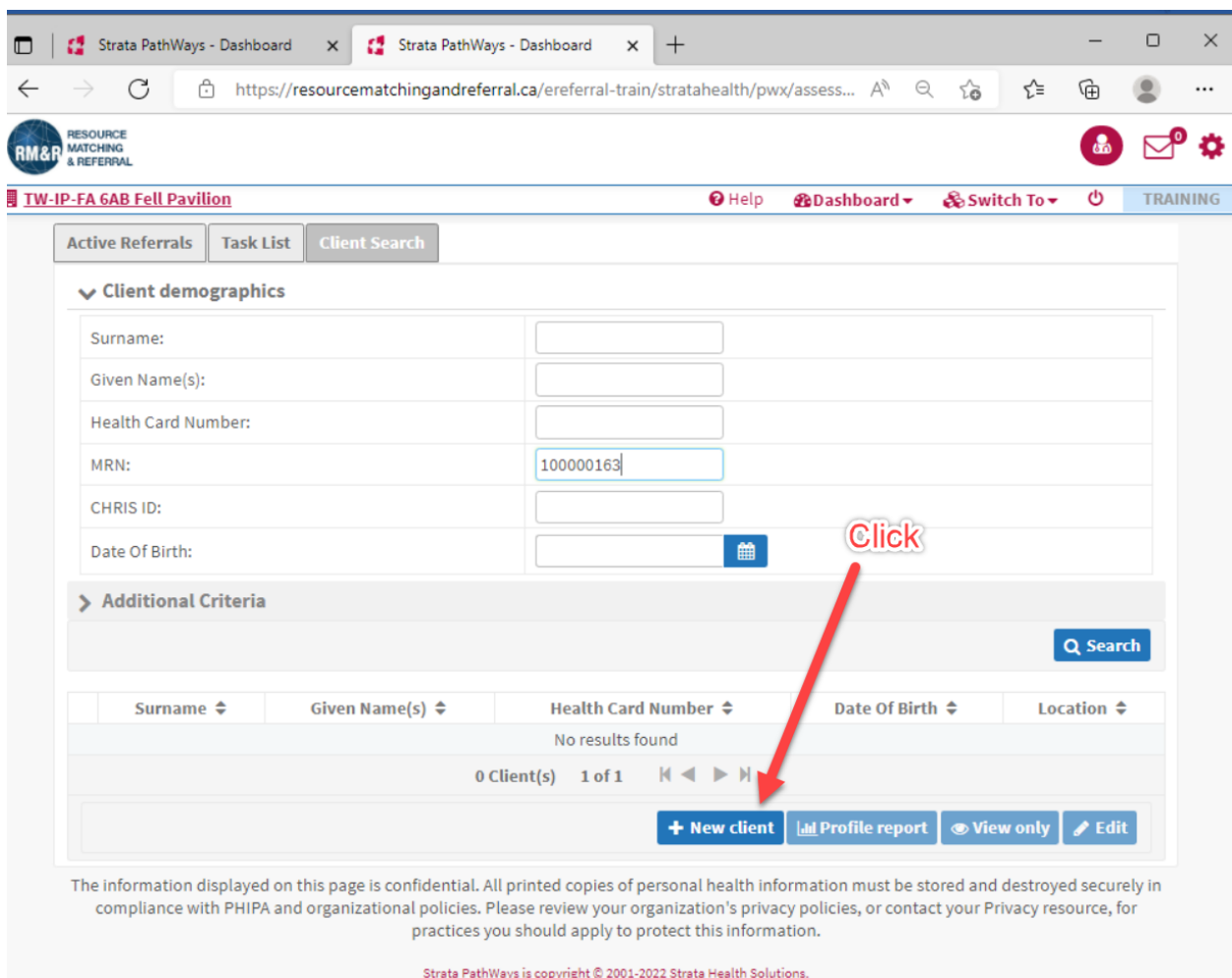
The screenshot shows the 'Strata PathWays - Dashboard' interface. At the top, the service area is set to 'TW-IP-FA 6AB Fell Pavilion'. Below this, there are tabs for 'Active Referrals', 'Task List', and 'Client Search'. The 'Client Search' tab is selected. The search form includes fields for Surname, Given Name(s), Health Card Number, MRN, CHRIS ID, and Date Of Birth. Below the form is an 'Additional Criteria' section and a 'Search' button. The search results area shows 'No results found' and '0 Client(s) 1 of 1'. At the bottom, there is a disclaimer and technical information.

Annotations on the screenshot:

- 1. Ensure you have your service area selected (points to the service area dropdown)
- 2. Click this tab (points to the Client Search tab)
- 3. Enter in as many or as few fields as necessary to try and find patient (sometimes less is more) (points to the search input fields)
- 4. Click search (points to the Search button)

7a. If the correct patient is found, select them and proceed to page 41

7b. If the patient is not found, click the “+ New client” button

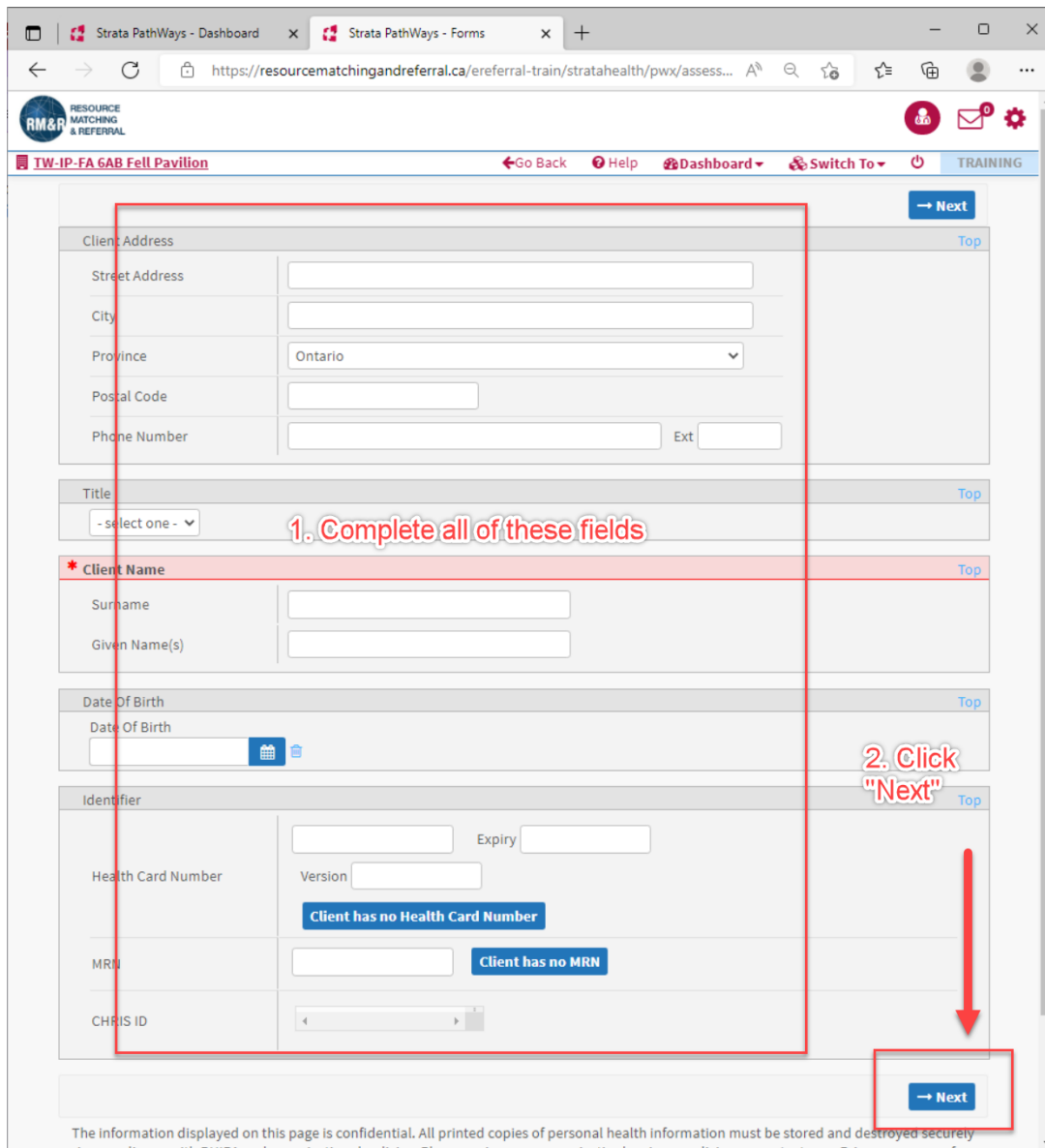


The screenshot shows the Strata Pathways - Dashboard interface. The browser address bar displays the URL: <https://resourcemattingandreferral.ca/ereferral-train/stratahealth/pwx/assess...>. The page header includes the RM&R logo and navigation links for Help, Dashboard, Switch To, and TRAINING. The main content area is titled "Client Search" and contains a form for "Client demographics" with fields for Surname, Given Name(s), Health Card Number, MRN (100000163), CHRIS ID, and Date Of Birth. Below the form is an "Additional Criteria" section with a search button. A table below the search section shows "No results found" and "0 Client(s) 1 of 1". At the bottom of the table, there are buttons for "+ New client", "Profile report", "View only", and "Edit". A red arrow points to the "+ New client" button with the word "Click" written next to it.

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

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8. Complete all of the fields and click "Next". **NOTE: For the MRN Field, you MUST include "[space] 3910" after the 7 digit MRN...for example "2223333 (3910)"**



The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assess...>. The page title is "TW-IP-FA GAB Fell Pavilion". The form is titled "Client Information" and contains the following sections:

- Client Address:** Street Address, City, Province (Ontario), Postal Code, Phone Number, and Ext.
- Title:** - select one -
- * Client Name:** Surname and Given Name(s).
- Date Of Birth:** Date Of Birth.
- Identifier:** Health Card Number (with Expiry and Version fields), MRN (with a "Client has no MRN" button), and CHRIS ID.

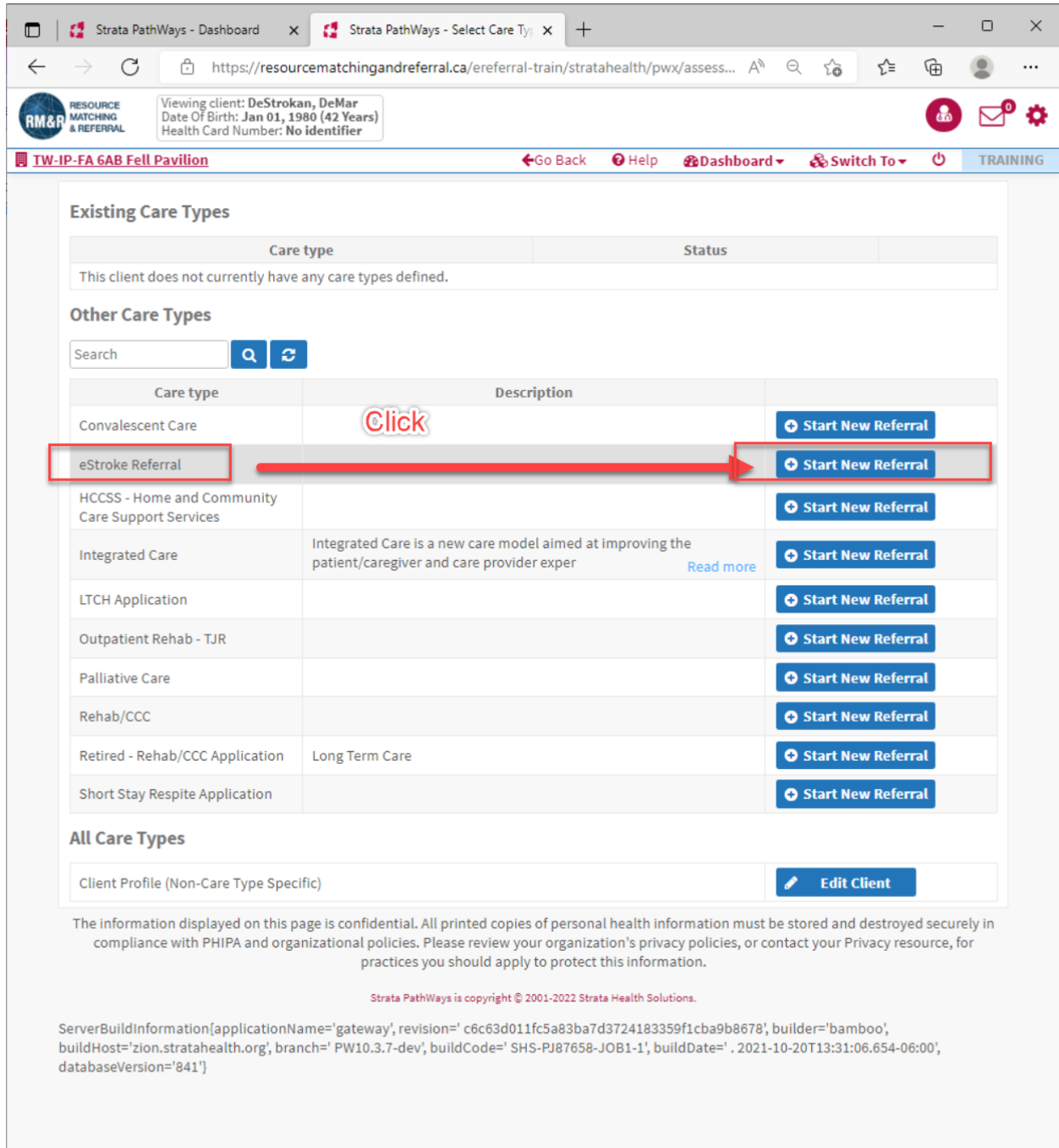
Annotations on the screenshot include:

- A red box surrounding the form fields with the text "1. Complete all of these fields".
- A red arrow pointing to the "Next" button with the text "2. Click 'Next'".
- A red box around the "Next" button at the bottom right.

Buttons for "Client has no Health Card Number" and "Client has no MRN" are visible. A "Next" button is also present at the top right of the form area.

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies or contact your Privacy resource for

9. Click the blue “Start New Referral” box next to the eStroke Referral care type



Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA 6AB Fell Pavilion

← Go Back ? Help Dashboard Switch To TRAINING

Existing Care Types

Care type	Status
This client does not currently have any care types defined.	

Other Care Types

Search

Care type	Description	
Convalescent Care		<input type="button" value="Start New Referral"/>
eStroke Referral		<input type="button" value="Start New Referral"/>
HCCSS - Home and Community Care Support Services		<input type="button" value="Start New Referral"/>
Integrated Care	Integrated Care is a new care model aimed at improving the patient/caregiver and care provider exper Read more	<input type="button" value="Start New Referral"/>
LTCH Application		<input type="button" value="Start New Referral"/>
Outpatient Rehab - TJR		<input type="button" value="Start New Referral"/>
Palliative Care		<input type="button" value="Start New Referral"/>
Rehab/CCC		<input type="button" value="Start New Referral"/>
Retired - Rehab/CCC Application	Long Term Care	<input type="button" value="Start New Referral"/>
Short Stay Respite Application		<input type="button" value="Start New Referral"/>

All Care Types

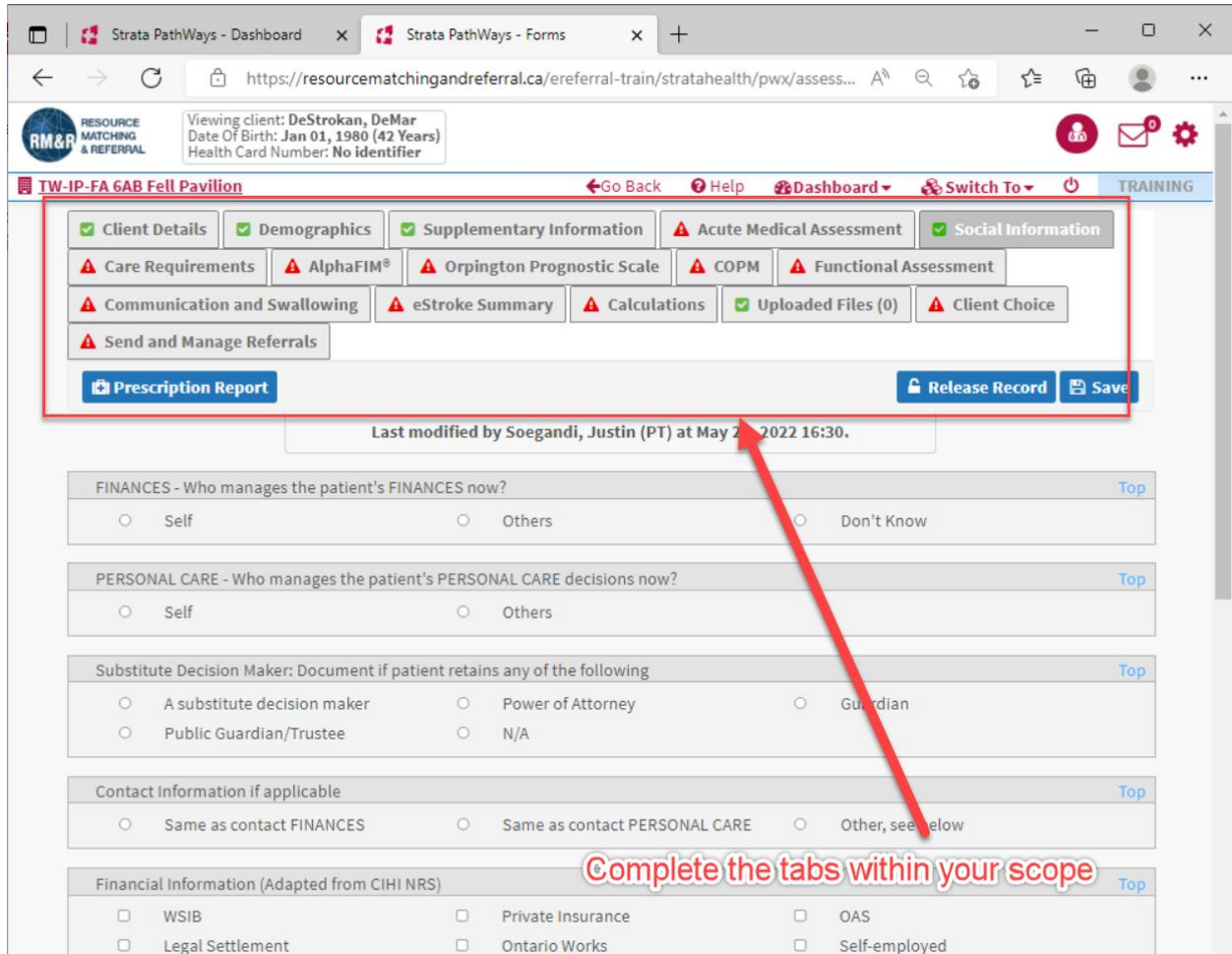
Client Profile (Non-Care Type Specific)

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

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```
ServerBuildInformation{applicationName='gateway', revision=' c6c63d011fc5a83ba7d3724183359f1c9a9b8678', builder='bamboo',
buildHost='zion.stratahealth.org', branch=' PW10.3.7-dev', buildCode=' SHS-PJ87658-JOB1-1', buildDate=' .2021-10-20T13:31:06.654-06:00',
databaseVersion='841'}
```

10. Complete the relevant tabs for your scope of practice



Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA GAB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details
 Demographics
 Supplementary Information
 Acute Medical Assessment
 Social Information

Care Requirements
 AlphaFIM®
 Orpington Prognostic Scale
 COPM
 Functional Assessment

Communication and Swallowing
 eStroke Summary
 Calculations
 Uploaded Files (0)
 Client Choice

Send and Manage Referrals

Last modified by Soegandi, Justin (PT) at May 2, 2022 16:30.

FINANCES - Who manages the patient's FINANCES now? [Top](#)

Self
 Others
 Don't Know

PERSONAL CARE - Who manages the patient's PERSONAL CARE decisions now? [Top](#)

Self
 Others

Substitute Decision Maker: Document if patient retains any of the following [Top](#)

A substitute decision maker
 Power of Attorney
 Guardian
 Public Guardian/Trustee
 N/A

Contact Information if applicable [Top](#)

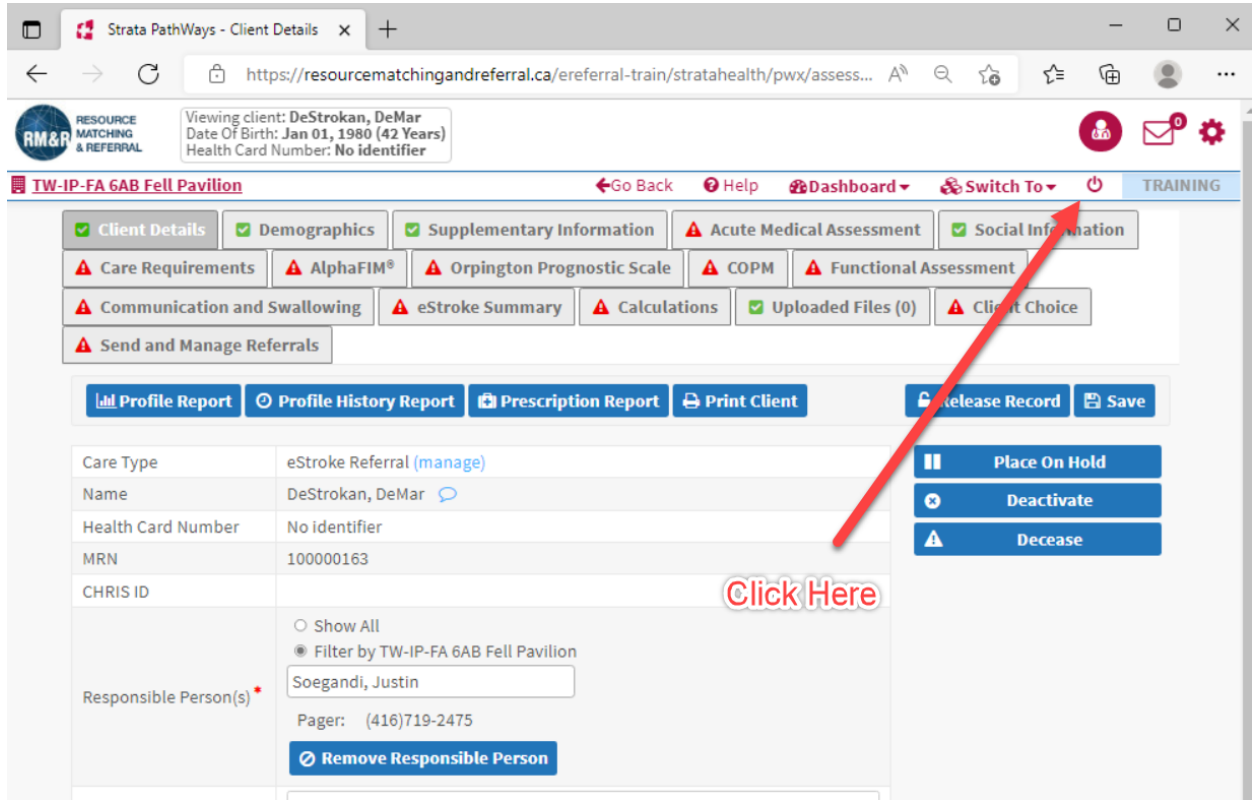
Same as contact FINANCES
 Same as contact PERSONAL CARE
 Other, see below

Financial Information (Adapted from CIHI NRS) [Top](#)

WSIB
 Private Insurance
 OAS
 Legal Settlement
 Ontario Works
 Self-employed

Complete the tabs within your scope

11. Log Out



Strata PathWays - Client Details

https://resourcematcingandreferral.ca/ereferral-train/stratahealth/pwx/assess...

RM&R RESOURCE MATCHING & REFERRAL

Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA 6AB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details Demographics Supplementary Information Acute Medical Assessment Social Information

Care Requirements AlphaFIM® Orpington Prognostic Scale COPM Functional Assessment

Communication and Swallowing eStroke Summary Calculations Uploaded Files (0) Client Choice

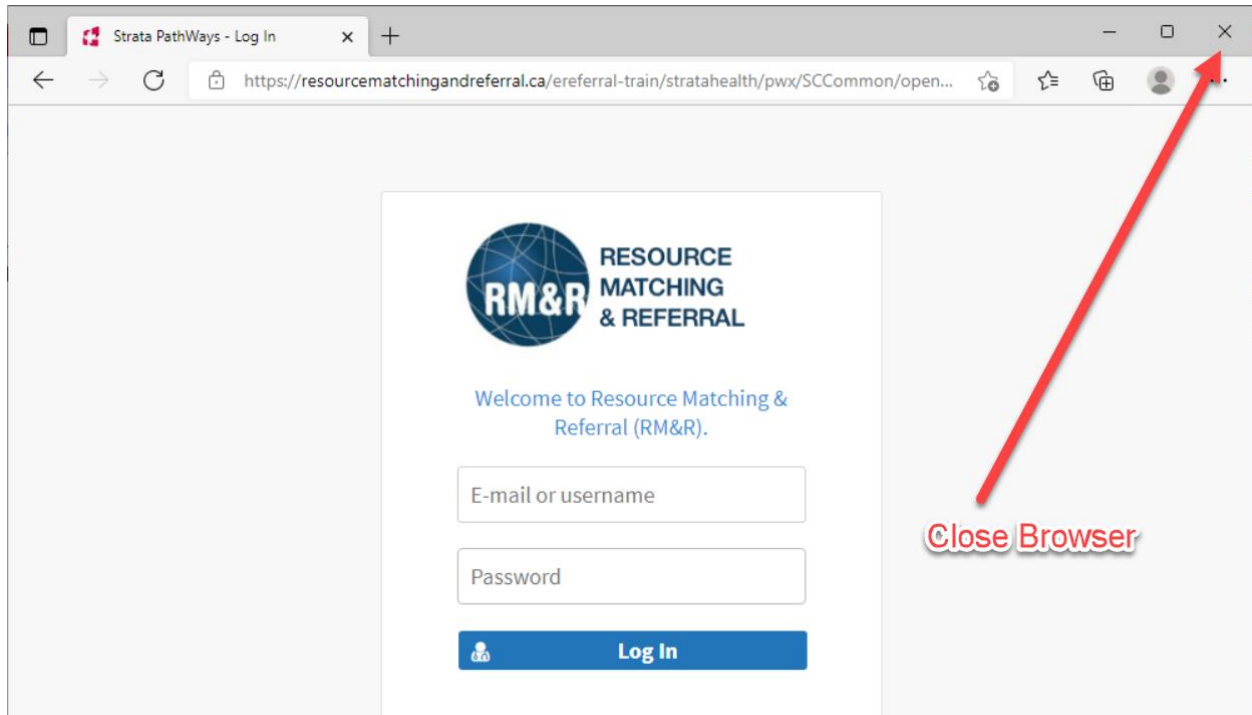
Send and Manage Referrals

Profile Report Profile History Report Prescription Report Print Client Release Record Save

Care Type	eStroke Referral (manage)	Place On Hold
Name	DeStrokan, DeMar	Deactivate
Health Card Number	No identifier	Decease
MRN	100000163	
CHRIS ID		
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 6AB Fell Pavilion <input type="text" value="Soegandi, Justin"/> Pager: (416)719-2475 <input type="button" value="Remove Responsible Person"/>	

Click Here

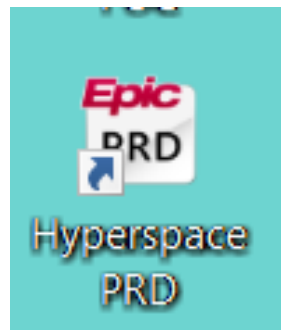
12. Close the browser



COMPLETING A REFERRAL

Once the referral is creating the clinical details regarding the referral need to be completed.

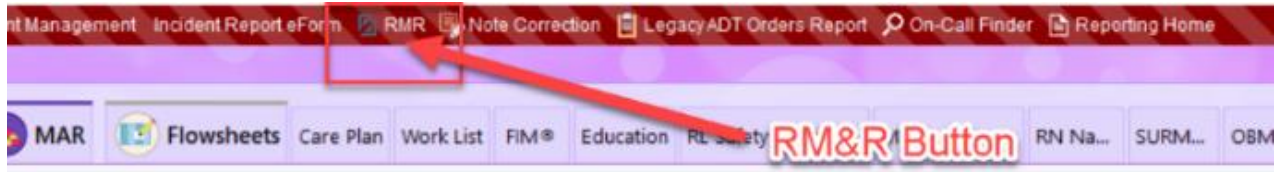
1. Launch Epic from Desktop



2. Log In

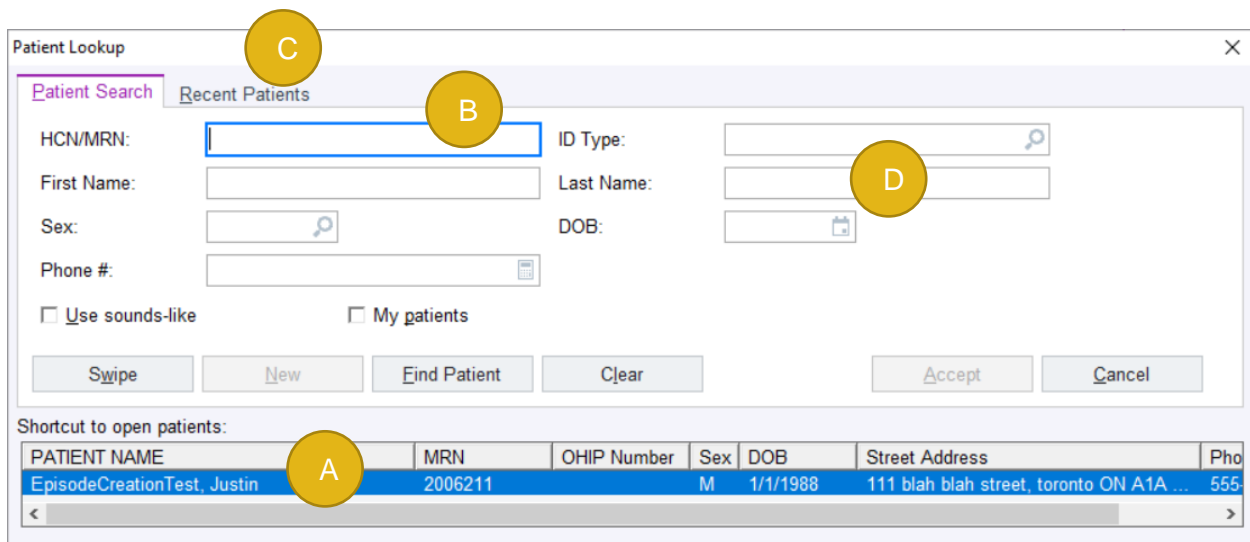


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- Clicking in the “Shortcut to open patients” list
- Typing “=” in the HCN/MRN field
- Clicking on the “Recent Patients” tab and finding them there
- Entering demographic information manually



Patient Lookup

Patient Search Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for DeStrokan, DeMar ✕

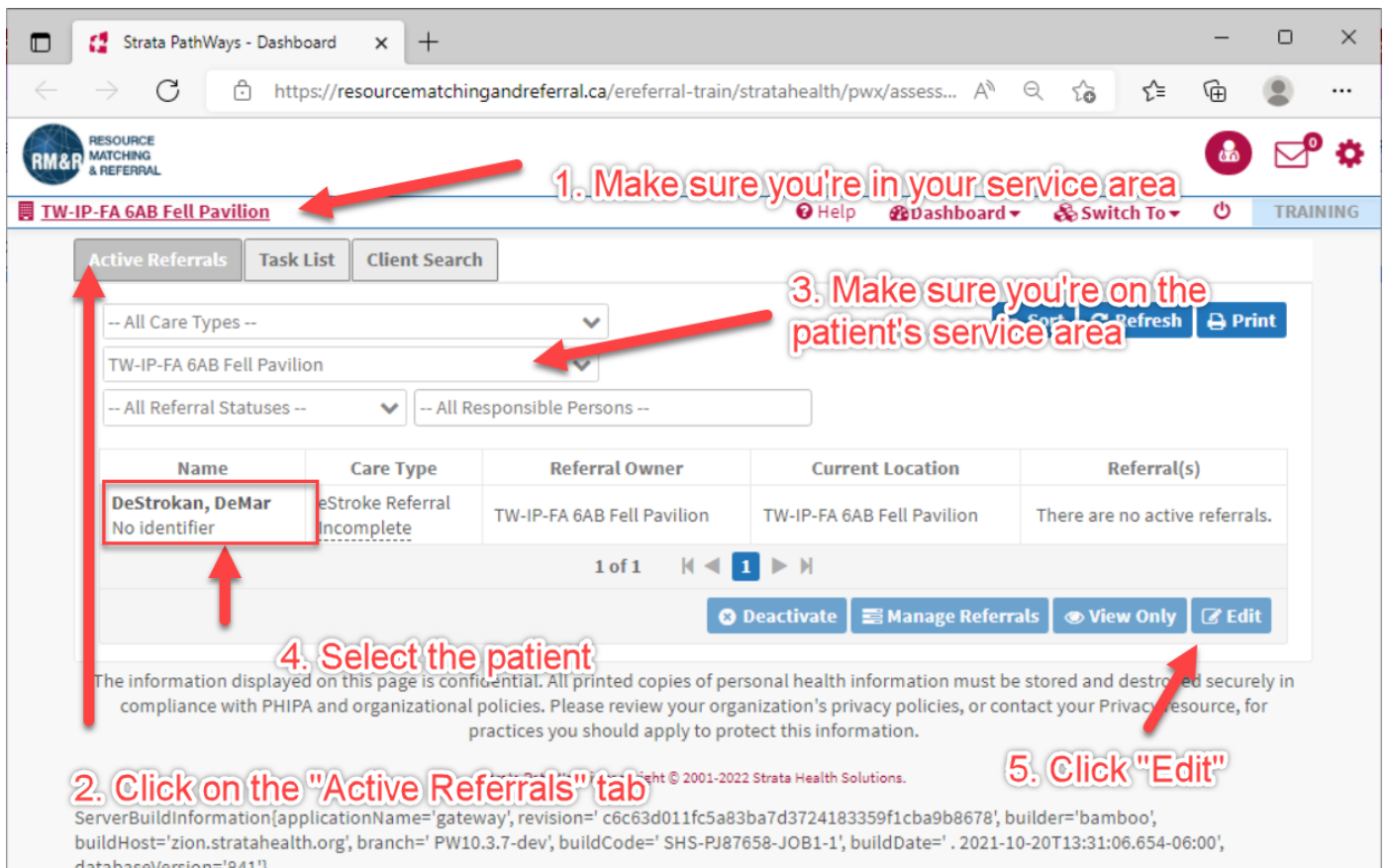
Selected record: DeStrokan, DeMar

Number	Contact Date	Contact Type
2	27/5/22	Hospital Encounter
1	27/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

- 1. Ensure you have your service area selected
- 2. Click on the “Active Referrals tab” tab
- 3. Make sure your filters include the patient’s service area
- 4. Select the patient
- 5. Click “Edit”



The screenshot shows the Strata Pathways - Dashboard interface. The browser address bar displays the URL: https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assess... The page header includes the RM&P Resource Matching & Referral logo and navigation links for Help, Dashboard, Switch To, and TRAINING. The main content area features three tabs: Active Referrals, Task List, and Client Search. The Active Referrals tab is selected, showing a filter section with dropdown menus for Care Types (set to TW-IP-FA 6AB Fell Pavilion), Referral Statuses, and Responsible Persons. Below the filters is a table with the following data:

Name	Care Type	Referral Owner	Current Location	Referral(s)
DeStrokan, DeMar No identifier	eStroke Referral Incomplete	TW-IP-FA 6AB Fell Pavilion	TW-IP-FA 6AB Fell Pavilion	There are no active referrals.

At the bottom of the table, there are pagination controls (1 of 1) and action buttons: Deactivate, Manage Referrals, View Only, and Edit. The Edit button is highlighted with a red arrow. A red box highlights the patient name 'DeStrokan, DeMar' in the table. Red arrows point to the 'Active Referrals' tab, the service area dropdown, the patient name, and the Edit button. Red text annotations 1-5 are overlaid on the image, corresponding to the steps in the list above.

1. Make sure you're in your service area

2. Click on the "Active Referrals" tab

3. Make sure you're on the patient's service area

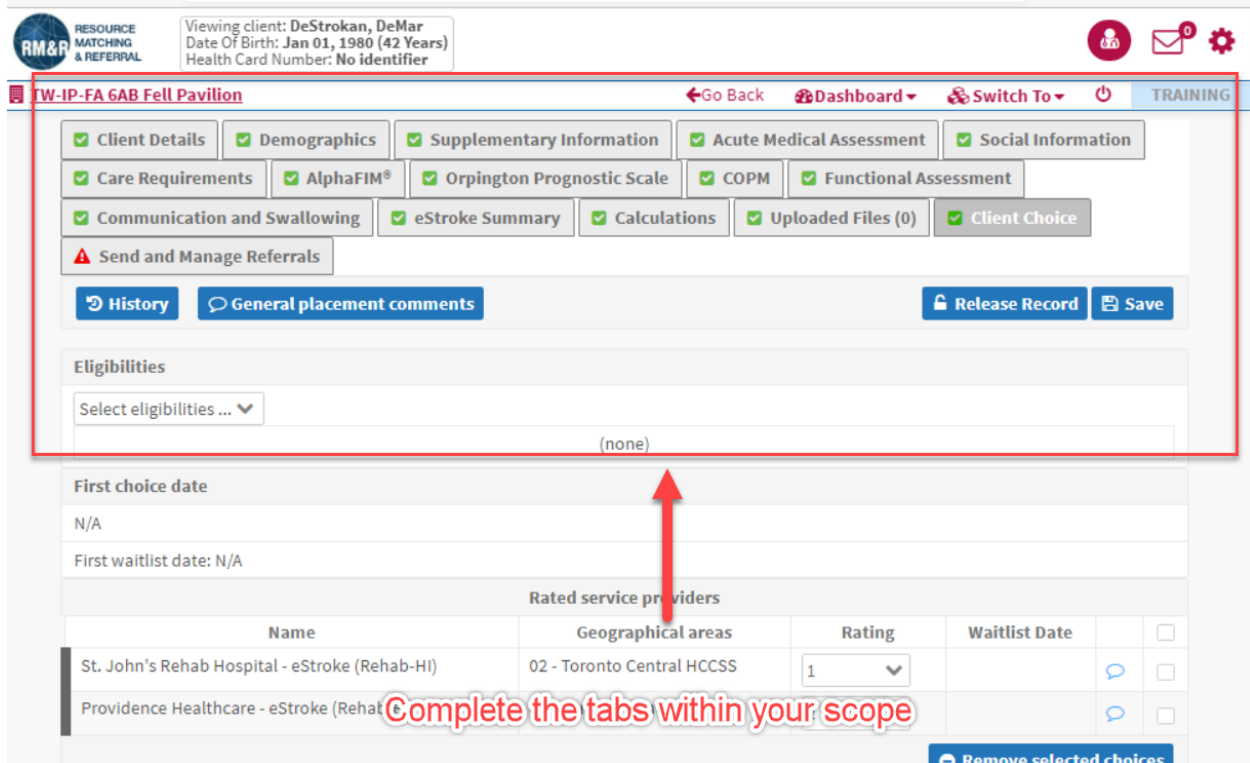
4. Select the patient

5. Click "Edit"

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

ServerBuildInformation[applicationName='gateway', revision=' c6c63d011fc5a83ba7d3724183359f1cba9b8678', builder='bamboo', buildHost='zion.stratahealth.org', branch=' PW10.3.7-dev', buildCode=' SHS-PJ87658-JOB1-1', buildDate=' . 2021-10-20T13:31:06.654-06:00', databaseVersion='R41']

7. Complete the relevant tabs for your scope of practice



RM&R RESOURCE MATCHING & REFERRAL

Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA GAB Fell Pavilion

Go Back Dashboard Switch To TRAINING

Client Details
 Demographics
 Supplementary Information
 Acute Medical Assessment
 Social Information

Care Requirements
 AlphaFIM®
 Orpington Prognostic Scale
 COPM
 Functional Assessment

Communication and Swallowing
 eStroke Summary
 Calculations
 Uploaded Files (0)
 Client Choice

Send and Manage Referrals

Eligibilities

Select eligibilities ...

(none)

First choice date

N/A

First waitlist date: N/A

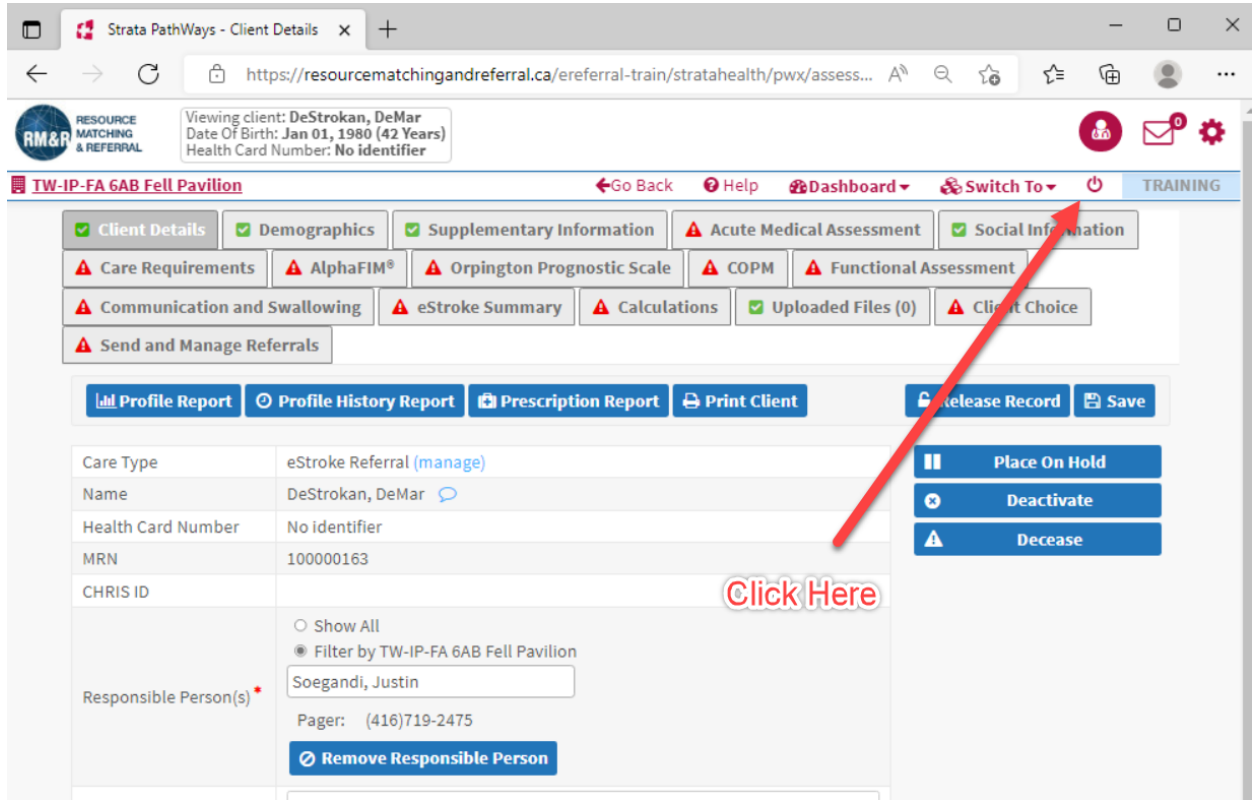
Rated service providers

Name	Geographical areas	Rating	Waitlist Date		
St. John's Rehab Hospital - eStroke (Rehab-HI)	02 - Toronto Central HCCSS	1		<input type="checkbox"/>	<input type="checkbox"/>
Providence Healthcare - eStroke (Rehab-HI)				<input type="checkbox"/>	<input type="checkbox"/>

Remove selected choices

Complete the tabs within your scope

8. Log Out



Strata PathWays - Client Details

https://resourcematcingandreferral.ca/ereferral-train/stratahealth/pwx/assess...

RM&R RESOURCE MATCHING & REFERRAL

Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA 6AB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details Demographics Supplementary Information Acute Medical Assessment Social Information

Care Requirements AlphaFIM® Orpington Prognostic Scale COPM Functional Assessment

Communication and Swallowing eStroke Summary Calculations Uploaded Files (0) Client Choice

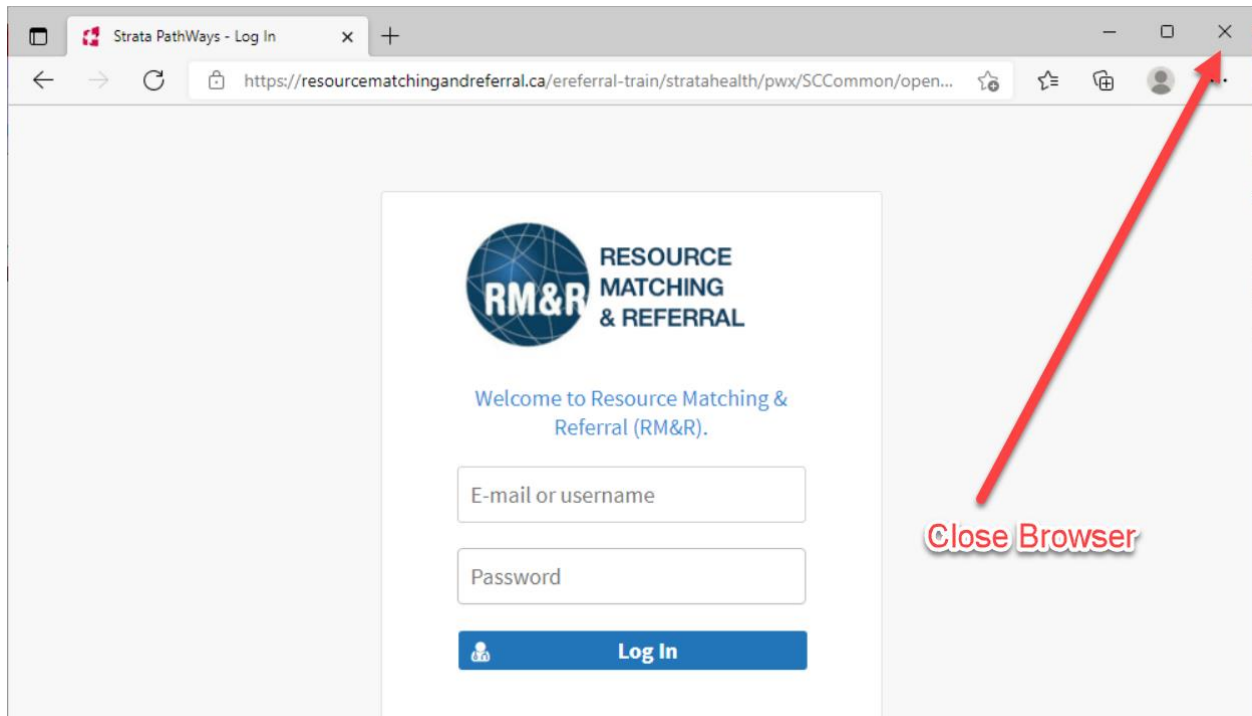
Send and Manage Referrals

Profile Report Profile History Report Prescription Report Print Client Release Record Save

Care Type	eStroke Referral (manage)	Place On Hold
Name	DeStrokan, DeMar	Deactivate
Health Card Number	No identifier	Decease
MRN	100000163	
CHRIS ID		
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 6AB Fell Pavilion <input type="text" value="Soegandi, Justin"/> Pager: (416)719-2475 <input type="button" value="Remove Responsible Person"/>	

Click Here

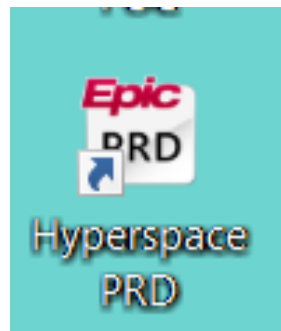
9. Close the browser



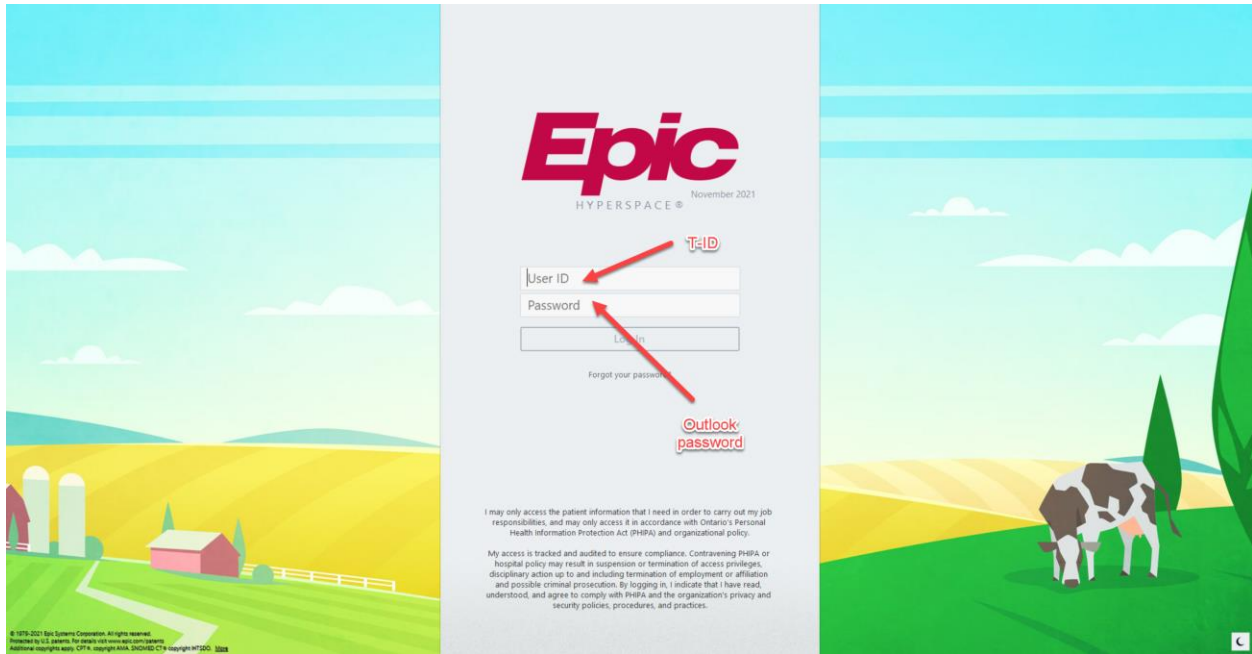
SENDING A REFERRAL

Once the referral is completed, it needs to be sent to receiving organization(s)

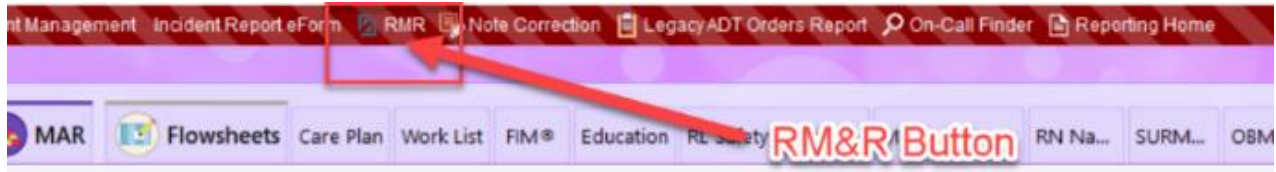
1. Launch Epic from Desktop



2. Log In

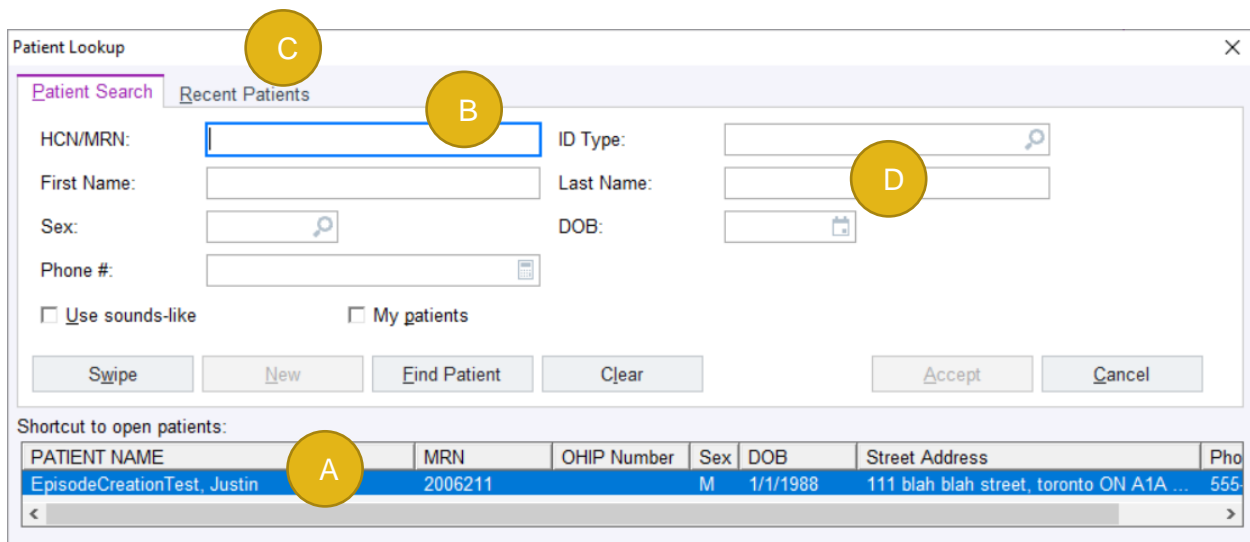


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- Clicking in the “Shortcut to open patients” list
- Typing “=” in the HCN/MRN field
- Clicking on the “Recent Patients” tab and finding them there
- Entering demographic information manually



Patient Lookup

Patient Search Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for DeStrokan, DeMar ✕

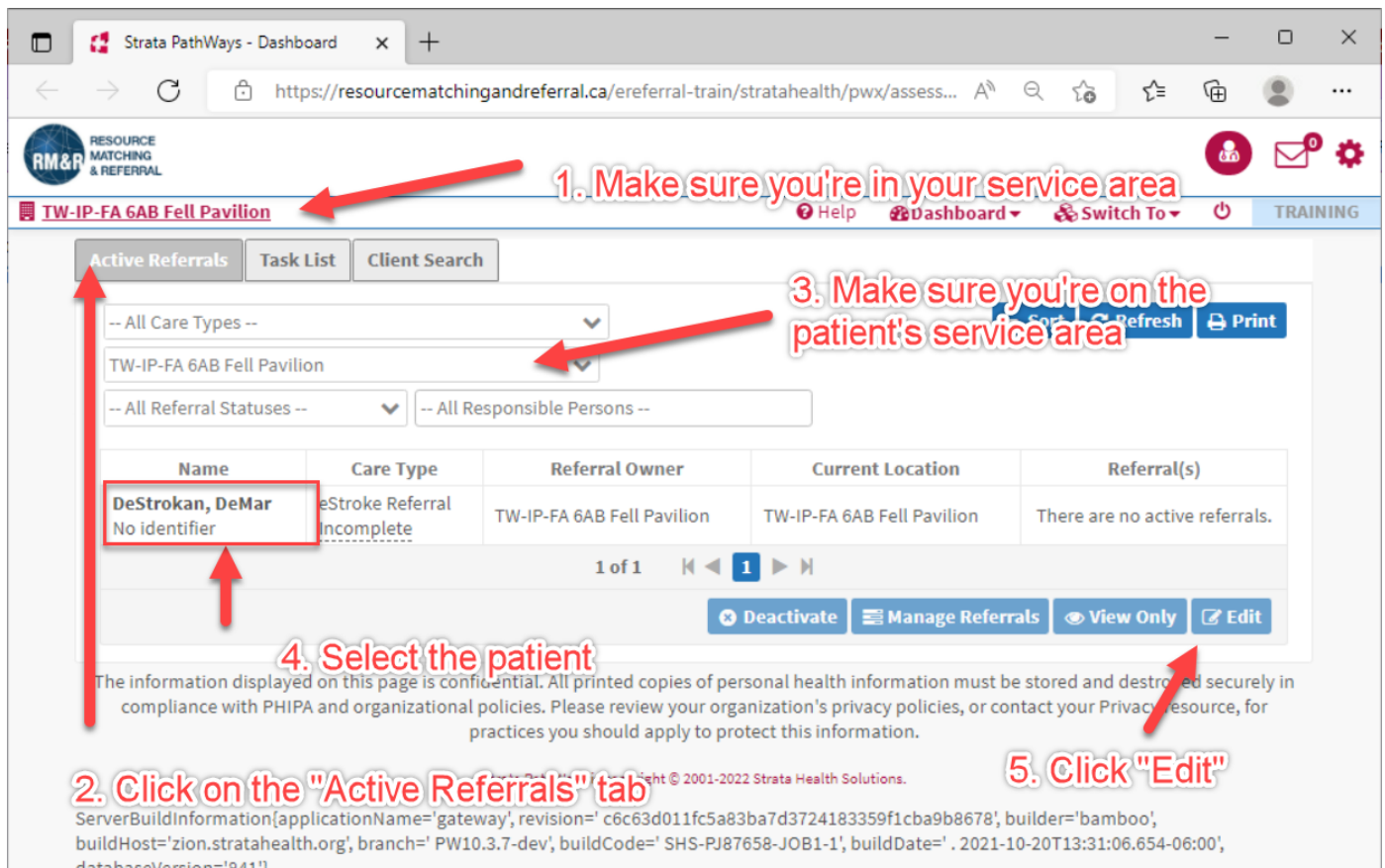
Selected record: DeStrokan, DeMar

Number	Contact Date	Contact Type
2	27/5/22	Hospital Encounter
1	27/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

- 1. Ensure you have your service area selected
- 2. Click on the “Active Referrals tab” tab
- 3. Make sure your filters include the patient’s service area
- 4. Select the patient
- 5. Click “Edit”



The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assess...>. The page title is "Strata Pathways - Dashboard". The main content area is titled "TW-IP-FA 6AB Fell Pavilion" and contains a tabbed interface with "Active Referrals", "Task List", and "Client Search". The "Active Referrals" tab is selected, showing a list of referrals. The first row in the table is highlighted, with the patient name "DeStrokan, DeMar" and "No identifier" visible. Below the table, there are buttons for "Deactivate", "Manage Referrals", "View Only", and "Edit". The "Edit" button is highlighted with a red arrow. Red annotations and arrows point to the "Active Referrals" tab, the "TW-IP-FA 6AB Fell Pavilion" filter, the patient name in the table, and the "Edit" button.

1. Make sure you're in your service area

2. Click on the "Active Referrals" tab

3. Make sure you're on the patient's service area

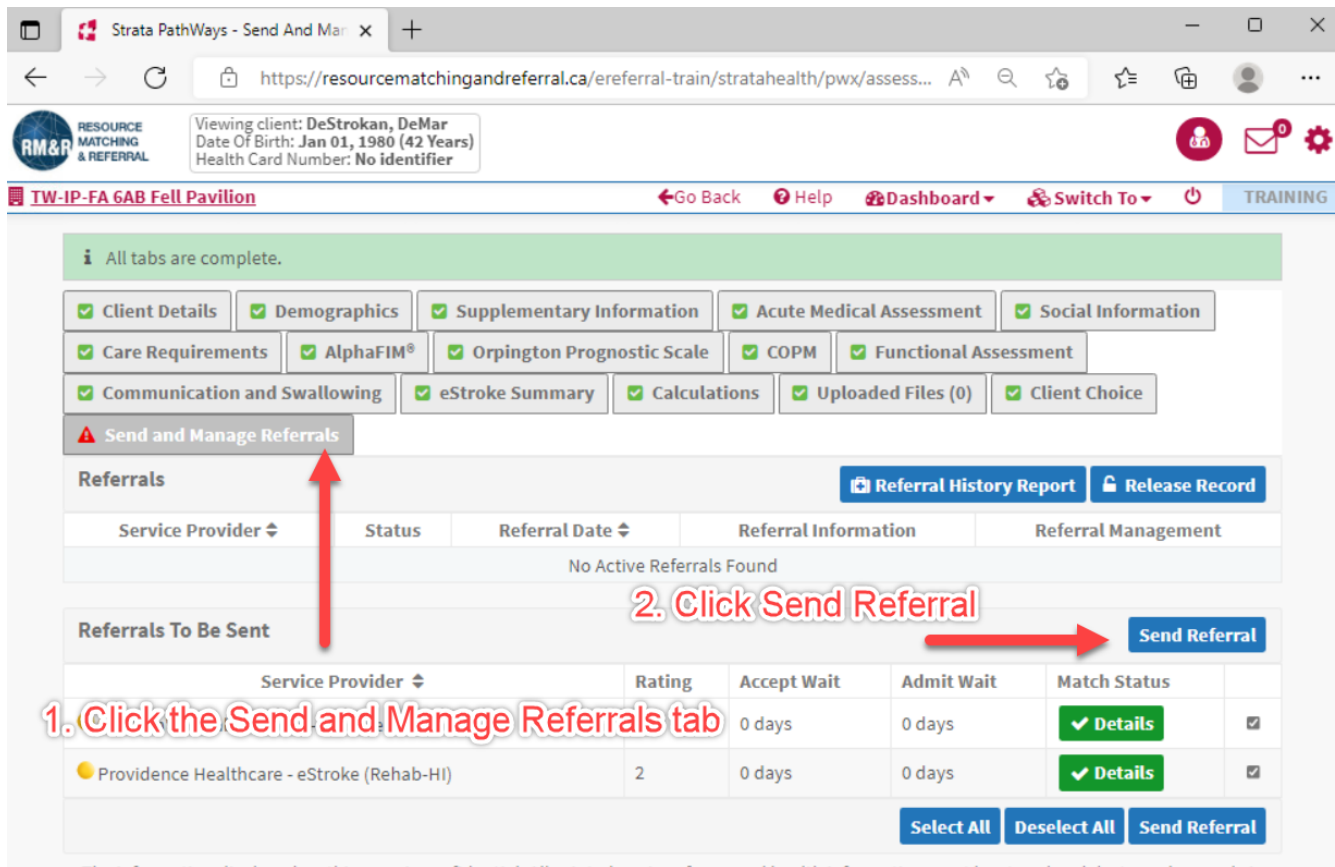
4. Select the patient

5. Click "Edit"

The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

ServerBuildInformation[applicationName='gateway', revision=' c6c63d011fc5a83ba7d3724183359f1cba9b8678', builder='bamboo', buildHost='zion.stratahealth.org', branch=' PW10.3.7-dev', buildCode=' SHS-PJ87658-JOB1-1', buildDate=' . 2021-10-20T13:31:06.654-06:00', databaseVersion='R41']

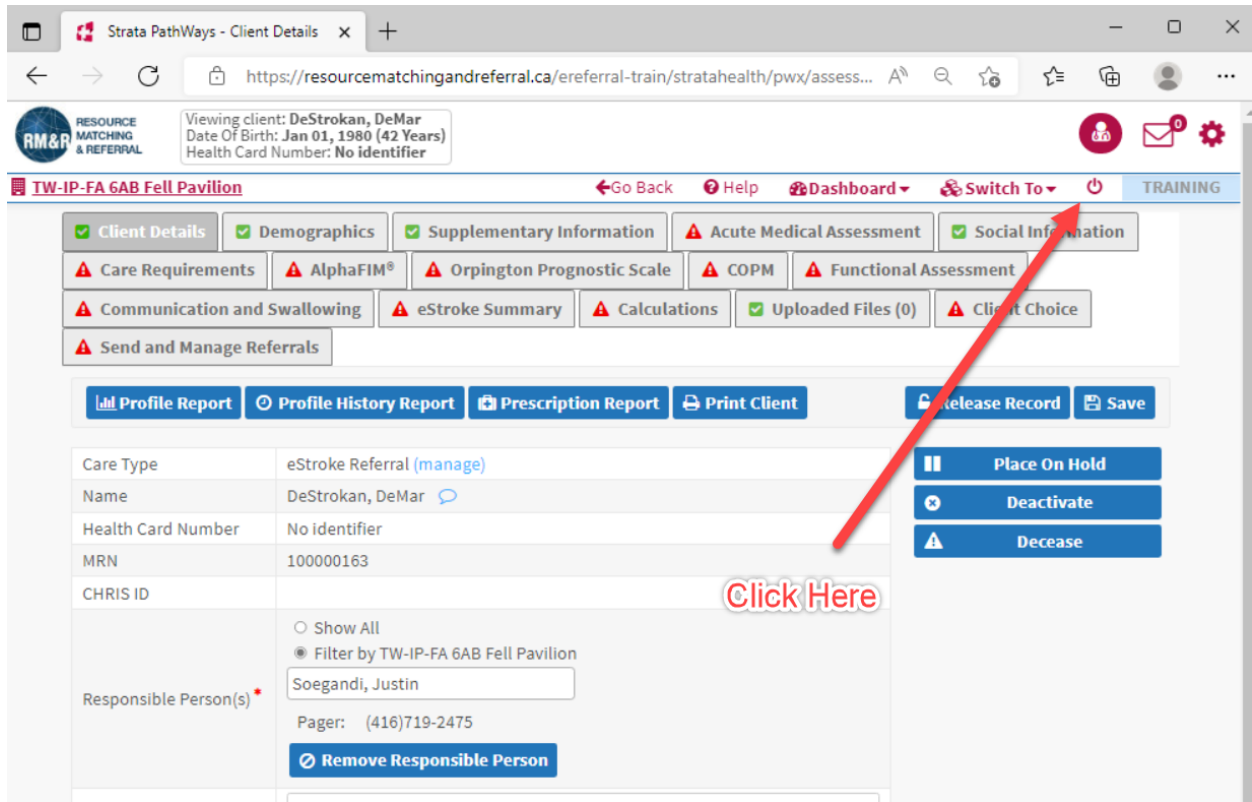
7. Click the “Send and Manage Referrals Tab” and click “Send Referral”



The screenshot shows the Strata Pathways web application interface. At the top, there is a navigation bar with a 'TRAINING' indicator. Below this, a status bar shows 'TW-IP-FA 6AB Fell Pavilion' and various utility icons. The main content area displays a list of completed tabs, including 'Client Details', 'Demographics', 'Supplementary Information', 'Acute Medical Assessment', 'Social Information', 'Care Requirements', 'AlphaFIM', 'Orpington Prognostic Scale', 'COPM', 'Functional Assessment', 'Communication and Swallowing', 'eStroke Summary', 'Calculations', 'Uploaded Files (0)', and 'Client Choice'. The 'Send and Manage Referrals' tab is highlighted with a red arrow and the annotation '1. Click the Send and Manage Referrals tab'. Below this, there are two tables. The first table, 'Referrals', shows 'No Active Referrals Found'. The second table, 'Referrals To Be Sent', contains one entry for 'Providence Healthcare - eStroke (Rehab-HI)'. A red arrow points from the 'Send Referral' button in the table to the annotation '2. Click Send Referral'.

Service Provider	Rating	Accept Wait	Admit Wait	Match Status
Providence Healthcare - eStroke (Rehab-HI)	2	0 days	0 days	<input checked="" type="checkbox"/> Details

8. Log Out



Strata PathWays - Client Details

https://resourcematcingandreferral.ca/ereferral-train/stratahealth/pwx/assess...

RM&R RESOURCE MATCHING & REFERRAL

Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier

TW-IP-FA 6AB Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details Demographics Supplementary Information Acute Medical Assessment Social Information

Care Requirements AlphaFIM® Orpington Prognostic Scale COPM Functional Assessment

Communication and Swallowing eStroke Summary Calculations Uploaded Files (0) Client Choice

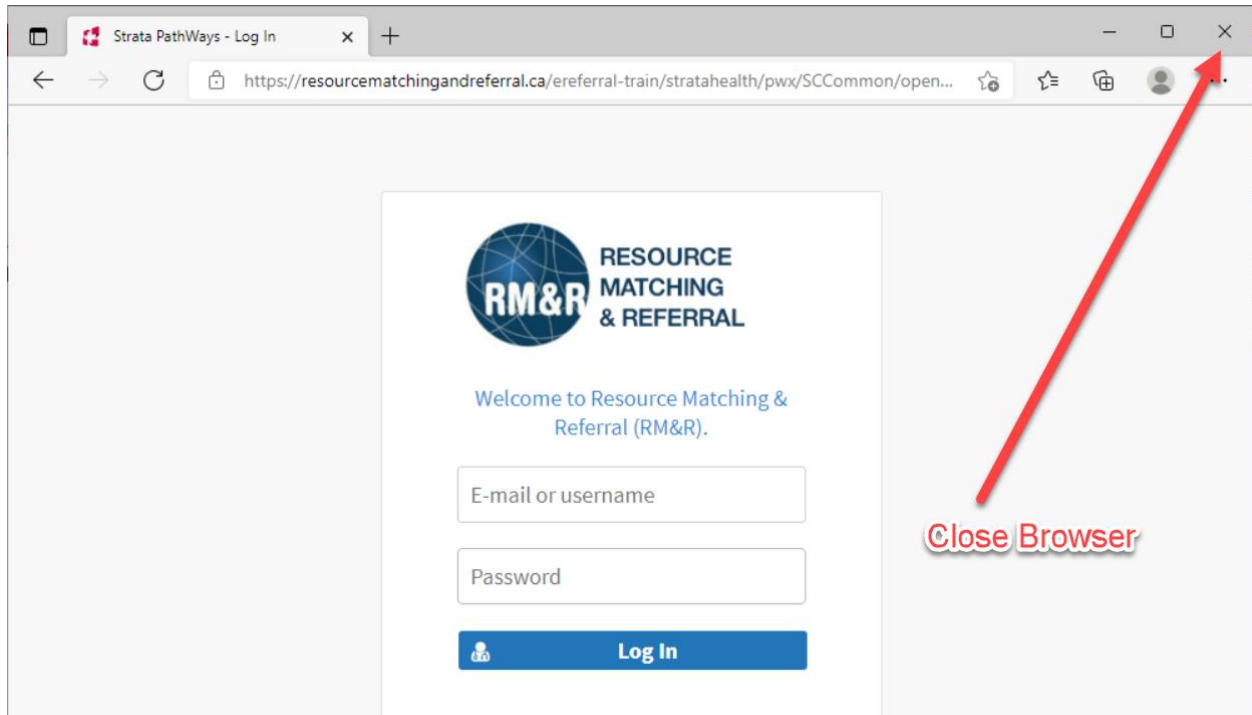
Send and Manage Referrals

Profile Report Profile History Report Prescription Report Print Client Release Record Save

Care Type	eStroke Referral (manage)	Place On Hold
Name	DeStrokan, DeMar	Deactivate
Health Card Number	No identifier	Decease
MRN	100000163	
CHRIS ID		
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 6AB Fell Pavilion <input type="text" value="Soegandi, Justin"/> Pager: (416)719-2475 <input type="button" value="Remove Responsible Person"/>	

Click Here

9. Close the browser

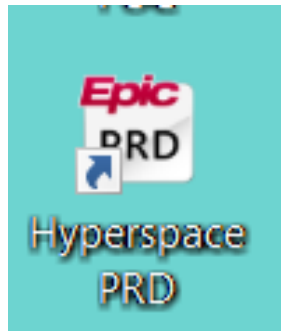


Workflow for any care type excluding:

- **Home and Community Care**
- **IP Rehab/ Complex Continuing Care**
- **Integrated Care**
- **Palliative Care**
- **Outpatient Rehab – Total Joint Replacement**
- **eStroke**

CREATING A REFERRAL

1. Launch Epic from Desktop



2. Log In

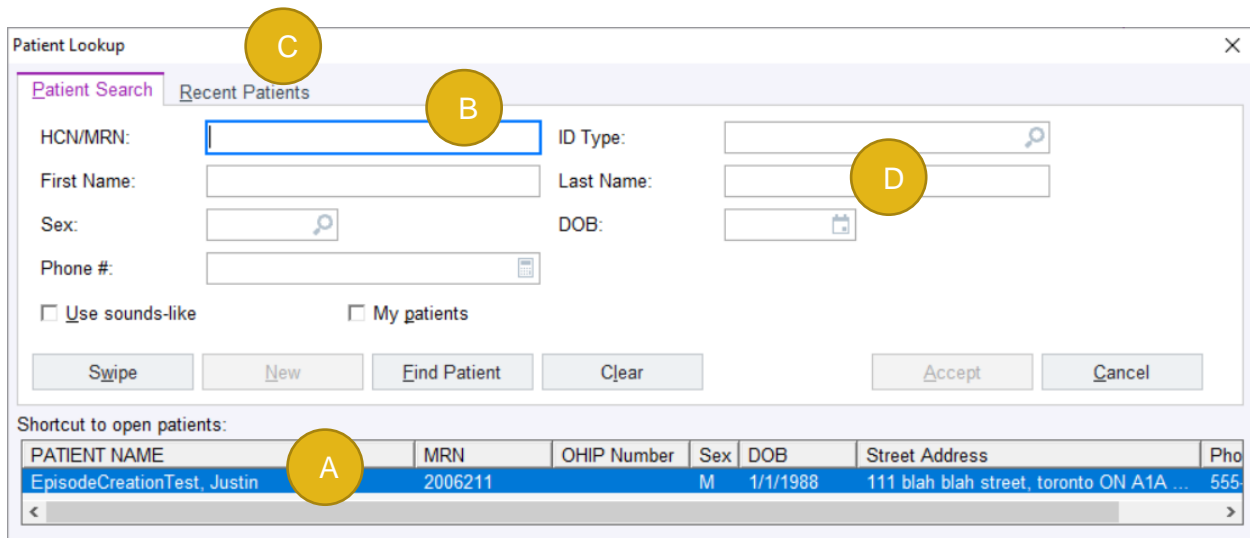


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- Clicking in the “Shortcut to open patients” list
- Typing “=” in the HCN/MRN field
- Clicking on the “Recent Patients” tab and finding them there
- Entering demographic information manually



Patient Lookup

Patient Search | Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555-

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for Stark, Arya ×

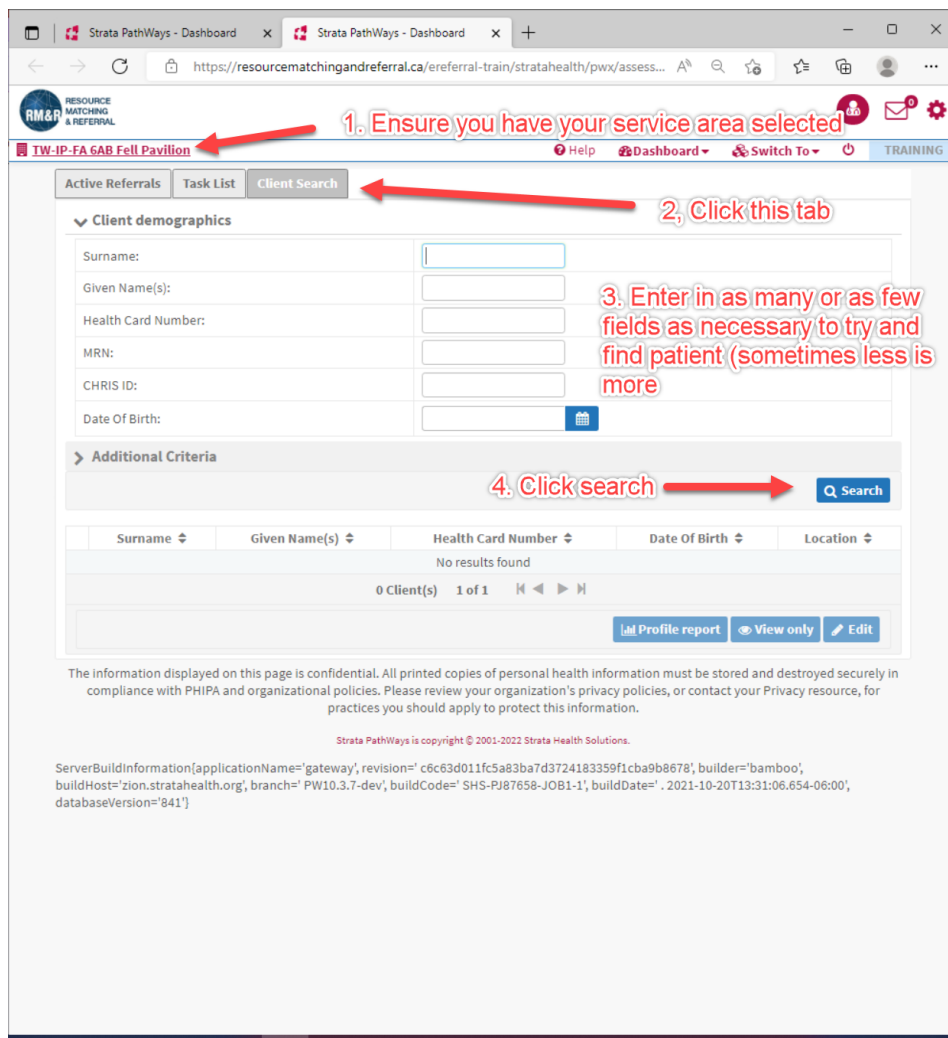
Selected record: Stark, Arya

Number	Contact Date	Contact Type
2	30/5/22	Hospital Encounter
1	30/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

- 1. Ensure you have your service area selected
- 2. Click on the “Client Search” tab
- 3. Enter as many or as few fields to try and find your patient. **If using MRN, include “[space] (3910)” after the 7-digit number. for example “2223333 (3910)”**
- 4. Click “Search”

The screenshot shows the Strata Pathways Client Search interface. Red annotations and arrows highlight the following steps:

- 1. Ensure you have your service area selected:** An arrow points to the dropdown menu showing "TW-IP-FA GAB Fell Pavilion".
- 2. Click this tab:** An arrow points to the "Client Search" tab.
- 3. Enter in as many or as few fields as necessary to try and find patient (sometimes less is more):** This annotation is placed over the search input fields for Surname, Given Name(s), Health Card Number, MRN, CHRIS ID, and Date of Birth.
- 4. Click search:** An arrow points to the "Search" button.

The interface also shows a table with columns for Surname, Given Name(s), Health Card Number, Date of Birth, and Location. Below the table, it displays "No results found" and "0 Client(s) 1 of 1".

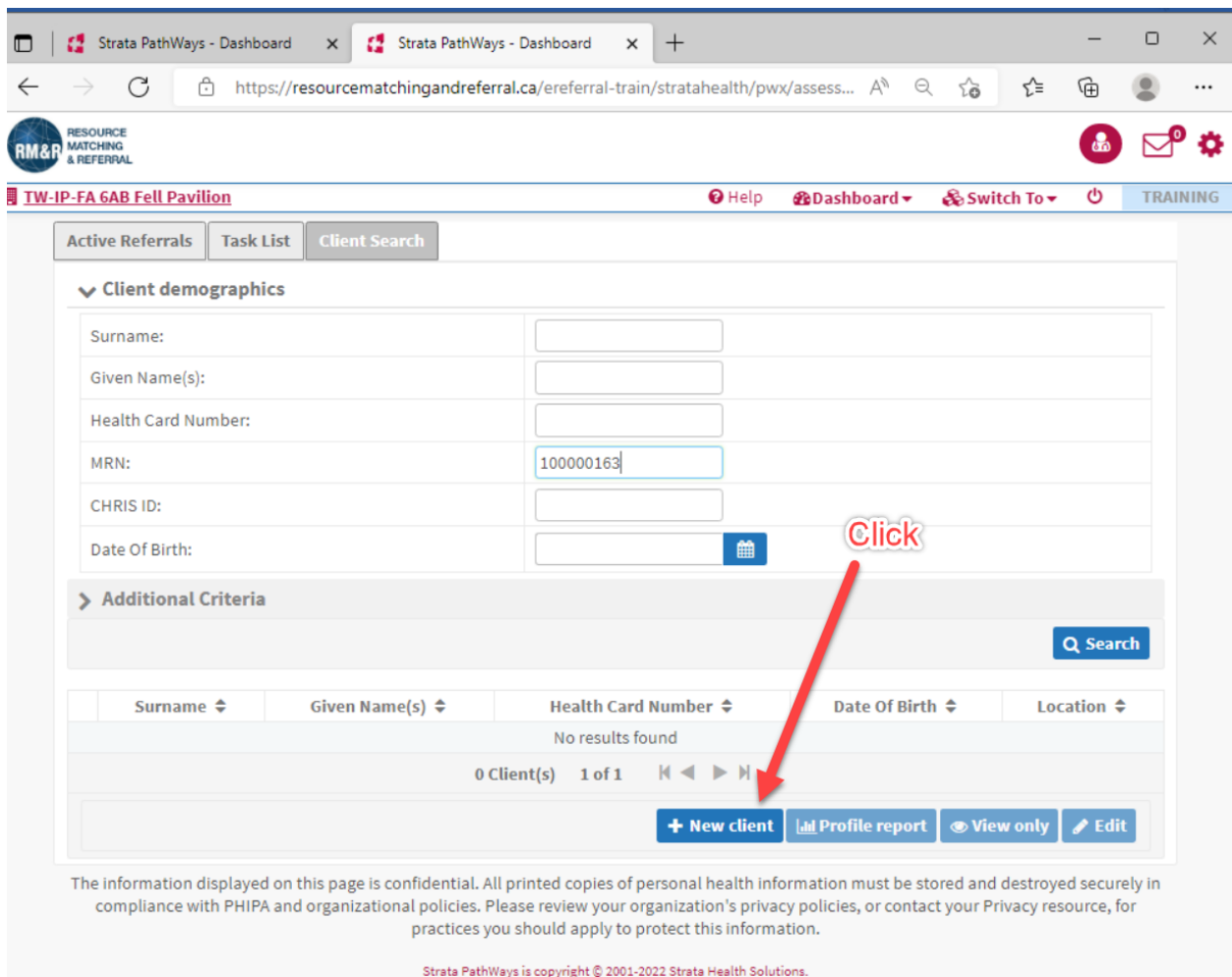
The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

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ServerBuildInformation[applicationName='gateway', revision=' c6c63d011fc5a83ba7d3724183359f1c9a9b8678', builder='bamboo', buildHost='zion.stratahealth.org', branch=' PW10.3.7-dev', buildCode=' SHS-PJ87658-JOB1-1', buildDate=' . 2021-10-20T13:31:06.654-06:00', databaseVersion='841']

7a. If the correct patient is found, select them and proceed to page 41

7b. If the patient is not found, click the “+ New client” button

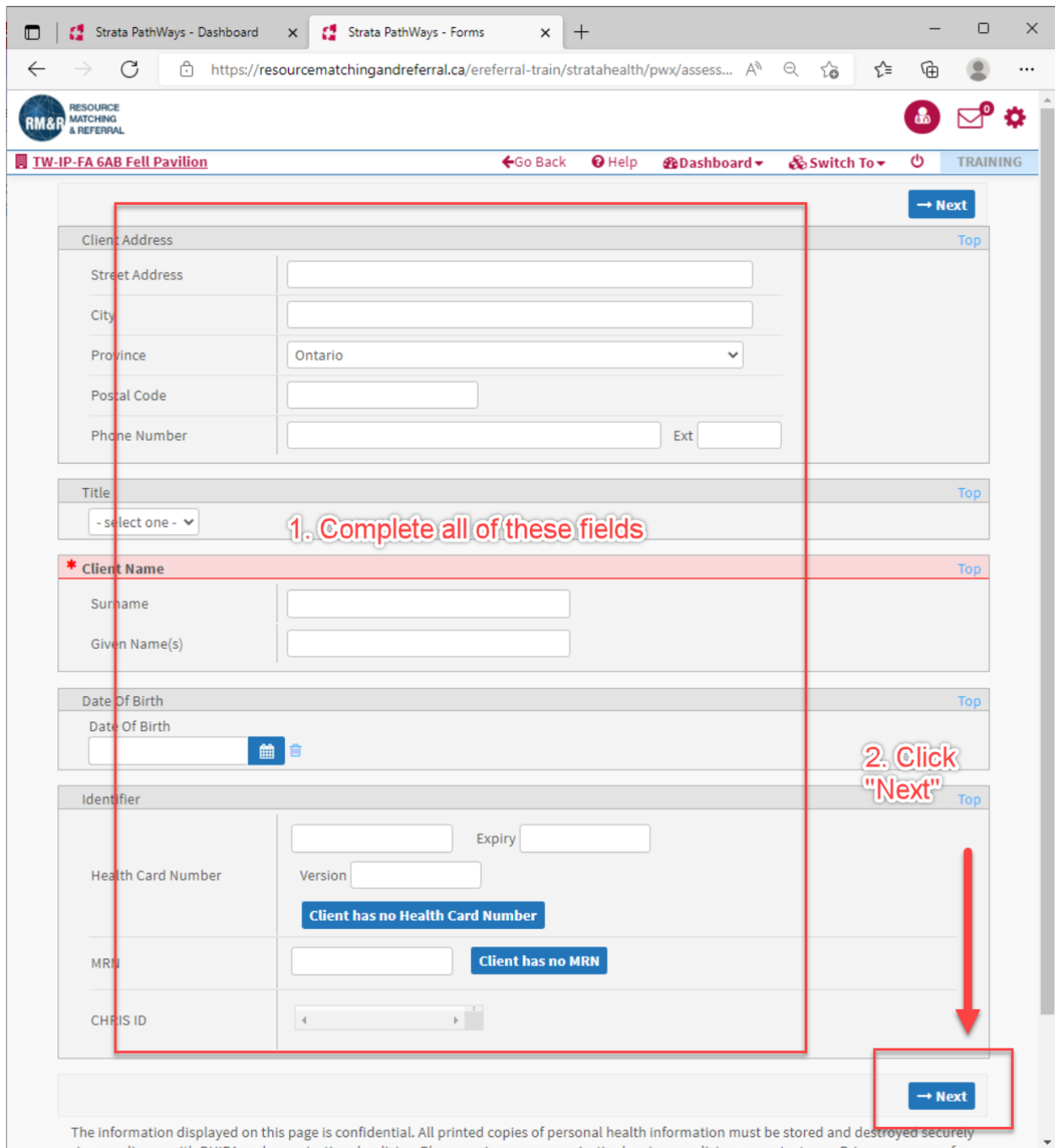


The screenshot shows the Strata Pathways Client Search interface. The 'Client demographics' section includes input fields for Surname, Given Name(s), Health Card Number, MRN (with the value 100000163), CHRIS ID, and Date Of Birth. Below this is an 'Additional Criteria' section with a search button. A table below shows 'No results found' and '0 Client(s) 1 of 1'. A red arrow points to the '+ New client' button with the word 'Click' written above it.

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8. Complete all of the fields and click “Next” **NOTE: For the MRN Field, you MUST include “[space] 3910” after the 7 digit MRN...for example “2223333 (3910)”**



The screenshot shows a web browser window with the URL <https://resourcematcingandreferral.ca/ereferral-train/stratahealth/pwx/assess...>. The page title is "TW-IP-FA GAB Fell Pavilion". The form contains the following sections:

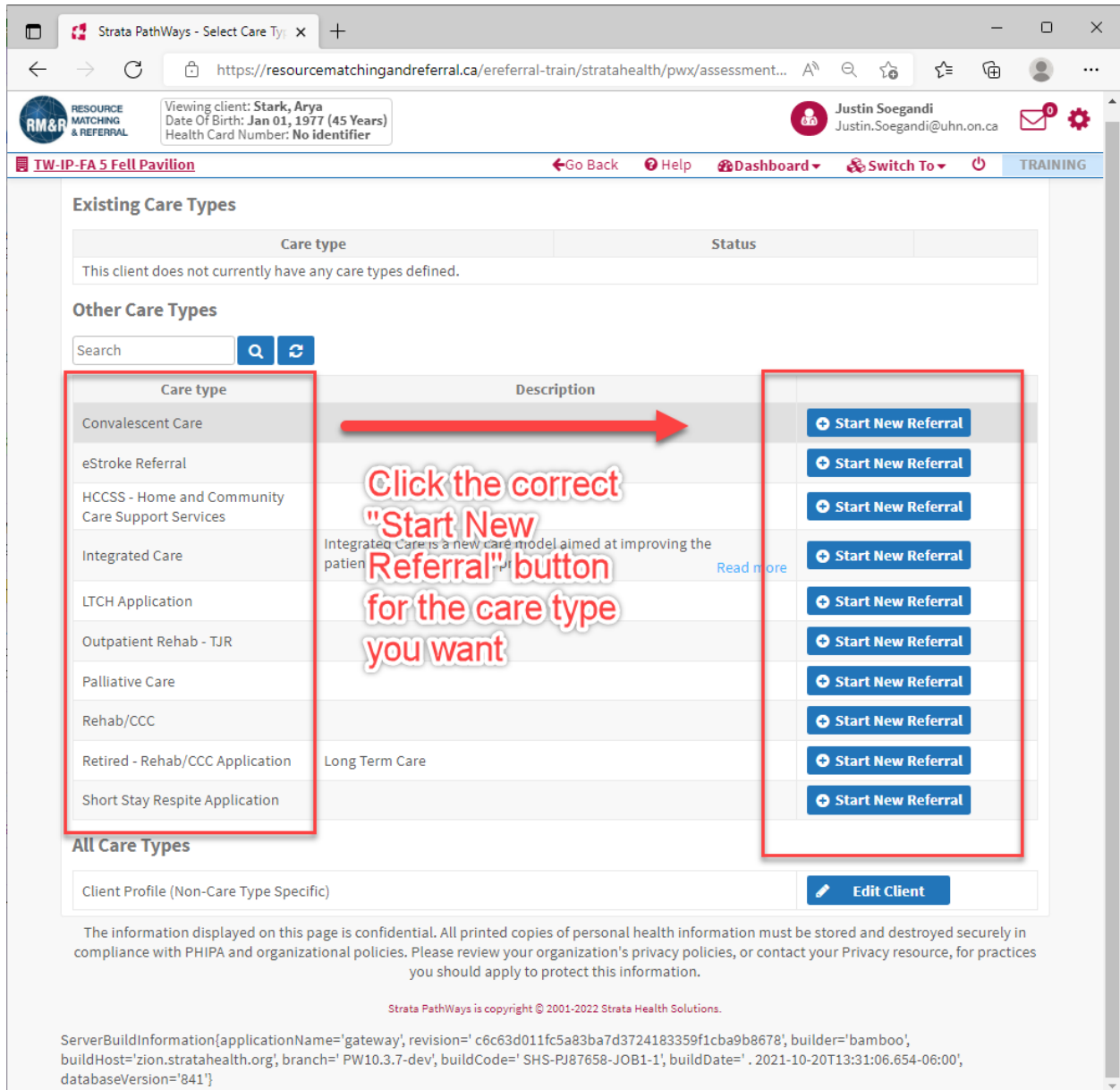
- Client Address:** Street Address, City, Province (Ontario), Postal Code, Phone Number, Ext.
- Title:** - select one -
- * Client Name:** Surname, Given Name(s)
- Date Of Birth:** Date Of Birth
- Identifier:** Health Card Number (with "Client has no Health Card Number" button), MRN (with "Client has no MRN" button), CHRIS ID

Red annotations include:

- A red box around the form fields with the text "1. Complete all of these fields".
- A red arrow pointing to the "Next" button at the bottom right with the text "2. Click 'Next'".
- A "Next" button at the top right of the form.
- A "Next" button at the bottom right of the page.

At the bottom of the page, there is a confidentiality notice: "The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PUIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for..."

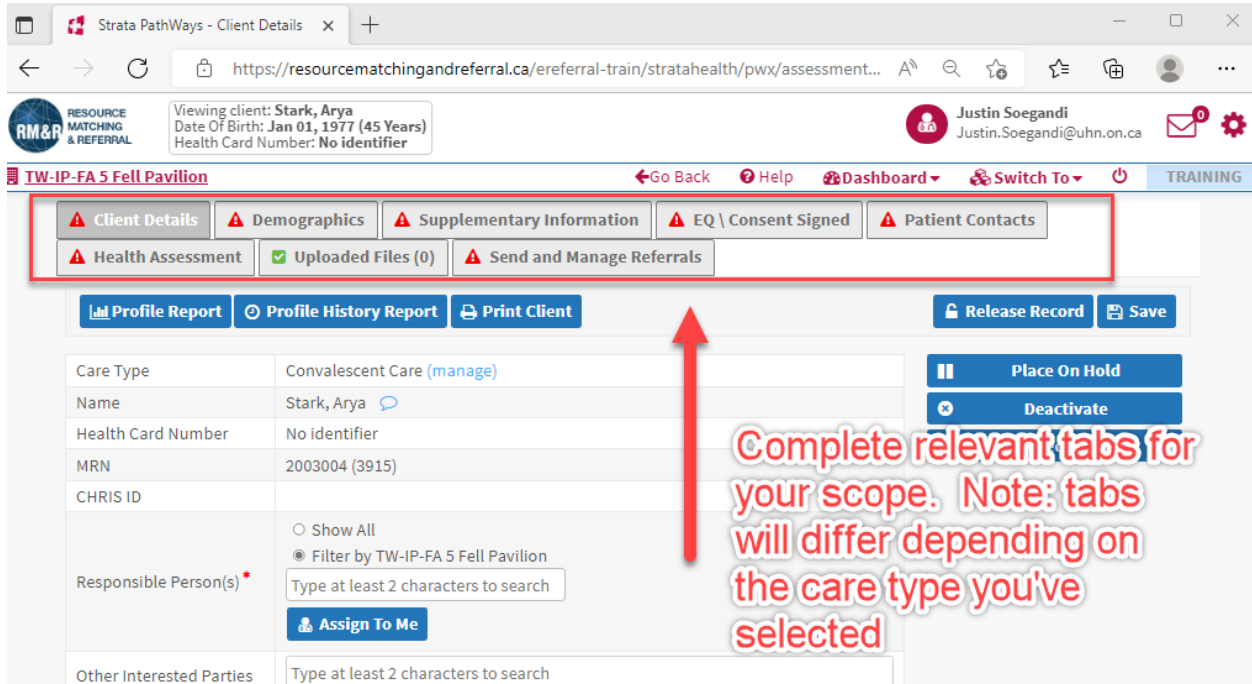
9. Click the blue “Start New Referral” box next to the care type that you want



The screenshot shows the 'Strata PathWays - Select Care Type' interface. At the top, it displays the client's name 'Stark, Arya', date of birth 'Jan 01, 1977 (45 Years)', and health card number 'No identifier'. The user 'Justin Soegandi' is logged in. The page title is 'TW-IP-FA 5 Fell Pavilion'. The main content area is divided into 'Existing Care Types' (empty) and 'Other Care Types'. A search bar is present above a table of care types. The table has columns for 'Care type', 'Description', and 'Start New Referral'. The 'Convalescent Care' row is highlighted with a red arrow pointing to its 'Start New Referral' button. A red text overlay with a white border says: 'Click the correct "Start New Referral" button for the care type you want'. Below the table is an 'All Care Types' section with a client profile and an 'Edit Client' button. A footer contains a confidentiality notice and server build information.

Care type	Description	Start New Referral
Convalescent Care		Start New Referral
eStroke Referral		Start New Referral
HCCSS - Home and Community Care Support Services		Start New Referral
Integrated Care	Integrated Care is a new care model aimed at improving the patient experience. Read more	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
Short Stay Respite Application		Start New Referral

10. Complete the relevant tabs for your scope of practice



Strata Pathways - Client Details

https://resourcematcingandreferral.ca/ereferral-train/stratahealth/pwx/assessment...

Viewing client: Stark, Arya
Date Of Birth: Jan 01, 1977 (45 Years)
Health Card Number: No identifier

Justin Soegandi
Justin.Soegandi@uhn.on.ca

TW-IP-FA.5 Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

Client Details Demographics Supplementary Information EQ \ Consent Signed Patient Contacts

Health Assessment Uploaded Files (0) Send and Manage Referrals

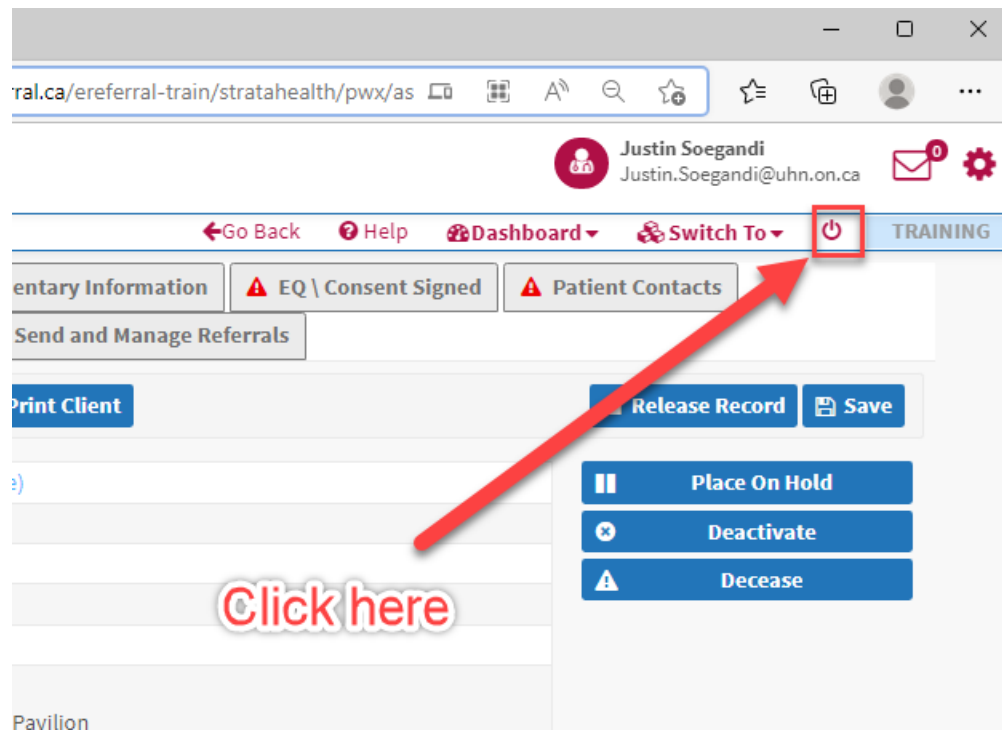
Profile Report Profile History Report Print Client Release Record Save

Care Type	Convalescent Care (manage)
Name	Stark, Arya
Health Card Number	No identifier
MRN	2003004 (3915)
CHRIS ID	
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 5 Fell Pavilion <input type="text" value="Type at least 2 characters to search"/> <input type="button" value="Assign To Me"/>
Other Interested Parties	<input type="text" value="Type at least 2 characters to search"/>

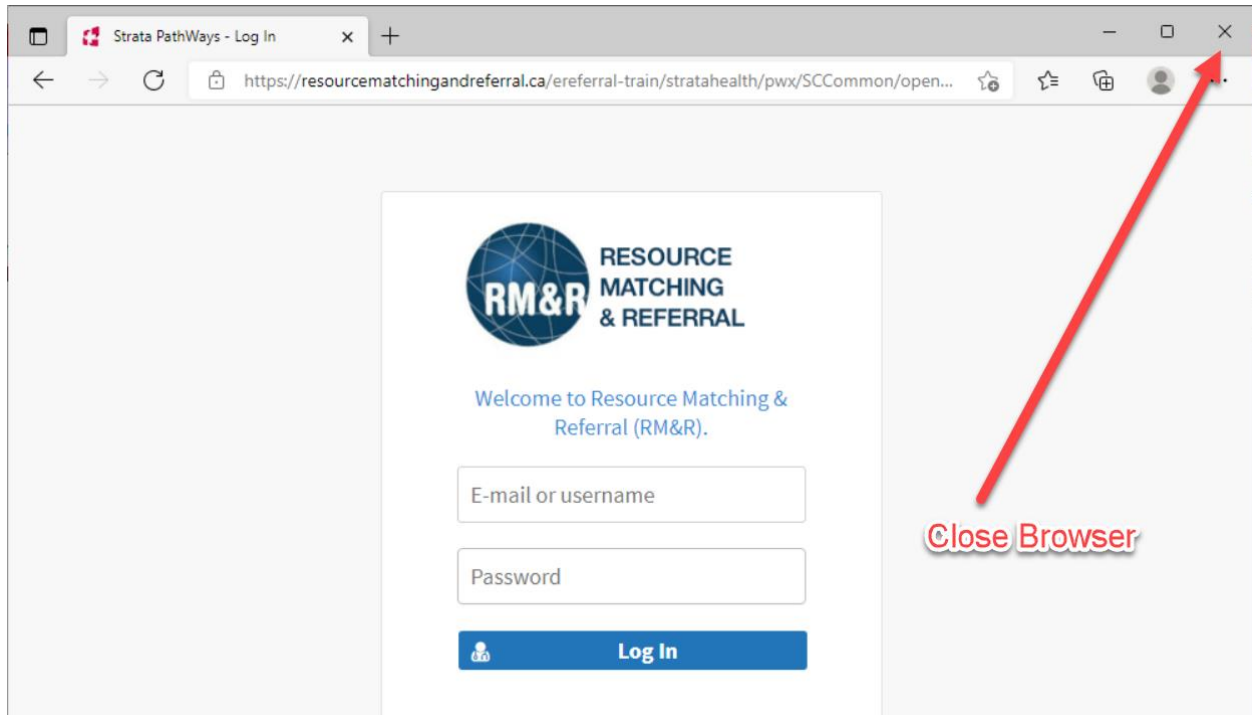
Place On Hold Deactivate

Complete relevant tabs for your scope. Note: tabs will differ depending on the care type you've selected

11. Log Out



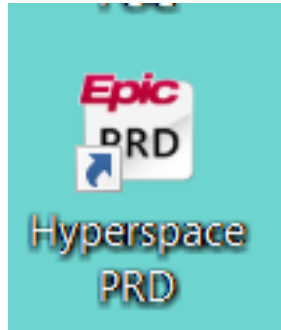
12. Close the browser



COMPLETING A REFERRAL

Once the referral is creating the clinical details regarding the referral need to be completed.

1. Launch Epic from Desktop



2. Log In

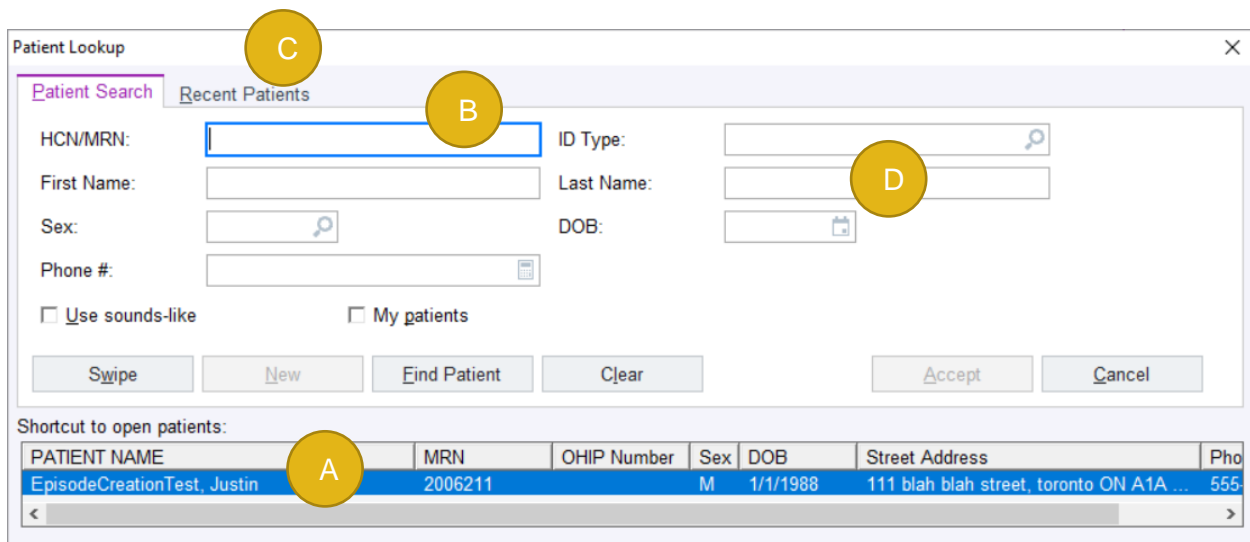


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- Clicking in the “Shortcut to open patients” list
- Typing “=” in the HCN/MRN field
- Clicking on the “Recent Patients” tab and finding them there
- Entering demographic information manually



Patient Lookup

Patient Search Recent Patients

HCN/MRN: ID Type:

First Name: Last Name:

Sex: DOB:

Phone #:

Use sounds-like My patients

Swipe New Find Patient Clear Accept Cancel

Shortcut to open patients:

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for Stark, Arya ✕

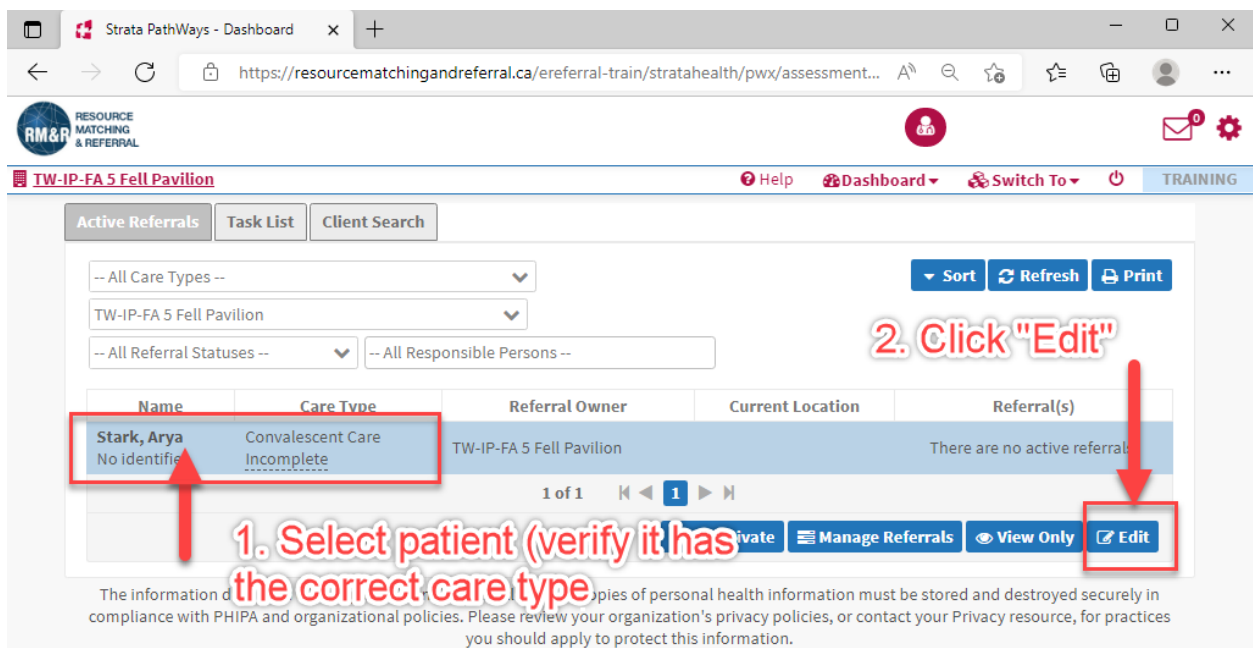
Selected record: Stark, Arya

Number	Contact Date	Contact Type
2	30/5/22	Hospital Encounter
1	30/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

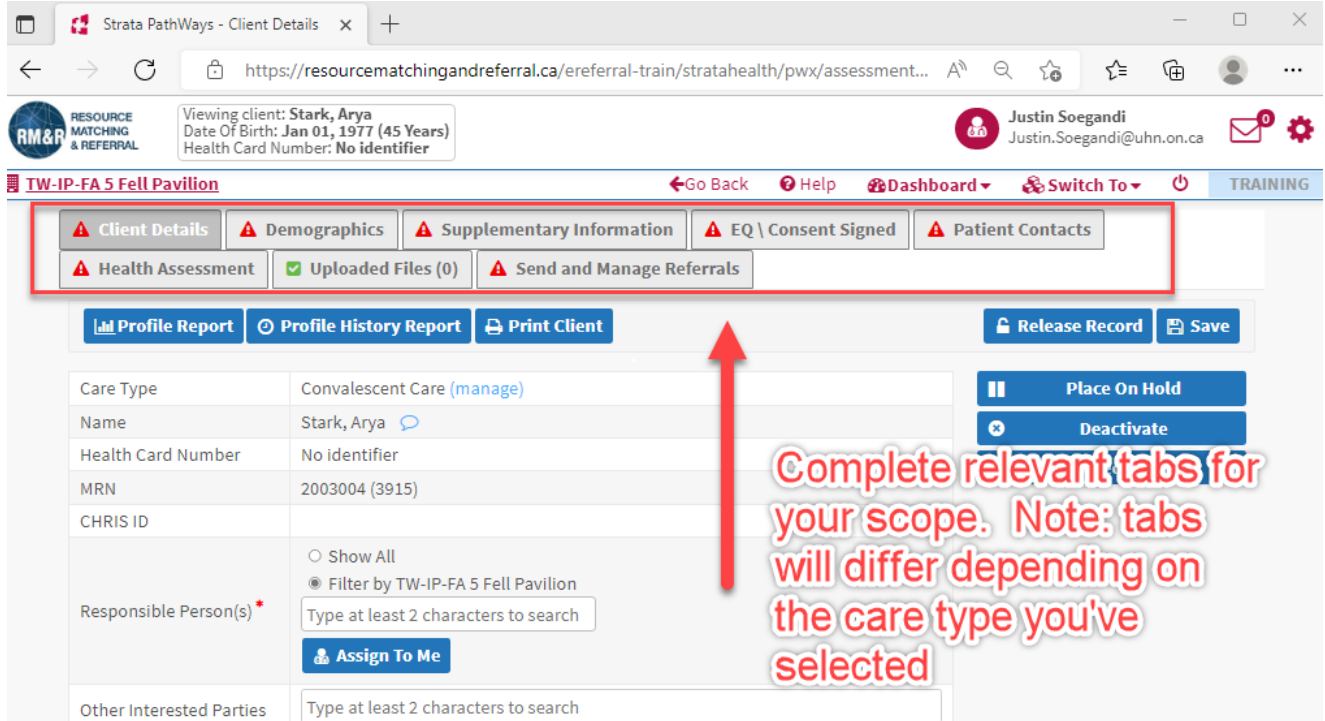
- 1. Select the patient
- 2. Click “Edit”



The screenshot shows a web application interface for 'Strata PathWays - Dashboard'. The main content area displays a table of 'Active Referrals'. The table has columns for Name, Care Type, Referral Owner, Current Location, and Referral(s). A single row is visible for 'Stark, Arya' with a care type of 'Convalescent Care Incomplete'. The 'Edit' button for this row is highlighted with a red box and a red arrow. Red text annotations provide instructions: '1. Select patient (verify it has the correct care type)' and '2. Click "Edit"'. The interface also includes search filters, a pagination control showing '1 of 1', and a footer with a privacy notice.

Name	Care Type	Referral Owner	Current Location	Referral(s)
Stark, Arya No identifier	Convalescent Care Incomplete	TW-IP-FA 5 Fell Pavilion		There are no active referrals

7. Complete the relevant tabs for your scope of practice



Viewing client: **Stark, Arya**
Date Of Birth: Jan 01, 1977 (45 Years)
Health Card Number: No identifier

Justin Soegandi
Justin.Soegandi@uhn.on.ca

TW-IP-FA 5 Fell Pavilion

Go Back Help Dashboard Switch To TRAINING

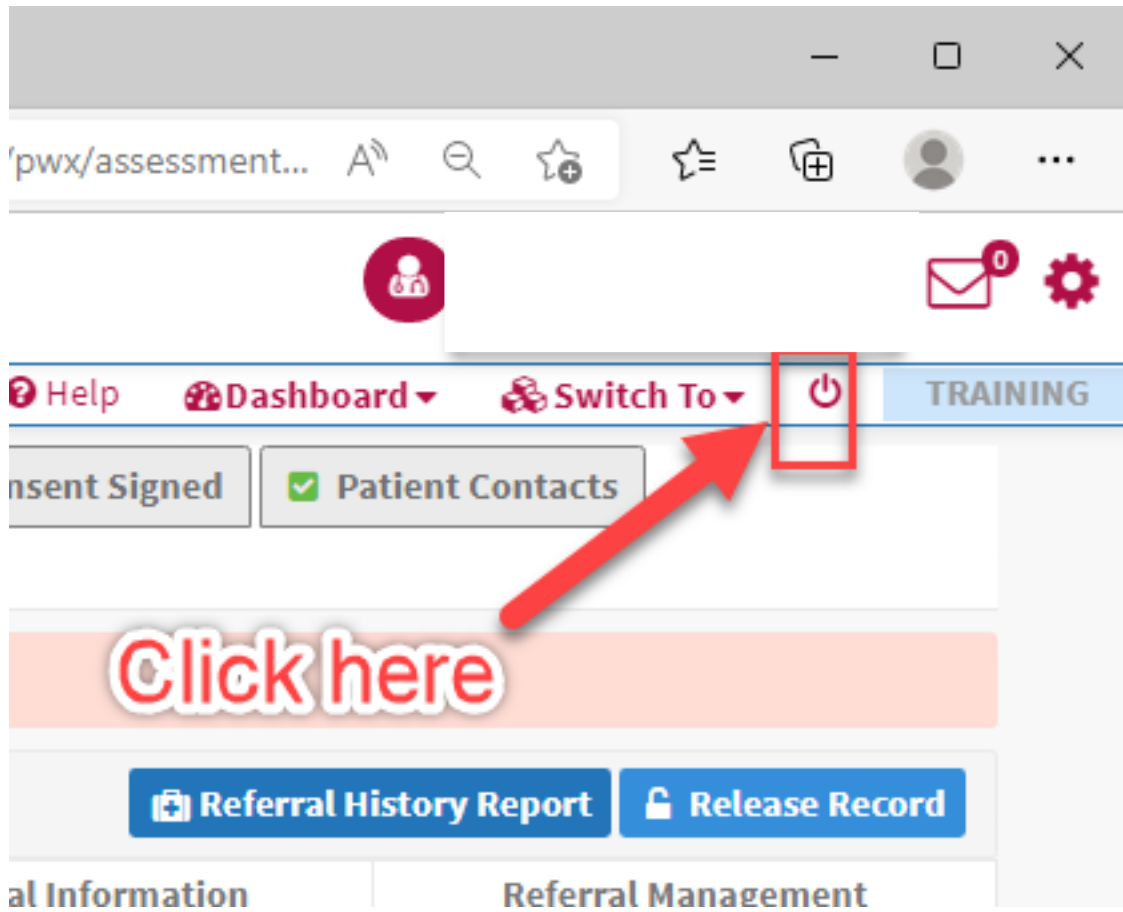
Client Details Demographics Supplementary Information EQ \ Consent Signed Patient Contacts
Health Assessment Uploaded Files (0) Send and Manage Referrals

Profile Report Profile History Report Print Client Release Record Save

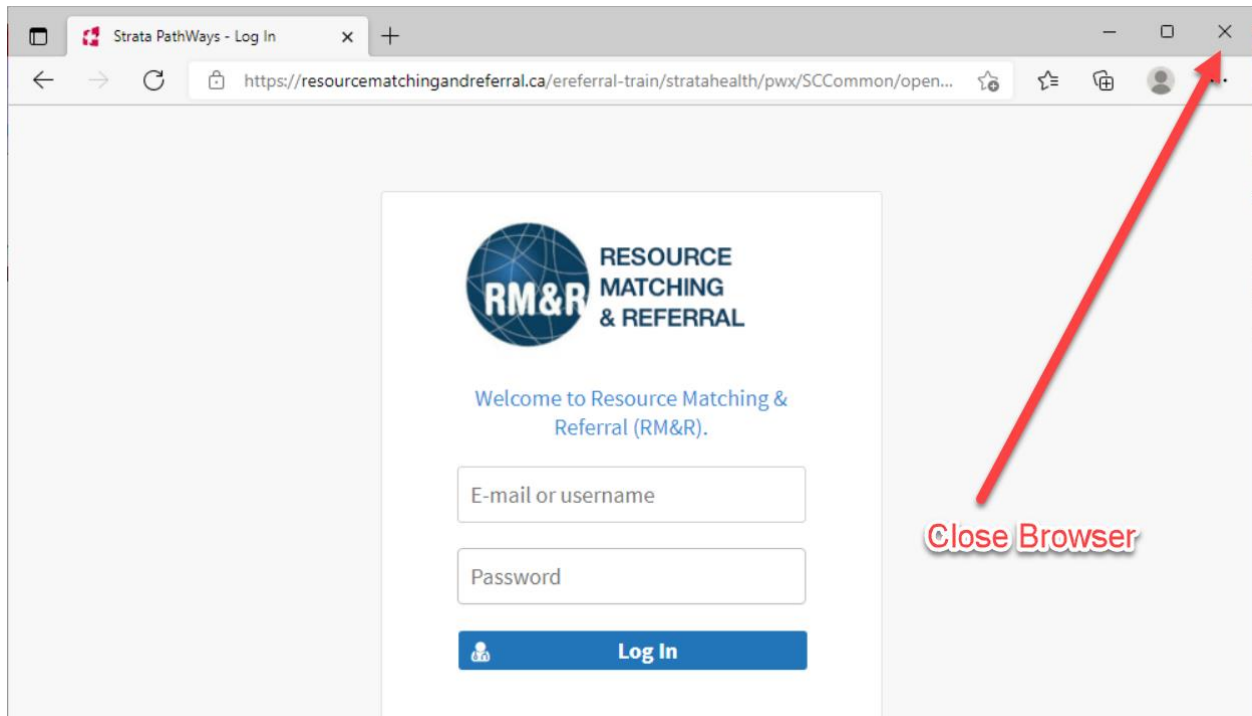
Care Type	Convalescent Care (manage)	Place On Hold
Name	Stark, Arya	Deactivate
Health Card Number	No identifier	
MRN	2003004 (3915)	
CHRIS ID		
Responsible Person(s)	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by TW-IP-FA 5 Fell Pavilion <input type="text" value="Type at least 2 characters to search"/> <input type="button" value="Assign To Me"/>	
Other Interested Parties	<input type="text" value="Type at least 2 characters to search"/>	

Complete relevant tabs for your scope. Note: tabs will differ depending on the care type you've selected

8. Log Out



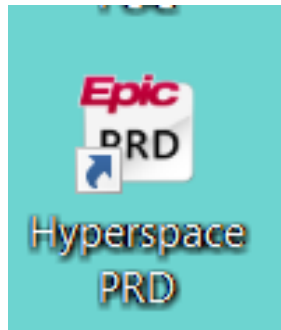
9. Close the browser



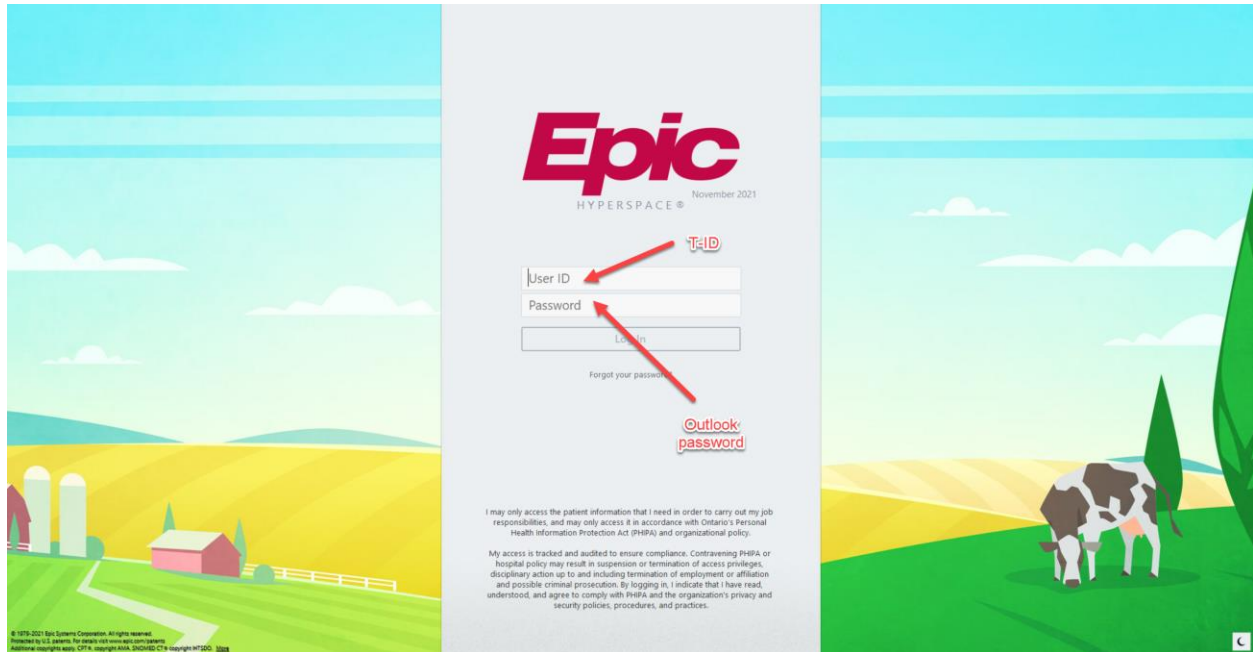
SENDING A REFERRAL

Once the referral is completed, it needs to be sent to receiving organization(s)

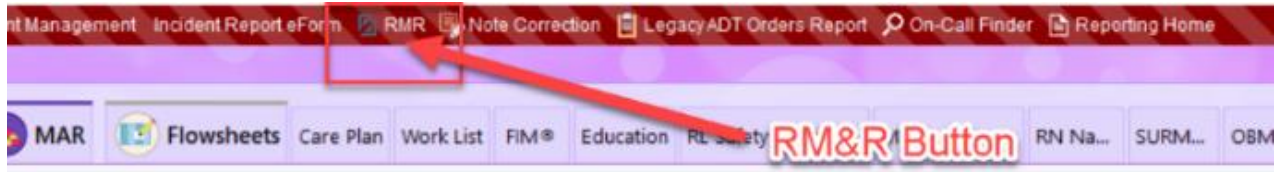
1. Launch Epic from Desktop



2. Log In

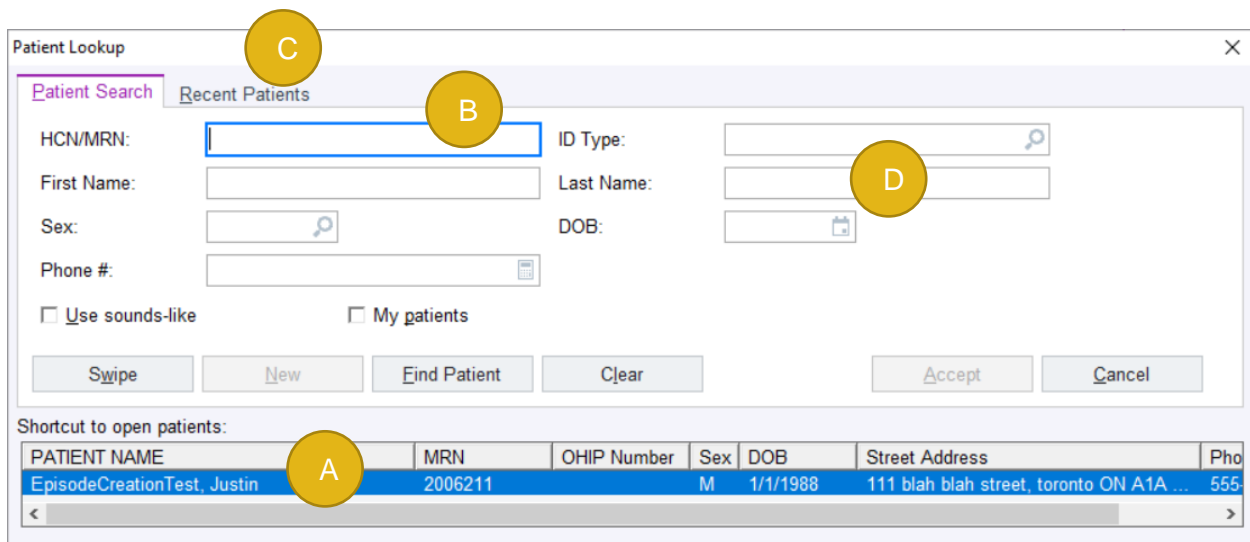


3. Launch RM&R by clicking the RM&R button at the top of Hyperspace



4. Select the patient by:

- Clicking in the “Shortcut to open patients” list
- Typing “=” in the HCN/MRN field
- Clicking on the “Recent Patients” tab and finding them there
- Entering demographic information manually



The screenshot shows a 'Patient Lookup' window with two tabs: 'Patient Search' and 'Recent Patients'. The 'Patient Search' tab is active. The form contains several input fields: HCN/MRN, ID Type, First Name, Last Name, Sex, and DOB. Below the form are checkboxes for 'Use sounds-like' and 'My patients', and buttons for 'Swipe', 'New', 'Find Patient', 'Clear', 'Accept', and 'Cancel'. At the bottom, there is a table titled 'Shortcut to open patients:' with columns for Patient Name, MRN, OHIP Number, Sex, DOB, Street Address, and Phone. A yellow circle labeled 'A' highlights the first row of the table. Another yellow circle labeled 'B' highlights the HCN/MRN input field. A yellow circle labeled 'C' highlights the 'Recent Patients' tab. A yellow circle labeled 'D' highlights the Last Name input field.

PATIENT NAME	MRN	OHIP Number	Sex	DOB	Street Address	Pho
EpisodeCreationTest, Justin	2006211		M	1/1/1988	111 blah blah street, toronto ON A1A ...	555

5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

Encounter Selection for Stark, Arya ✕

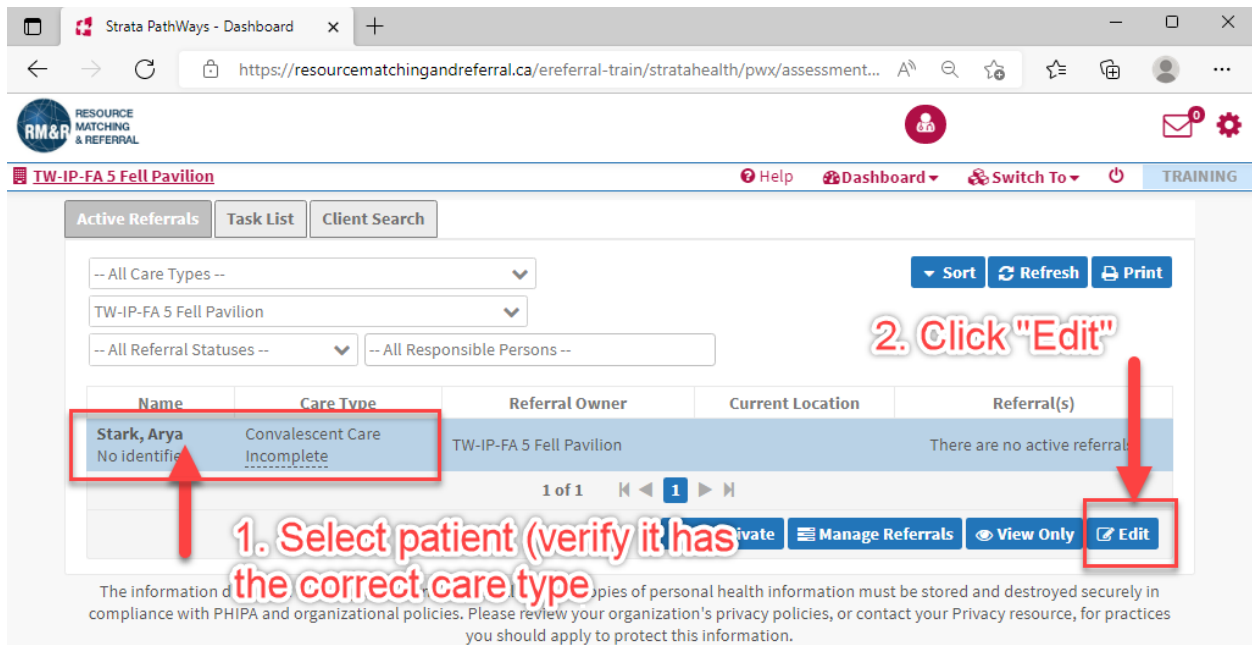
Selected record: Stark, Arya

Number	Contact Date	Contact Type
2	30/5/22	Hospital Encounter
1	30/5/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to below.

- 1. Select the patient
- 2. Click “Edit”



The screenshot shows a web application interface for 'Strata PathWays - Dashboard'. The main content area displays a table of 'Active Referrals'. The table has columns for Name, Care Type, Referral Owner, Current Location, and Referral(s). The first row is highlighted in blue and contains the following data:

Name	Care Type	Referral Owner	Current Location	Referral(s)
Stark, Arya No identifier	Convalescent Care Incomplete	TW-IP-FA 5 Fell Pavilion		There are no active referrals

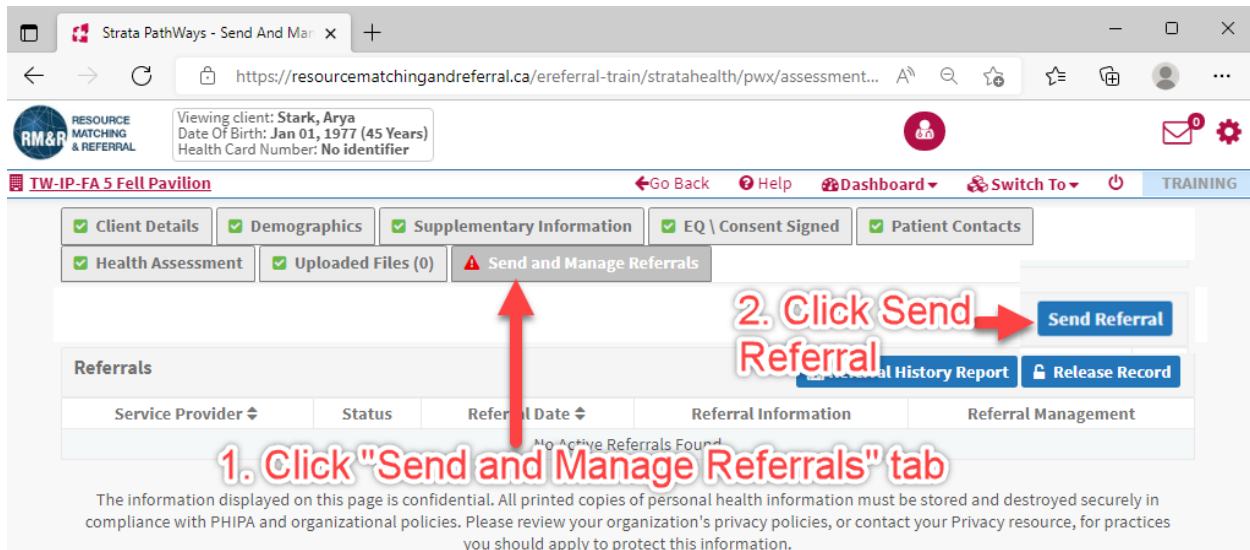
Below the table, there are navigation controls including '1 of 1', 'Previous', 'Next', and buttons for 'Private', 'Manage Referrals', 'View Only', and 'Edit'. The 'Edit' button is circled in red. Red arrows point from the text annotations to the patient name and the 'Edit' button.

1. Select patient (verify it has the correct care type)

2. Click "Edit"

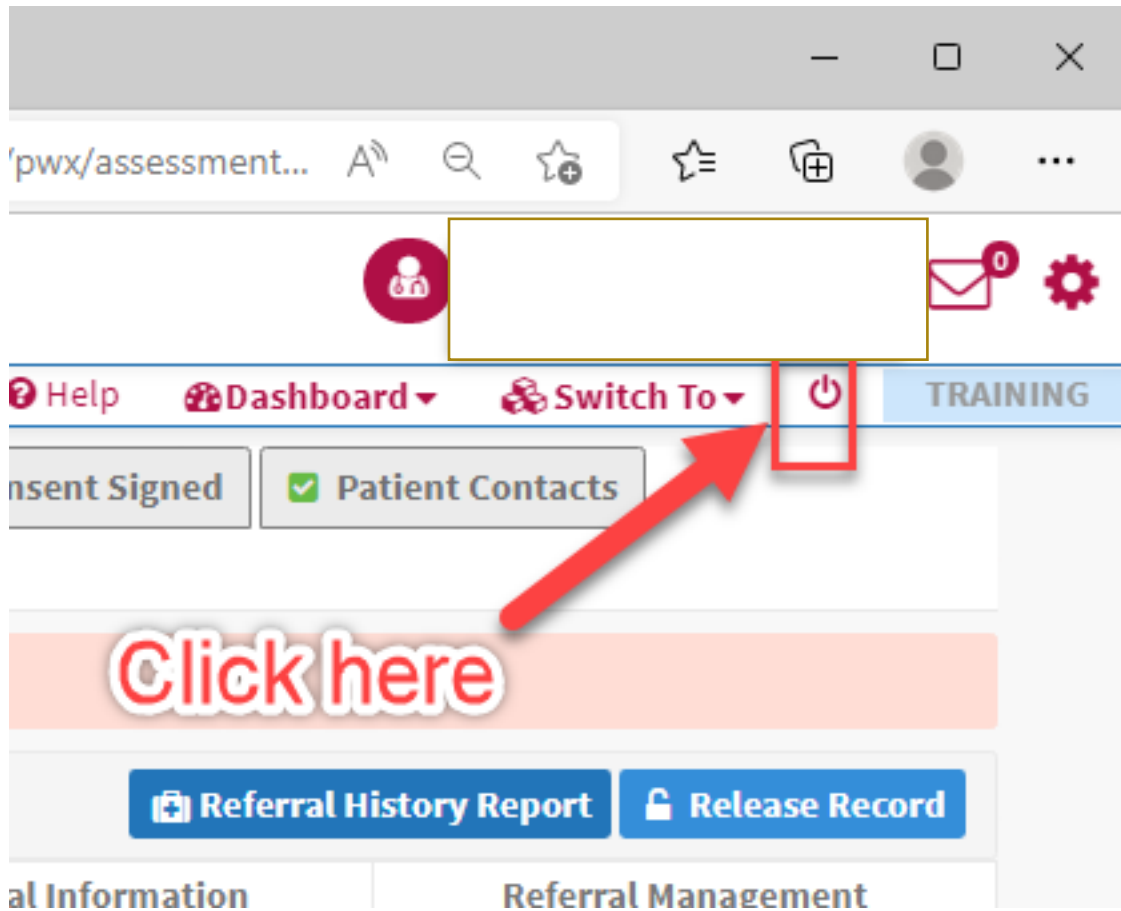
The information displayed on this page is for informational purposes only. All copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

7. Click the “Send and Manage Referrals Tab” and click “Send Referral”

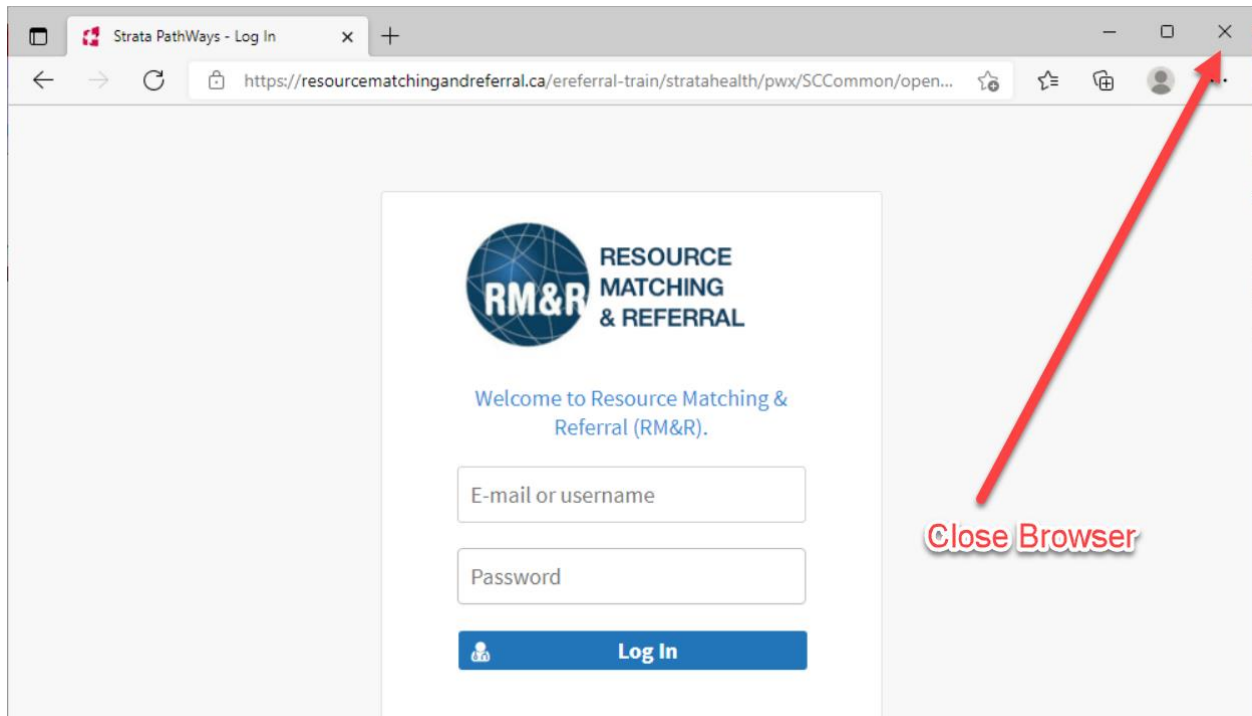


The screenshot shows a web browser window with the URL <https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assessment...>. The page displays client information for Stark, Arya (DOB: Jan 01, 1977, 45 Years, Health Card Number: No identifier). A navigation bar includes 'TW-IP-FA 5 Fell Pavilion', 'Go Back', 'Help', 'Dashboard', 'Switch To', and 'TRAINING'. A series of tabs are visible: Client Details, Demographics, Supplementary Information, EQ \ Consent Signed, Patient Contacts, Health Assessment, Uploaded Files (0), and Send and Manage Referrals. A red arrow points to the 'Send and Manage Referrals' tab with the text '1. Click "Send and Manage Referrals" tab'. Below the tabs is a 'Referrals' table with columns: Service Provider, Status, Referral Date, Referral Information, and Referral Management. A 'Send Referral' button is highlighted with a red arrow and the text '2. Click Send Referral'. Below the table, it says 'No Active Referrals Found'. A disclaimer at the bottom states: 'The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with PHIPA and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.'

8. Log Out



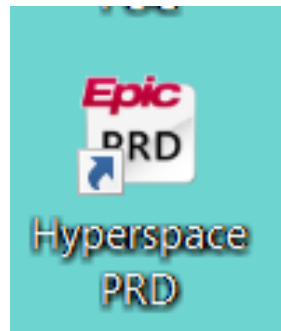
9. Close the browser



REVIEWING REFERRALS

There will be time when users who need to review referrals will need to access RM&R without first accessing a patient's chart.

1. Launch Epic from Desktop



2. Log In

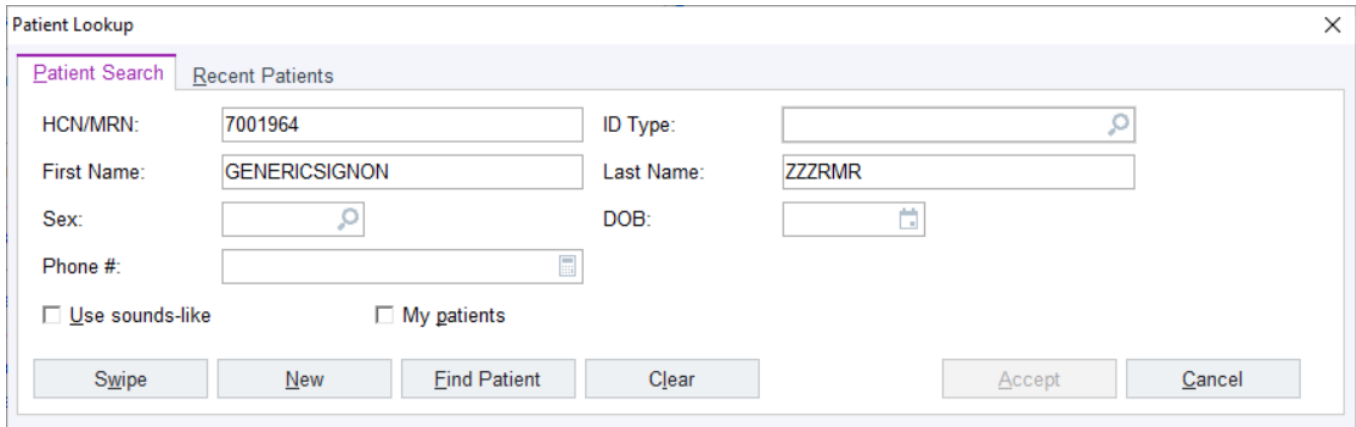


3. Launch RM&R by clicking the RM&R –Receiver button at the top of Hyperspace



4. Search and select the following patient in the patient look up screen:

First Name: GENERICSIGNON
Last Name: ZZZRMR
MRN: 7001964



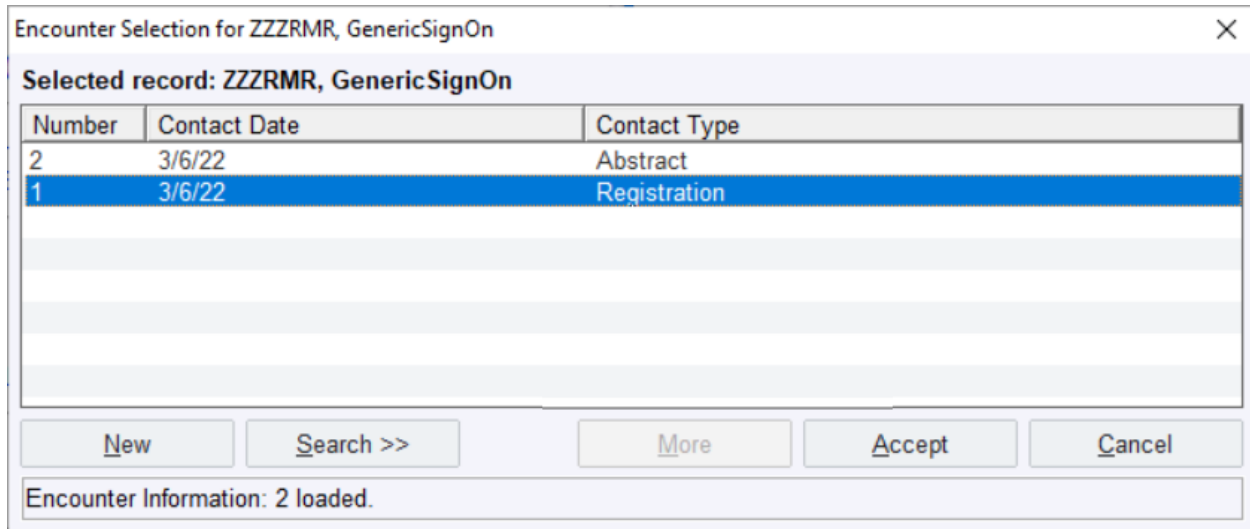
The screenshot shows a 'Patient Lookup' window with two tabs: 'Patient Search' (active) and 'Recent Patients'. The 'Patient Search' tab contains the following fields and controls:

- HCN/MRN:
- ID Type:
- First Name:
- Last Name:
- Sex:
- DOB:
- Phone #:
- Use sounds-like
- My patients

At the bottom of the window, there are two rows of buttons:

- Row 1:
- Row 2:

5. Select the “Registration” encounter in the Encounter selection pop-up



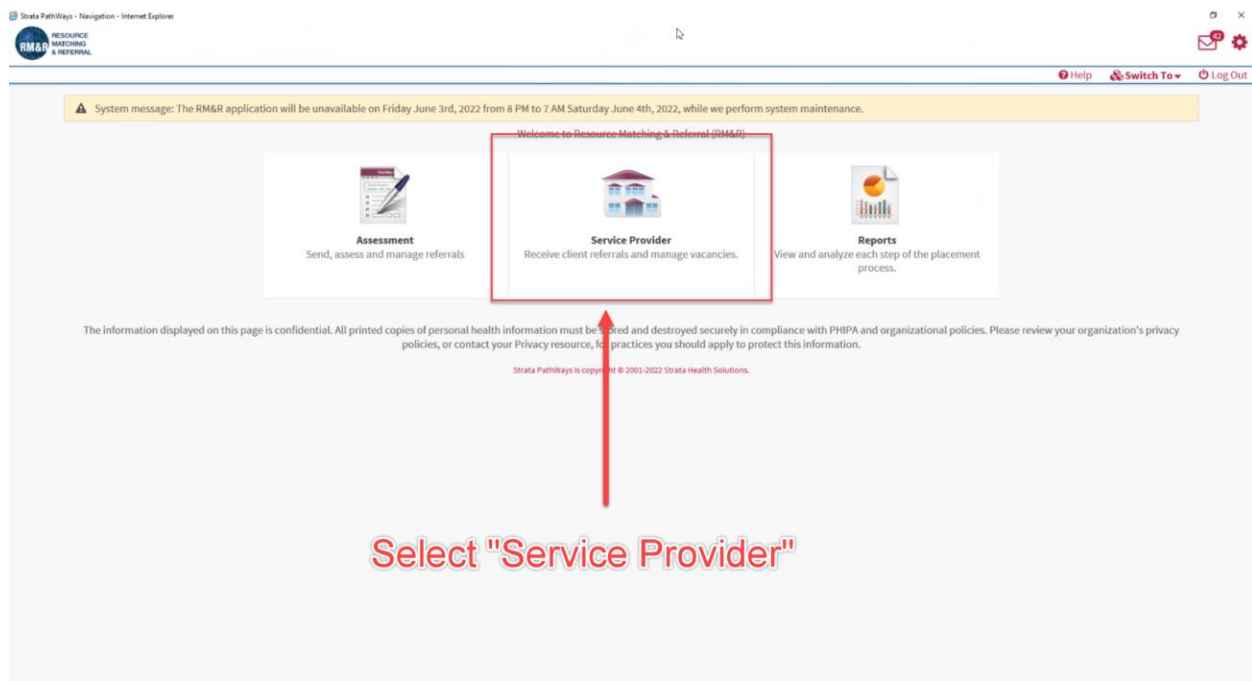
Encounter Selection for ZZZRMR, GenericSignOn

Selected record: ZZZRMR, GenericSignOn

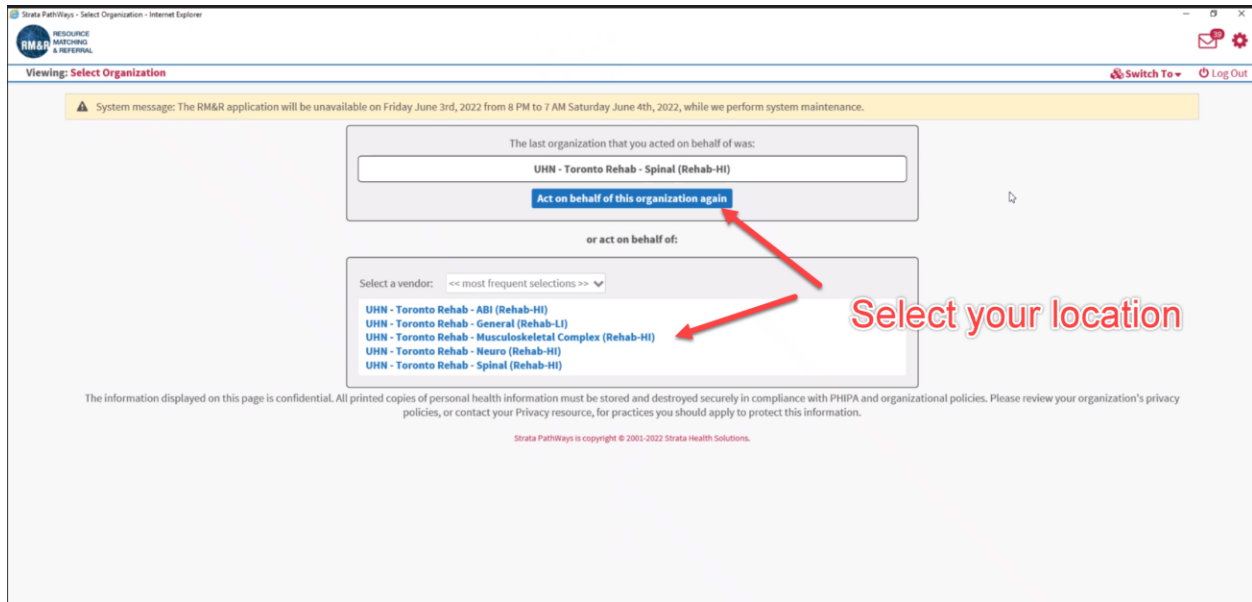
Number	Contact Date	Contact Type
2	3/6/22	Abstract
1	3/6/22	Registration

Encounter Information: 2 loaded.

6. A new browser will open up and land on a page similar to this. Select "Service Provider":



7. Select the location which you're supporting



Strata PathWays - Select Organization - Internet Explorer

RESOURCE MATCHING & REFERRALS

Viewing: **Select Organization** Switch To Log Out

System message: The RM&R application will be unavailable on Friday June 3rd, 2022 from 8 PM to 7 AM Saturday June 4th, 2022, while we perform system maintenance.

The last organization that you acted on behalf of was:

UHN - Toronto Rehab - Spinal (Rehab-HI)

[Act on behalf of this organization again](#)

or act on behalf of:

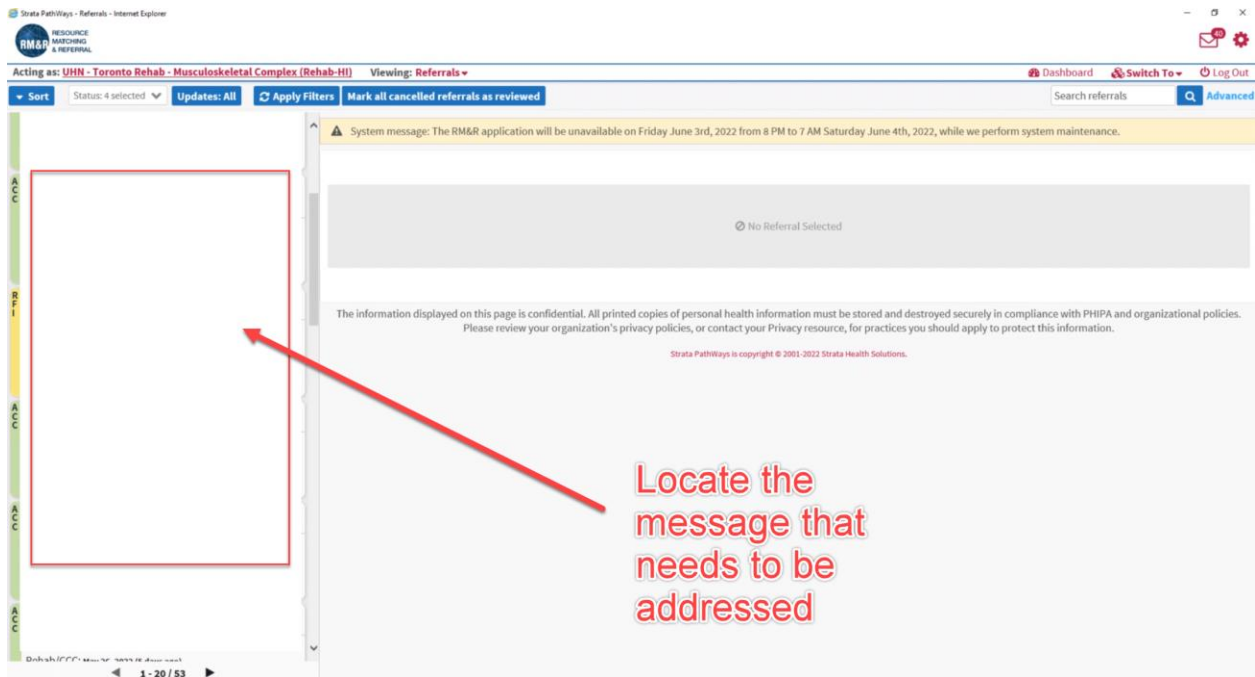
Select a vendor: << most frequent selections >>

- UHN - Toronto Rehab - ABI (Rehab-HI)
- UHN - Toronto Rehab - General (Rehab-LI)
- UHN - Toronto Rehab - Musculoskeletal Complex (Rehab-HI)
- UHN - Toronto Rehab - Neuro (Rehab-HI)
- UHN - Toronto Rehab - Spinal (Rehab-HI)

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8. Locate the message that needs to be addressed and complete your work.



System message: The RM&R application will be unavailable on Friday June 3rd, 2022 from 8 PM to 7 AM Saturday June 4th, 2022, while we perform system maintenance.

No Referral Selected

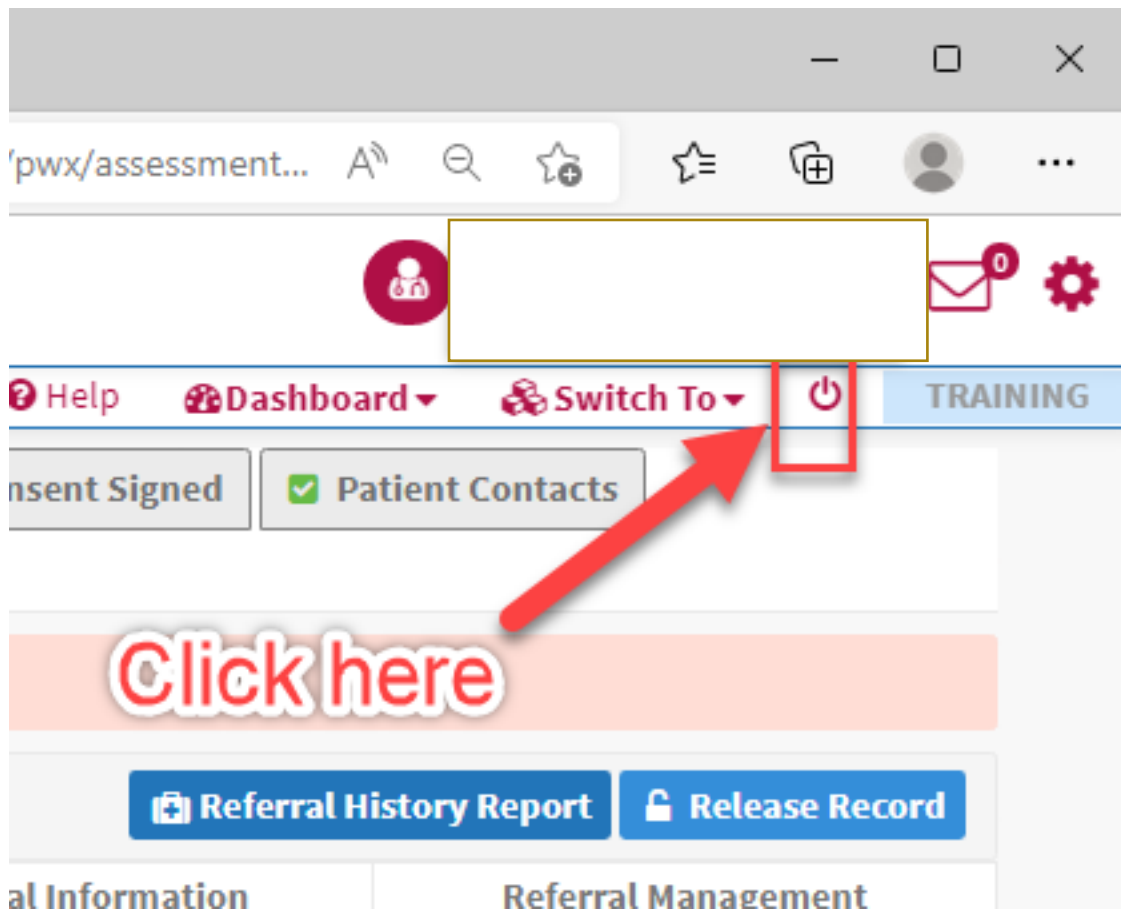
The information displayed on this page is confidential. All printed copies of personal health information must be stored and destroyed securely in compliance with Phipa and organizational policies. Please review your organization's privacy policies, or contact your Privacy resource, for practices you should apply to protect this information.

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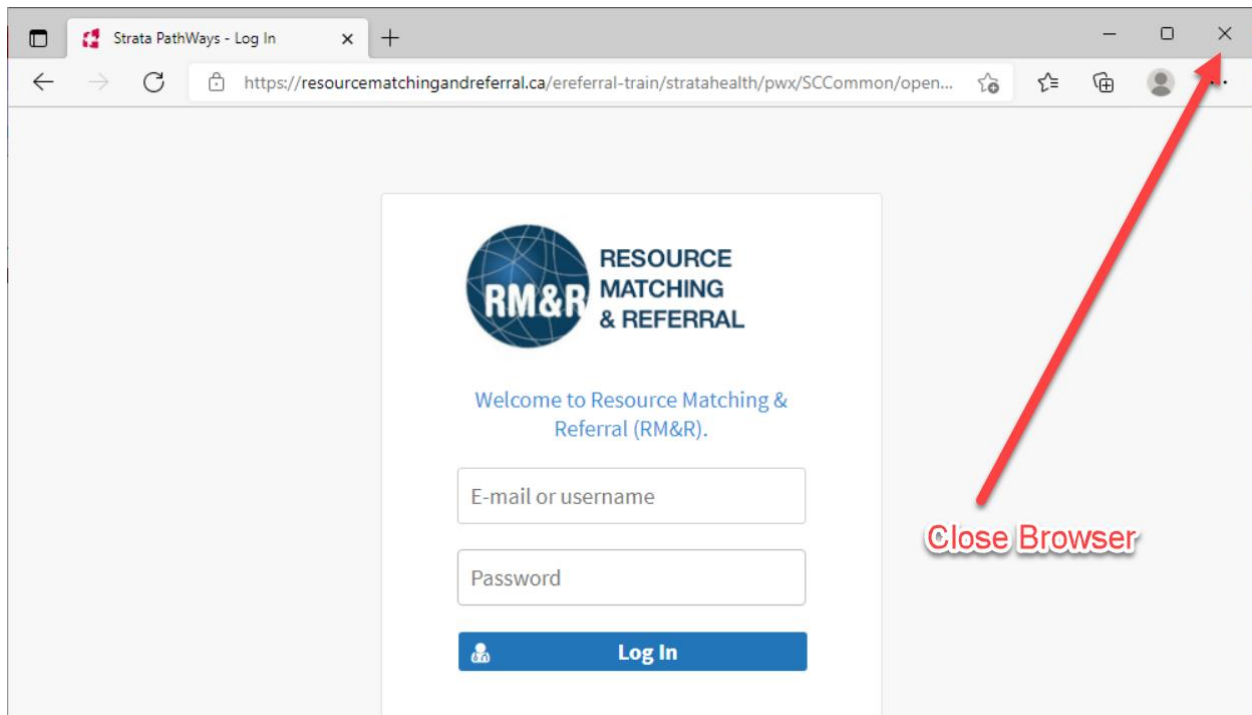
1 - 20 / 53

Locate the message that needs to be addressed

8. Log Out



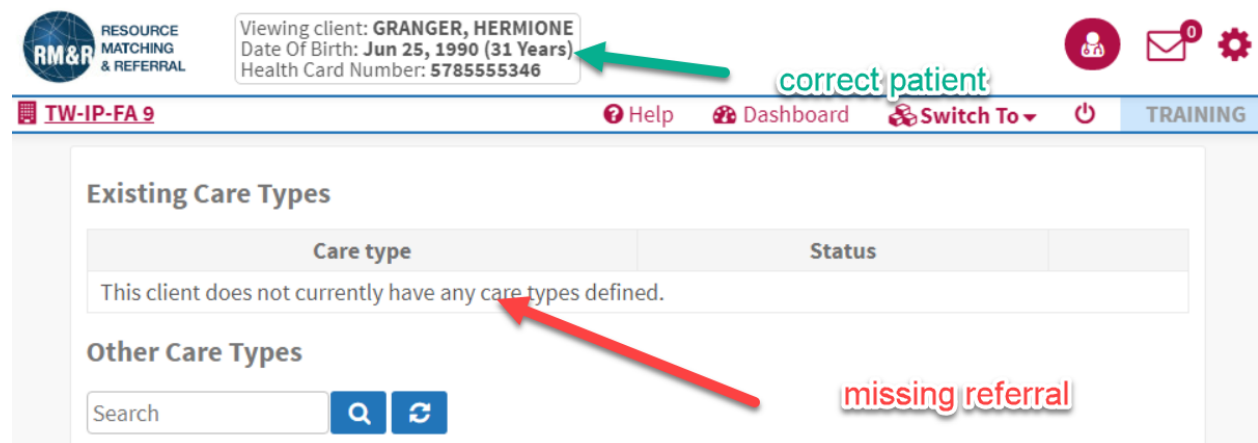
9. Close the browser



TROUBLESHOOTING

SCENARIO 1: Patient was created but no referral was created

In this scenario, you may see something like this:



RM&R RESOURCE MATCHING & REFERRAL

Viewing client: **GRANGER, HERMIONE**
Date Of Birth: **Jun 25, 1990 (31 Years)**
Health Card Number: **5785555346**

correct patient

TW-IP-FA 9 Help Dashboard Switch To TRAINING

Existing Care Types

Care type	Status
This client does not currently have any care types defined.	

Other Care Types

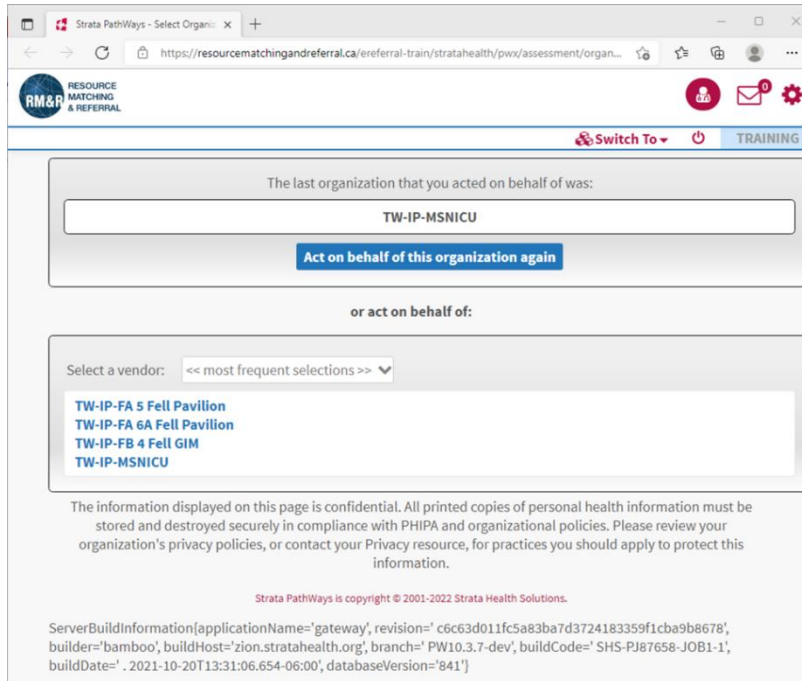
Search

missing referral

If this occurs, follow the steps on pages 73 to 94.

SCENARIO 2: No patient created

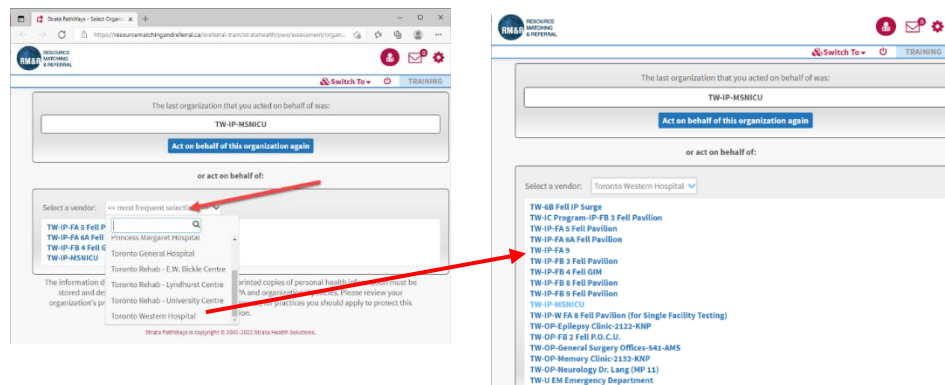
In this scenario, you may see something like this:



If you land on this page after selecting the patient and encounter in Epic, try the following:

SEARCH OR CREATE PATIENT MANUALLY

1. Select the patient's location





TROUBLESHOOTING: SCENARIO 2 – NO PATIENT CREATED

2. Follow the steps from pages **70-94**

Additional Resources

If you continue to have difficulty, please contact these additional resources:

1. Help Desk

- Phone: X4357
- Email: help@uhn.ca

2. Resource Matching and Referral Help Desk

- Phone: 1-866-556-5005
- Email: referral@uhn.ca

SERVICE PROVIDER REQUEST FORM

Double click the image below to open up the PDF in a separate window



RM&R Service Provider Request Form

- Create New Service Provider/Caseload Referral Sender
 Modify Existing Service Provider/Caseload Referral Receiver

Service Provider/Caseload Information	
Service Provider/Caseload Name:	
Vendor:	
Type:	
Care Type:	
Location Code (Name as appears in HIS):	

Geographical Areas:	<input type="checkbox"/>	01 – LHIN Placement Office	<input type="checkbox"/>	09 – Hamilton Niagara Haldimand Brant LHIN
	<input type="checkbox"/>	02 – Toronto Central LHIN	<input type="checkbox"/>	10 – North East LHIN
	<input type="checkbox"/>	03 – Central LHIN	<input type="checkbox"/>	11 – North Simcoe Muskoka LHIN
	<input type="checkbox"/>	04 – Central East LHIN	<input type="checkbox"/>	12 – North West LHIN
	<input type="checkbox"/>	05 – Central West LHIN	<input type="checkbox"/>	13 – South East LHIN
	<input type="checkbox"/>	06 – Mississauga Halton LHIN	<input type="checkbox"/>	14 – South West LHIN
	<input type="checkbox"/>	07 – Champlain LHIN	<input type="checkbox"/>	15 – Waterloo Wellington LHIN
	<input type="checkbox"/>	08 – Erie St. Clair LHIN		

Address			
Street Address:			
City:	Province: Ontario	Country: Canada	Postal Code:
Phone Number:	Clinical Contact:		Fax No:
Service Areas:	Add:		
Users:	Add:		

Requestor Name:			
Requestor Position:			
Requestor Phone Number:		Ext:	
<input type="checkbox"/> Requestor is Site LRA			

V3.00

Created by Justin Soegandi, June 1, 2022