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

synapse

CREATING, COMPLETING, SENDING REFERRALS

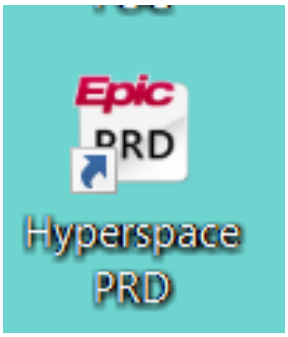
synapse

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

Epic
November 2021
HYPERSPACE®
T-ID
User ID
Password
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Outlook password
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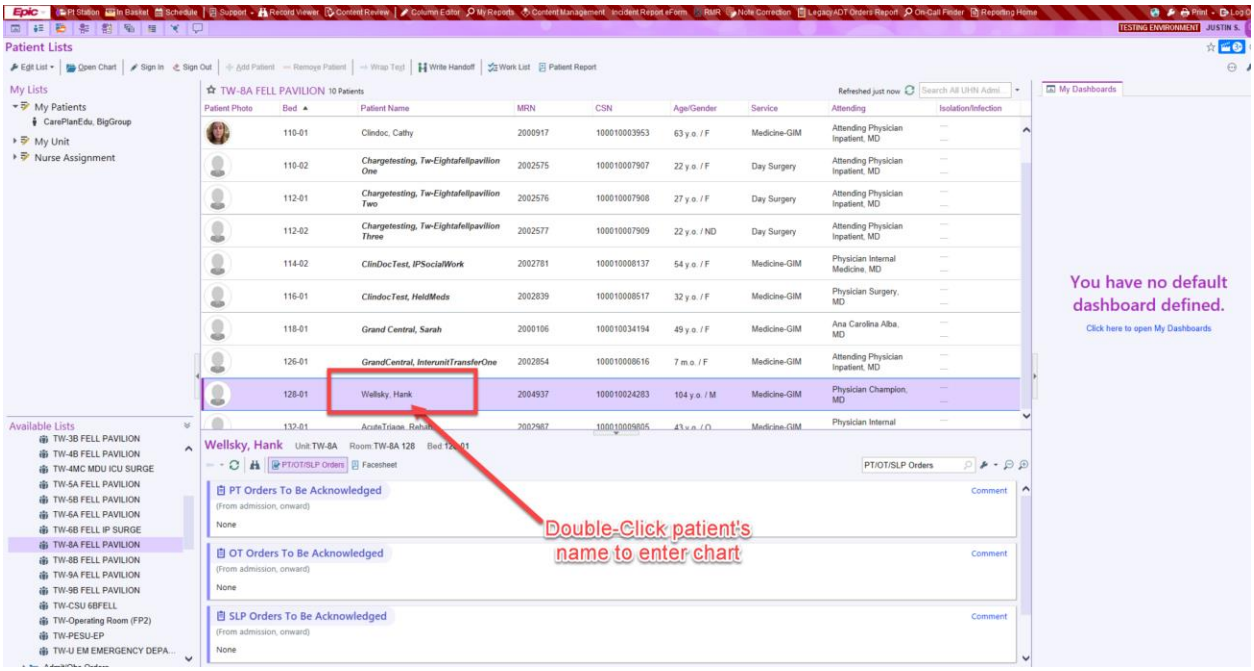
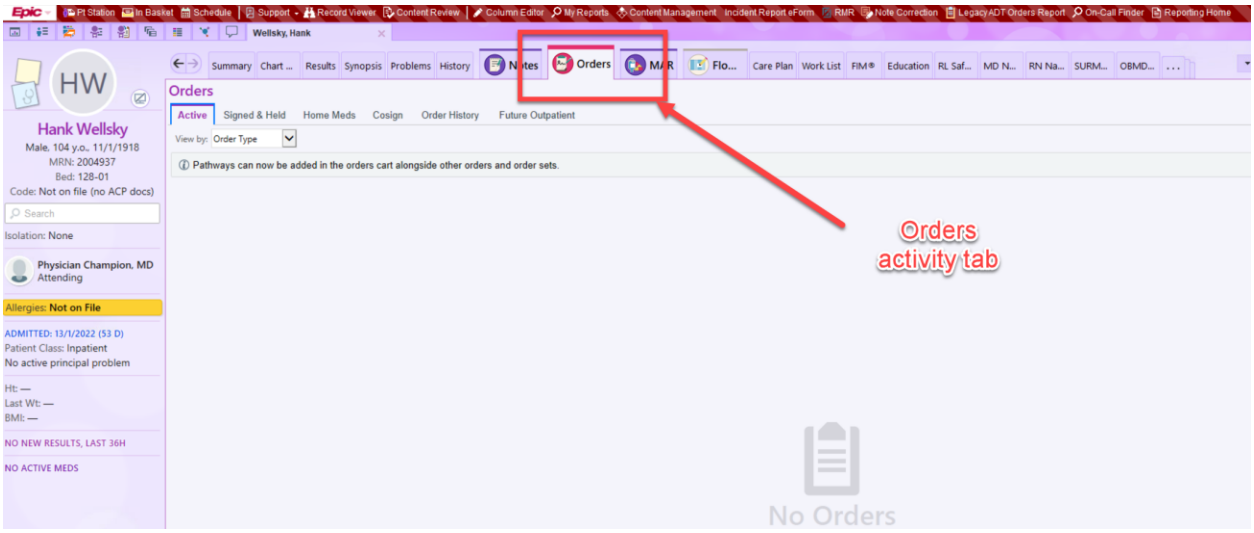
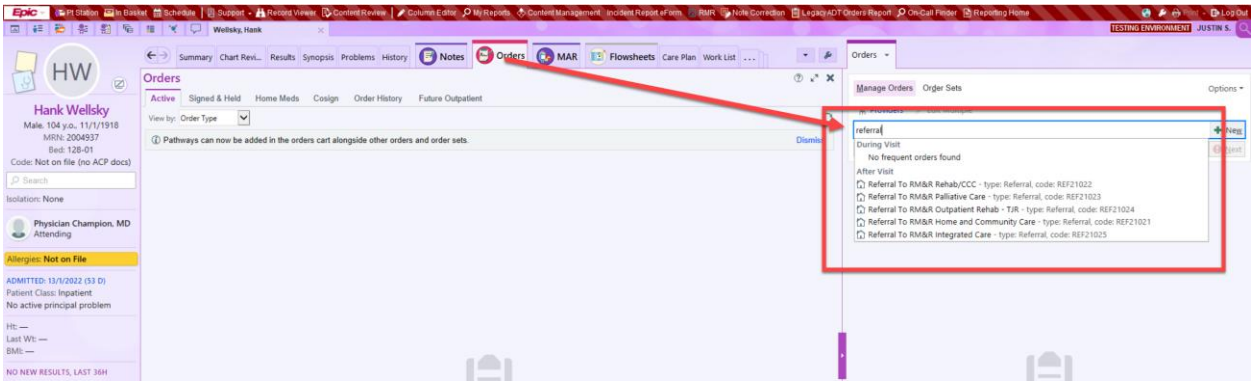
3. Enter Patient's Chart



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.

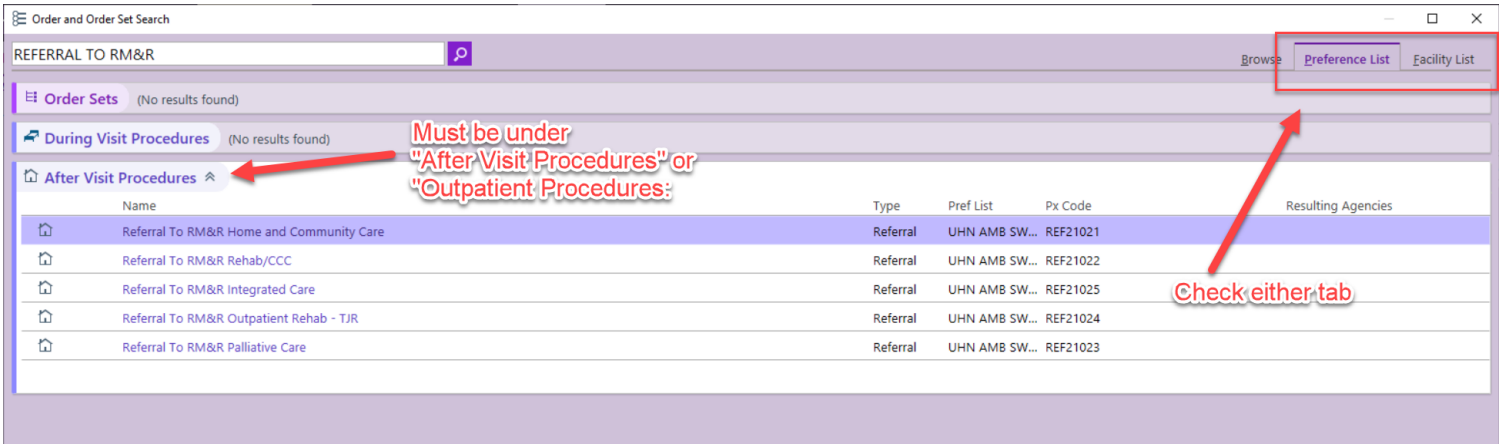


6. Click the order, ensuring it's placed as an:

- "After Visit Procedure"
  Or
- "Outpatient Procedure"

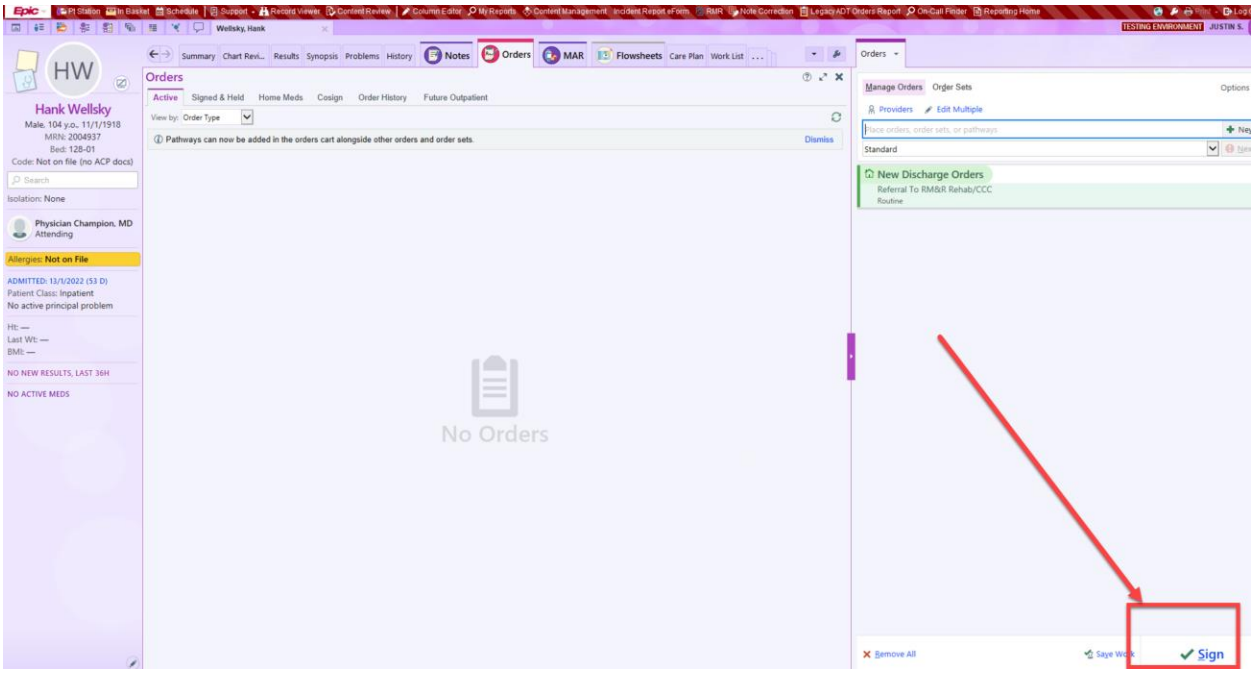
Not as an:

- "During Visit Procedure
  Or
- "Hospital Procedure

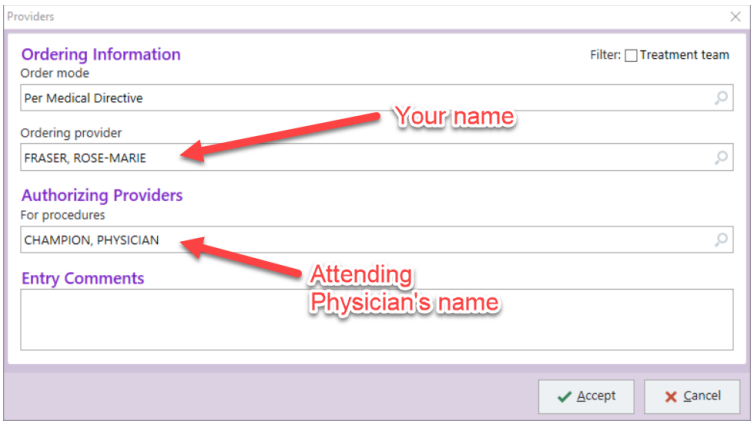


*If either "After Visit Procedures" or "Outpatient Procedures" are not visible, try selecting both the Preference List and Facility List tabs. If the order is still not visible, proceed to Troubleshooting on page 26

7. Sign the Order



*If the following pop-up shows up

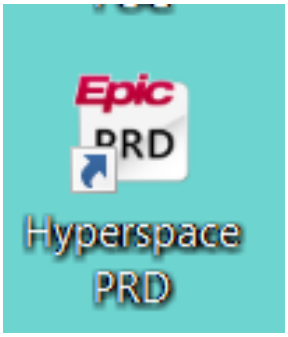


Entering your name in the “Ordering Provider” field and the attending physician’s name in the “Authorizing Providers” field

COMPLETING A REFERRAL

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

1. Launch Epic from Desktop



2. Log In

Epic
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T-ID
User ID
Password
Log In
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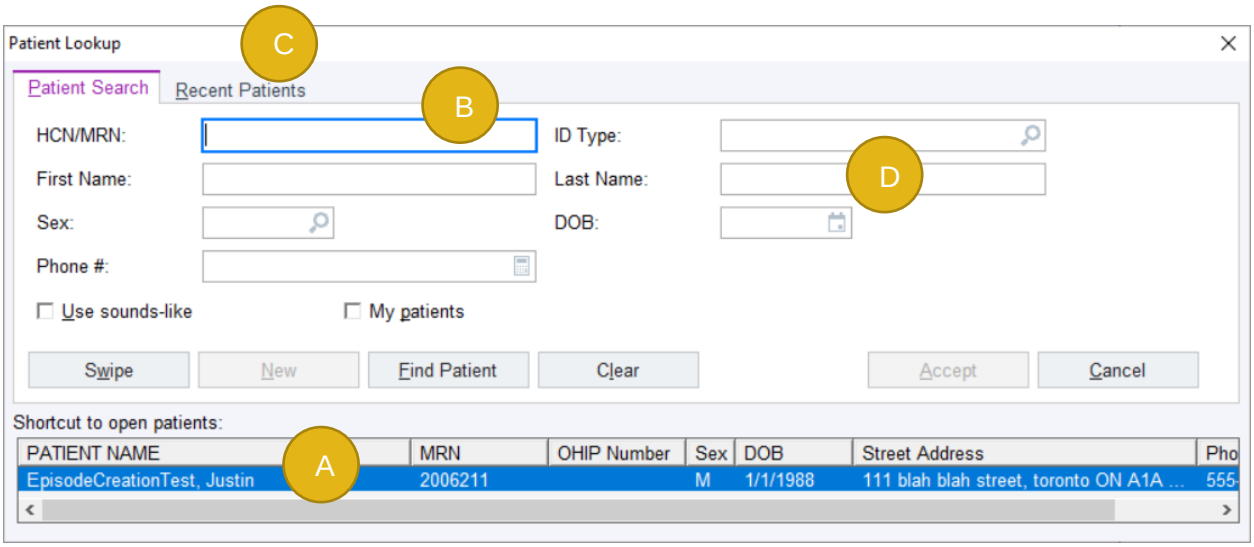
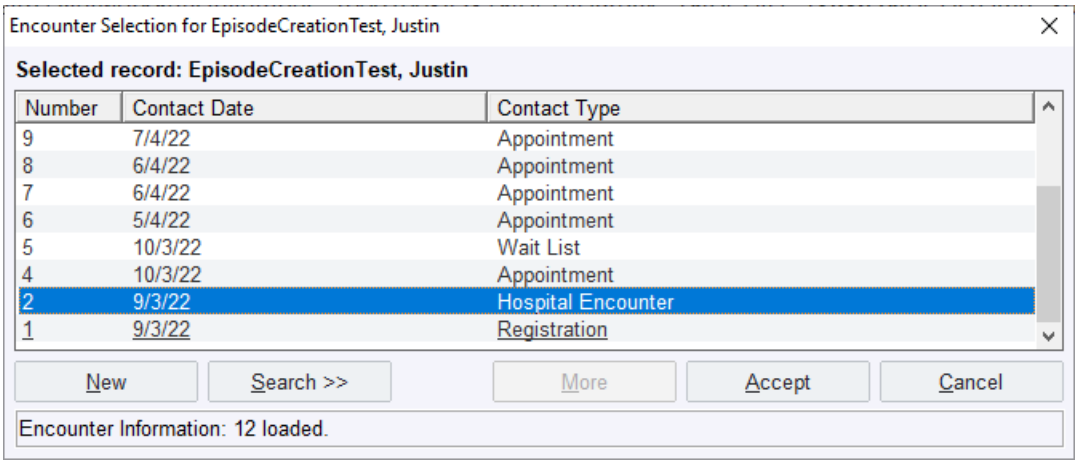
3. Launch RM&R by clicking the RM&R button at the top of Hyperspace

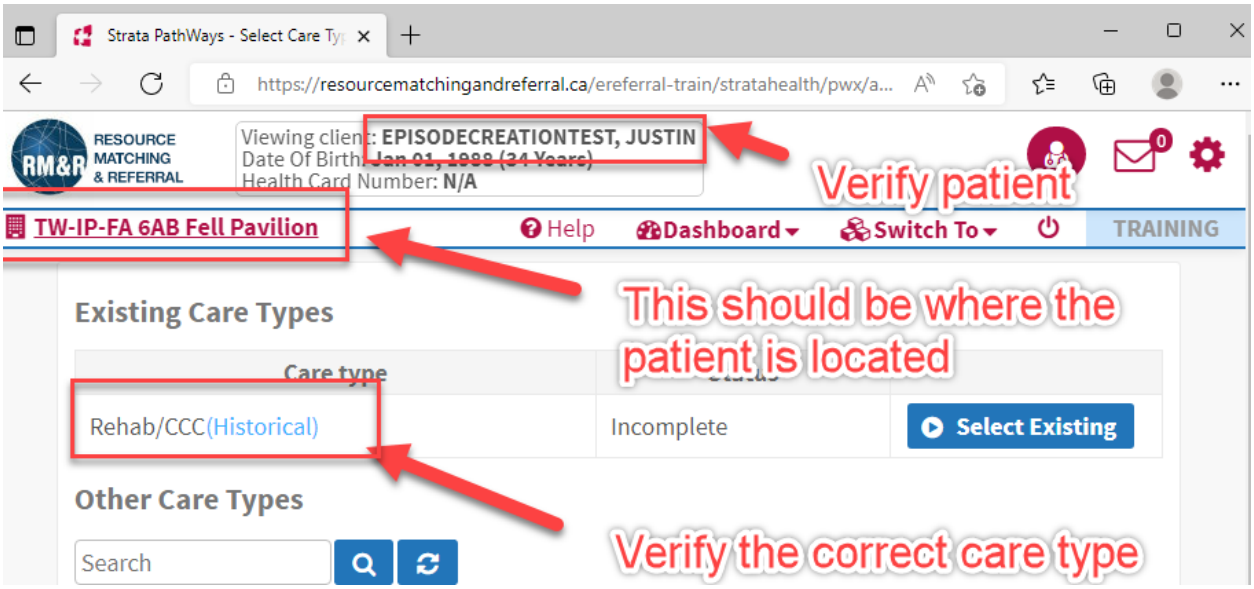
4. Select the patient by:
    A. Clicking in the “Shortcut to open patients” list
    B. Typing “=” in the HCN/MRN field
    C. Clicking on the “Recent Patients” tab and finding them there
    D. Entering demographic information manually



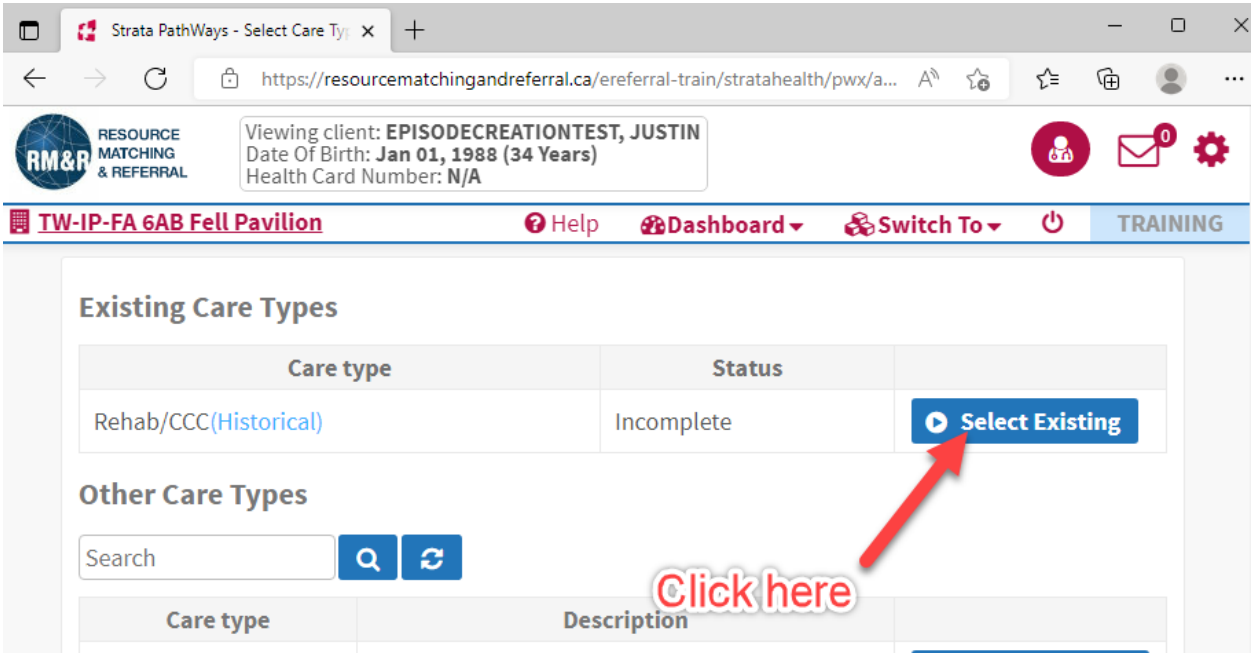
5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)



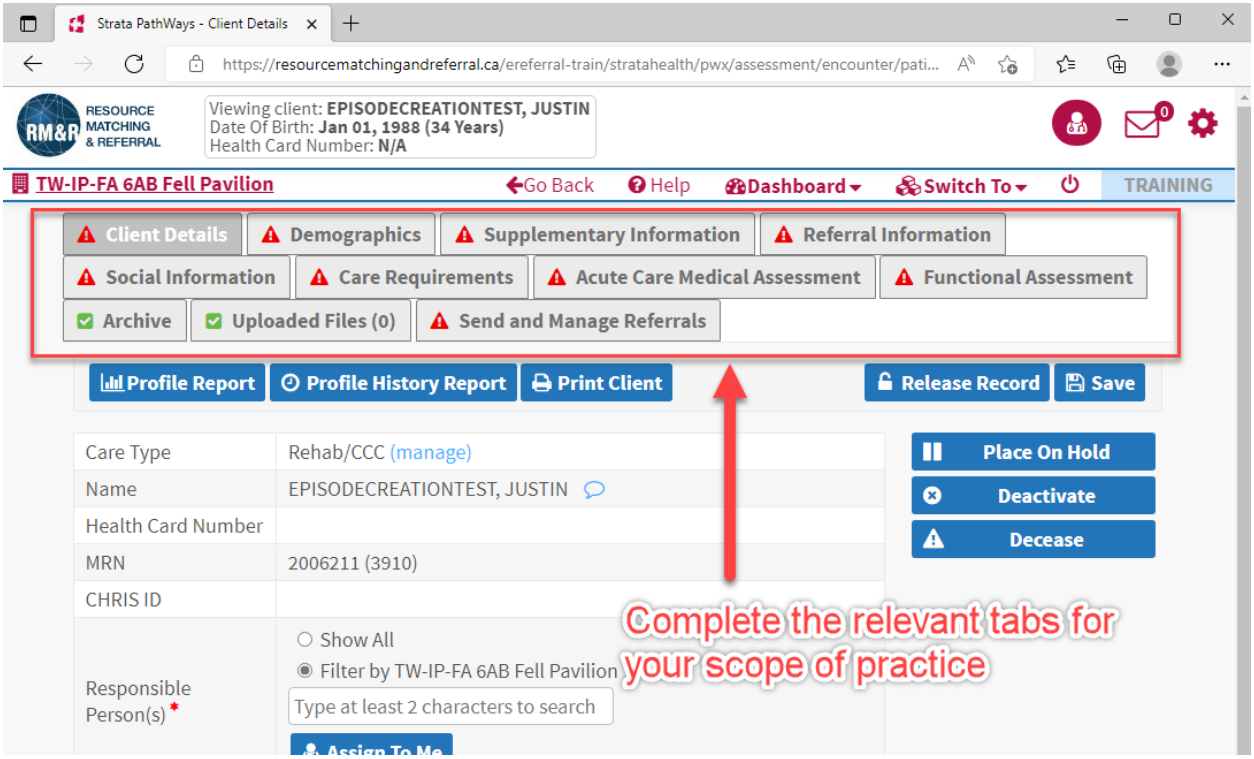
A new browser should open up and you should land here. Double check the highlighter info.



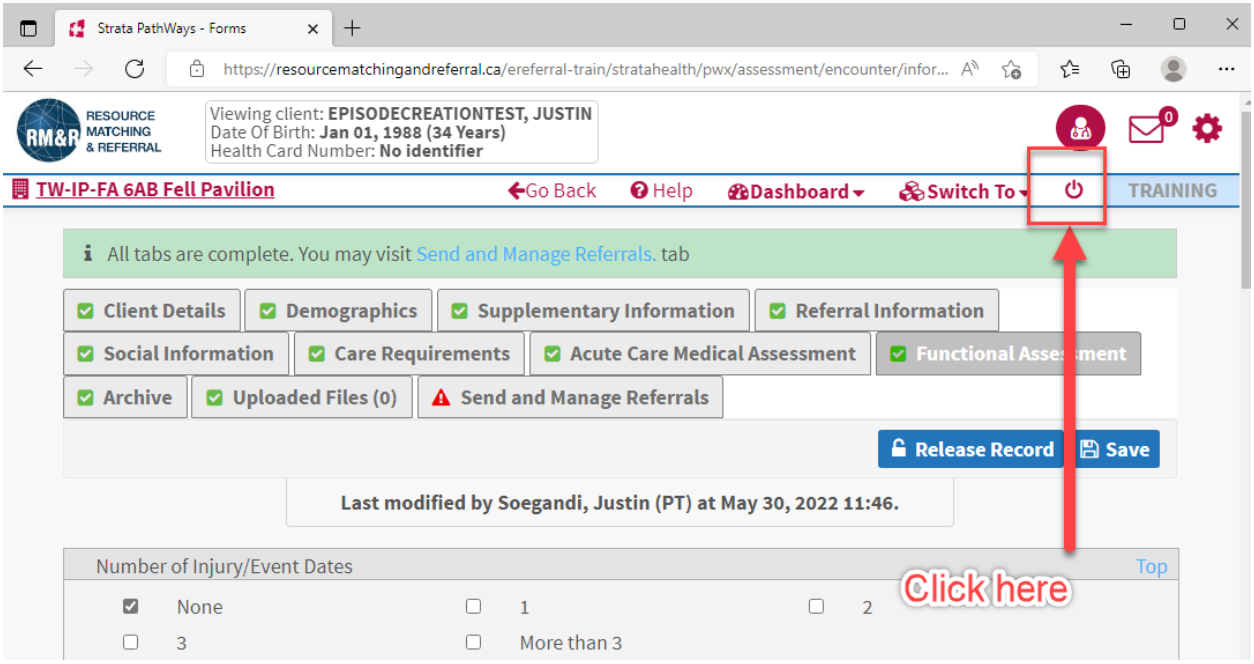
6. Click the “Select Existing” box



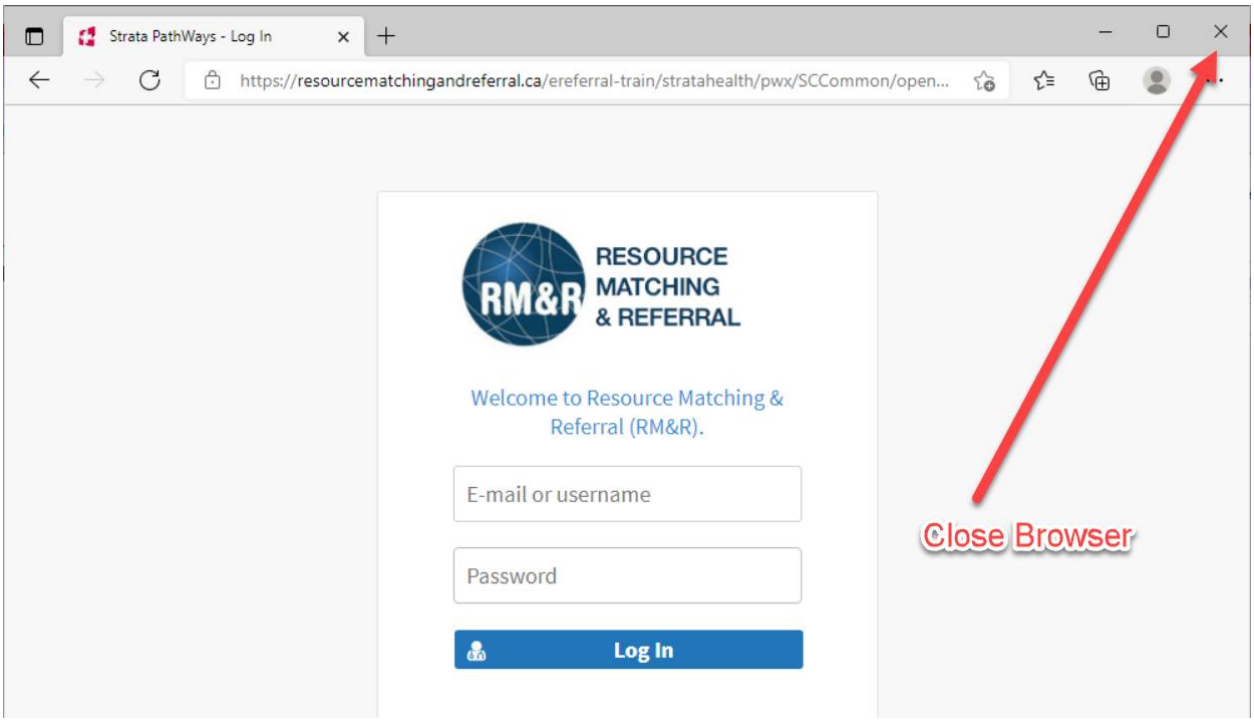
7. Complete the relevant tabs for your scope of practice



8. Log Out


Strata PathWays - Forms
https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assessment/encounter/infor...
RESOURCE MATCHING & REFERRAL
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
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
Top
None
1
2
3
More than 3
Click here

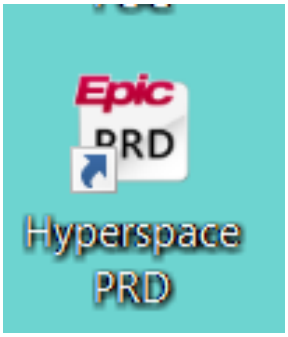
9. Close the browser



SENDING A REFERRAL

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

1. Launch Epic from Desktop



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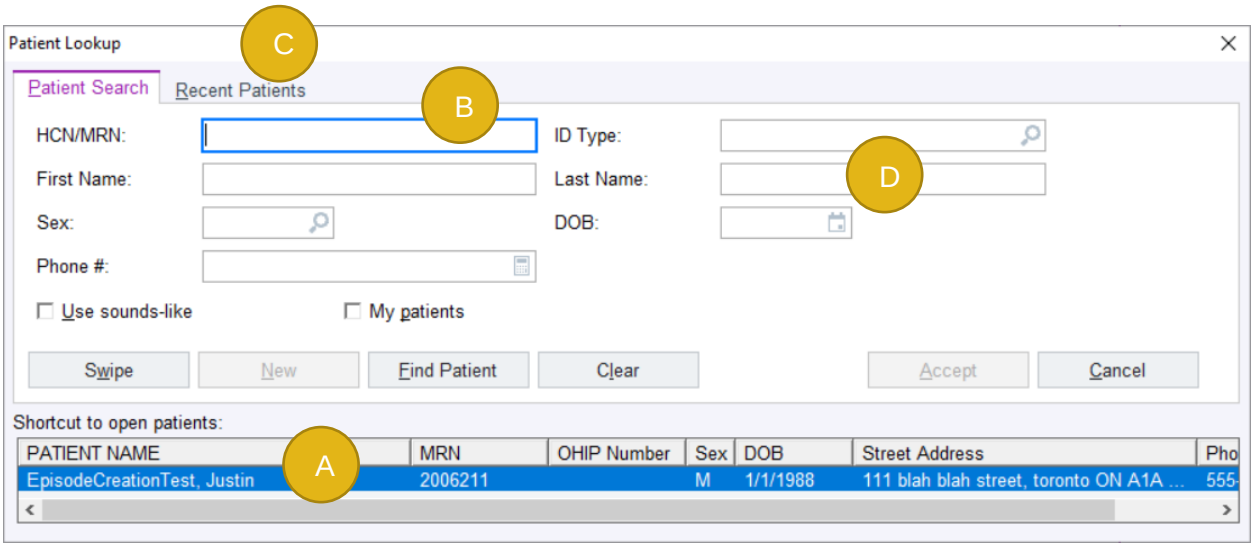
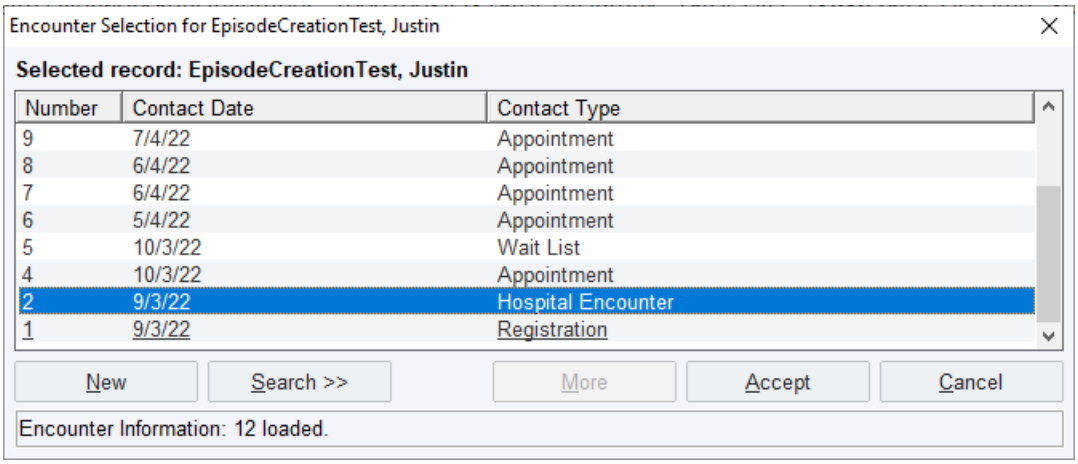
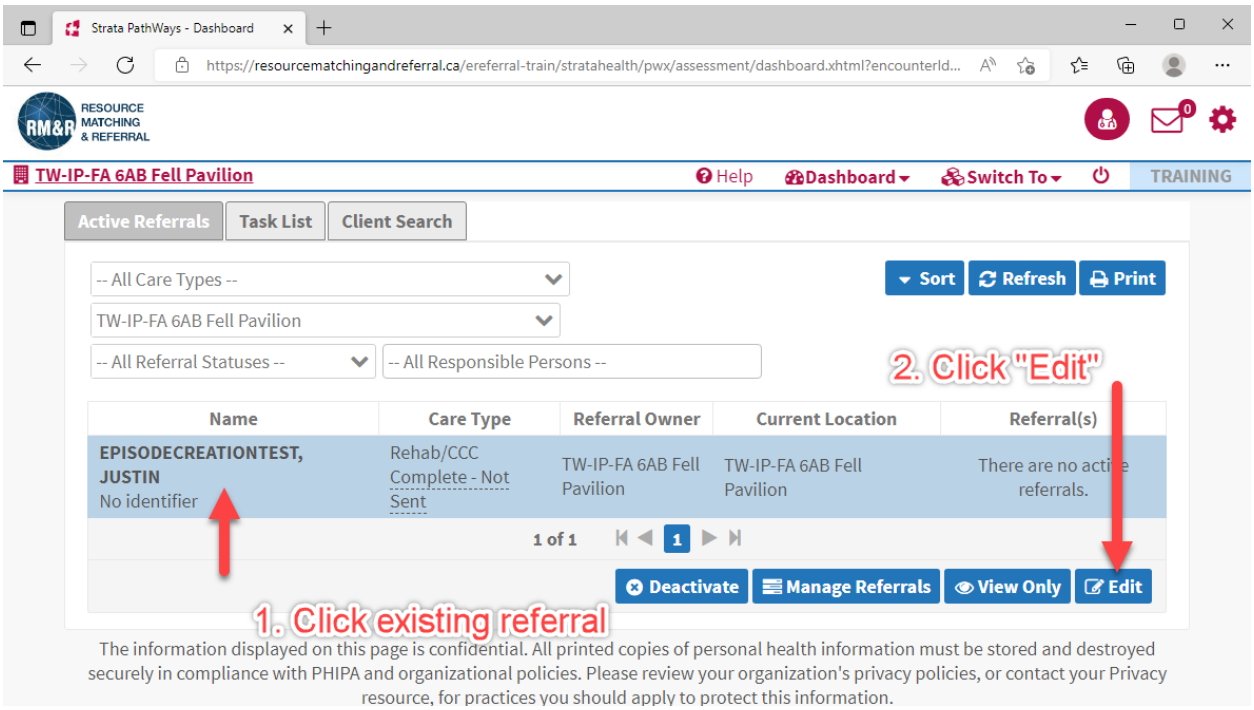


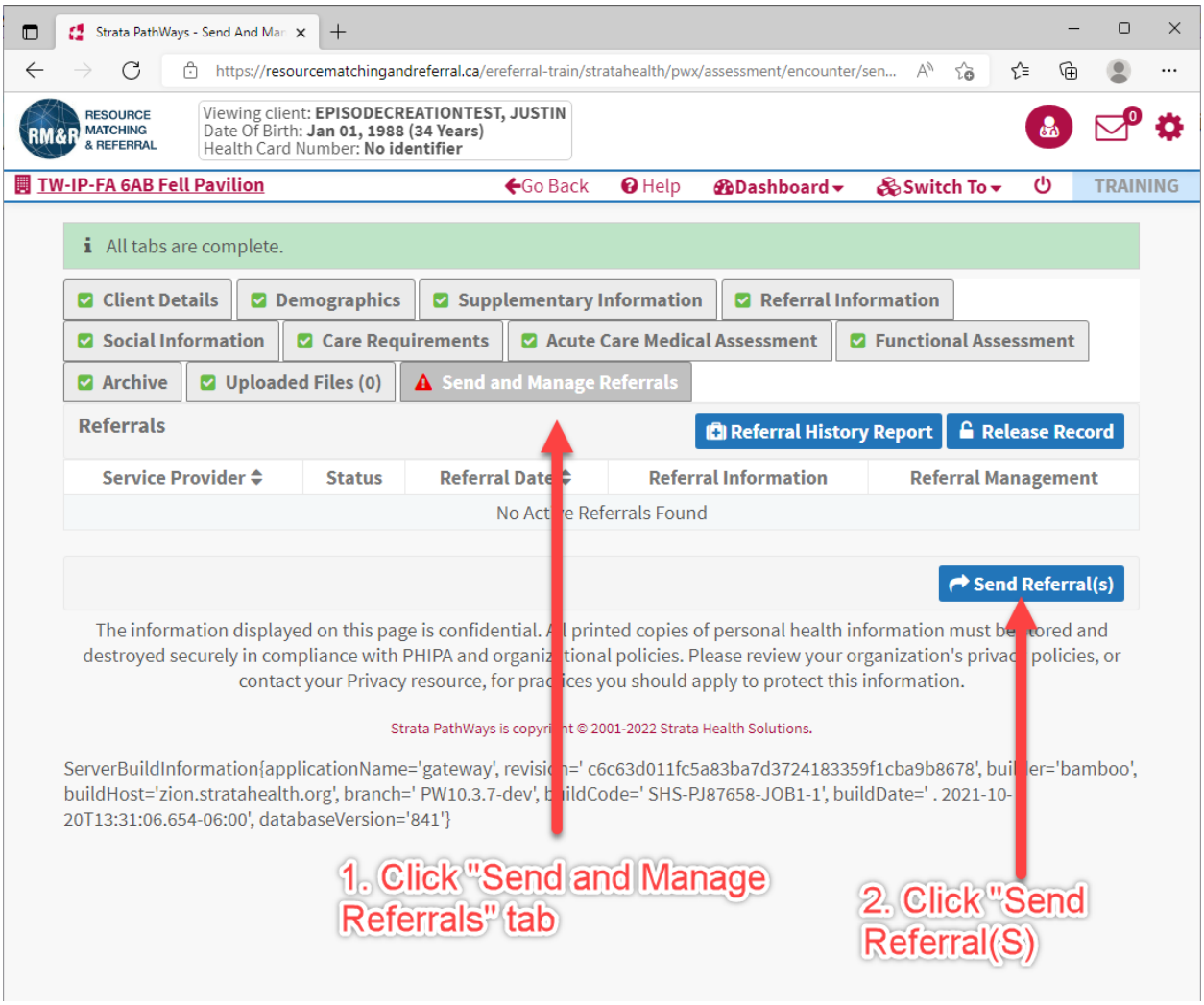
5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)



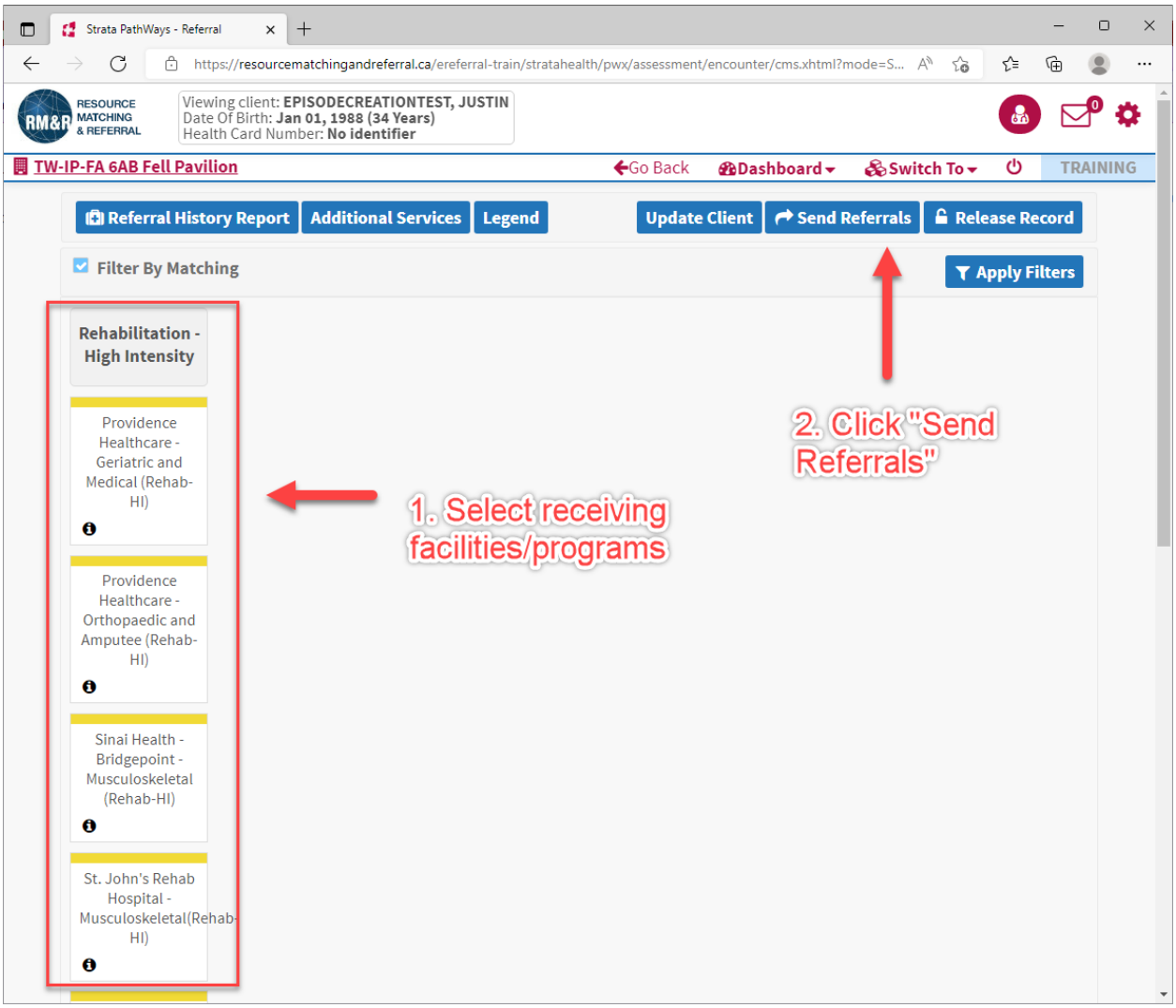
6. In the new browser, select the existing referral and click “Edit”



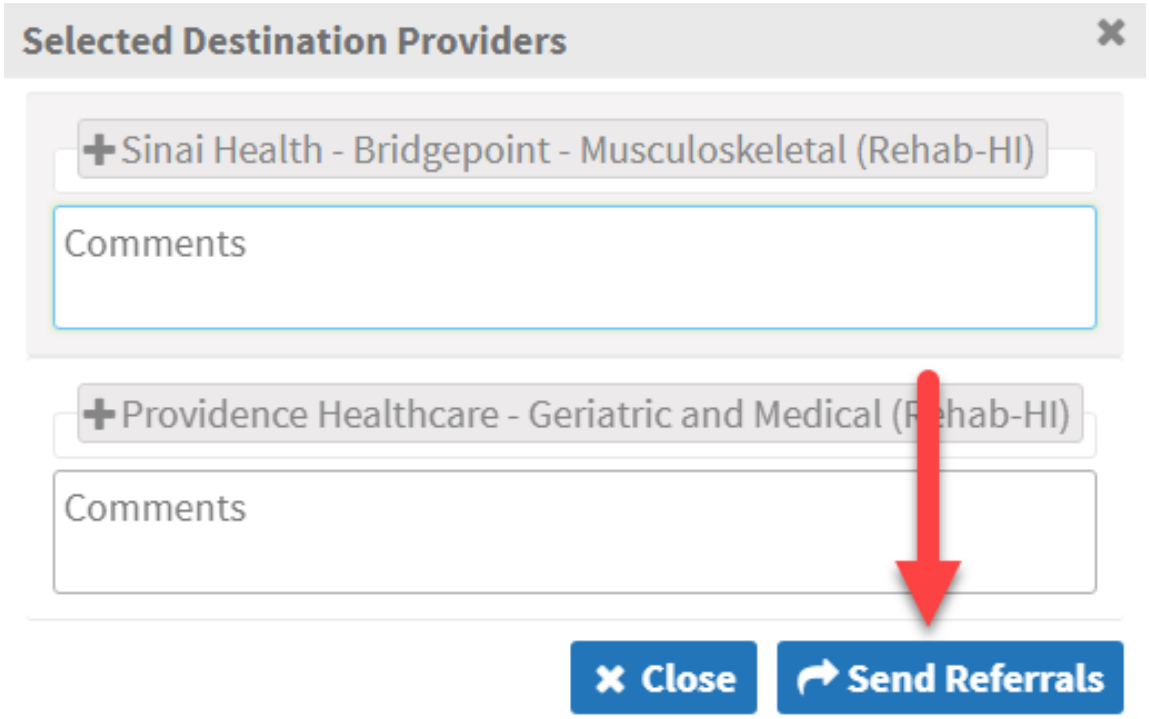
7. Click on the “Send and Manage Referrals” tab and click on the “Send Referral(s)” button



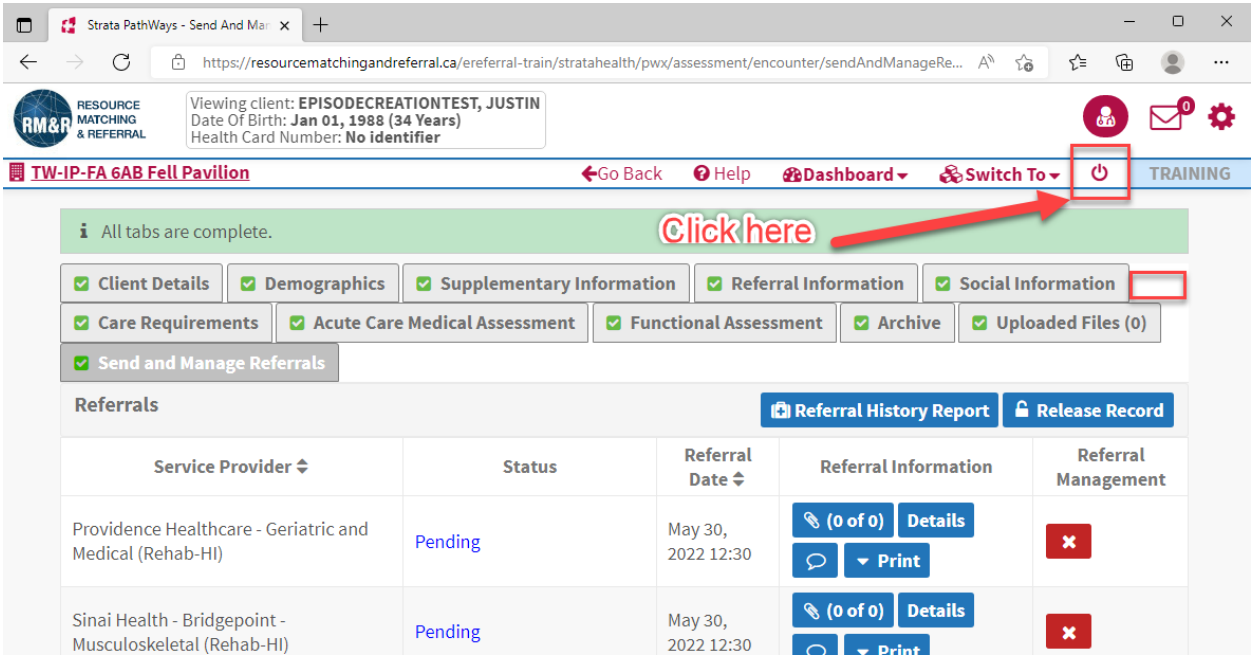
8. Some Care Types will take you to a facility selection screen like below. If so, select the desired facilities to receive this referral and click the “Send Referrals” button. If not, then proceed to page 30.



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



10. Log Out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Click here
Client Details
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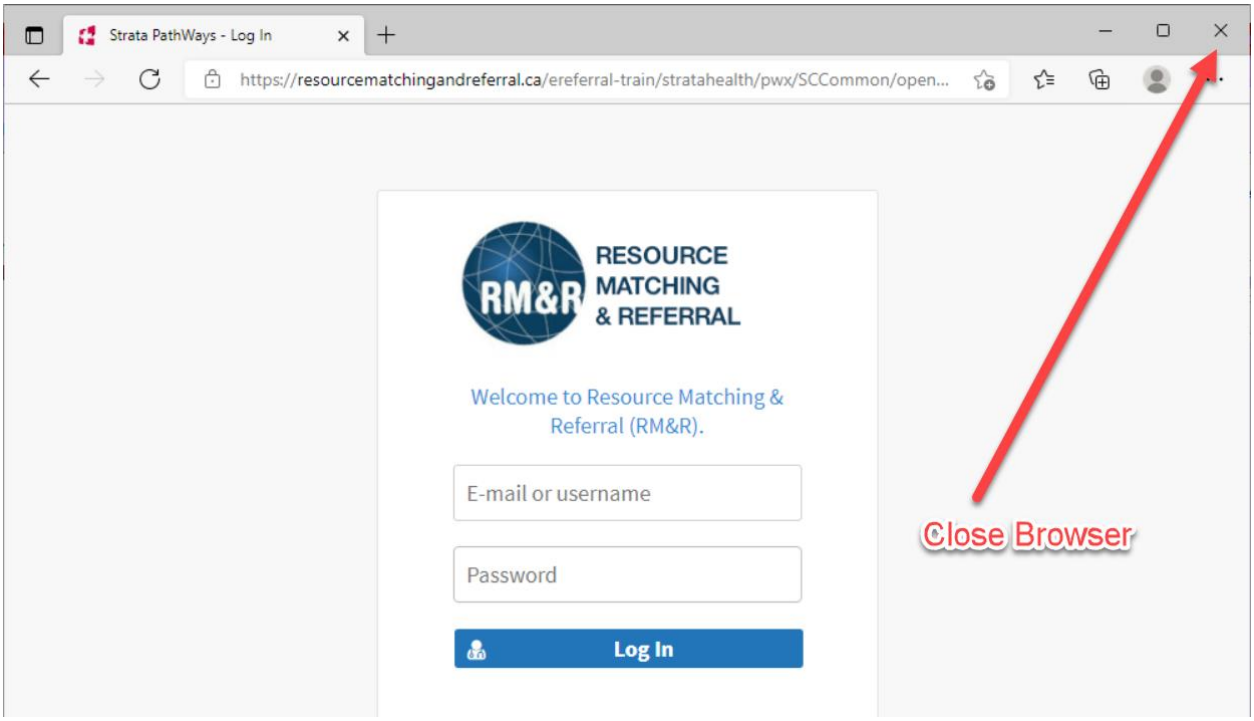
Supplementary Information
Referral Information
Social Information
Care Requirements
Acute Care Medical Assessment
Functional Assessment
Archive
Uploaded Files (0)
Send and Manage Referrals
Referrals
Referral History Report
Release Record
Service Provider
Status
Referral Date
Referral Information
Referral 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

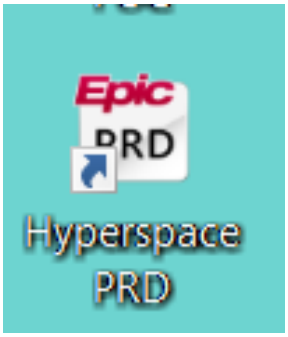
11. Close the browser



Workflow for eStroke

CREATING A REFERRAL

1. Launch Epic from Desktop



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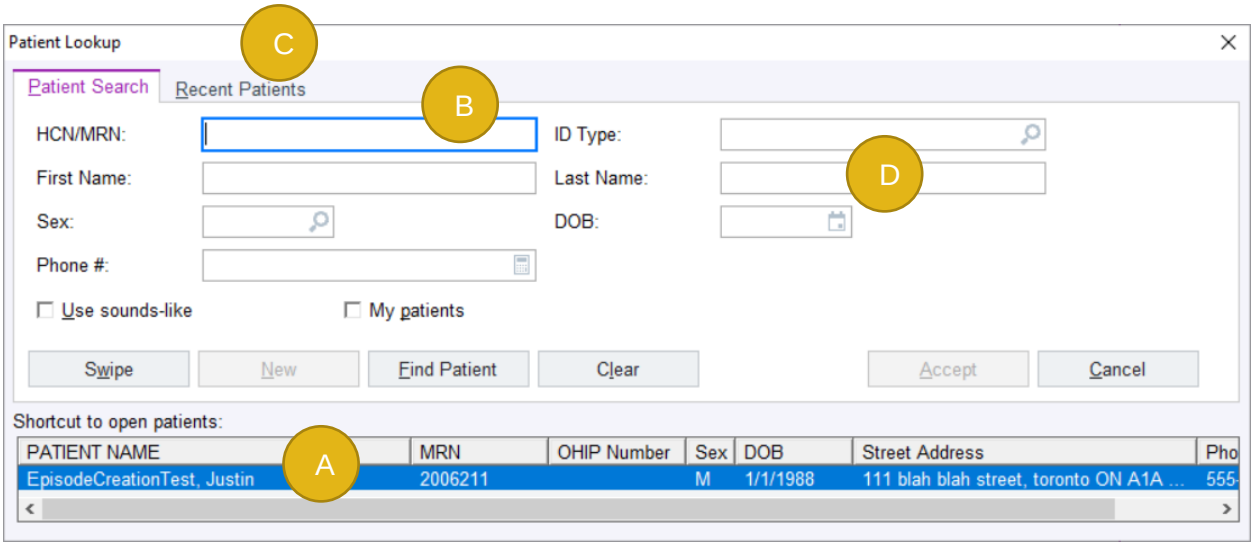
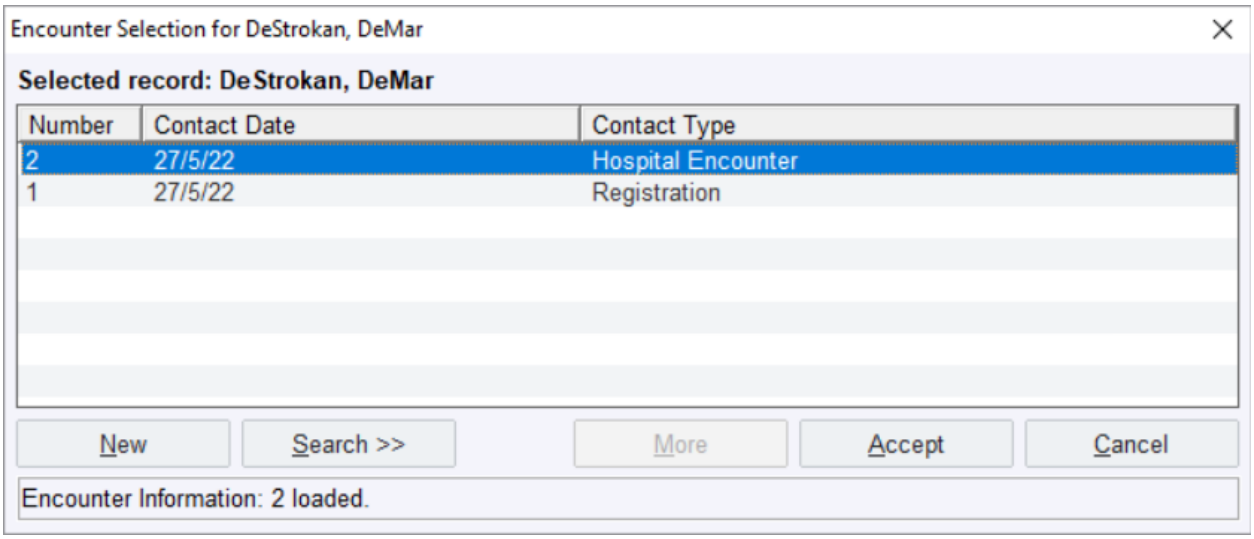
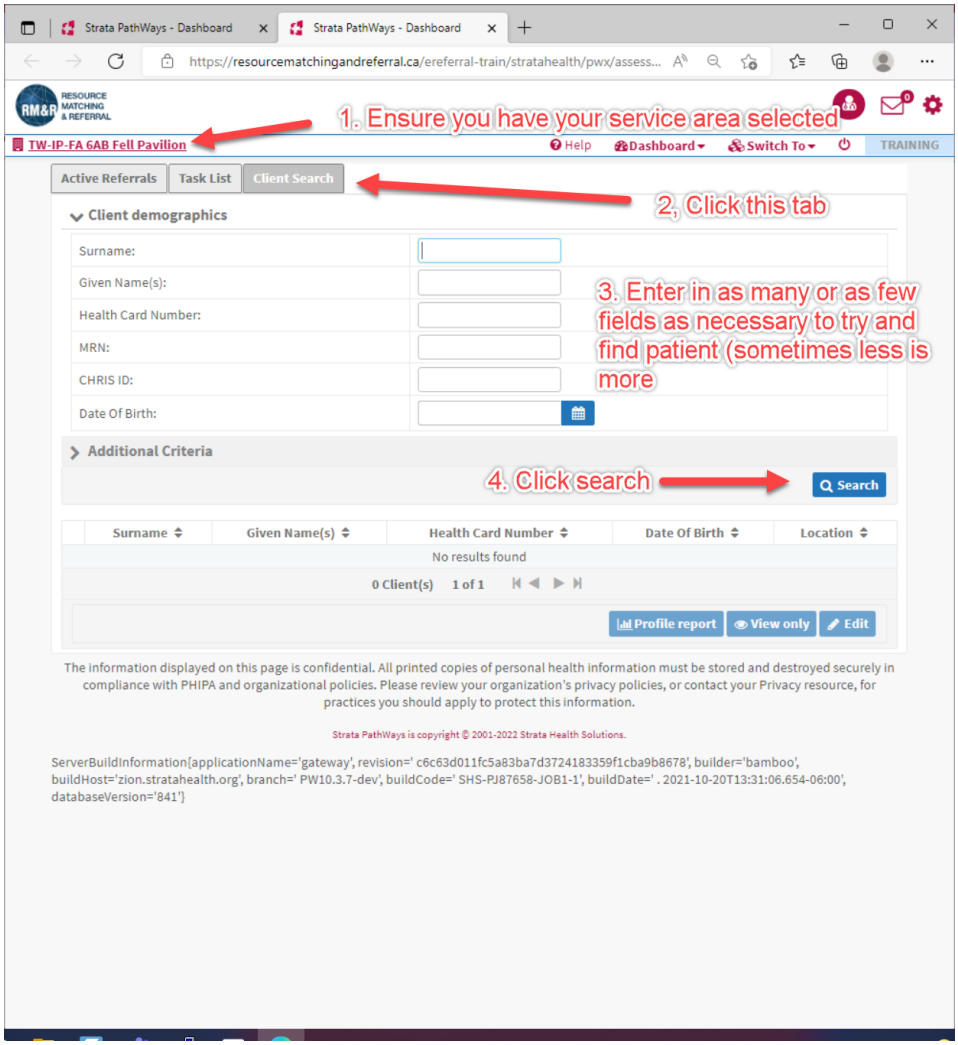


5. Select the appropriate patient encounter (likely the most recent Hospital Encounter or Appointment for OP)

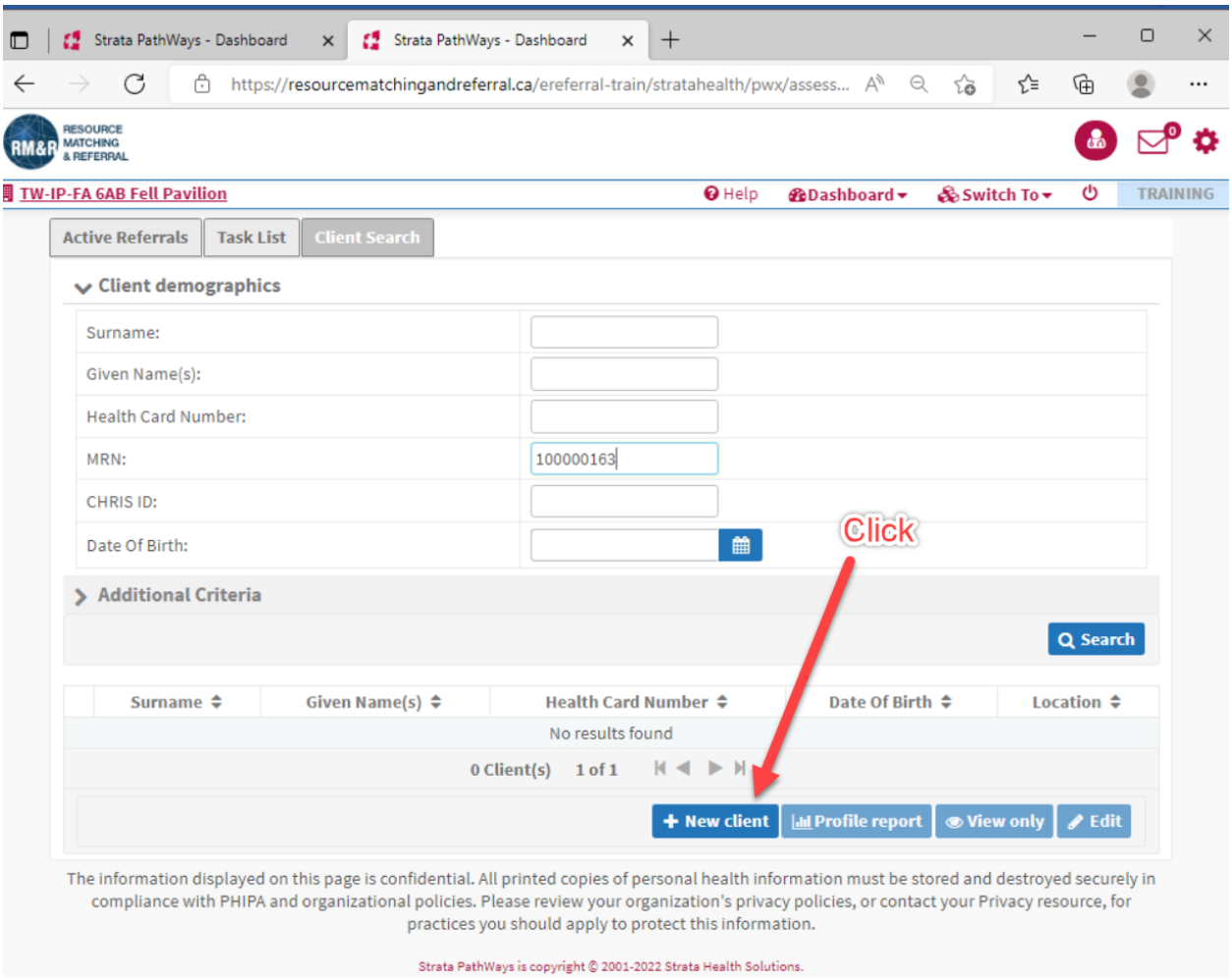


6. A new browser will open up and land on a page similar to below.
    1. 1. Ensure you have your service area selected
    2. 2. Click on the “Client Search” tab
    3. 3. Enter as many or as few fields to try and find your patient. If using MRN, include “[space] (3910)” after the 7-digit number *for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

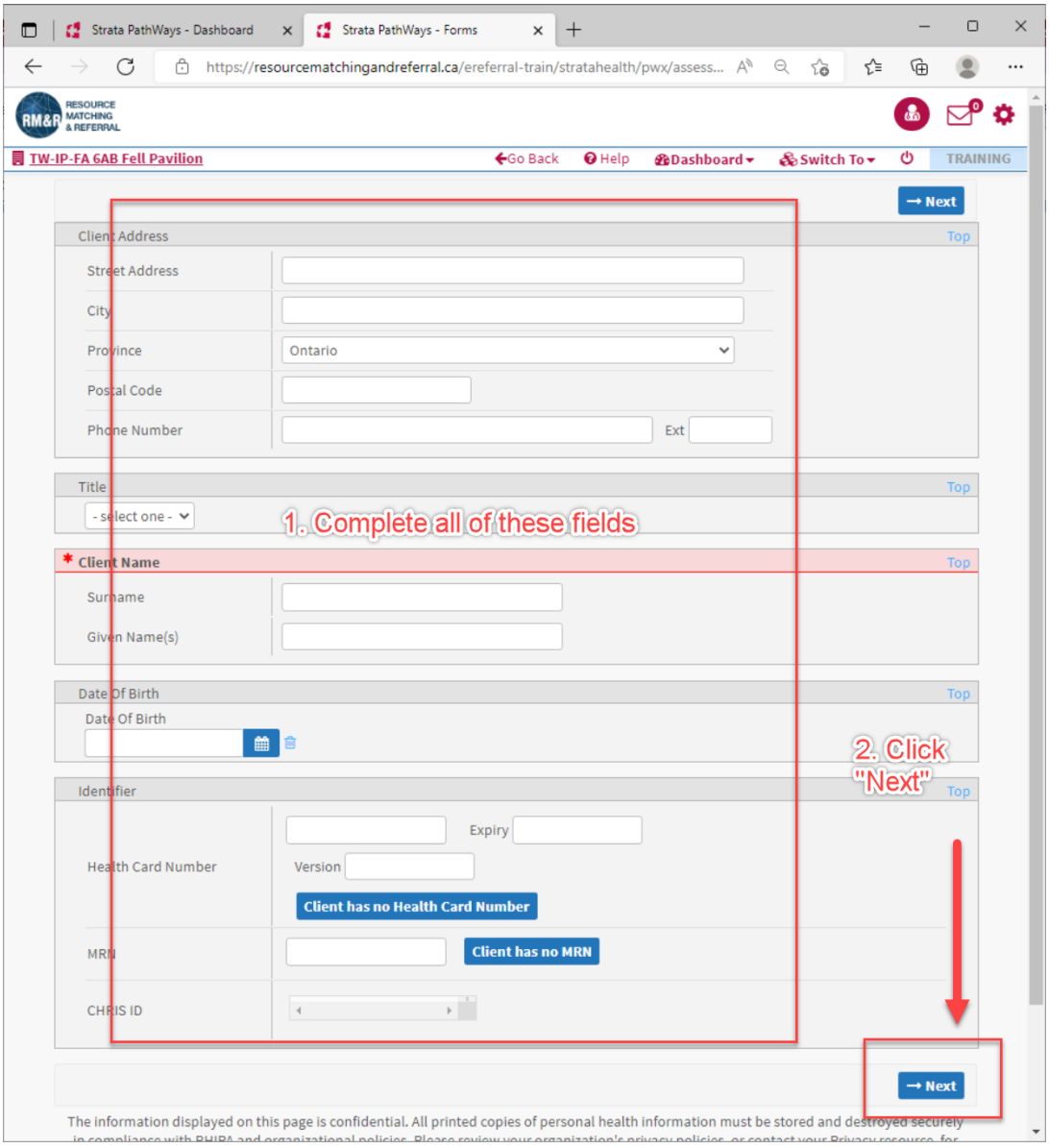


7a. If the correct patient is found, select them and proceed to page 41

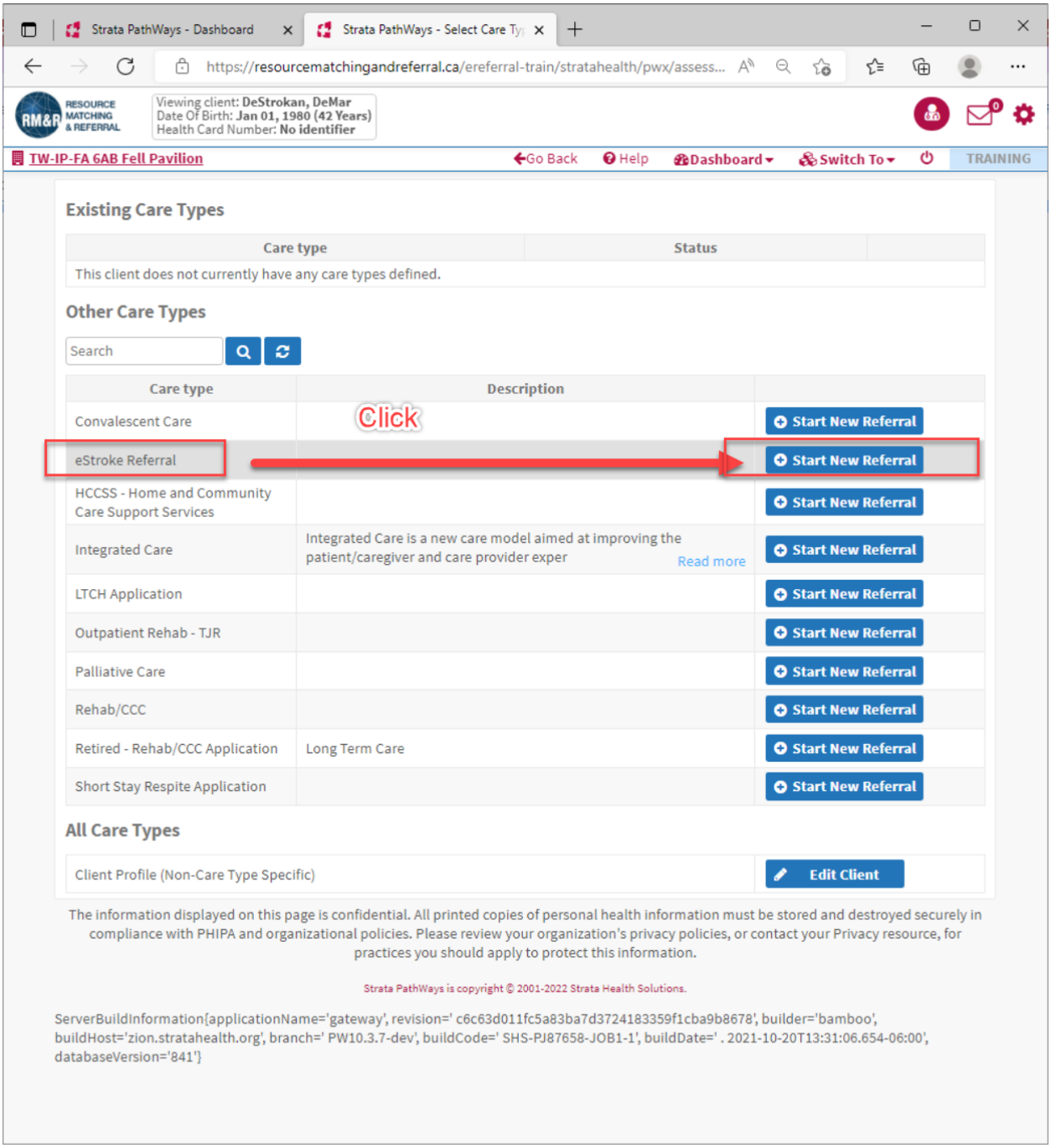
7b. If the patient is not found, click the “+ New client” button



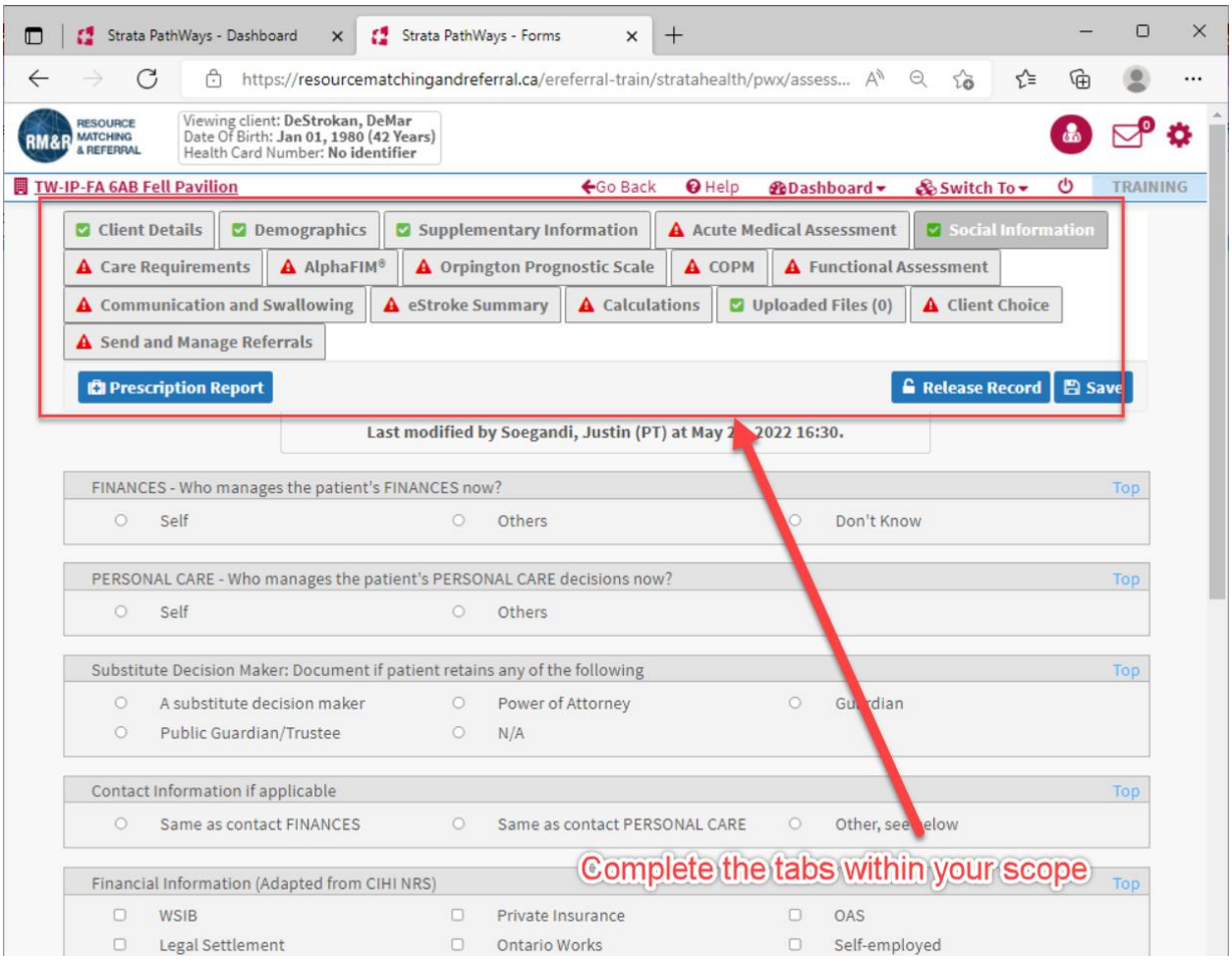
8. Complete all of the fields and click “Next”. NOTE: For the MRN Field, you MUST include “[space] 3910” after the 7 digit MRN….*for example “2223333 (3910)”*



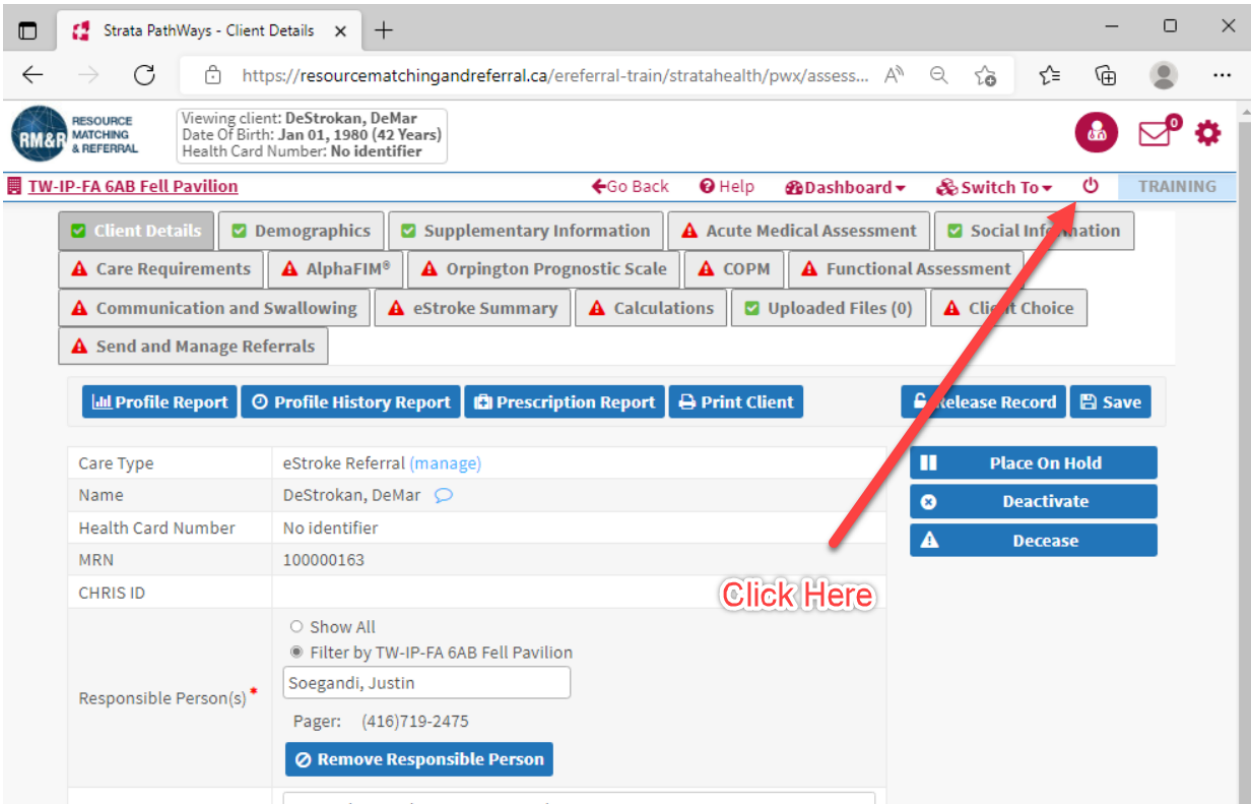
9. Click the blue “Start New Referral” box next to the eStroke Referral care type



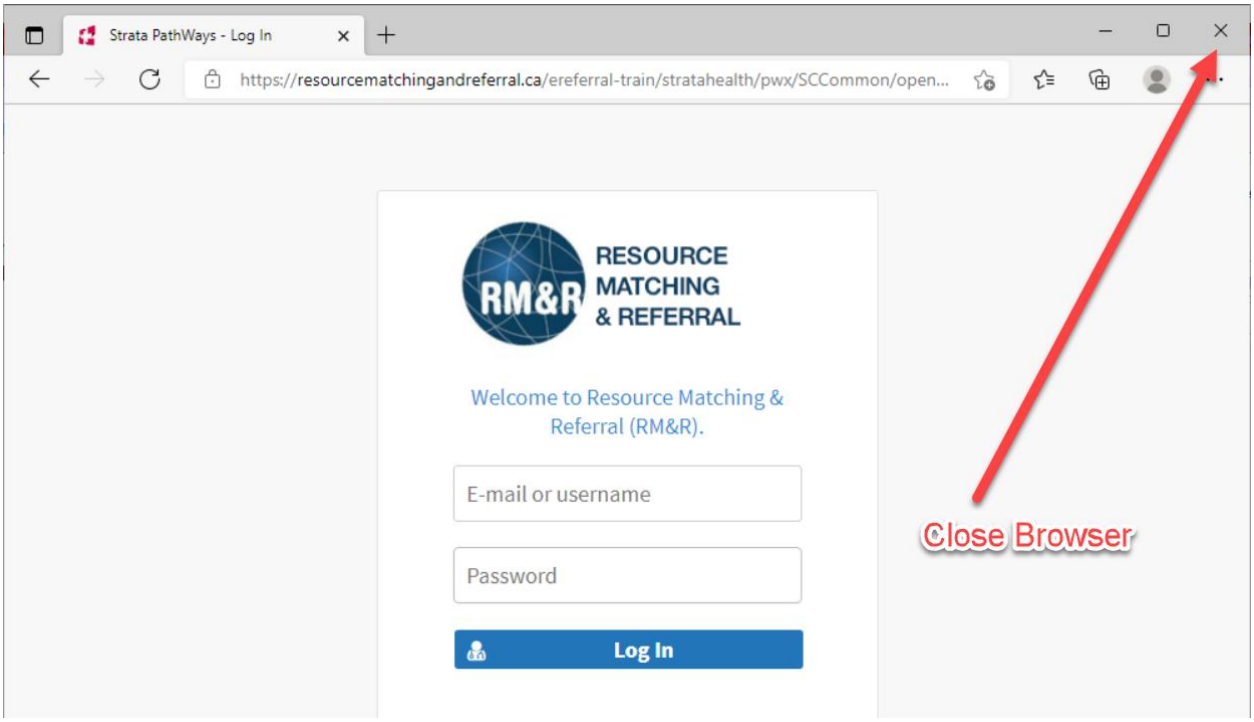
10. Complete the relevant tabs for your scope of practice



11. Log Out


Strata PathWays - Client Details
https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assess...
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
Care Requirements
AlphaFIM®
Orpington Prognostic Scale
COPM
Functional Assessment
Communication and Swallowing
eStroke Summary
Calculations
Uploaded Files (0)
Send and Manage Referrals
Profile Report
Profile History Report
Prescription Report
Print Client
Save
Care Type
eStroke Referral (manage)
Name
DeStrokan, DeMar
Health Card Number
No identifier
MRN
100000163
CHRIS ID
Place On Hold
Deactivate
Decease
Click Here
Show All
Filter by TW-IP-FA 6AB Fell Pavilion
Responsible Person(s)
Soegandi, Justin
Pager: (416)719-2475
Remove Responsible Person

12. Close the browser



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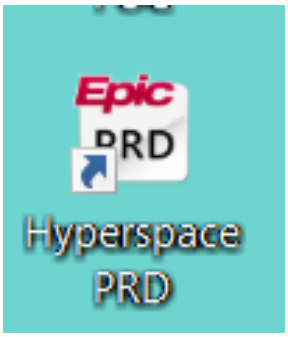

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Epic
November 2021
HYPERSPACE ®
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User ID
Password
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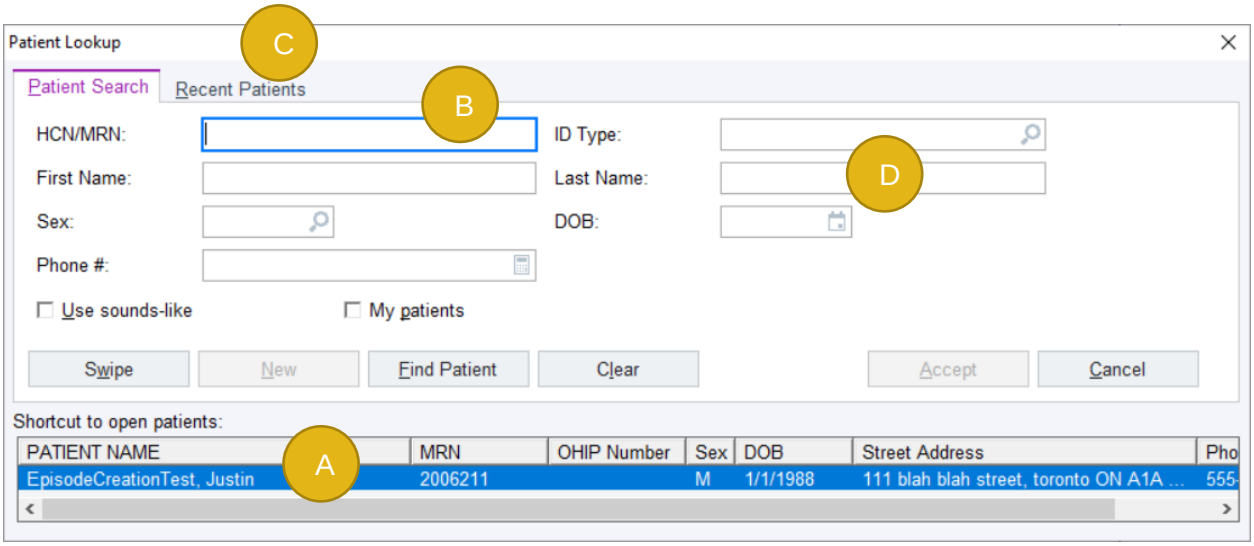

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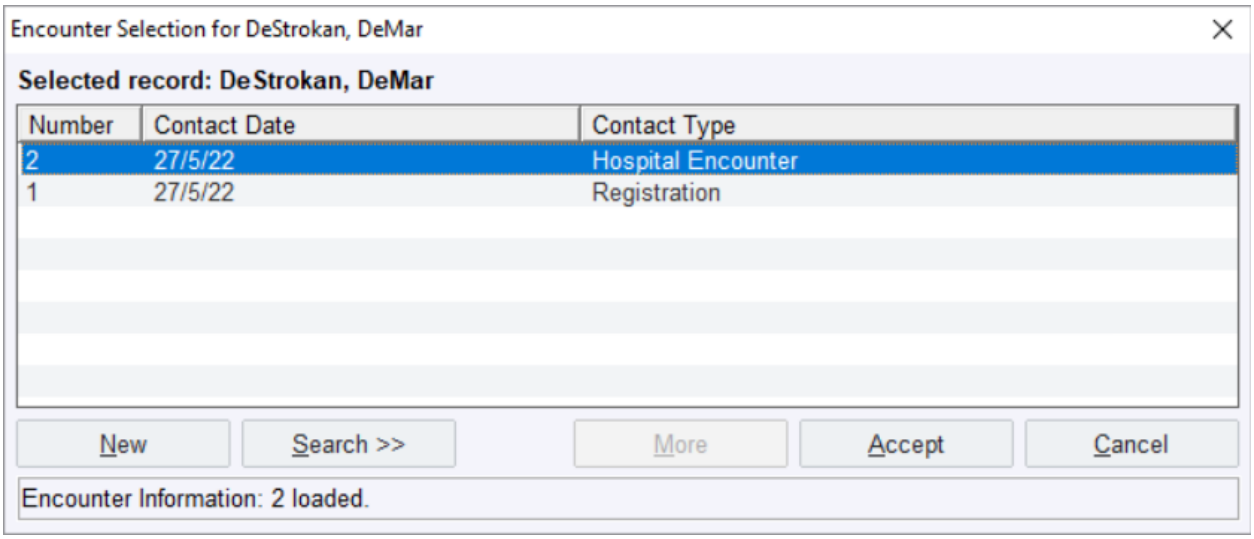

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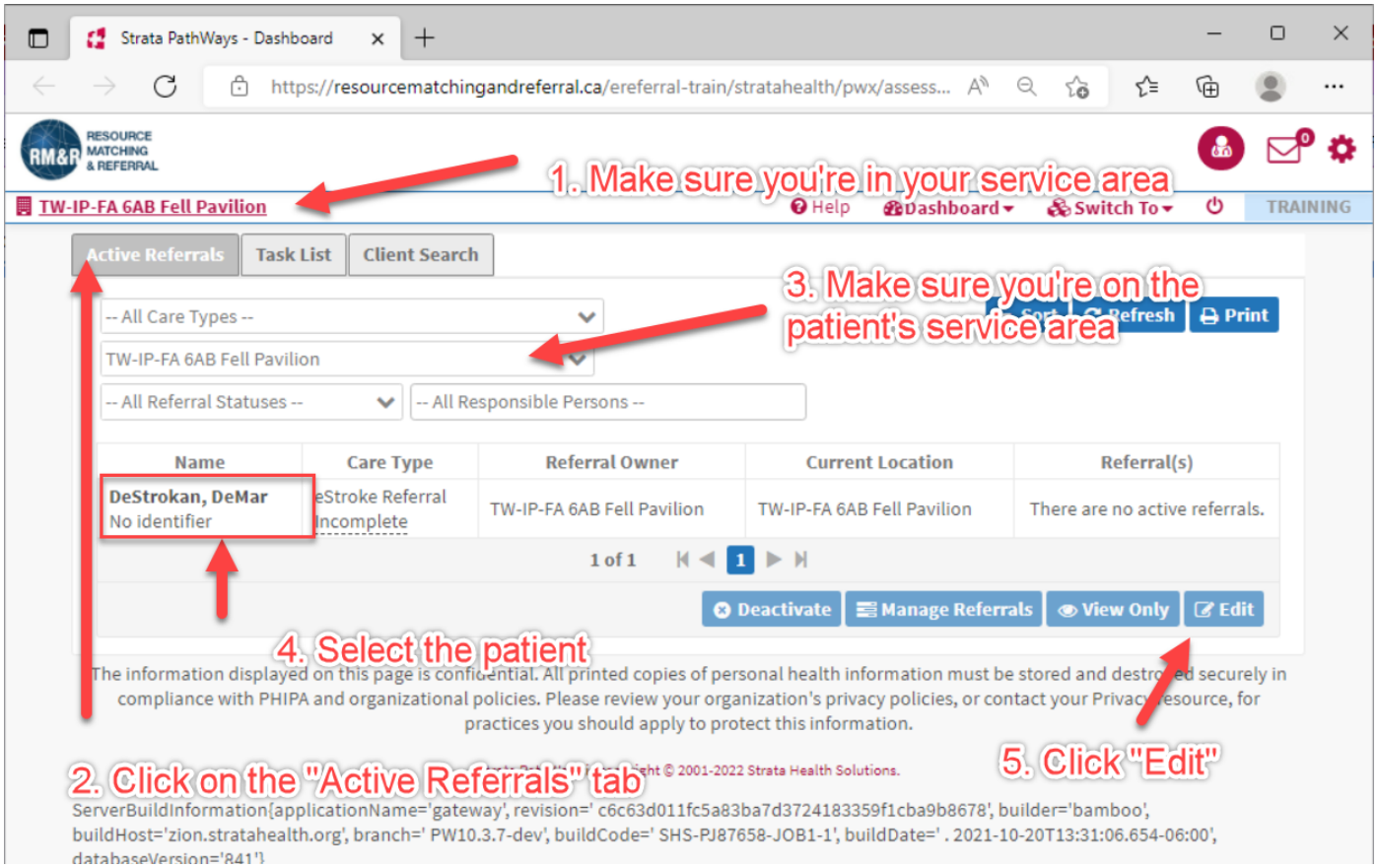

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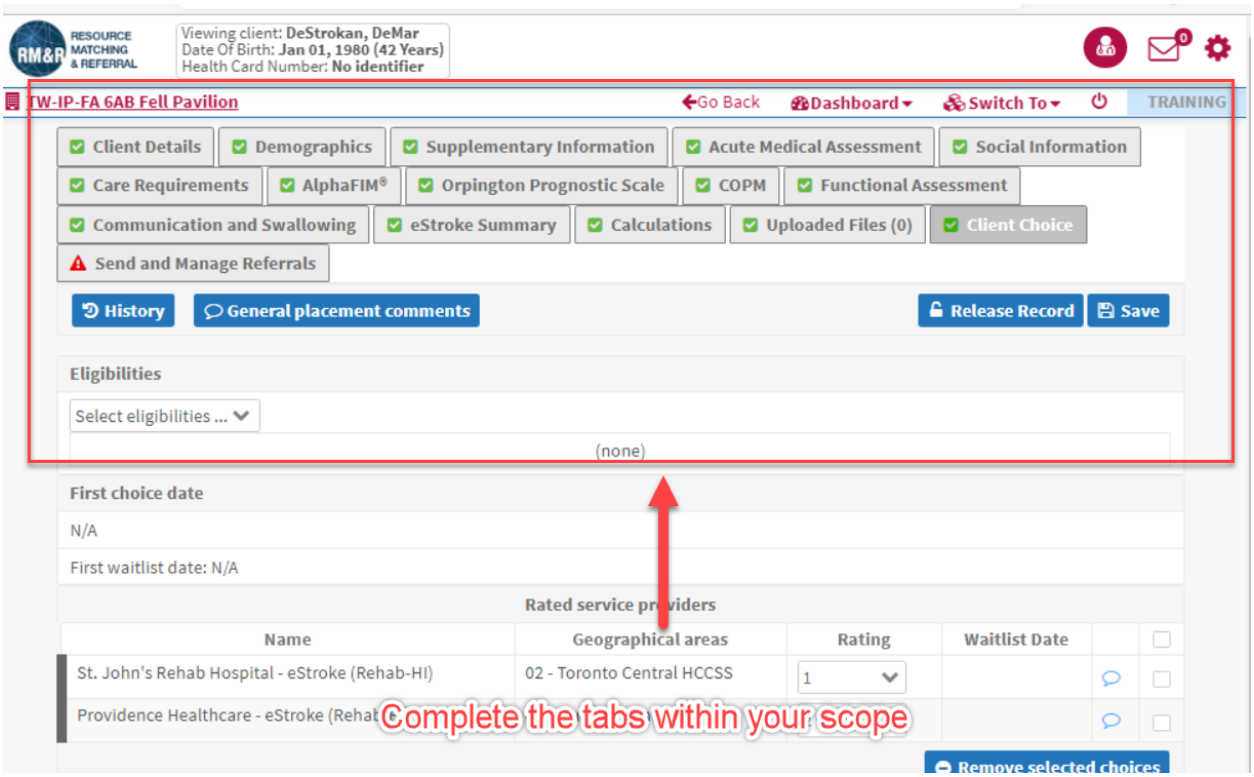

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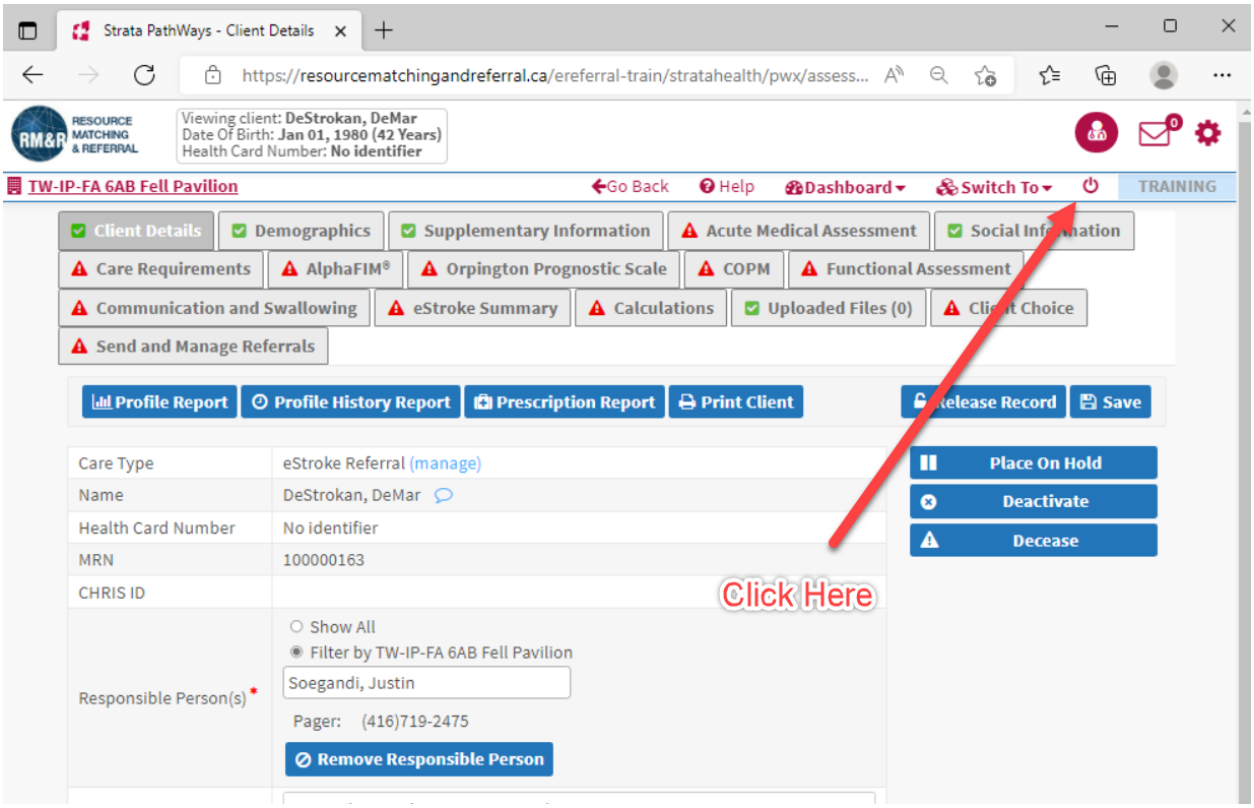
Strata PathWays - Client Details
https://resourcematchingandreferral.ca/ereferral-train/stratahealth/pwx/assess...
RESOURCE MATCHING & REFERRAL
Viewing client: DeStrokan, DeMar
Date Of Birth: Jan 01, 1980 (42 Years)
Health Card Number: No identifier
TW-IP-FA 6AB Fell Pavilion
Go Back
Help
Dashboard
Switch To
TRAINING
Client Details
Demographics
Supplementary Information
Acute Medical Assessment
Social Information
Care Requirements
AlphaFIM®
Orpington Prognostic Scale
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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)
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MRN
100000163
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Show All
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Soegandi, Justin
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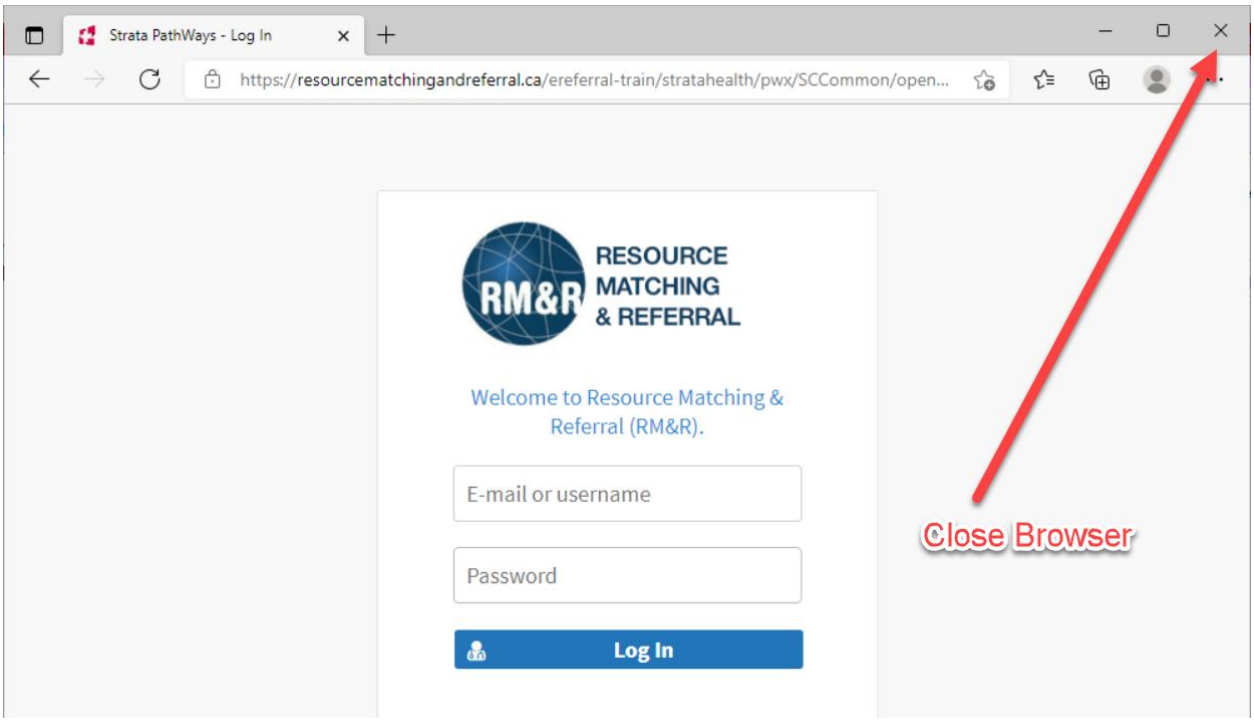

SENDING A REFERRAL

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

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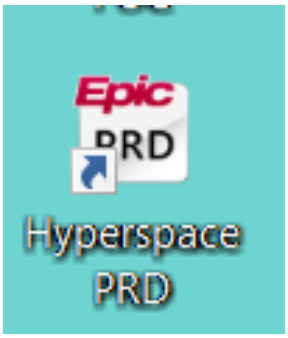

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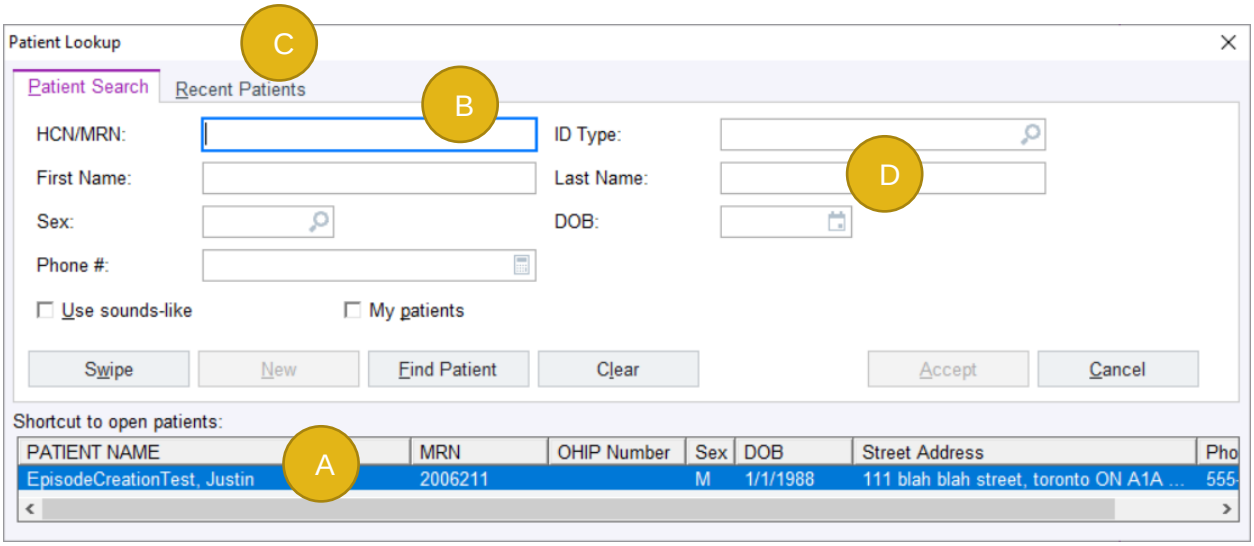

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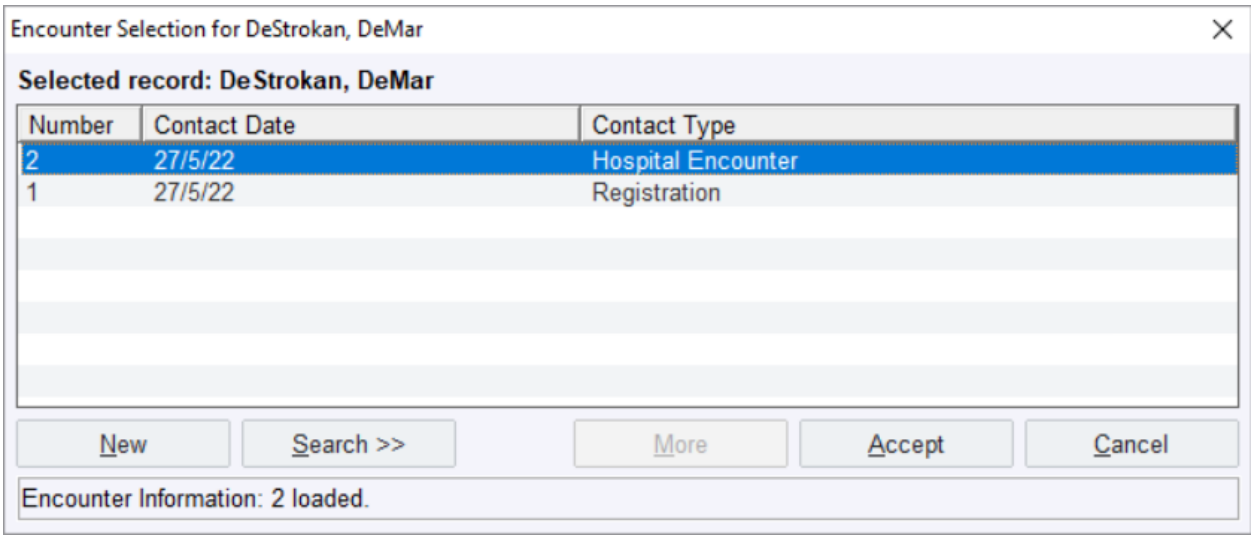

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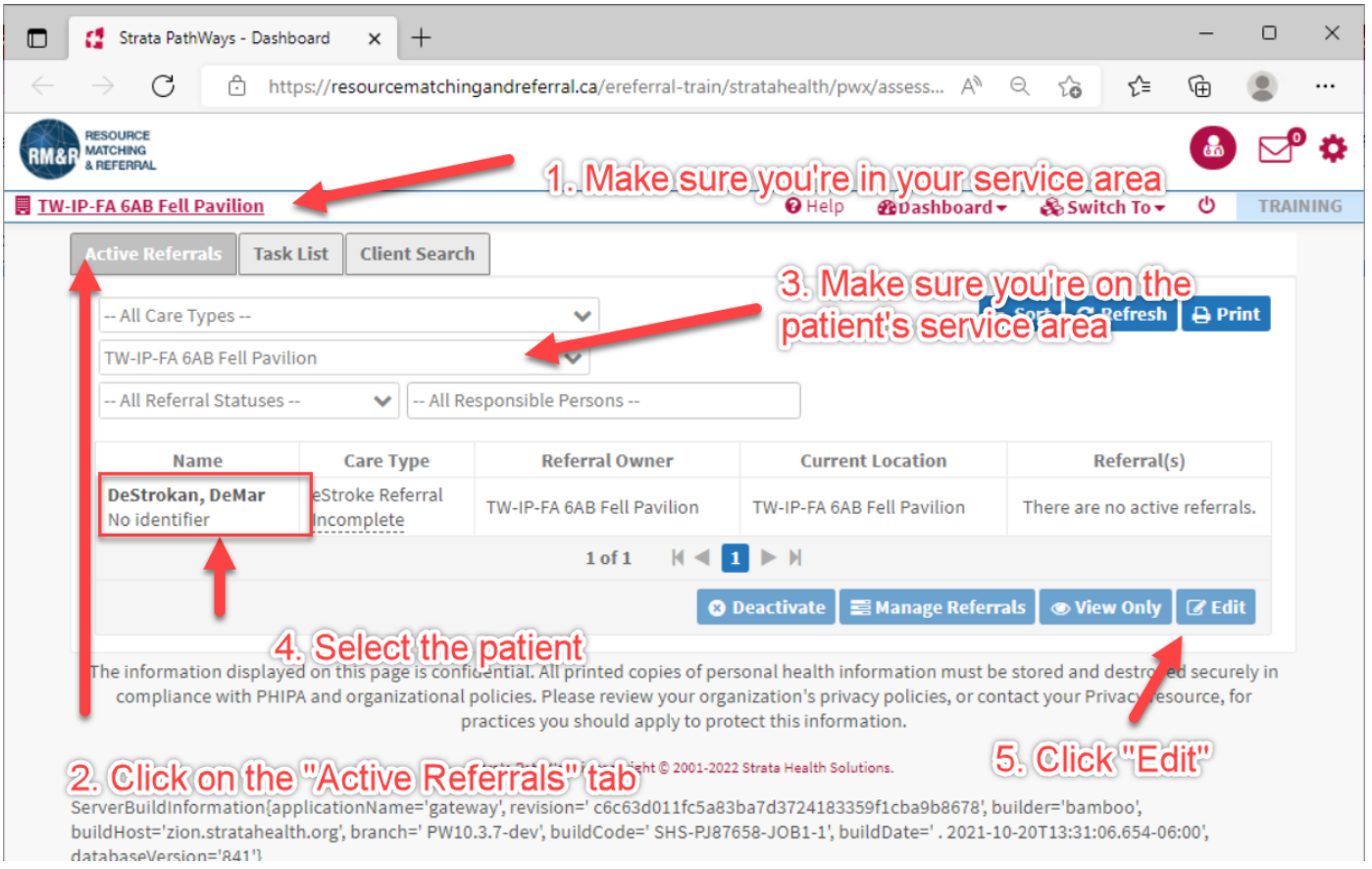
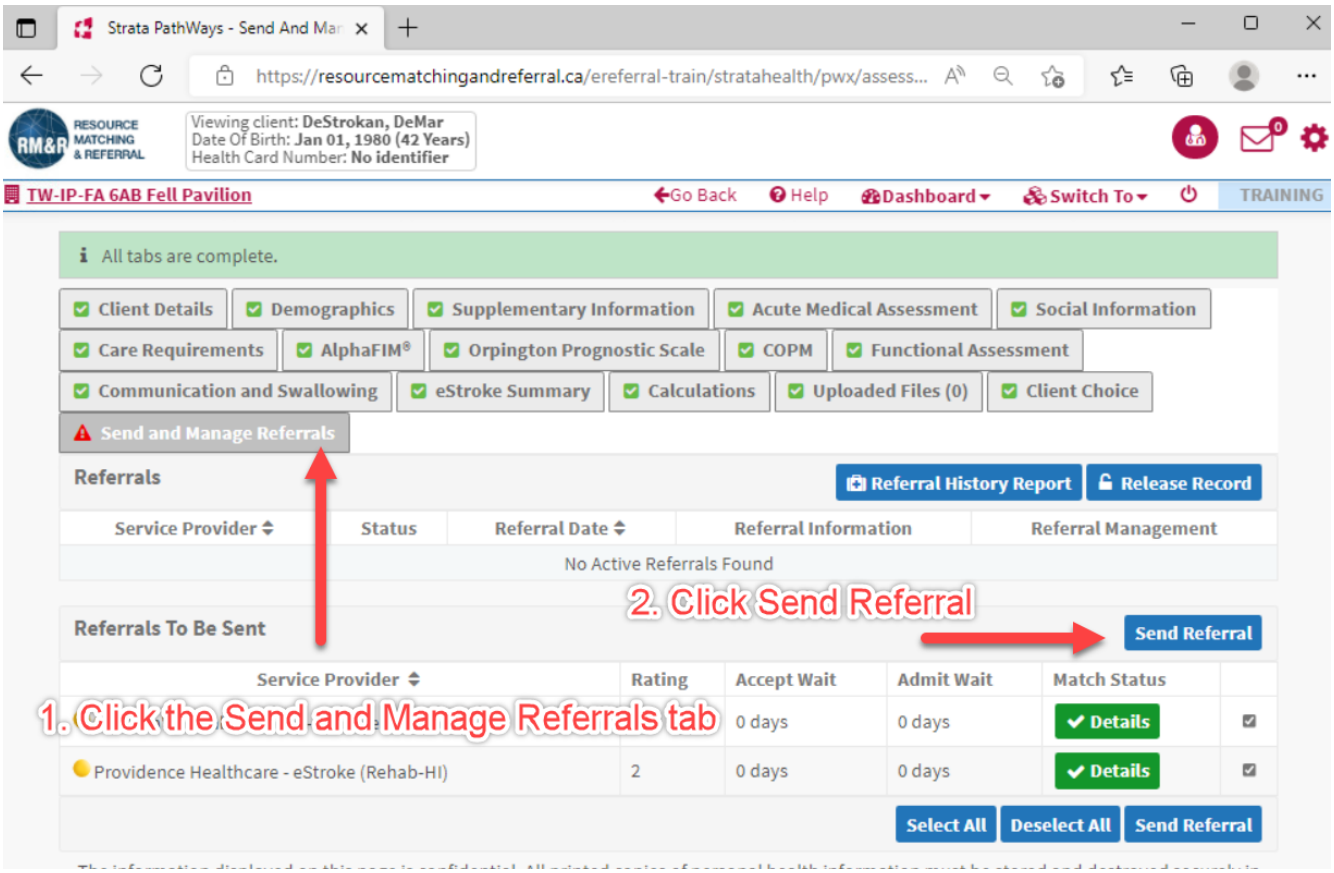


7. Click the “Send and Manage Referrals Tab” and click “Send Referral”



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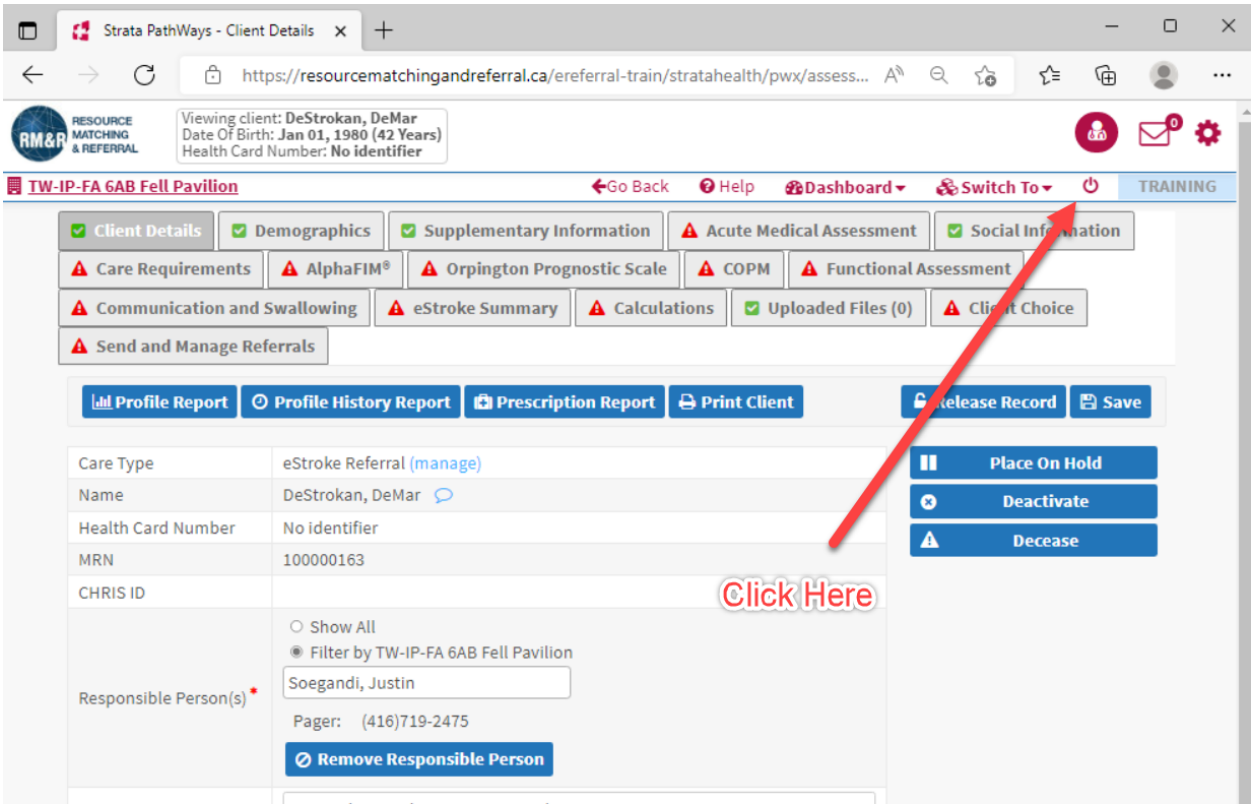
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Uploaded Files (0)
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Profile Report
Profile History Report
Prescription Report
Print Client
Release Record
Save
Care Type
eStroke Referral (manage)
Name
DeStrokan, DeMar
Health Card Number
No identifier
MRN
100000163
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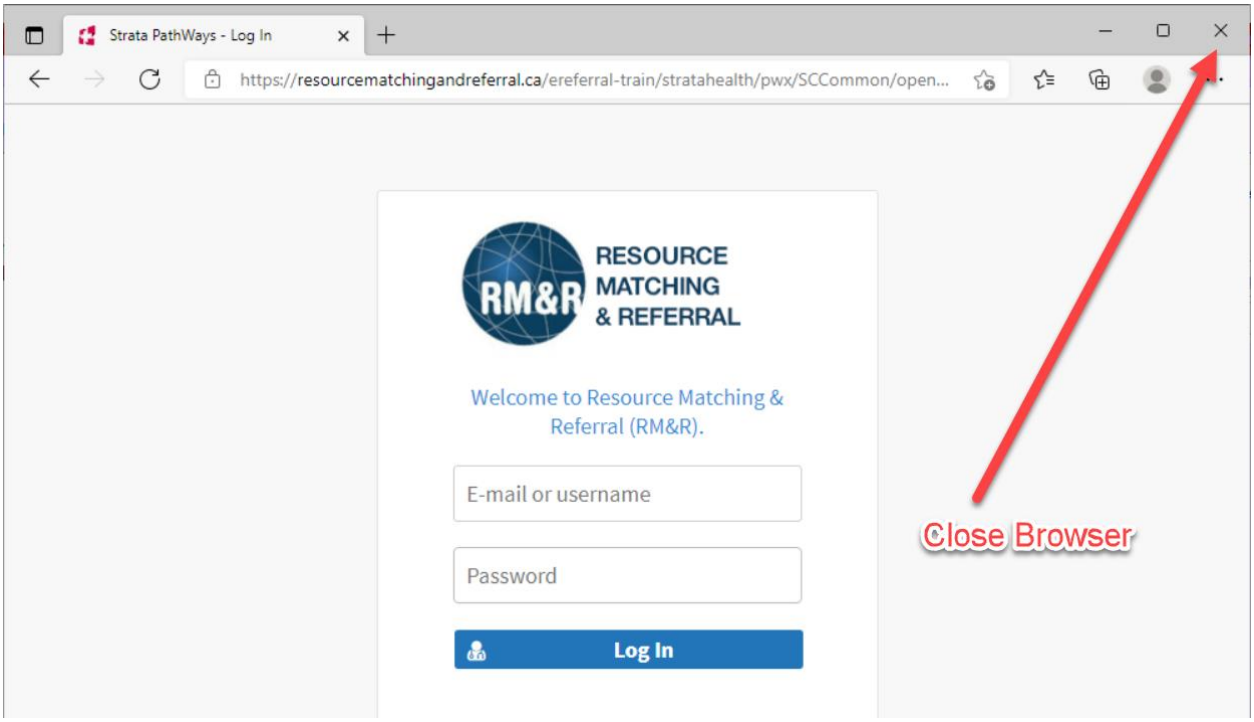
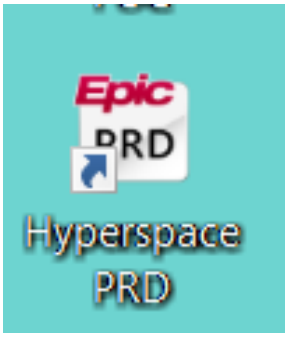


Workflow for any care type excluding:

- 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



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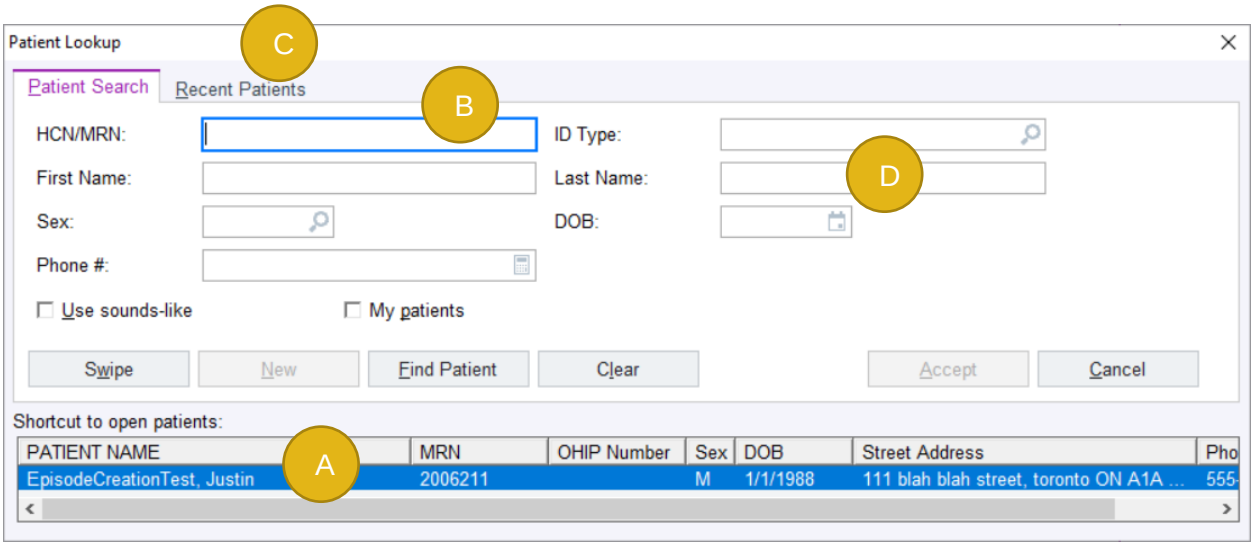

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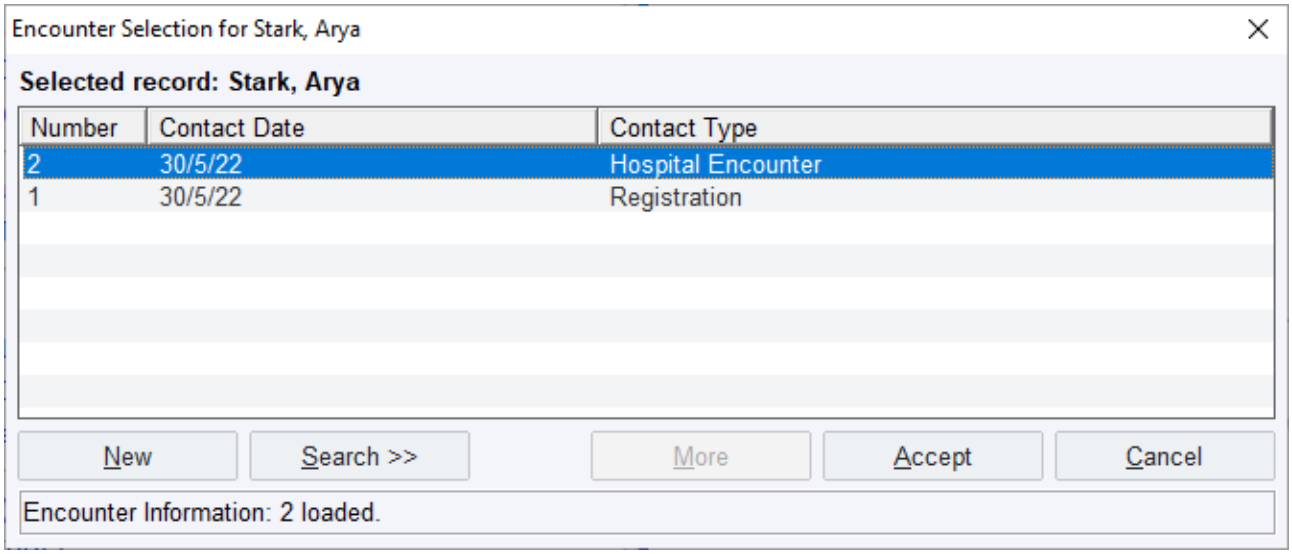
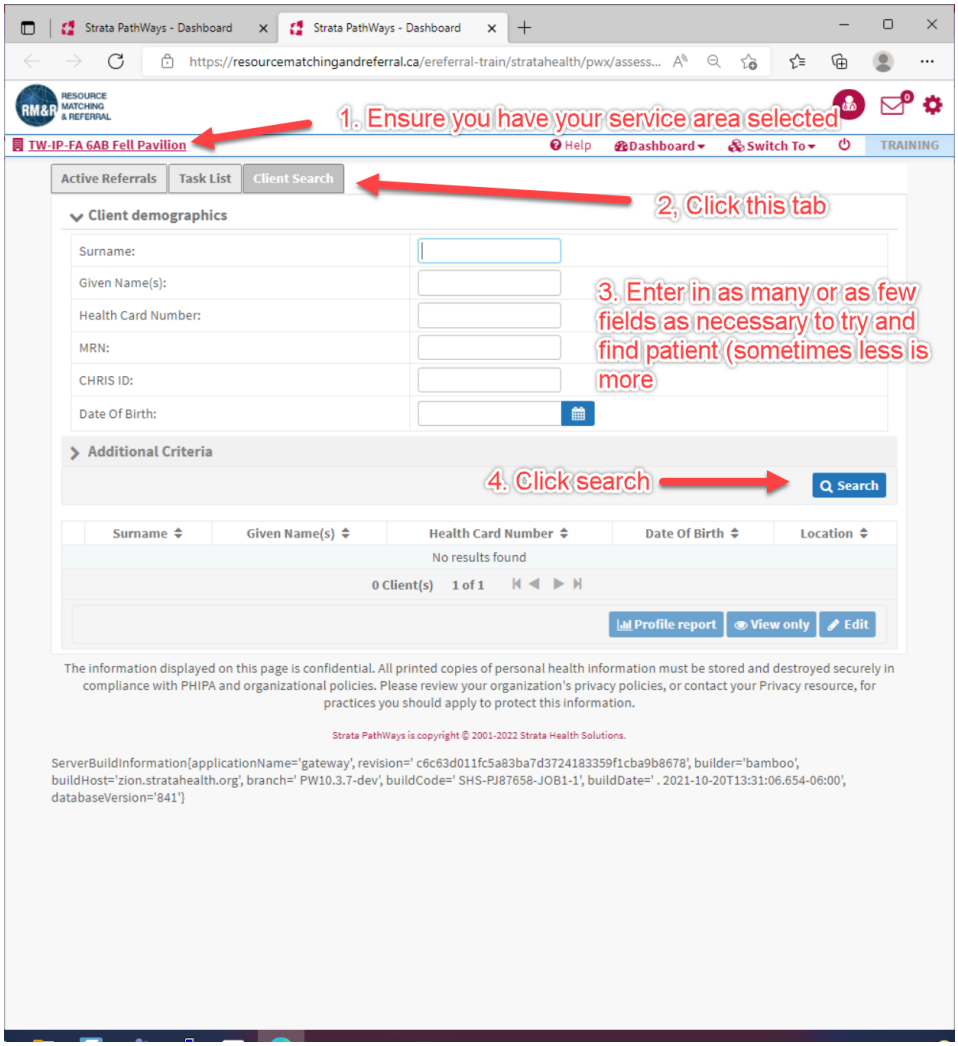
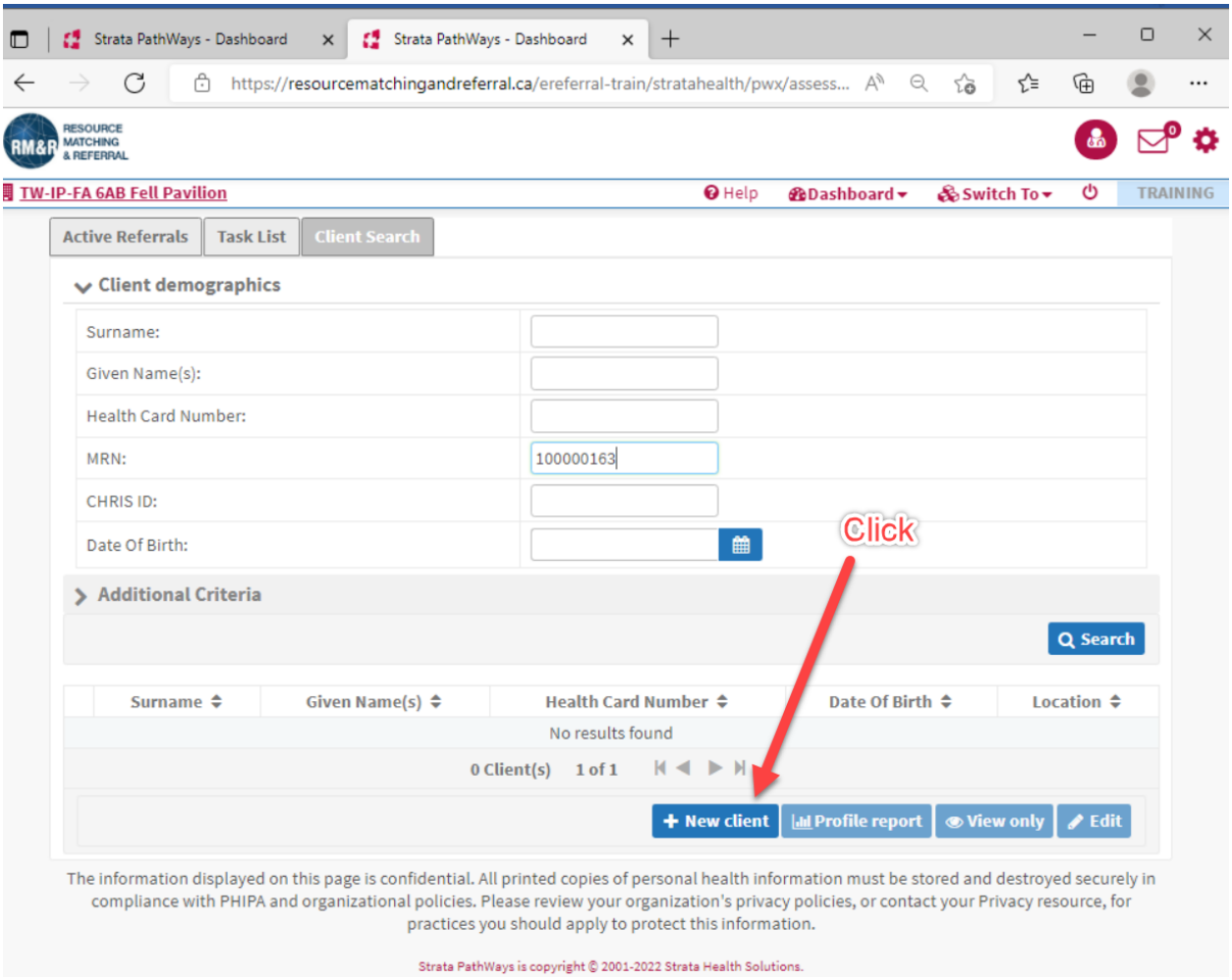


6. A new browser will open up and land on a page similar to below.
    - 1. Ensure you have your service area selected
    - 2. Click on the “Client Search” tab
    5. 3. Enter as many or as few fields to try and find your patient. If using MRN, include “[space] (3910)” after the 7-digit number. *for example “2223333 (3910)”*
    - 4. Click “Search”

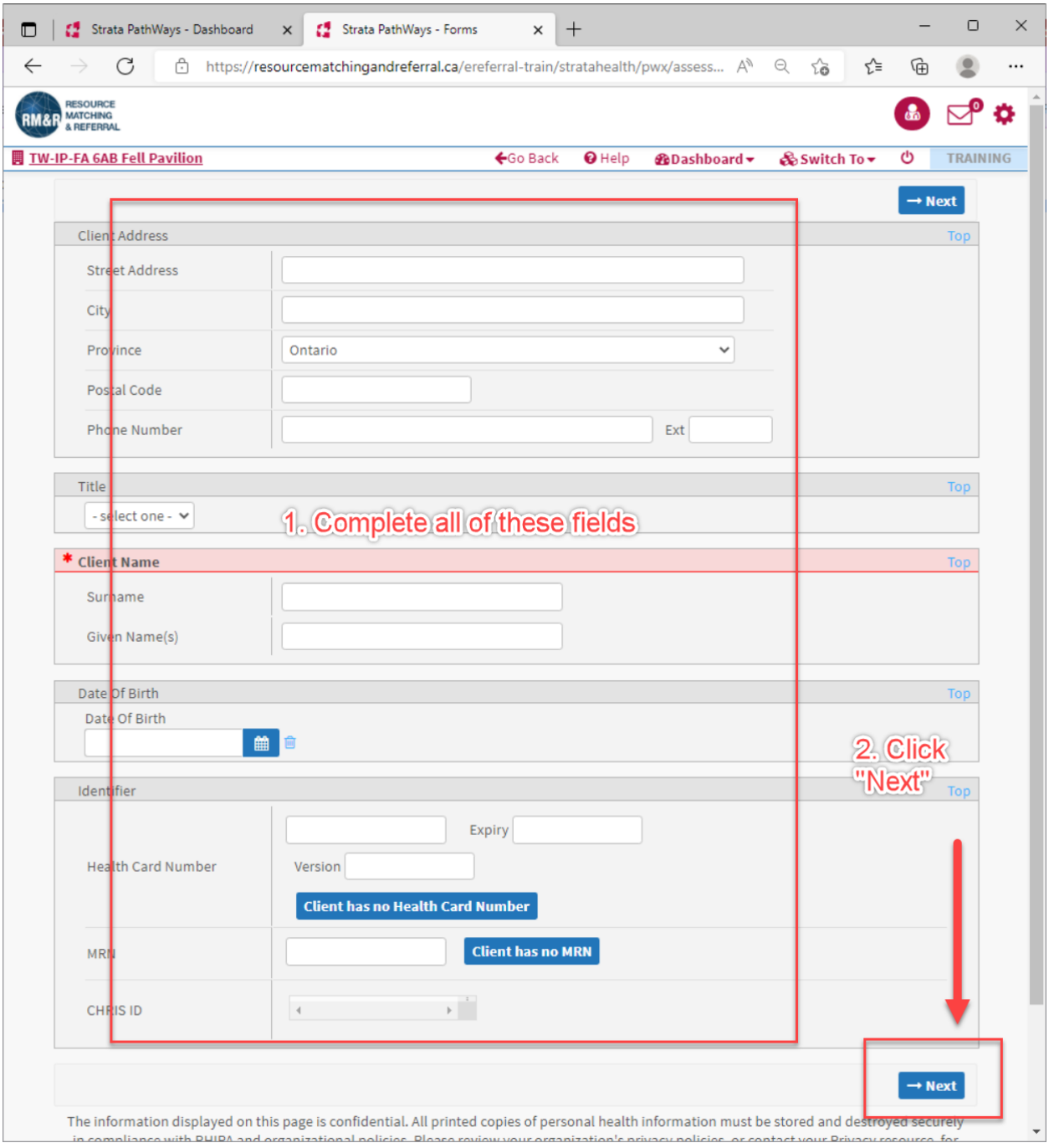


7a. If the correct patient is found, select them and proceed to page 41

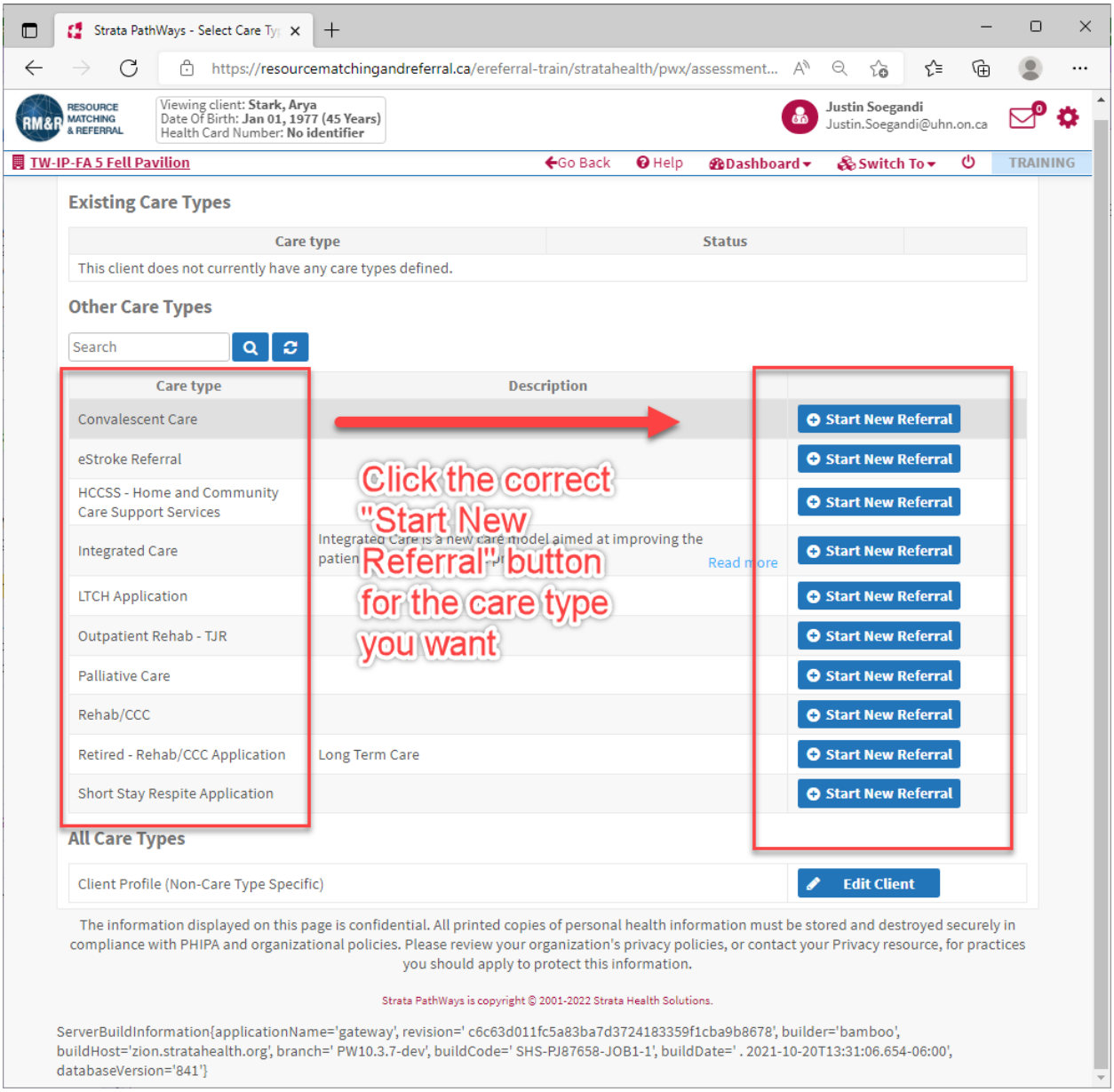
7b. If the patient is not found, click the “+ New client” button



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)”*



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



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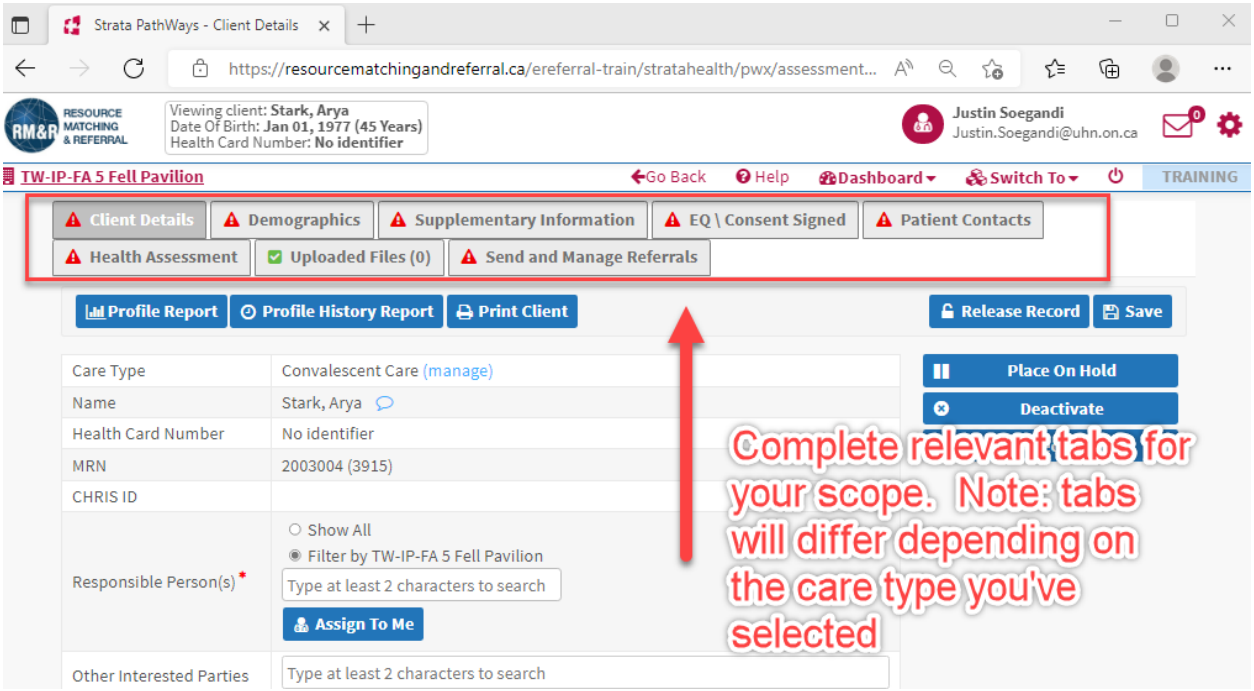

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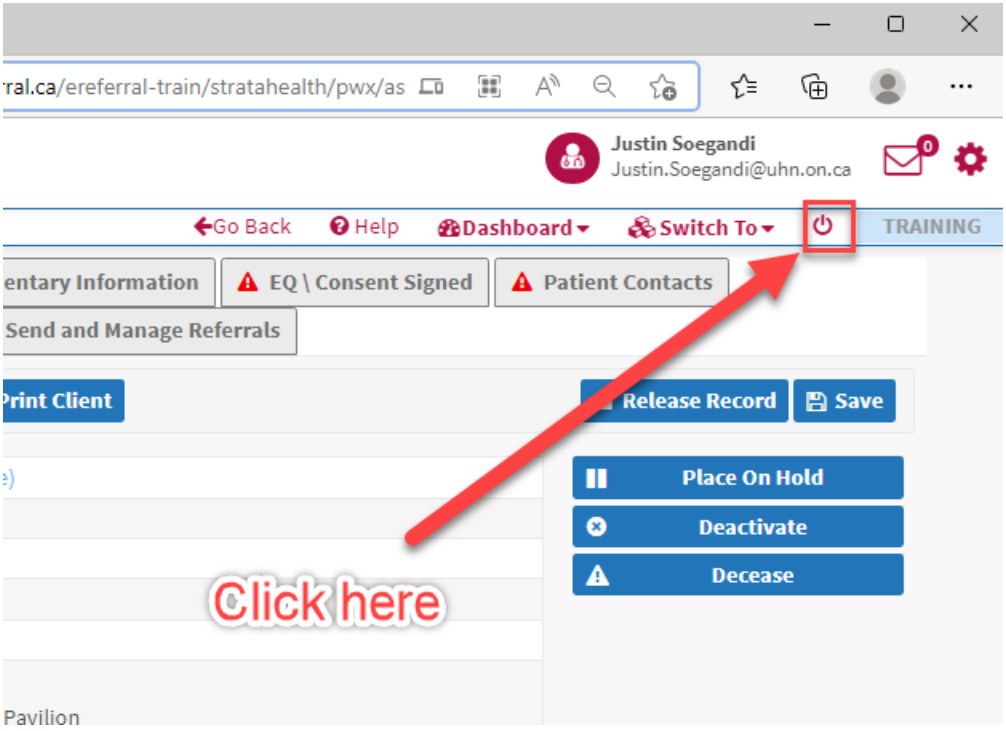
ral.ca/ereferral-train/stratahealth/pwx/as
Justin Soegandi
Justin.Soegandi@uhn.on.ca
Go Back
Help
Dashboard
Switch To
TRAINING
entary Information
EQ \ Consent Signed
Patient Contacts
Send and Manage Referrals
Print Client
Release Record
Save
Place On Hold
Deactivate
Decease
Click here
Pavilion

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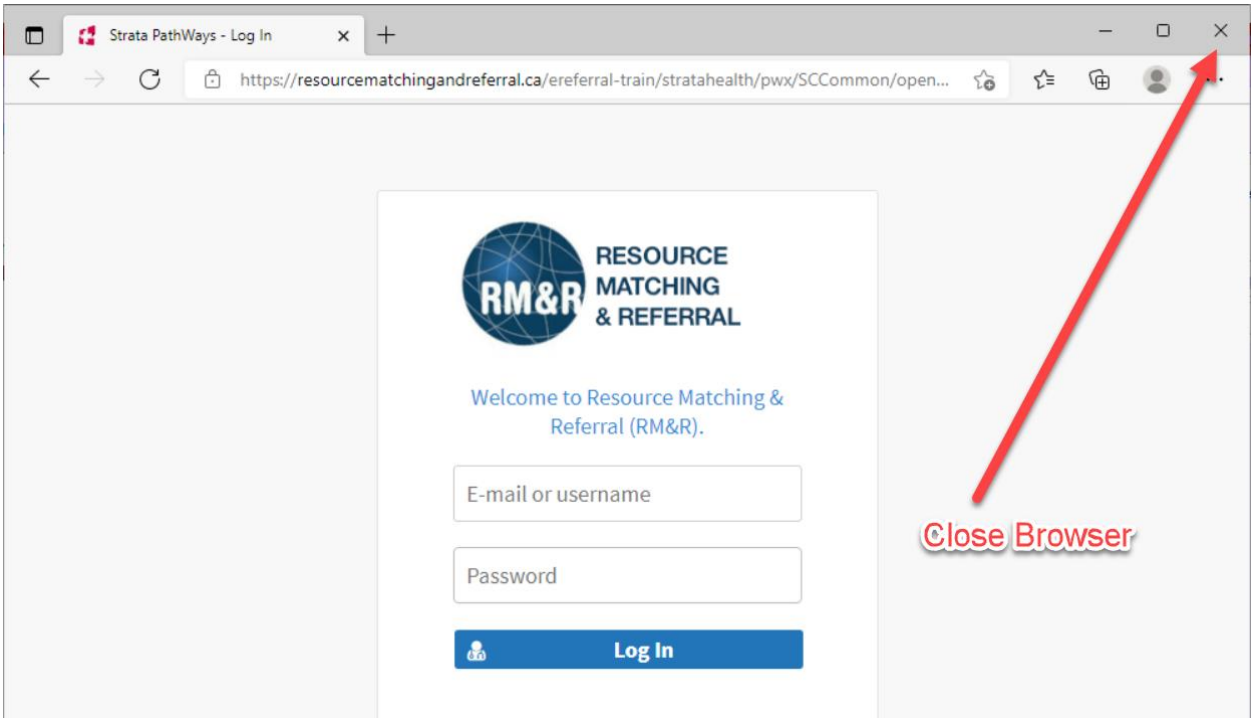

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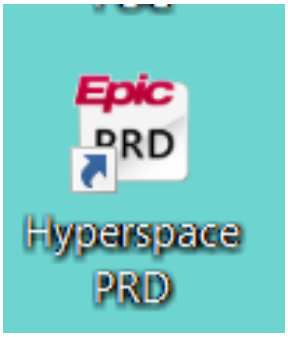

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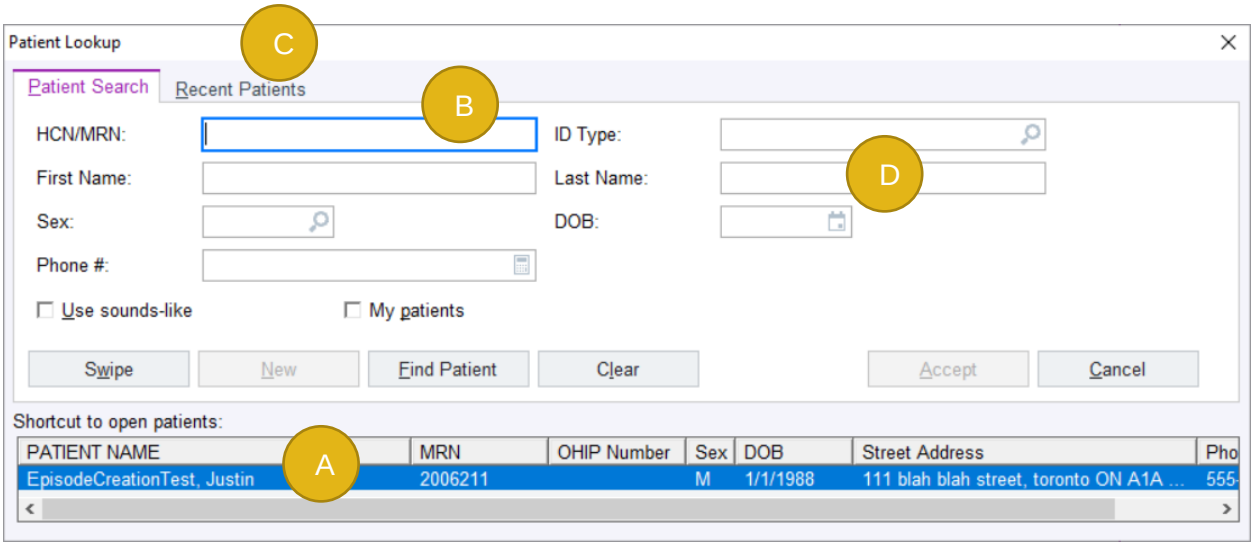

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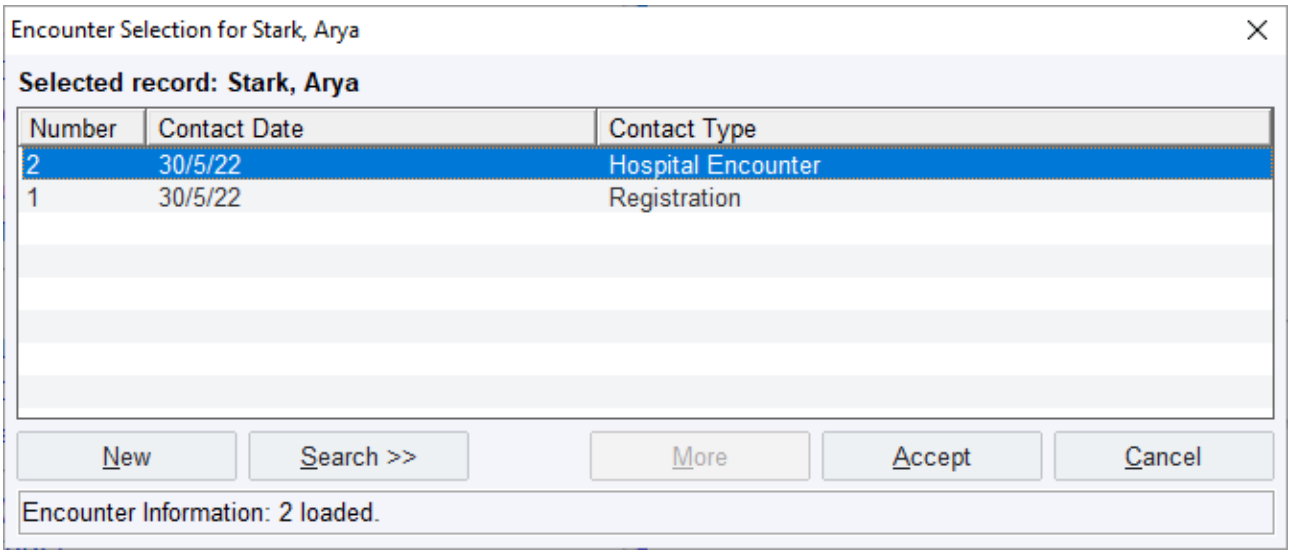

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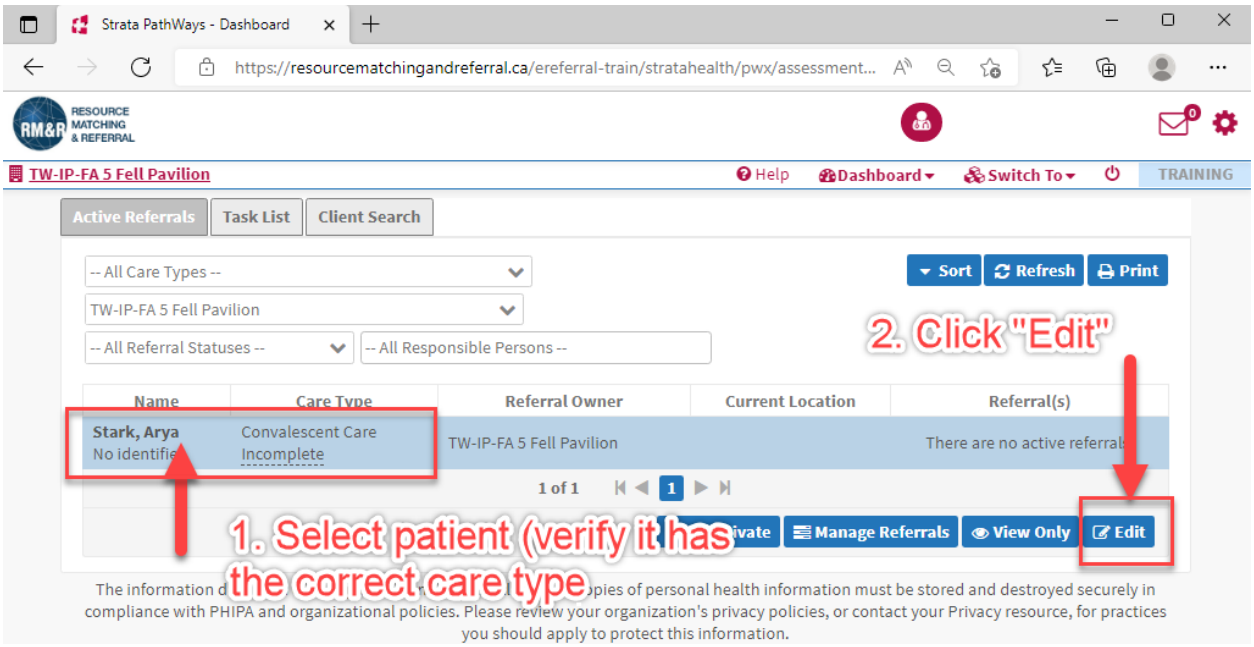

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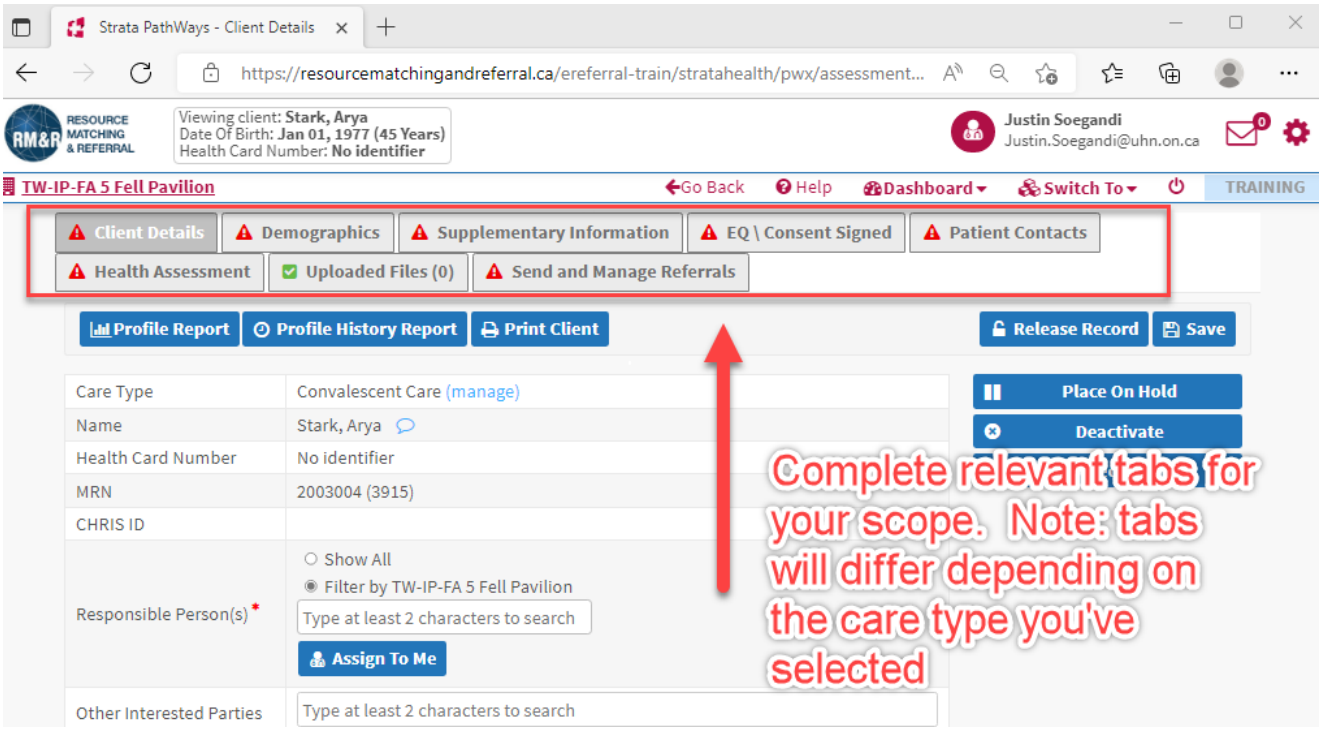

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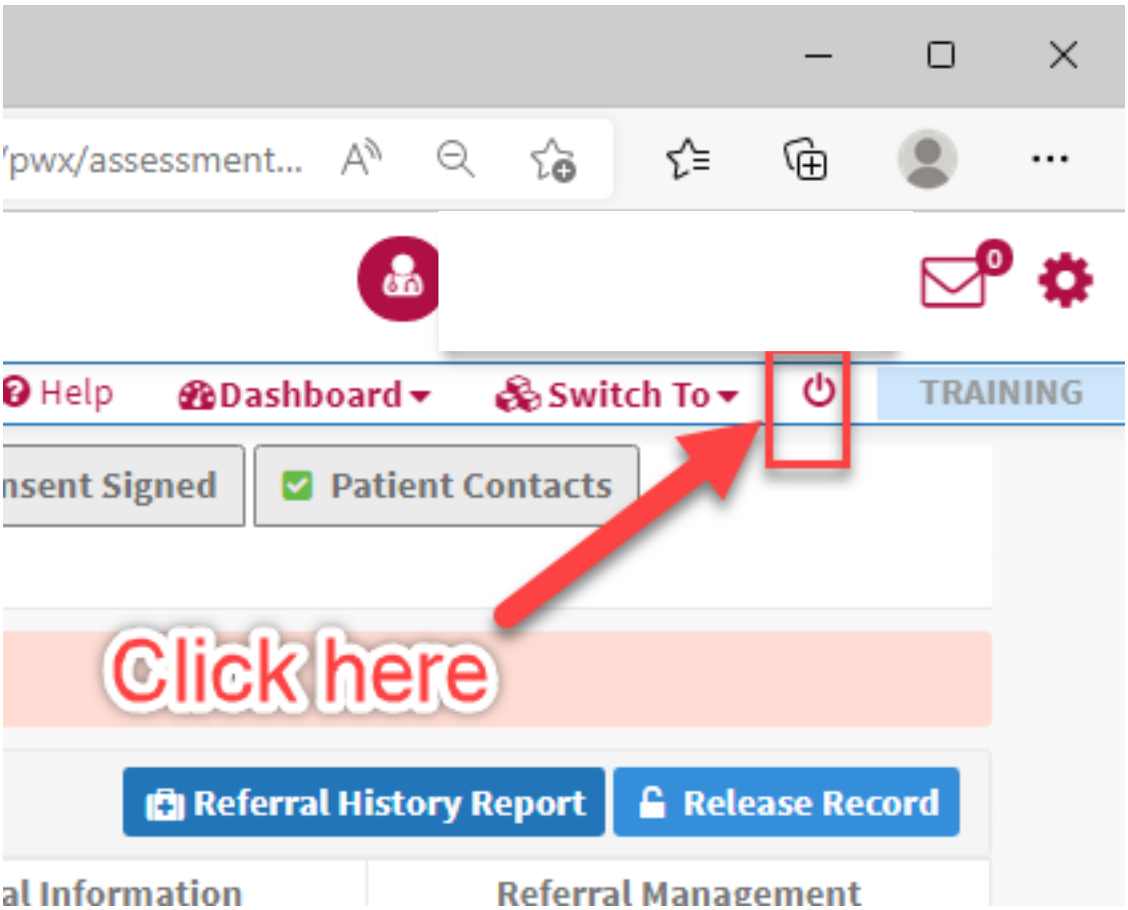
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Click here
Referral History Report
Release Record
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Referral Management

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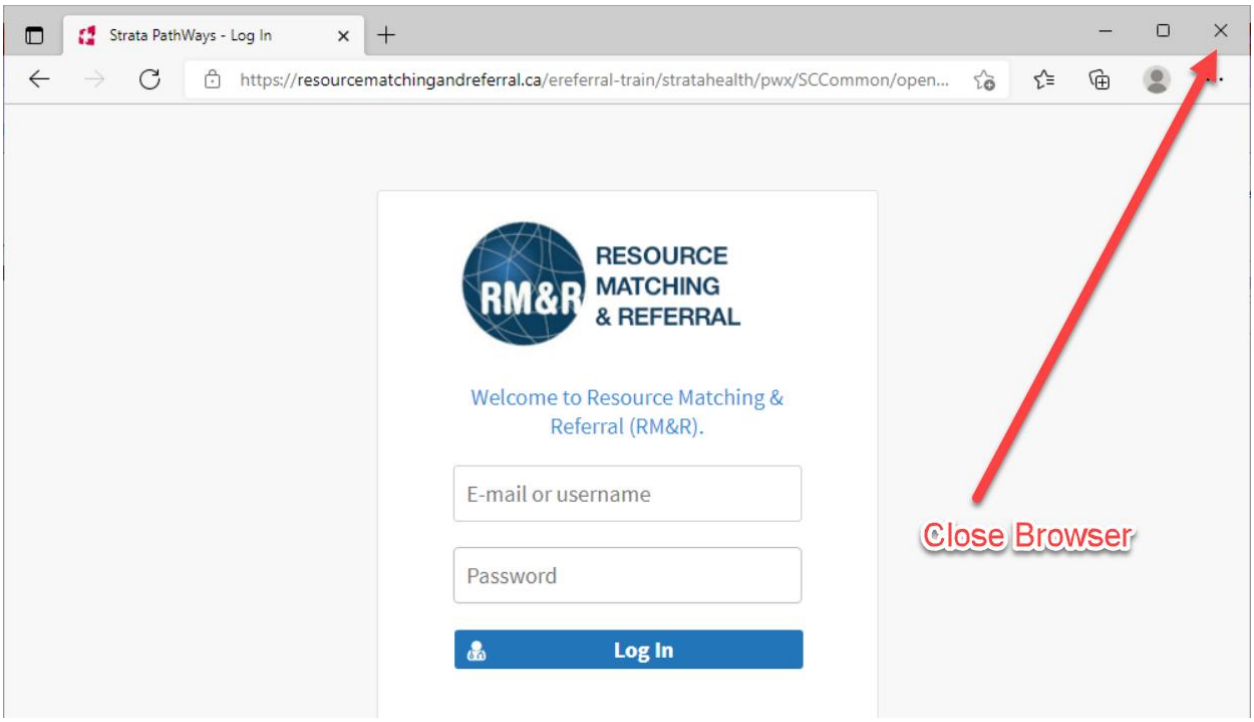

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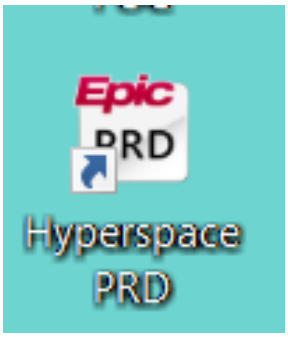

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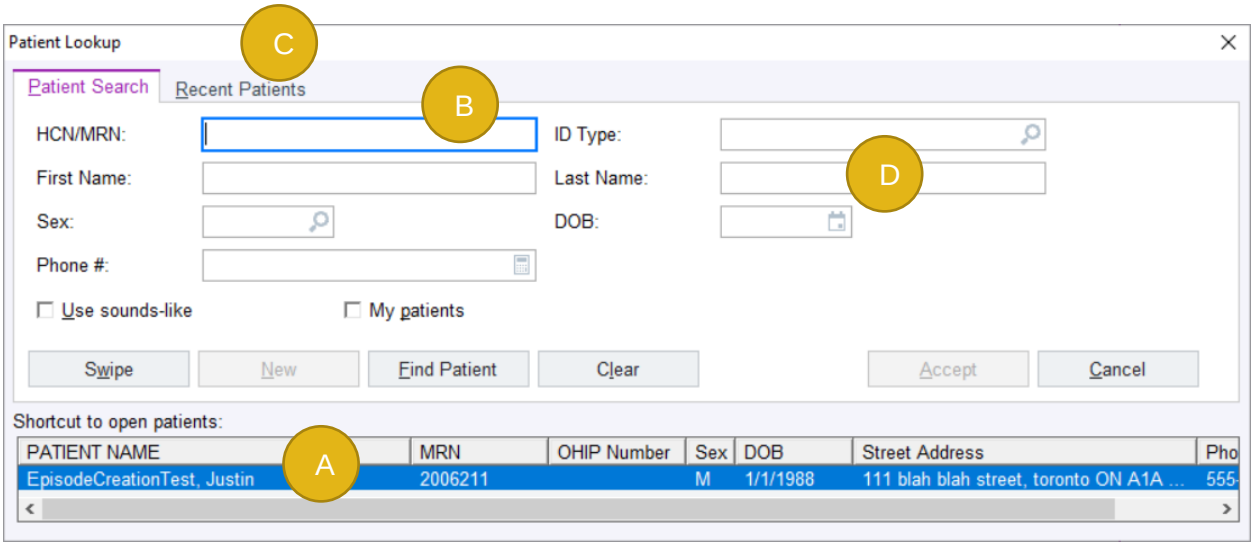

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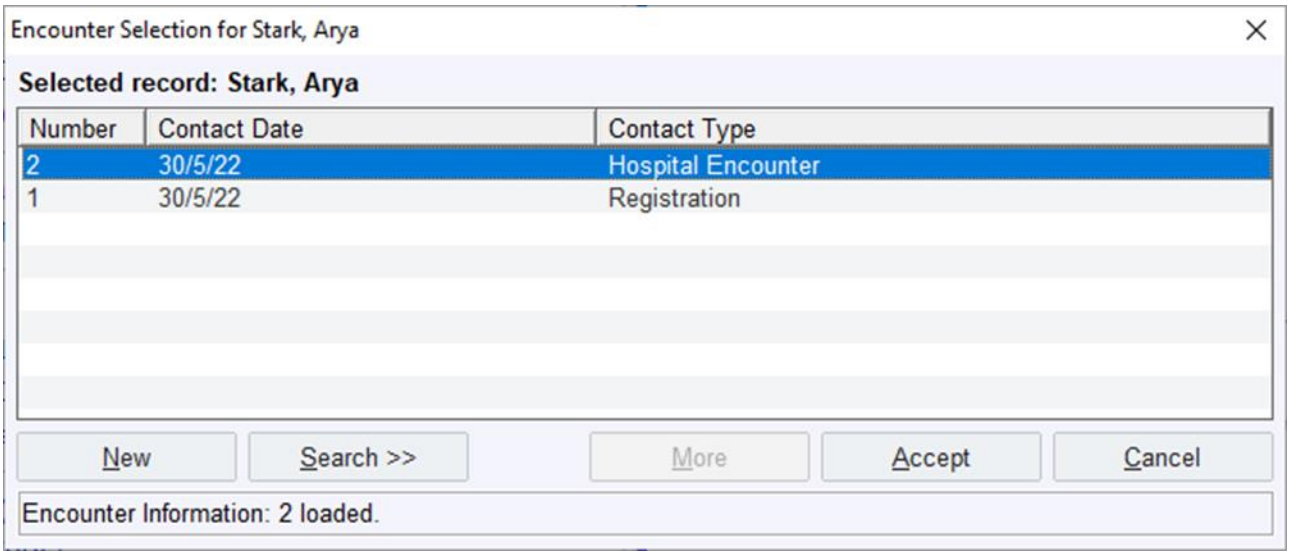

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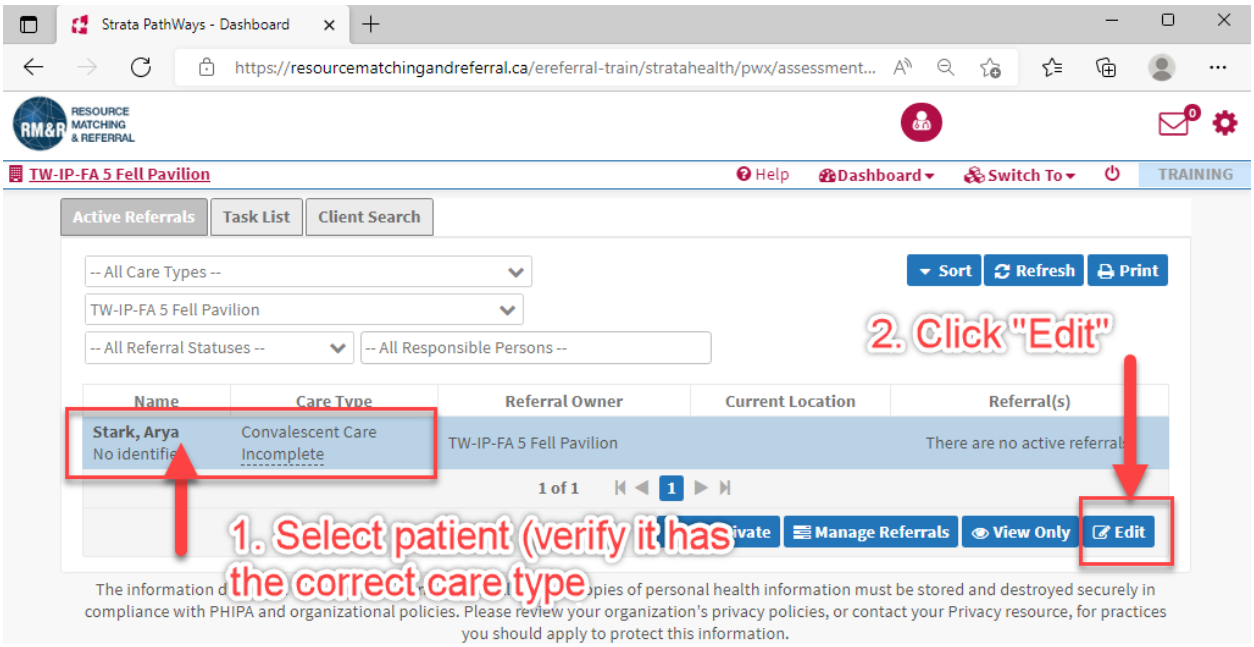
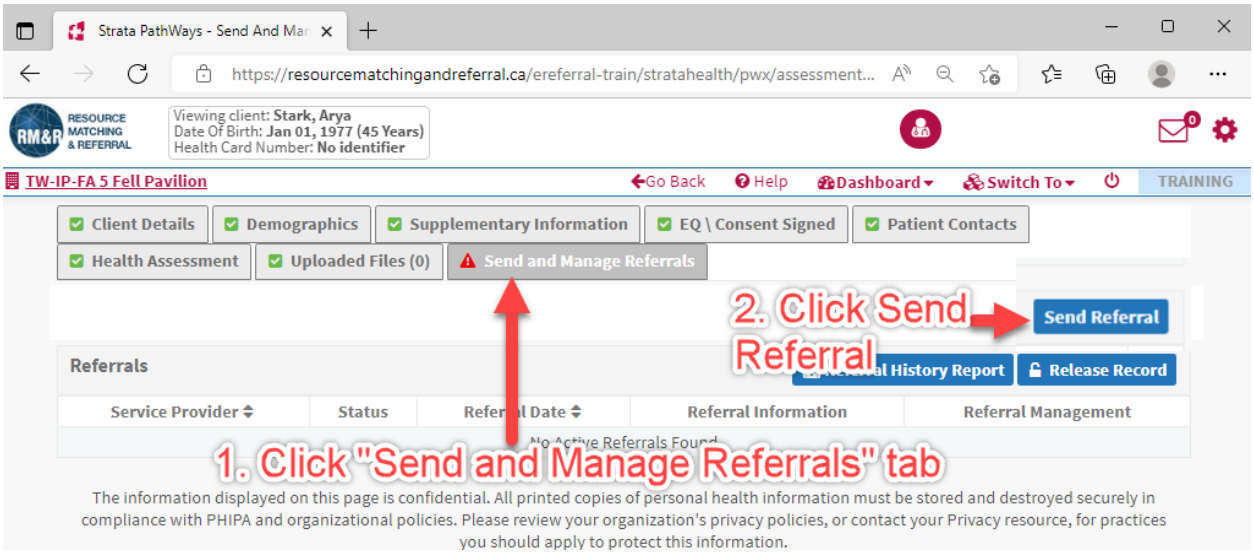
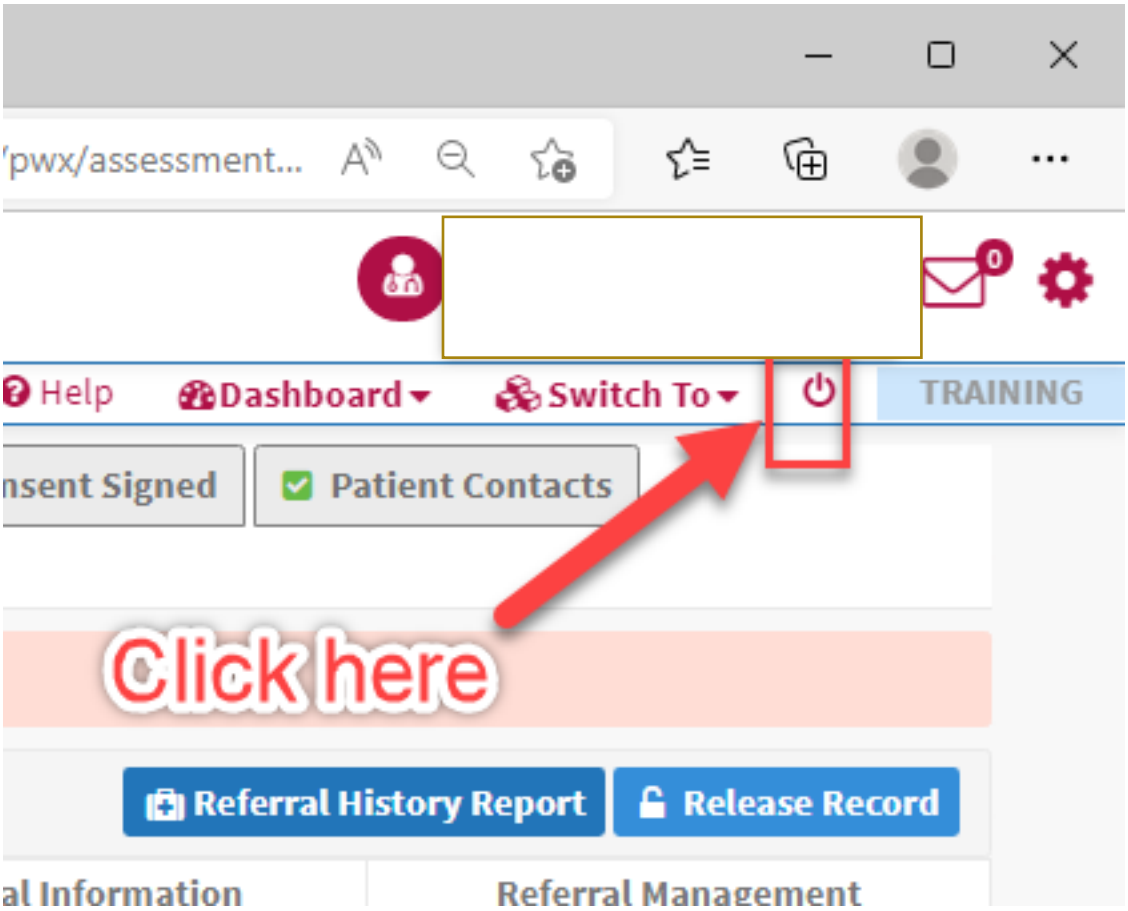


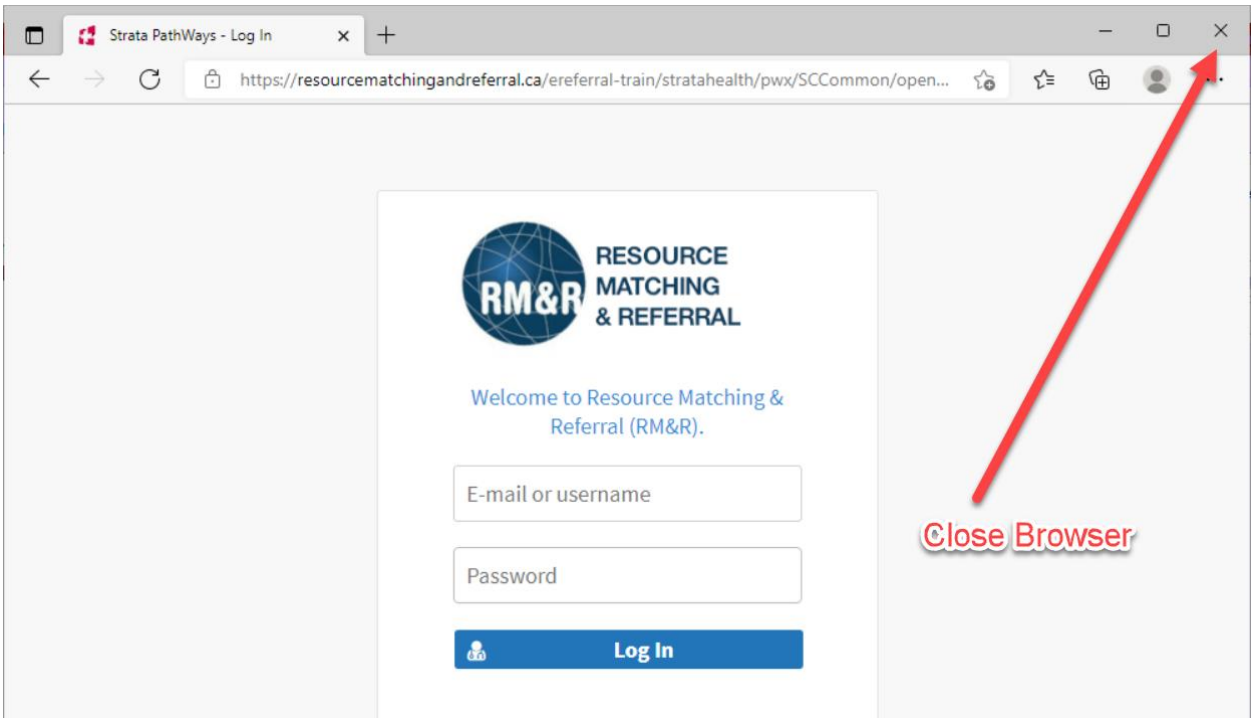
7. Click the “Send and Manage Referrals Tab” and click “Send Referral”



8. Log Out


pwx/assessment...
Help
Dashboard
Switch To
TRAINING
nsent Signed
Patient Contacts
Click here
Referral History Report
Release Record
al Information
Referral Management

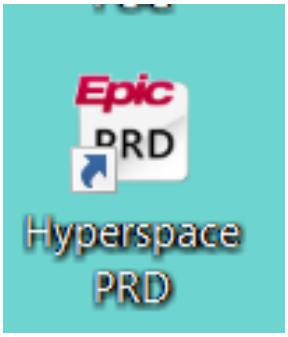
9. Close the browser



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



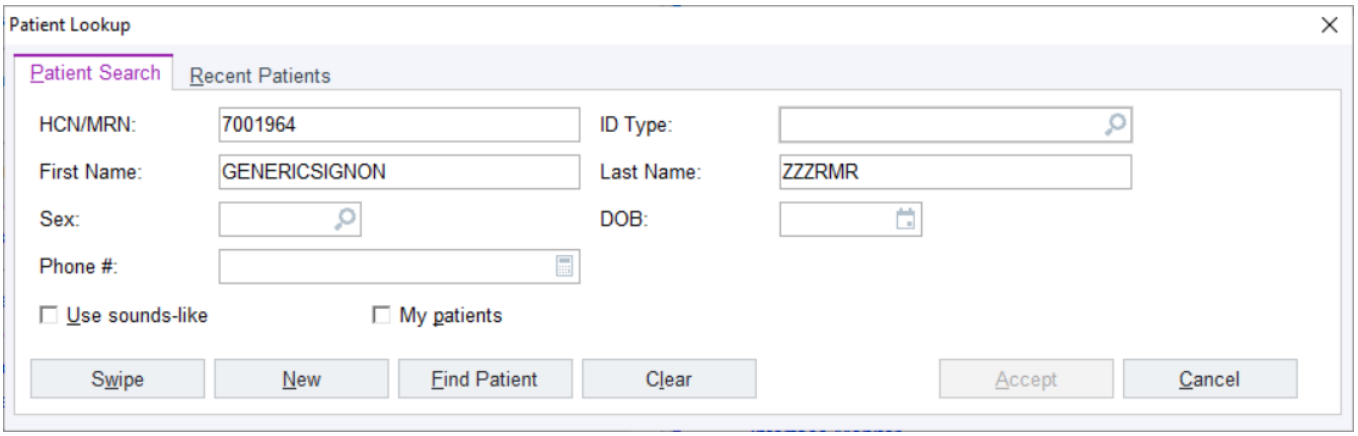
2. Log In

Epic
November 2021
HYPERSPACE ®
T-ID
User ID
Password
Log In
Forgot your password?
Outlook password
I may only access the patient information that I need in order to carry out my job responsibilities, and may only access it in accordance with Ontario's Personal Health Information Protection Act (PHIPA) and organizational policy.
My access is tracked and audited to ensure compliance. Contravening PHIPA or hospital policy may result in suspension or termination of access privileges, disciplinary action up to and including termination of employment or affiliation and possible criminal prosecution. By logging in, I indicate that I have read, understood, and agree to comply with PHIPA and the organization's privacy and security policies, procedures, and practices.

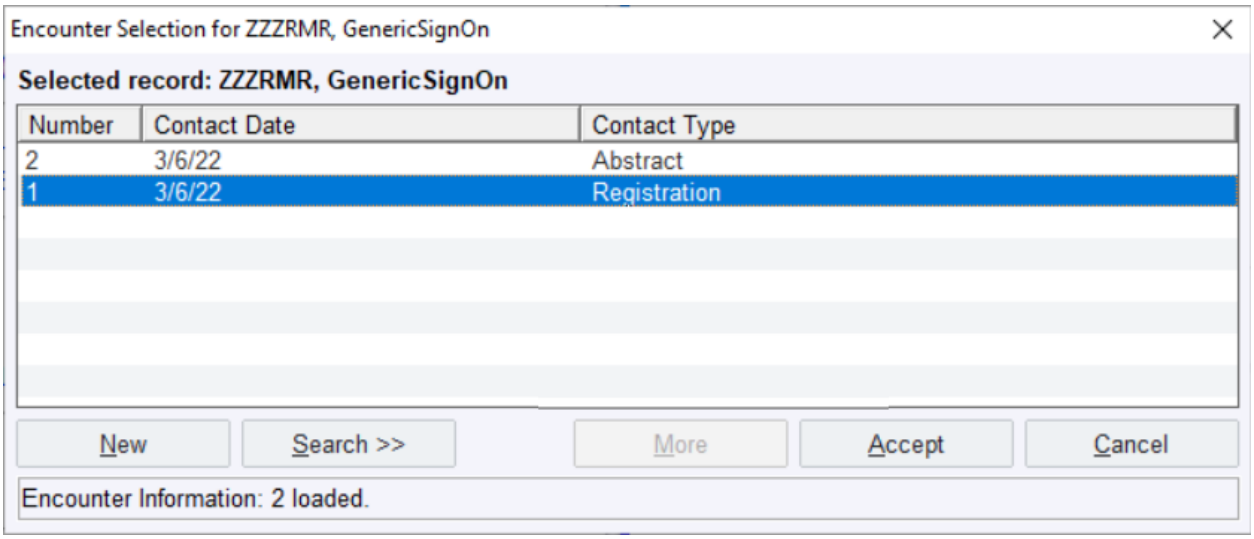
3. Launch RM&R by clicking the RM&R –Receiver button at the top of Hyperspace

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

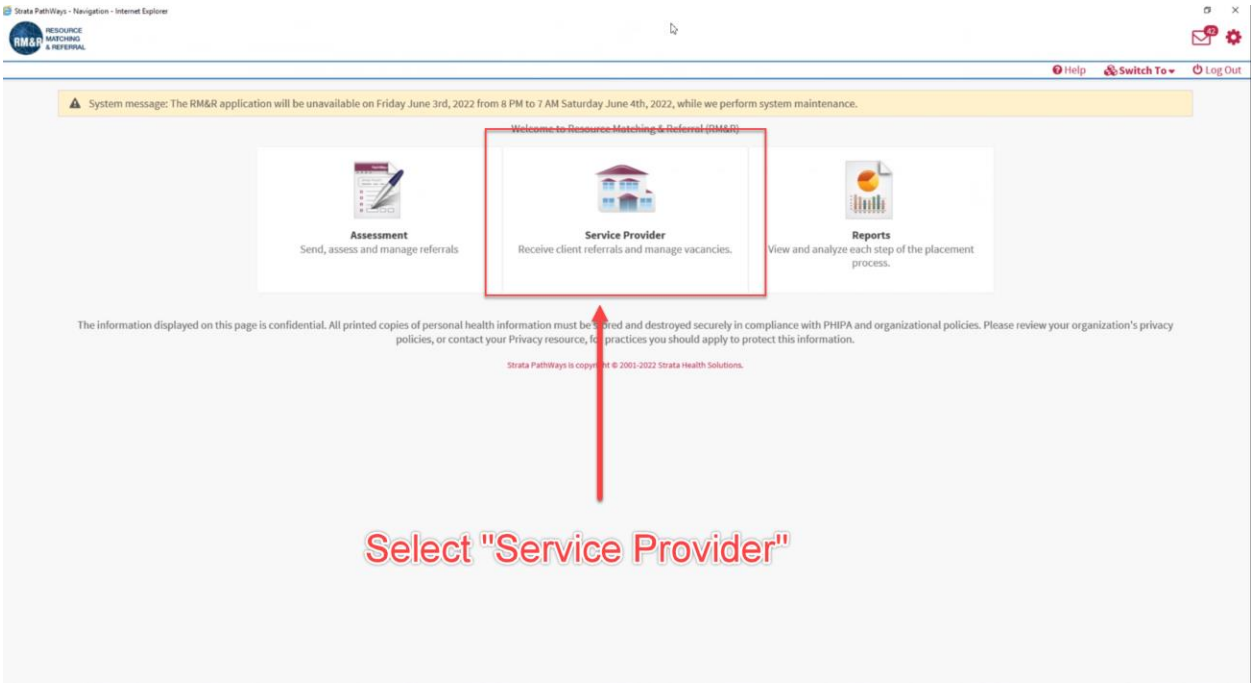
First Name:	**GENERICSIGNON**
Last Name:	**ZZZRMR**
MRN:	**7001964**



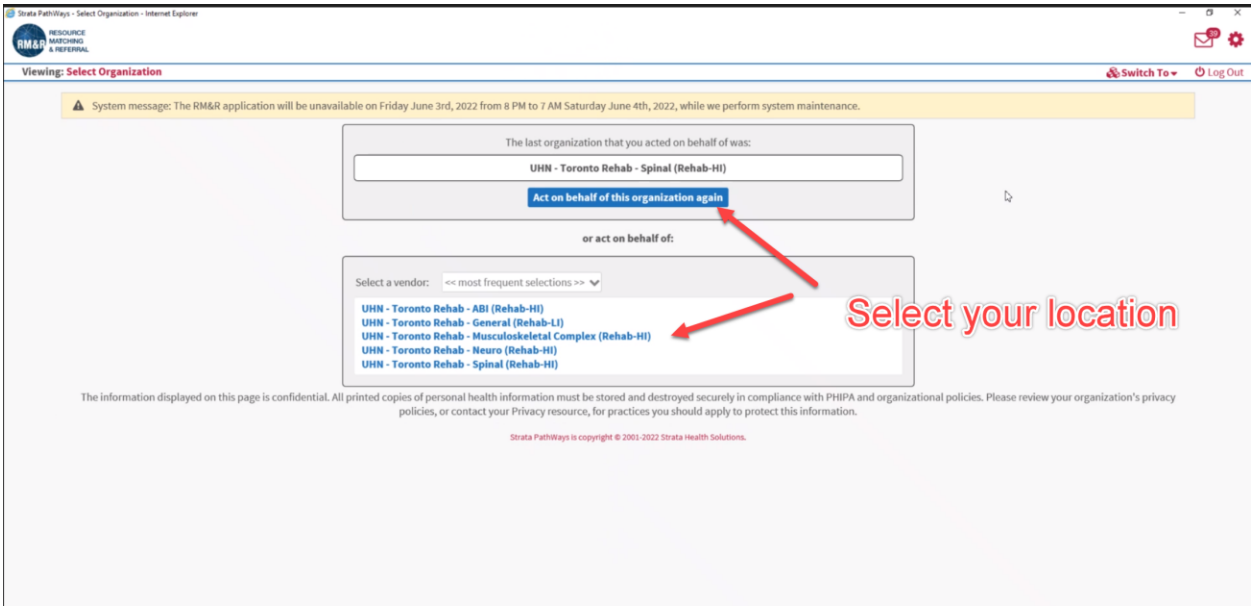
5. Select the “Registration” encounter in the Encounter selection pop-up



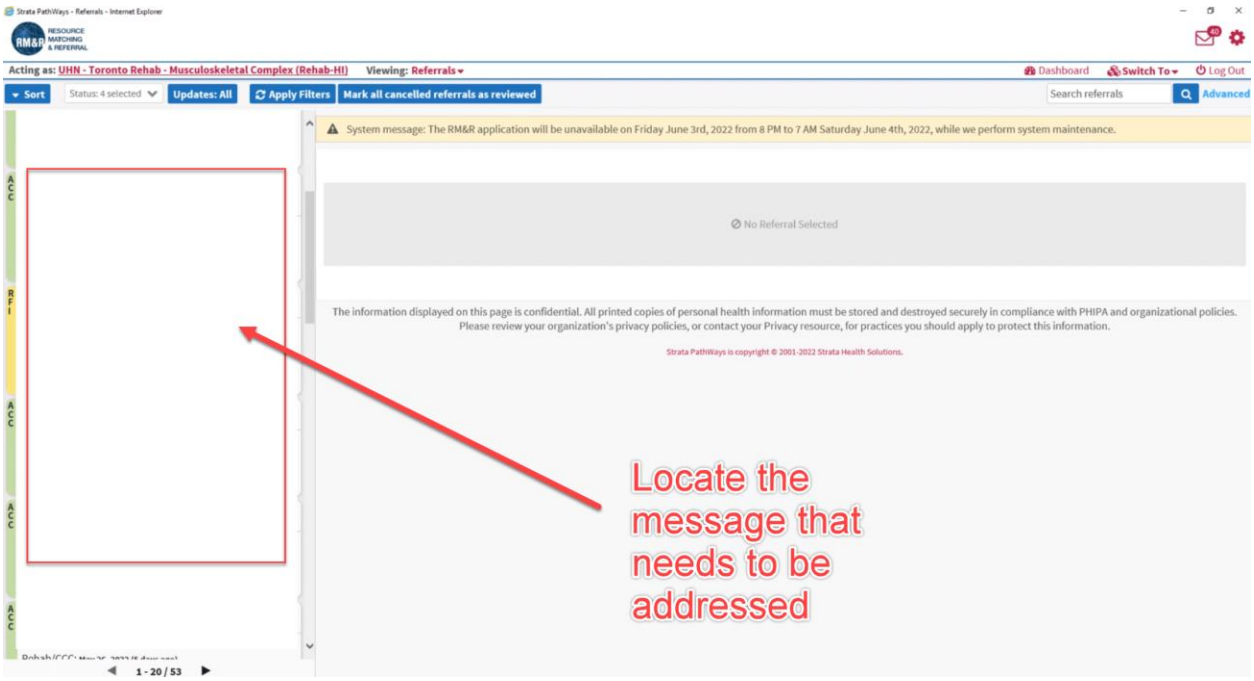
6. A new browser will open up and land on a page similar to this. Select “Service Provider”:



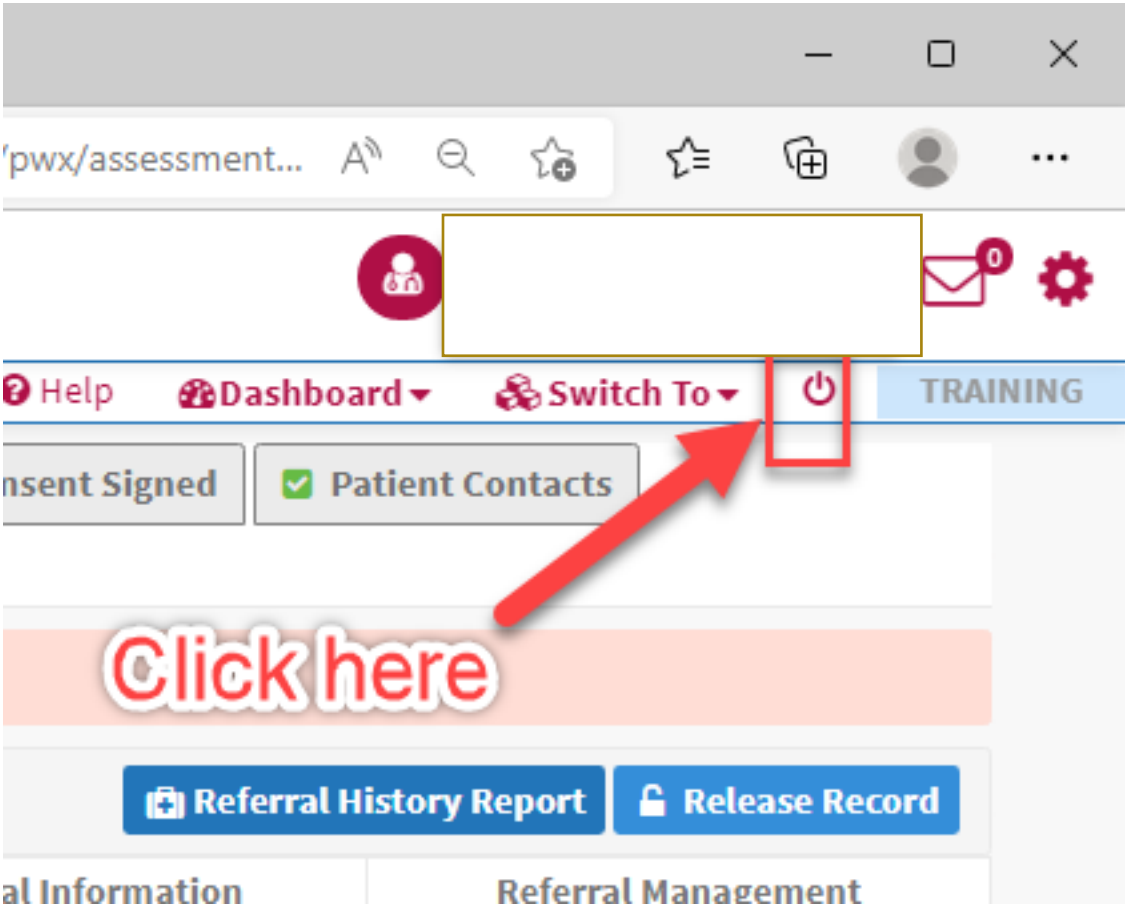
7. Select the location which you're supporting



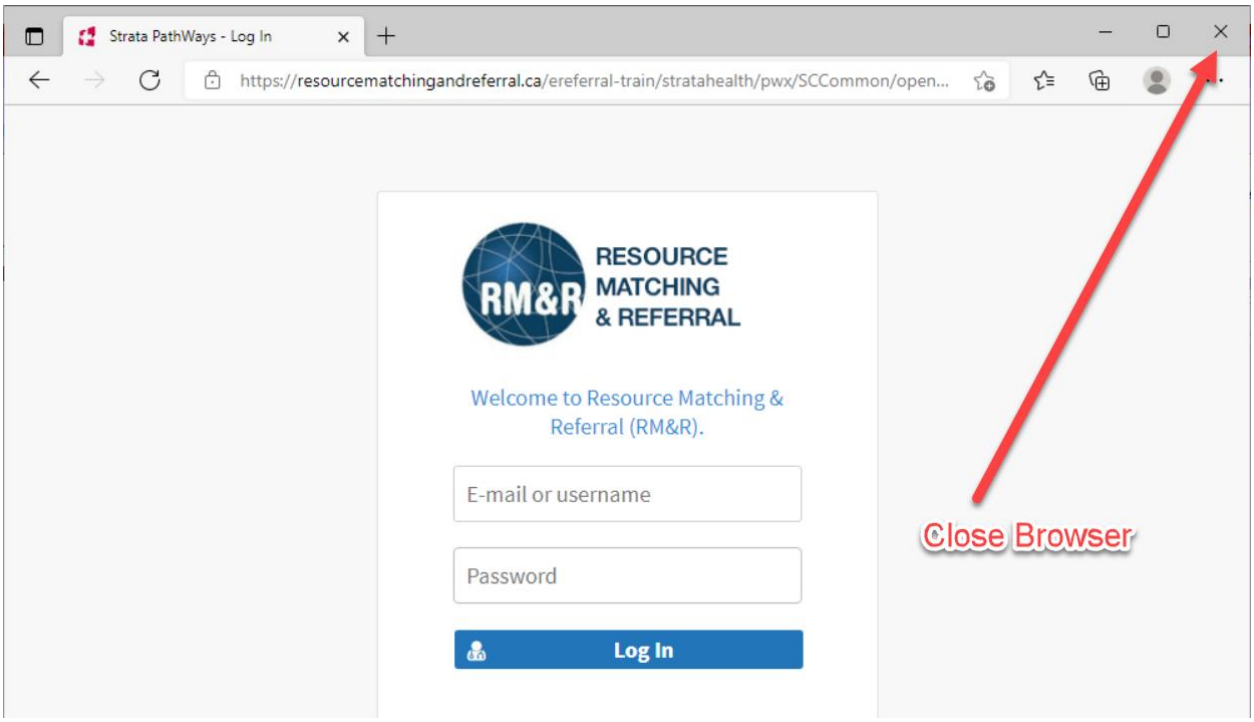
8. Locate the message that needs to be addressed and complete your work.



8. Log Out


pwx/assessment...
Help
Dashboard
Switch To
TRAINING
nsent Signed
Patient Contacts
Click here
Referral History Report
Release Record
al Information
Referral Management

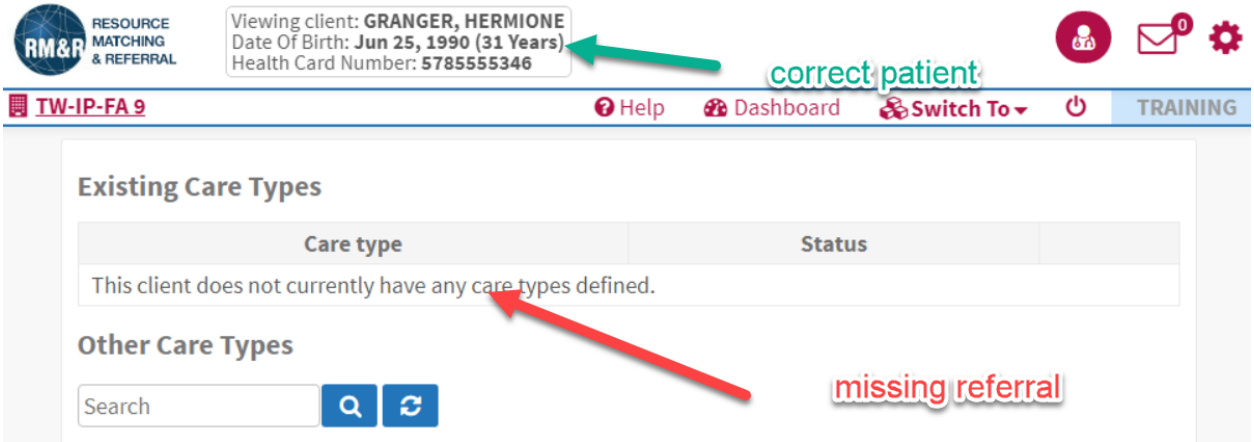
9. Close the browser



TROUBLESHOOTING

SCENARIO 1: Patient was created but no referral was created

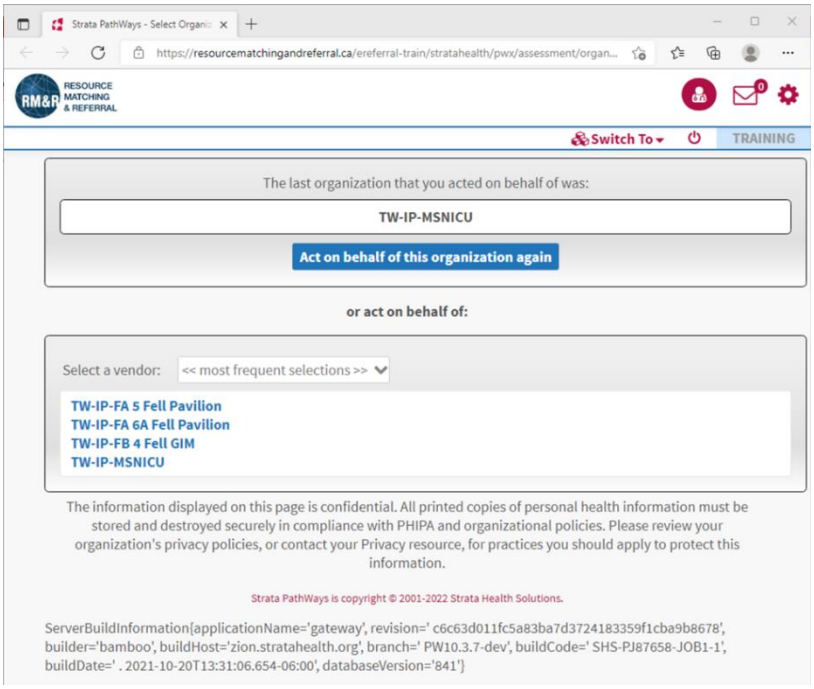
In this scenario, you may see something like this:



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

SCENARIO 2: No patient created

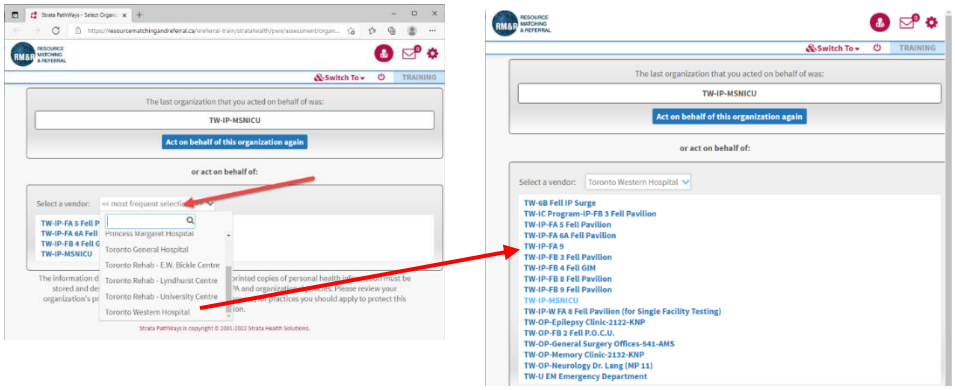
In this scenario, you may see something like this:



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



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

Additional Resources

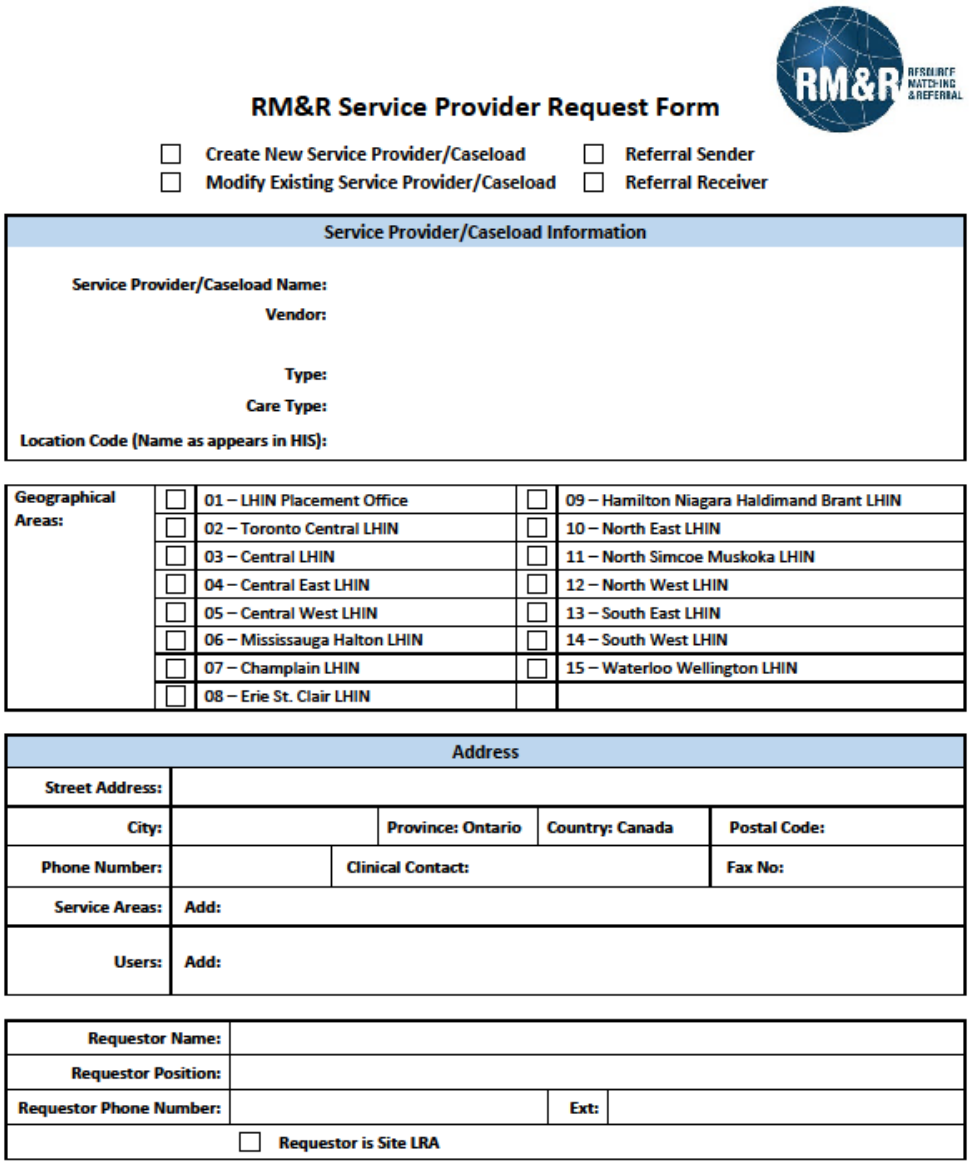
If you continue to have difficulty, please contact these additional resources:

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:				
	☐	01 – LHIN Placement Office	☐	09 – Hamilton Niagara Haldimand Brant LHIN
	☐	02 – Toronto Central LHIN	☐	10 – North East LHIN
	☐	03 – Central LHIN	☐	11 – North Simcoe Muskoka LHIN
	☐	04 – Central East LHIN	☐	12 – North West LHIN
	☐	05 – Central West LHIN	☐	13 – South East LHIN
	☐	06 – Mississauga Halton LHIN	☐	14 – South West LHIN
	☐	07 – Champlain LHIN	☐	15 – Waterloo Wellington LHIN
	☐	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:	
	☐ Requestor is Site LRA		

V3.00

Created by Justin Soegandi, June 1, 2022