

Resource Matching and Referral Program



V.11 New Features and Enhancements



RM&R V.11 - New Features and Enhancements

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Assessment Dashboard

Assessment Dashboard

- Applicable to **Assessment module** and **Referral Sender** role

Current:

The current interface shows a sidebar with 'Active Referrals', 'Task List', and 'Client Search'. The main area has filters for Care Types, Referral Sender, Referral Statuses, and Responsible Persons. A table with columns Name, Care Type, Referral Owner, Current Location, and Referral(s) is shown. The table contains one entry: '999test - Maha, LTCH Application Incomplete' with 'No identifier' and 'TEST - Referral Sender' as the referral owner. The referral(s) column contains the text 'There are no active referrals.'

V.11

The V.11 interface is similar but includes a 'Client Search' button. The table shows two entries. The first entry has a name '999dmtest999, 999dmtest999' (highlighted with a red box and a yellow 'NEW' banner), care type 'LTCH Application Complete - Not Sent', referral owner 'TG-Emergency Admit Unit', and current location 'TEST - Referral Sender' (highlighted with a red box and a yellow 'NEW' banner). The referral(s) column contains 'There are no active referrals.'

Assessment Dashboard



1. Easier access to client details pg. by clicking on the client name in the “active referrals” tab

Name	Care Type	Referral Owner	Current Location	Referral(s)
999dmttest999, 999dmttest999 Health Card: 1121121212	LTCH Application Complete - Not Sent	TG- Emergency Admit Unit	TEST - Referral Sender	There are no active referrals.

2. Clicking on provider under “current location” column, will display more details in a pop up.

The screenshot shows the same table as above, but with a 'Provider Information' popup window open over the 'TEST - Referral Sender' cell in the 'Current Location' column. The popup contains the following text:

Provider Information [Close]

TEST - Referral Sender

123 Fake Street Toronto ON M9M 9M9 Canada

Phone: (416)123-9874, Extension: 1111

Geographical Areas: 02 - Toronto Central HCCSS

Category: Misc.

Assessment Dashboard



3. Click on Provider Name under Referrals(s) tab will display a pop up box with more details about the provider.

Name	Care Type	Referral Owner	Current Location	Referral(s)
Test, Andrea No identifier	Long Term Ventilator Care Complete - Sent	TEST - Referral Sender	MSH - IP - 5 ICU OR	Toronto Grace LT Ventilator Care Pending ⓘ Updates sent West Park LTV Unit Pending ⓘ Updates sent

Referral Owner | **Current Location**

Provider Information [Close]

Toronto Grace LT Ventilator Care
650 Church Street Toronto ON M4Y 2G5 Canada
Geographical Areas: 02 - Toronto Central HCCSS
Category: Long Term Ventilator Care Unit

Long Term Ventilator Care Description
Long-term mechanically ventilated patients who are medically stable and awaiting transfer to an alternate care setting (outside the ICU)

[Close]

Printed copies of personal health information must be stored and destroyed securely in





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Client Search Tab

Client Search Tab

- The system will prevent user from creating a **duplicate client record**.
- The system will require one patient identifier to create the record.
- Name and DoB can be the same but the **identifier can't be**.

Client Name	
Surname	<input type="text" value="v11_duplicate"/>
Given Name(s)	<input type="text" value="999test999"/>

Date Of Birth	
Date Of Birth	<input type="text" value="Jul 01, 2000"/>  

Identifier	
Health Card Number	<input type="text" value="2345678901"/> Expiry <input type="text"/>
	Version <input type="text"/>
MRN	<input type="text" value="11001100"/> View Patient

Client has no MRN



Uploaded Files Tab

Upload Files Tab - Attachments

- Applicable to **Assessment module** and **Referral Sender** role



Viewing client: 999test999, v11_UserPreview
Date Of Birth: N/A
Health Card Number: No identifier

Maha Zeb
Maha.Zeb@stratahealth.com

Acting as: **TEST - Referral Sender**

[← Go Back](#) [Dashboard ▾](#) [Switch To ▾](#) [Log Out](#)

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

<input checked="" type="checkbox"/> Client Details	<input checked="" type="checkbox"/> Demographics	<input checked="" type="checkbox"/> Crisis	<input checked="" type="checkbox"/> Supplementary Information	<input checked="" type="checkbox"/> EQ \ Consent Signed	<input checked="" type="checkbox"/> LTCH Matching Profile	<input checked="" type="checkbox"/> Financial Information	<input checked="" type="checkbox"/> Patient Contacts
<input checked="" type="checkbox"/> Health Assessment	<input checked="" type="checkbox"/> Eligibility for LTCH Admission	<input checked="" type="checkbox"/> Transcription - Placement Office Use only	<input checked="" type="checkbox"/> ARCHIVED_DATA	<input checked="" type="checkbox"/> Uploaded Files (4)	<input checked="" type="checkbox"/> Client Choice		
<input checked="" type="checkbox"/> Send and Manage Referrals							



Upload Files Tab - Attachments

1. Multiple uploaded files can be deleted simultaneously

<input type="checkbox"/>	Name ↕	Category ↕
<input checked="" type="checkbox"/>	sample-pdf-with-images1.pdf	category 1
<input checked="" type="checkbox"/>	sample-pdf-with-images.pdf	category 1
<input checked="" type="checkbox"/>	sample-pdf-file1.pdf	category 1
<input type="checkbox"/>	sample-pdf-with-images1.pdf	

Delete Selected Files Attach to Referrals

















2. After upload files can be attached to multiple referrals simultaneously.

Attach to referrals		
File name	Category	Description
sample-pdf-with-images1.pdf	category 1	test 3
sample-pdf-with-images.pdf	category 1	test 2
sample-pdf-file1.pdf	category 1	test 1
sample-pdf-with-images1.pdf		

Attach Documents to Referrals		
Destination Service Provider	Status	<input checked="" type="checkbox"/>
CE - Fairview Lodge (LTC)	Accepted	<input checked="" type="checkbox"/>
CE - Frost Manor (LTC)	Pending [*HCCSS Staff ONLY*Matching reviewed-match criteria issue unknown]	<input checked="" type="checkbox"/>
Test-LTC1 Testing Home	Accepted	<input checked="" type="checkbox"/>
Test-LTC2 Testing Home	Pending [*HCCSS Staff ONLY*Matching reviewed-match criteria issue unknown]	<input checked="" type="checkbox"/>

Upload Files Tab - Attachments

3. Uploaded file attributes can be updated after upload.

<input type="checkbox"/>	Name ↕	Category ↕	Description ↕	Uploaded ↕	Uploaded By ↕	Actions
<input type="checkbox"/>	sample-pdf-with-images1.pdf	category 1	test 3	May 8, 2023 12:34	Bhagat, Rahul	   
<input type="checkbox"/>	sample-pdf-with-images.pdf	category 1	test 2	May 8, 2023 12:34	Bhagat, Rahul	   
<input type="checkbox"/>	sample-pdf-file1.pdf	category 1	test 1	May 8, 2023 12:34	Bhagat, Rahul	   
<input type="checkbox"/>	sample-pdf-with-images1.pdf			May 8, 2023 12:18	Bhagat, Rahul	   

Edit File

Edit File		
File name	Category	Description
<input type="text" value="sample-pdf-with-images1"/> .pdf	<input type="text" value="category 1"/>	<input type="text" value="test 3"/>

Uploaded Files compiled into one PDF

- Applicable to **Service Provider module** and **Referral Receiver** role

Acting as: [Test-LTC1 Testing Home](#) Viewing: [Referrals](#) [Dashboard](#)

Sort Status: 4 selected Updates: All Apply Filters Mark all cancelled referrals as reviewed

999test999, v11_UserPreview
From: TEST - Referral Sender
LTCH Application: May 8, 2023 (2 days ago)
Referral Updated: May 10, 2023 11:23

Print Edit vacancy Assign Edit client Reviewed Request For Information

Updates Details Matching Profile Clinical Profile Comments (0) Client Choice **Attachments (4)**

<input type="checkbox"/>	Name	Category	Description	Date	Added
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- Select attachments to be compiled together, and click on **“Save as PDF”**. This will generate a new PDF and will be saved locally in the download folder.

Updates Details Matching Profile Clinical Profile Comments (0) Client Choice **Attachments (4)**

<input checked="" type="checkbox"/>	Name	Category	Description	Date	Added by	
<input checked="" type="checkbox"/>	sample-pdf-file1.pdf	category 1	test 1	May 8, 2023 16:30	Bhagat, Rahul	
<input checked="" type="checkbox"/>	sample-pdf-with-images1.pdf			May 8, 2023 16:30	Bhagat, Rahul	
<input checked="" type="checkbox"/>	sample-pdf-with-images1.pdf	category 1	test 3	May 8, 2023 16:30	Bhagat, Rahul	
<input checked="" type="checkbox"/>	sample-pdf-with-images.pdf	category 1	test 2	May 8, 2023 16:30	Bhagat, Rahul	

1 of 1 **1**

Save as PDF



Client Choice Tab

Client Choice Tab

- Applicable to **Assessment module** and **Referral Sender** role
- Applicable to referrals where client has to choose from multiple service providers (e.g. LTCH, Palliative..)

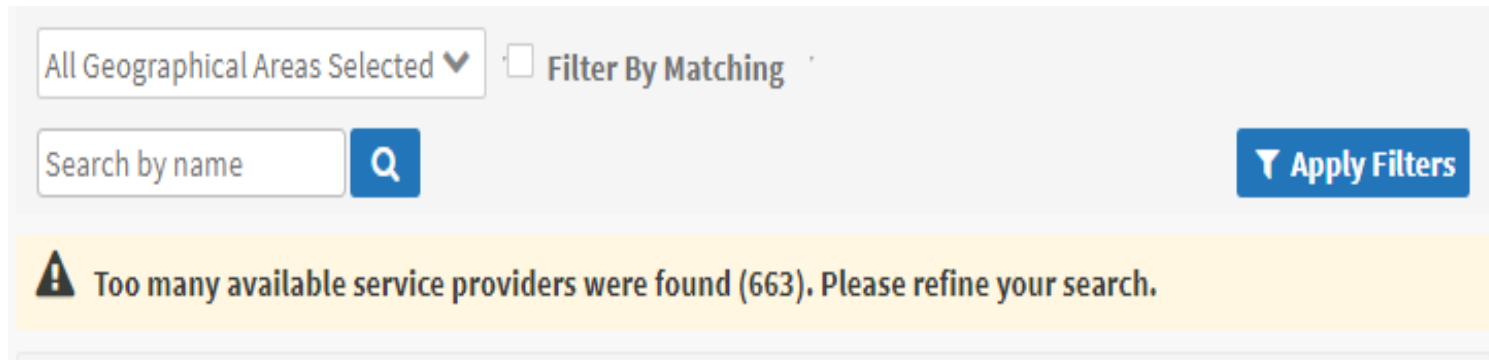
The screenshot displays the user interface for the Resource Matching & Referral (RM&R) system. At the top left is the RM&R logo. A central box shows client information: "Viewing client: 999test999, v11_UserPreview", "Date Of Birth: N/A", and "Health Card Number: No identifier". On the right are icons for a user profile and an envelope. Below this is a navigation bar with "TEST - Referral Sender" and buttons for "Go Back", "Dashboard", and "Switch To". A main menu contains several tabs: "Client Details", "Demographics", "Supplementary information", "Referral Information", "Health Assessment Information", "Uploaded Files (3)", "Client Choice", and "Send and Manage Referrals". The "Client Choice" tab is highlighted with a red rectangular border.

Enhancements to Client Choice Tab

1. Total number of Service Providers displayed on a page has been increased from 10 to 25.

This will make it easier for users to find a specific provider, especially if the number of available service providers is very large.

2. If the number of available Service Providers exceeds 250, the application will display a warning to narrow down the search result.

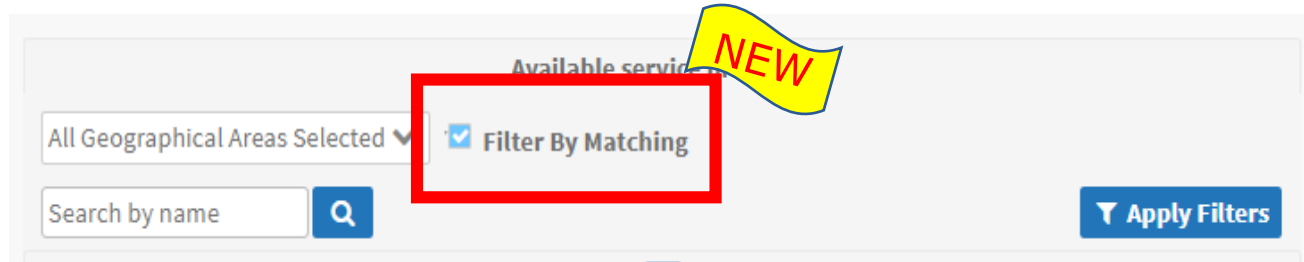


The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "All Geographical Areas Selected" with a downward arrow.
- A checkbox labeled "Filter By Matching".
- A search input field with the placeholder text "Search by name" and a blue search button with a magnifying glass icon.
- A blue button labeled "Apply Filters" with a downward arrow.
- A yellow warning banner with a triangle icon and the text: "Too many available service providers were found (663). Please refine your search."

Enhancements to Client Choice Tab

3. Users can filter Service Provider list to only display providers who match patient criteria. *This will narrow down the list of Service Providers displayed on the page.*



4. Clicking on Service Provider name will provide more details about the provider.

CE - Hillsdale Estates (LTC)	N/A	✓ Details	🗨	+
CE - Hillsdale Terraces (LTC)	N/A	✓ Details	🗨	+
CE - Hope Street Terrace (LTC)	N/A	✓ Details	🗨	+

Provider Information ✕

CE - Hillsdale Estates (LTC)
Geographical Areas: 04 - Central East HCCSS
Category: Central East LHIN - LTC

✕ Close

Enhancements to Client Choice Tab

5. Selecting a Service Provider now only takes one click.

Current:

1. Click on the checkbox.
2. Click on "Add selected choices" button

17 days	<input checked="" type="checkbox"/>	✕ Details	🗨	<input type="checkbox"/>
19 days	<input checked="" type="checkbox"/>	✕ Details	🗨	<input type="checkbox"/>
➕ Add selected choices				

v.11:

1. Click on the "+" button.

	✕ Details	🗨	+
	✕ Details	🗨	+
	✕ Details	🗨	+
	✕ Details	🗨	+

NEW



**Send & Manage Referrals
Tab**

Send and Manage Referrals Tab

- Applicable to **Assessment module** and **Referral Sender** role
- Applicable to referrals where clinician has to manage referrals to multiple service providers

The screenshot shows the 'Send and Manage Referrals' tab highlighted with a red box. The interface includes a header with the 'RM&R RESOURCE MATCHING & REFERRAL' logo, a client information box, and navigation links. The main content area displays a grid of tabs, with 'Send and Manage Referrals' being the active tab.

Viewing client: 999test999, v11_UserPreview
Date Of Birth: N/A
Health Card Number: No identifier

TEST - Referral Sender

Go Back Dashboard Switch To

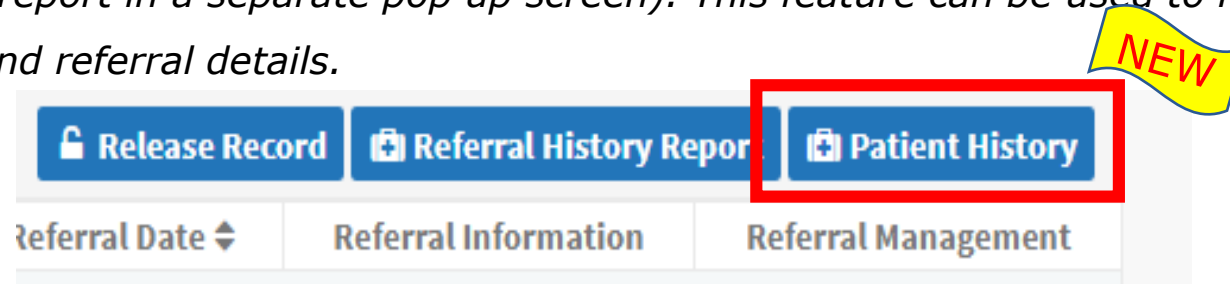
Client Details Demographics Supplementary Information Referral Information

Health Assessment Information Uploaded Files (3) Client Choice Send and Manage Referrals

Enhancements to Send & Manage Referrals Tab

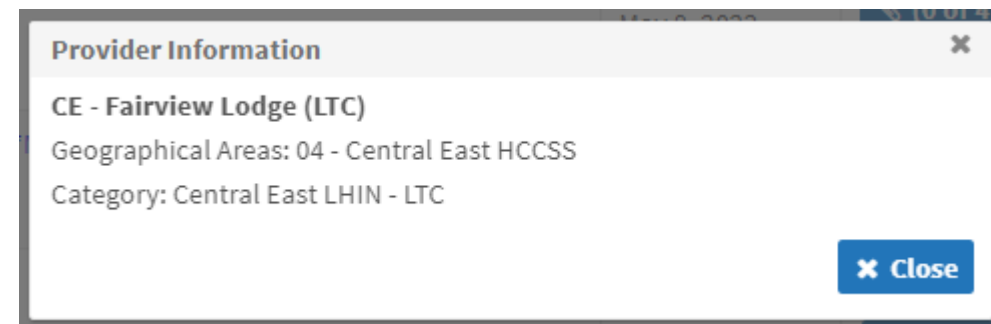
1. There is a new **"Patient History"** button.

Clicking on this button takes user to a new page within the application (unlike "Referral History Report" which generates a downloadable report in a separate pop up screen). This feature can be used to filter historical information based on care type, date and referral details.



2. Clicking on Service Provider name will provide more details about the provider.

Service Provider	Status
CE - Fairview Lodge (LTC)	Pending
CE - Frost Manor (LTC)	Pending [*HCCSS Staff ONLY*Matching review unknown] Updates sent



Enhancements to Send & Manage Referrals Tab

3. If a denied referral is over-ridden, the override reason is displayed along with comments for override. Earlier only comments were displayed.

Current:

Wong, Judy (Override)	December 5, 2022 09:44
TestLTC SendRef Choice2 LTC2 Testing Home override comments	

v.11:

Bhagat, Rahul (Override)	May 8, 2023 12:54
*HCCSS Staff ONLY*Matching reviewed-match criteria issue unknown	
comments are displayed along with override reason	

A decorative graphic on the left side of the page. It features a vertical dashed blue line at the top left, which curves into a dashed blue semi-circle. A dashed green semi-circle is positioned below it, with a small green dot at its top end. A dashed blue semi-circle is positioned to the right of the green one, with a small blue dot at its top end. A dashed green semi-circle is positioned below the blue one, with a small green dot at its top end. A dashed blue vertical line extends downwards from the bottom of the blue semi-circle.

Service Provider / Vacancies

Enhancements to Service Provider Tab

- Applicable to **Service Provider module/ Referral Receiver** role

1.

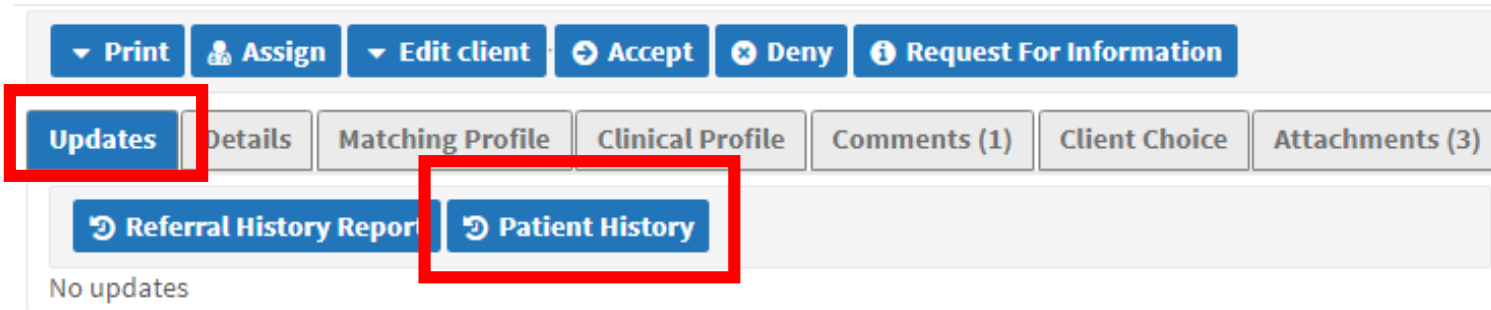
If a denied referral is over-ridden, the override reason is displayed along with comments for override.



The screenshot shows a toolbar with buttons: Print, Assign, Edit client, Accept, Deny, and Request For Information. Below the toolbar are tabs: Updates, Details, Matching Profile, Clinical Profile, Comments (1), Client Choice, and Attachments (3). The 'Comments (1)' tab is active and highlighted with a red border. It contains a '+ Add comment' button and a comment entry: 'Bhagat, Rahul (Override) May 10, 2023 11:23' with the text '*HCCSS Staff ONLY*Matching reviewed-match criteria issue unknown' and 'test' below it.

2.

“Patient History” button is also available in Service Provider module (under “Updates” tab)



The screenshot shows the same toolbar as above. The 'Updates' tab is highlighted with a red border. Below the tabs are buttons: Referral History Report and Patient History. The 'Patient History' button is also highlighted with a red border. Below the buttons, it says 'No updates'.

Enhancements to Vacancies workflow

1. "Search for a client to discharge" form and search result has been consolidated into one.

Current:

Search for a client to discharge ✕

Surname:

Given Name(s):

Health Card Number:

Q Search clients

Please select a client for Discharge

Surname	Given Name(s)	Date Of Birth	Health Card Number	Discharged
999Testing	May	Jun 06, 1902		No
999Testing999	Rdc	Jun 06, 1975	No Identifier	No
Testing	Placement HPG	Feb 02, 1977		No
Testing	Primavera	Apr 03, 1945		No
Testing	Threetwoone	May 18, 1951		No
Testing Disable	Client 1	Jan 01, 1928	No Identifier	Yes (July 8, 2016)

6 Clients 1 of 1 ⏪ 1 ⏩

Q Search Again
Discharge client not in list
Discharge selected client

v.11:

Search for a client to discharge ✕

Surname:

Given Name(s):

Health Card Number:





Q Search clients

Surname	Given Name(s)	Date Of Birth	Health Card Number	Discharged
555Test555	Finn	Jan 01, 2001		Yes (July 18, 2021)
888Test888	Finn	Sep 03, 1981	5454545454	Yes (January 16, 2022)
999TEST001	v9.26 Automated Test LTCH 1 -		No Identifier	Yes (October 9,





Enhancements to Vacancies workflow

2. "Vacancy Name" field in Discharge Notice has been changed to "Discharge Vacancy Name".

Current:

Send the Discharge Notice		
Discharge Notice		
Service provider:	Test-LTC1 Testing Home	
Client:	Surname: *	<input type="text"/>
	Given Name(s): *	<input type="text"/>
	Date Of Birth:	<input type="text"/> 
	Health Card Number: *	<input type="text"/>
Discharge:	Discharge date: *	<input type="text"/> 
	Destination:	- select one - 
	Comment:	<input type="text"/>
	Reason: *	- select one - 
Vacancy name: *	<input type="text"/>	

v.11:

Send the Discharge Notice		
Client:	Surname: *	<input type="text"/>
	Given Name(s): *	<input type="text"/>
	Date Of Birth:	<input type="text"/> 
	Health Card Number: *	<input type="text"/>
Discharge:	Discharge date: *	<input type="text"/> 
	Destination:	- select one - 
	Comment:	<input type="text"/>
	Reason: *	- select one - 
Discharged Vacancy name: *	<input type="text"/>	

Enhancements to Vacancies workflow

3. After sending Discharge Notice user will be asked to enter vacancy "Date Available" & vacancy attributes before Vacancy Details page is displayed.

Edit New Vacancy

Service provider: *	Test-LTC1 Testing Home
Vacancy name: *	Floor 1 - Room 1 - Bed 1
Vacancy status:	Internal
Date available: *	<input type="text"/>
Vacancy restriction:	- select one -
Place On Hold:	- select one -
Care Coordinator:	

Edit New Vacancy Attributes

Vacancy Attributes	
Accommodation Rate *	Basic <input type="checkbox"/>
	Semi-Private <input type="checkbox"/>
	Private <input type="checkbox"/>
Bed Class *	New <input type="checkbox"/>
	A <input type="checkbox"/>
	B <input type="checkbox"/>
	C <input type="checkbox"/>
	Upgraded D <input type="checkbox"/>
	D <input type="checkbox"/>
Reunification Priority Access Bed	RPAB <input type="checkbox"/>
Gender (SI) *	Male <input type="checkbox"/>
	Female <input type="checkbox"/>
	Unimpaired <input type="checkbox"/>

Enhancements to Vacancies workflow

4. Planned Admission Date field will also require admission time when the bed offer is accepted.

Current:

Client Profile

Planned admission date:

Service provider comment:

Client comment:

Current location:

Responsible person:

Vacancy status:

Date Of Birth:

Service Provider:

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

v.11:

Client Profile

Planned admission date:

Service provider comment:

Client comment:

Current location:

Responsible person:

Vacancy status:

Date Of Birth:

Service Provider:

ump to:

Category:

Demographics
Bhagat, Rahul (Other) at May 8, 2023 12:28

Time 00:00

Hour

Minute

Current Date Close

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			