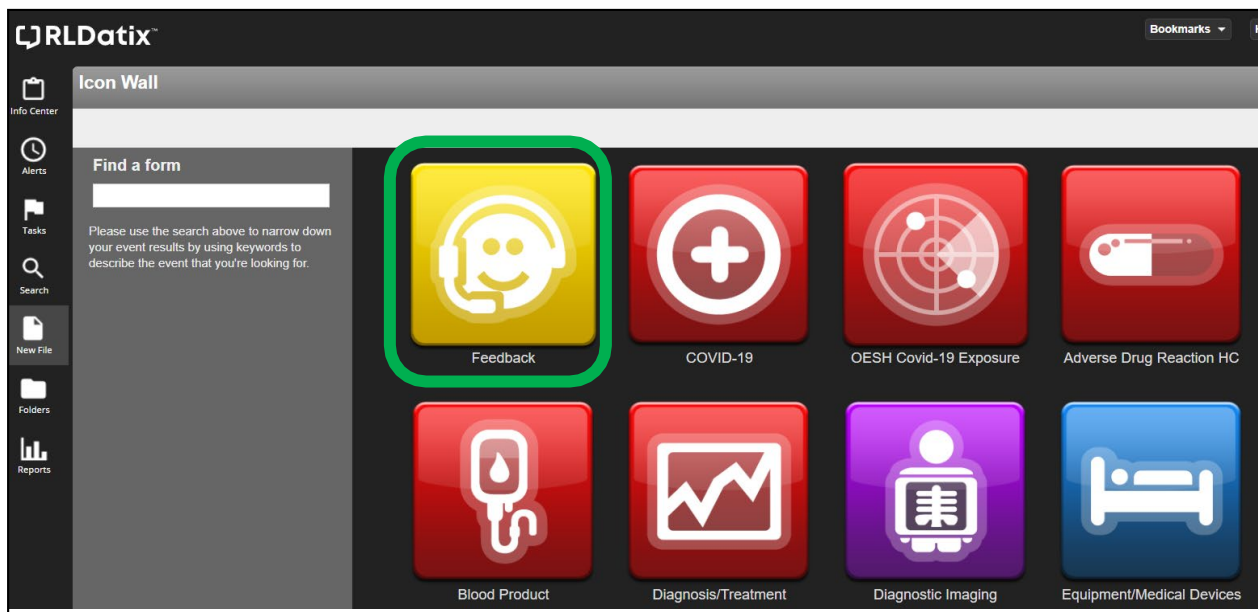


RL6 – Feedback Reference Manual



RL6 Feedback Process Support – (204) 926-7825 clientrelations@wrha.mb.ca

RL6 Feedback Software Support – (204) 926-1070 RL_support@wrha.mb.ca

WRHA Quality, Patient Safety & Accreditation

Version: 6.19, Nov, 2022

GETTING STARTED WITH RL6 FEEDBACK

Feedback (RL FBK) is a module within the RL6 Software application. The WRHA began using RL FBK in 2011 to capture and manage feedback such as complaints, compliments, suggestions, and requests. Staff within the WRHA that have a user license can input, manage, and close these file types. Staff with user licenses can also produce and receive reports dependent on their user scope.

Staff that have user licenses may also be assigned tasks, or file ownership dependent on their user scope. When feedback is received at WRHA Client Relations, tasks or file ownership will be assigned to licensed users with the expectation that they will follow up as appropriate according to their site/program processes, and in conjunction with the WRHA Complaint Management and Reporting – Health Care Experience (Policy # 10.50.010).

RL FBK Training is offered on an as-needed basis. If you feel you require a user license and training, please contact RL Support.

If at any time you have questions regarding the FBK Process, contact WRHA Client Relations at **204-926-7825** or by email to clientrelations@wrha.mb.ca; if you are having software issues while using RL6, please contact RL Support at **204-926-1070** or email rl_support@wrha.mb.ca

LOGGING IN



1. Double-click on the RL6 Management icon on your desktop

Note : If there is no RL6 icon on the Desktop go to

https://rl6.rlsolutions.com/WRHA_Prod and contact Service Desk to have it installed.

2. Ensure **WRHA** is selected from the drop-down box if you are within the (WRHA Global email address NTDWRHA domain). If you are not part of the WRHA network then you would need to select **APPLICATION ACCOUNT**. (image 1)
3. Type in your username and password that you use to access your work computer for WRHA. For application account users your username and temporary password will be assigned to you from the RL Team. (image 2)

A screenshot of the RLDatix login page. The RLDatix logo is at the top. Below it is a drop-down menu with 'WRHA' selected. An orange arrow points to the drop-down menu with a box labeled 'Drop-down box'. Below the drop-down menu are two input fields: 'User Name:' and 'Password:'. At the bottom is a blue 'Login' button.

Drop-down box

WRHA

Application Account

WRHA

User Name:

Password:

Login

(image 1)

A screenshot of the RLDatix login page. The RLDatix logo is at the top. Below it is a drop-down menu with 'WRHA' selected. Below the drop-down menu are two input fields: 'User Name:' and 'Password:'. At the bottom is a blue 'Login' button.

WRHA

User Name:

Password:

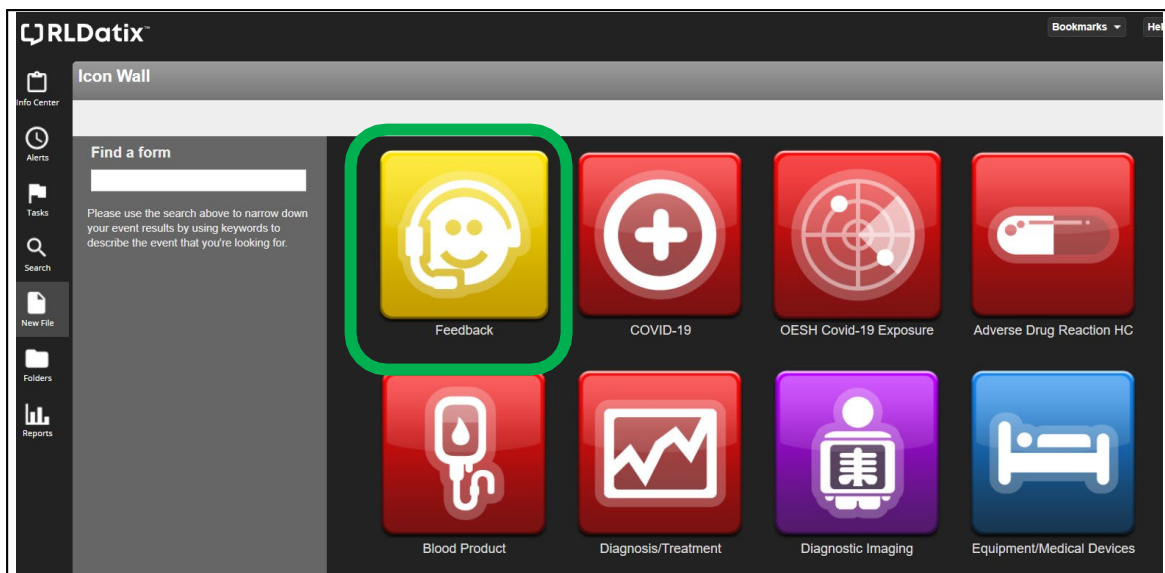
Login

(image 2)

Note : If you are part of the NTDWRHA domain (part of WRHA Outlook listings) your password is synced to your logon. If you are not part of the NTDWRHA domain, and forget your password, contact RL_Support@wrha.mb.ca to have it reset.

4. Click **Login**.

5. Click on the **Feedback**  icon on the *Icon Wall*.



The General Feedback Submission Form opens.

General Feedback Submission Form

Table of Contents

- Date and Place of Contact
- Person Affected
- Feedback Details
- Attachments
- File Status**

Elapsed time: 00:29

5 of 33 total fields completed.

2 of 4 mandatory fields completed.

Date and Place of Contact

Please indicate the date and place of contact details.

Date of Notification: * mm-dd-yyyy

Time of Notification:

File Ownership Site: * Corporate

How did you find out about us?

Did you speak to someone on unit?

Method of Notification:

Referral Source:

Entered By: Claudia Ruiz

Delete Exit More Actions Submit

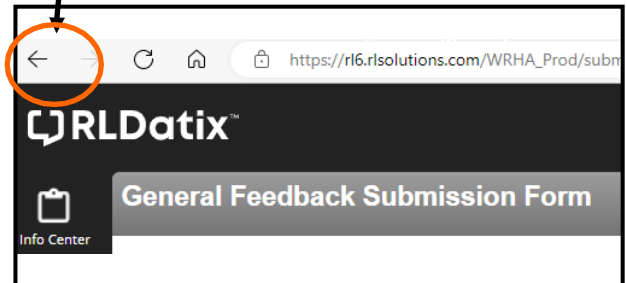
NAVIGATING RL6

Use the left-side widgets to navigate within the event form. Do not use the **Back** button to go to the previous screen.

Click on the section of the form that you want to go to

Table of Contents
Date and Place of Contact
Person Affected
Feedback Details
Attachments

DO NOT use the back button



Form Name

Scroll Bar

Table of Contents

- Date and Place of Contact
- Person Affected
- Feedback Details
- Attachments

File Status

Elapsed time: 02:24

5 of 33 total fields completed.

2 of 4 mandatory fields completed.

Indicates how many fields are completed and how many mandatory fields are completed

Collapse/expand Icon:
Allows you to collapse sections of the form

Drop-Down Lists

Mandatory Field

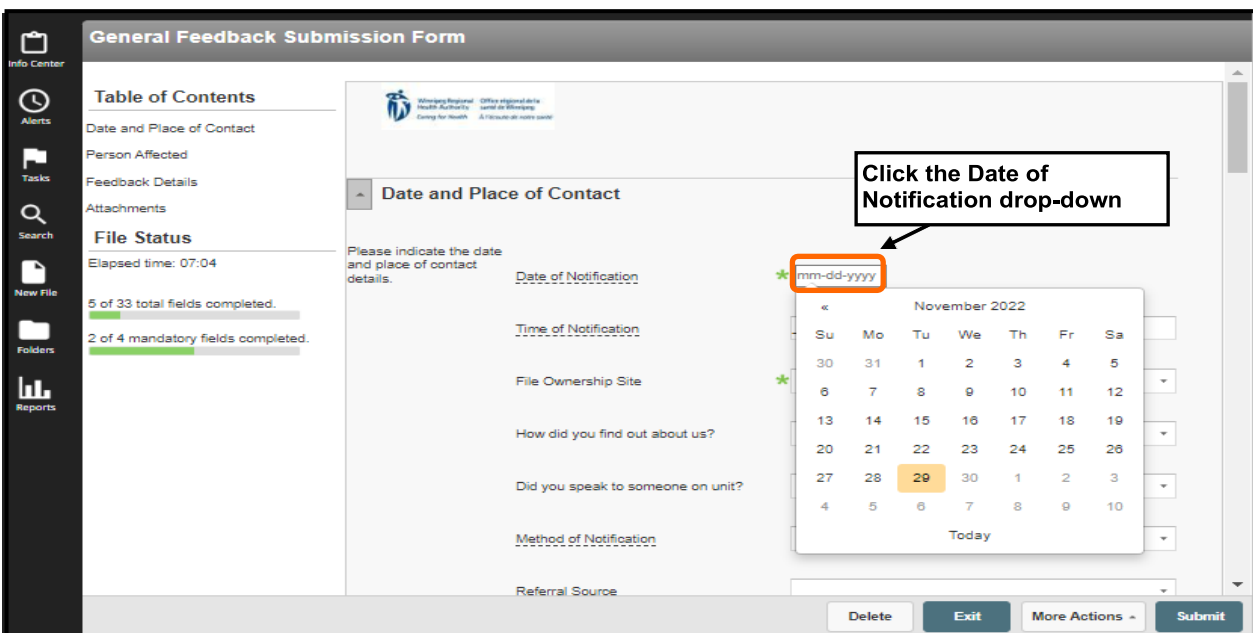
1. Complete the form ensuring all mandatory fields are entered (fields with a green asterisk *). Please provide as much information as possible in non-mandatory fields.

2. Click the  button.

INITIAL INPUT

Feedback is received in a variety of ways. All feedback is valuable as it offers opportunities to improve the services we provide and should be captured in the RL FBK module. Feedback can be in the form of letters, faxes, emails, phone calls, and in person. Feedback can be received directly from patients/clients/residents or it can be received via a family member, friend, another staff person, WRHA Client Relations, or another source. Anyone with a RL FBK User license can submit feedback.

1. Log into RL6.
2. Click on the **Feedback**  icon on the *Icon Wall*.
The General Feedback Submission Form opens.

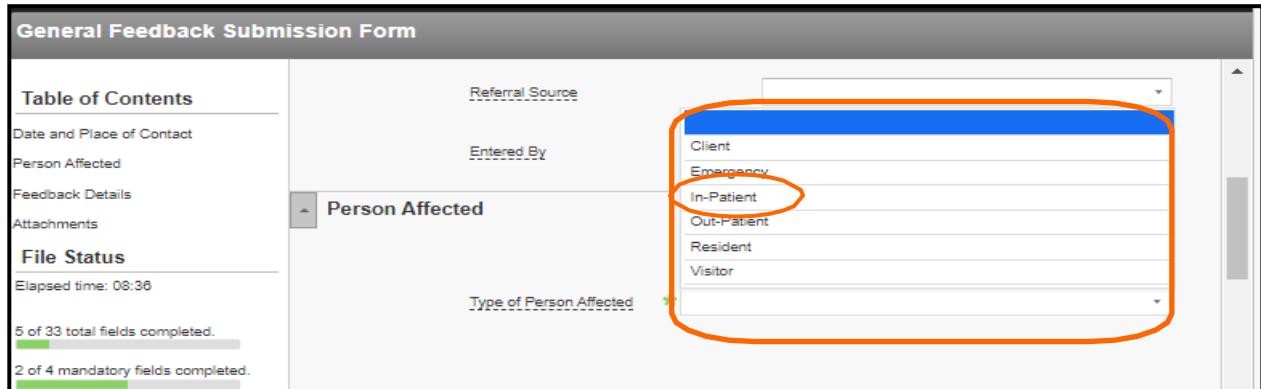


Date and Place of Contact

3. Click in the *Date of Notification* drop-down box and select the appropriate date.
For our example select **March 1930 2020**.
4. Click the *File Ownership Site* drop-down and select the appropriate option. For our example select **Grace Hospital**.
Note: the File Ownership Sites defaults to the site of the user who is logged into RL and completing the Feedback form.
5. Click the *Method of Notification* drop-down and select the appropriate option.
For our example select **E-mail**.
6. The *Entered By* text box defaults to the username who is logged into RL.

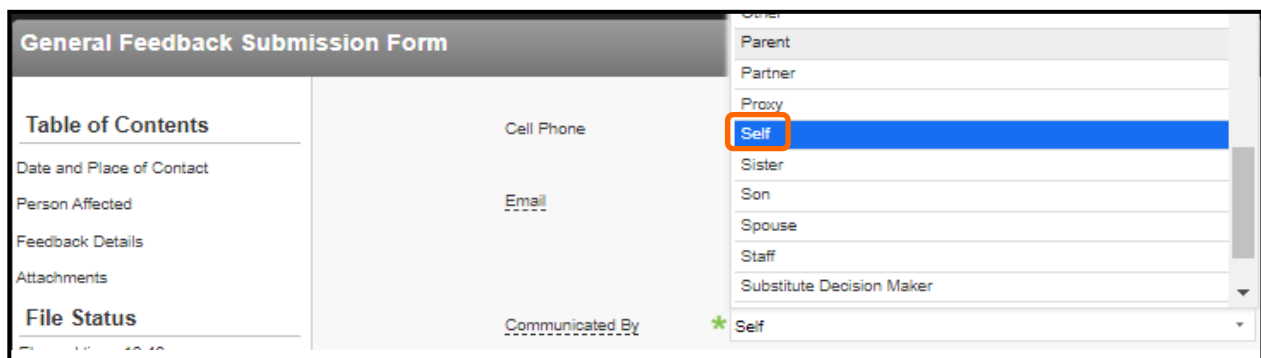
Person Affected

- Click the *Type of Person Affected* drop-down and select the appropriate option. For our example select **In-Patient**.



The screenshot shows the 'General Feedback Submission Form' with a sidebar on the left containing a 'Table of Contents' and 'File Status' (5 of 33 total fields completed, 2 of 4 mandatory fields completed). The main form area has fields for 'Referral Source', 'Entered By', and 'Type of Person Affected'. The 'Type of Person Affected' dropdown menu is open, showing options: Client, Emergency, In-Patient (highlighted with an orange circle), Out-Patient, Resident, and Visitor.

- For this example, make up and enter in a complainant's name, DOB, address, phone, email, etc.
- Click the *Communicated By* drop-down and select the appropriate option. In this example select **Self**; we assume the complainant reported feedback himself/herself.



The screenshot shows the 'General Feedback Submission Form' with a sidebar on the left. The main form area has fields for 'Cell Phone', 'Email', and 'Communicated By'. The 'Communicated By' dropdown menu is open, showing options: Parent, Partner, Proxy, Self (highlighted with an orange circle), Sister, Son, Spouse, Staff, and Substitute Decision Maker.

Feedback Details

10. Double-click in the **Case Information** text box to open up the Text Editor.

The screenshot shows the 'General Feedback Submission Form' interface. On the left is a sidebar with icons for Info Center, Alerts, Tasks, Search, and New File. The main area is divided into two panes. The left pane, titled 'Table of Contents', lists sections: Date and Place of Contact, Person Affected, Feedback Details, Attachments, and File Upload. The right pane, titled 'Feedback Details', contains a 'Case Information' section with a large text box. A callout box with an arrow points to this text box, containing the text: 'Double-click in the Case Information text box to open up the Text Editor'. Below the panes, progress bars indicate '5 of 33 total fields completed' and '2 of 4 mandatory fields completed'.

The Text Editor opens.

The screenshot shows the 'Case Information' text editor window. It has a title bar with a question mark icon. Below the title bar is a toolbar with various formatting options: undo, redo, font face (Ariel), font size (12), bold (B), italic (I), underline (U), strikethrough (ABC), font color (X), background color (X), text color (A), and tags (T). The main area is a large text box with a cursor at the top left. At the bottom right, it says 'Text: 0 / HTML: 4'. At the bottom of the window are 'Cancel' and 'OK' buttons.

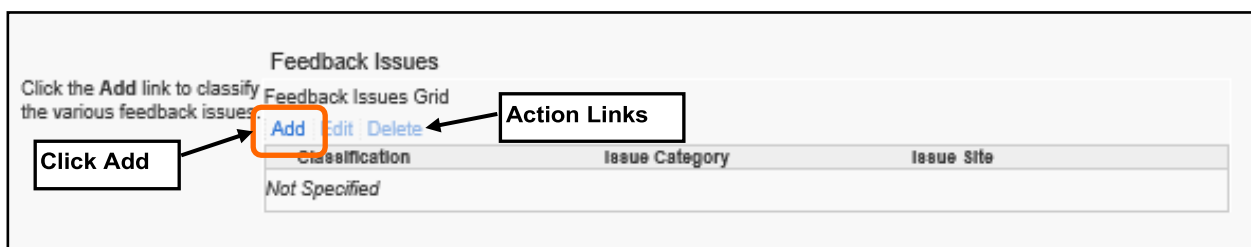
Within the Text Editor screen, you can use various formatting functions such as bold, font style, colour and spell check.

Note: Always use the copy and paste functions within the Text Editor. If you copy and paste directly within the form (not opening the Text Editor) the text may be overwritten. Ensure to first double-click in the form to open up the Text Editor and then use the copy and paste functions if desired. While working in the Text Editor ensure to click OK and Save every 10-15 minutes.

11. Summarize the feedback details, from the complainant's perspective, within the Text Editor's *Case Information* dialog box.

Use words like: “according to the complainant...”

12. Click **OK** to close the Text Editor.
The dialog box closes and you return to the Feedback form.
13. Click in the *When did this happen?* text box and type in the details.
Do not double-click as the text editor does not open in this field.
14. Click in the *Special Confidentially Instructions* text box to open up the Text Editor and add the appropriate information. Click **OK** to close the Text Editor.
15. In the *Feedback Issues* section click the **Add** action link.

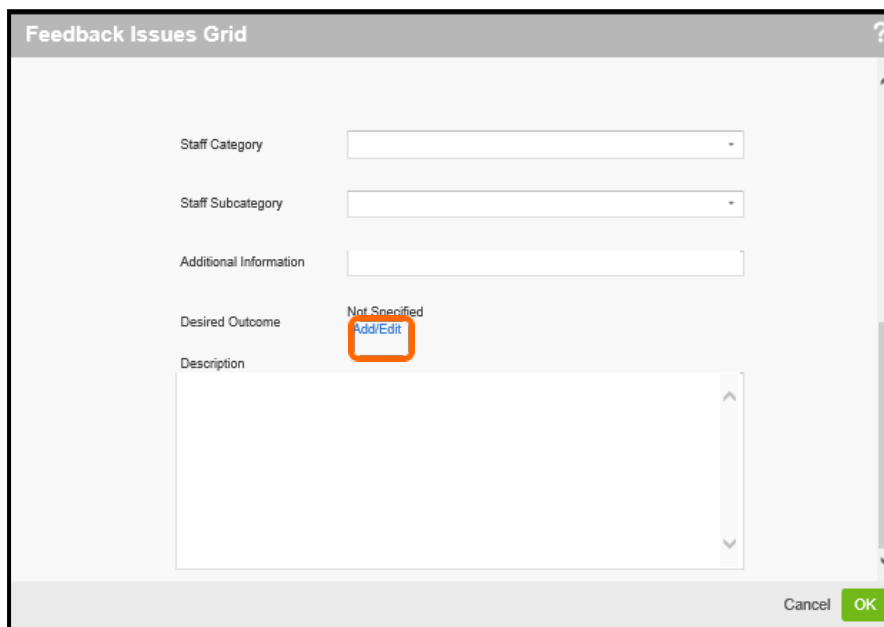


The Feedback Issues Grid opens.

The screenshot shows the 'Feedback Issues Grid' form. It has a title bar with a question mark icon. The form contains several fields with dropdown menus and a list of options. The 'Classification' field is highlighted with an orange box, and its dropdown menu is open, showing options: 'Advocacy', 'Complaint', 'Compliment', 'Consultation', 'Navigation', 'Request', 'Suggestion', and 'FIPPA Request'. The 'Issue Category' field is also highlighted with an orange box, and its dropdown menu is open, showing options: 'Compliment', 'Consultation', 'Navigation', 'Request', 'Suggestion', and 'FIPPA Request'. The 'Issue Site' field is highlighted with an orange box, and its dropdown menu is open, showing options: 'Corporate' and 'FIPPA Request'. The 'Issue Site Program/Service' field is highlighted with an orange box. The 'Issue Unit Location' field is highlighted with an orange box. The 'Issue WRHA Program' field is highlighted with an orange box. At the bottom right, there are 'Cancel' and 'OK' buttons.

16. In the *Classification* drop-down select the appropriate classification. For our example select **Complaint**.

17. In the *Issue Category* drop-down select the appropriate category. For our example select **Environment**.
18. In the *Issue Site* drop-down select the appropriate location. For our example select **Holy Family**.
Note: The Issue Site defaults to the site of the user that is logged into RL and completing the Feedback form.
19. If appropriate select an *Issue Site Program/Service and Issue Unit Location*.
20. In the *Issue WRHA Program* drop-down select the appropriate program. For our example select **Facility Management**.
21. Continue filling out relevant information within the text boxes.
22. In the *Desired Outcome* section click the **Add** action link.




The screenshot shows a web form titled "Feedback Issues Grid" with a question mark icon in the top right corner. The form contains several input fields and a text area:

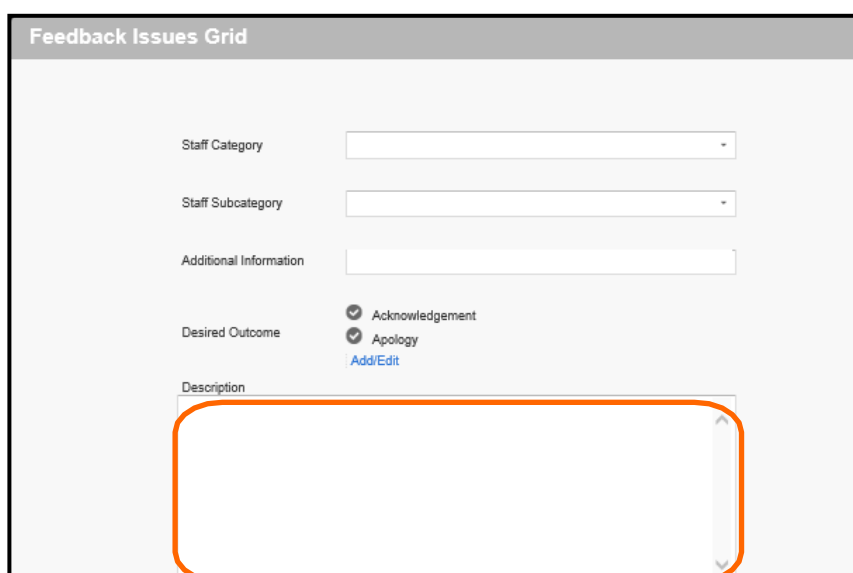
- Staff Category:** A dropdown menu.
- Staff Subcategory:** A dropdown menu.
- Additional Information:** A text input field.
- Desired Outcome:** A section containing the text "Not Specified" and a blue "Add/Edit" link. The "Add/Edit" link is highlighted with an orange rectangle.
- Description:** A large text area with a vertical scrollbar.

At the bottom right of the form, there are two buttons: "Cancel" and "OK".

The *Desired Outcome* dialog box opens.



23. Click the appropriate boxes to select the desired outcomes. You can select as many that applies.
24. Click **OK** to close the *Desired Outcome* dialog box.
25. Double-click in the *Description* text box to open the Text Editor. Enter in details of what the complainant would like as a resolution to the issue.



26. Click **OK** to close the Text Editor.

27. Click **OK** to close the *Feedback Issues Grid*.

28. If the complainant has another feedback issue click the **Add** action link to add another issue.

Feedback Issues

Click the Add link to classify the various feedback issues.

[Add](#) [Edit](#) [Delete](#)

Classification	Issue Category	Issue Site
<input type="checkbox"/> Complaint	Attitude/Behaviour	Grace Hospital

29. Click the **More Actions** button and select **Submit and Manage**.
The file is submitted.

Save as Incomplete
Import File
Submit & Manage
Submit & Copy

Delete Exit **More Actions** Submit

Notice the top-left corner has the file reference number.

RLDatix™


Feedback Management Form - **530381**

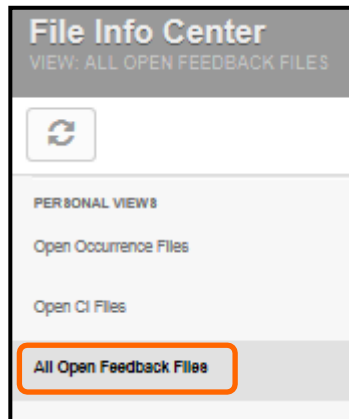
Info Center Add Follow-up ▾

File Reference Number

ADDING FOLLOW-UP

Once the form is submitted follow-up can be added to the file as it is being worked on.

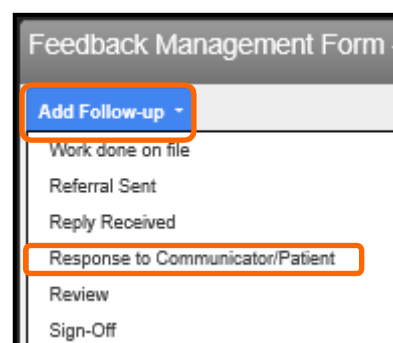
1. Click the **File Info Center**  icon.
2. Select **All Open Feedback Files** from the *Personal Views* menu.



3. Select the desired file to open by clicking on the File ID link before the file name.

<input type="checkbox"/>			125333	Feedback (125333)
<input type="checkbox"/>			125345	Feedback (125345)
<input type="checkbox"/>			125413	Feedback (125413)

4. Click the **Add Follow-up** button at the top-left screen.



5. Select the appropriate follow up action. For our example select **Response to Communicator/Patient**.

The New Response to Communicator/Patient Follow-up dialog box opens.

New Response to Communicator/Patient Follow-up

Date: 04-18-2020 Time: 14:13

Type: Response to Communicator/Patient Sub-Type: Acknowledgement

Issue: Method: Acknowledgement

Follow-up By: Cheryl Harder Follow-up To/With: Additional information requested

Time Spent(minut...): Money Spent: Additional information submitted

Item Purchased: Apology

Explanation

Interim Reply

Manager Review Complete

Patient/Family Conference

Details

Form Letters: Please Select Populate Email Print

Cancel Add

6. Select the date of this follow-up (today's date).
7. In the *Sub-Type* drop-down select the appropriate type of feedback response. In our example select **Acknowledgement**.
8. Scroll down to the *Details* section.
9. Double-click in the *Details* section to open up the *Description* text box within the Text Editor. Type the text "Called complainant to acknowledge complaint".

Description

Called complainant to acknowledge complaint.

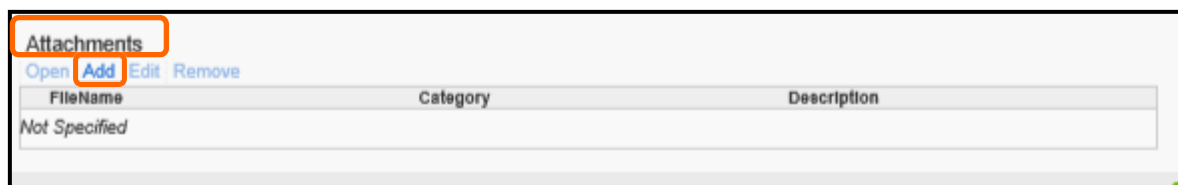
Text: 42 / HTML: 46

Cancel OK

10. Click **OK** to close the Text Editor.

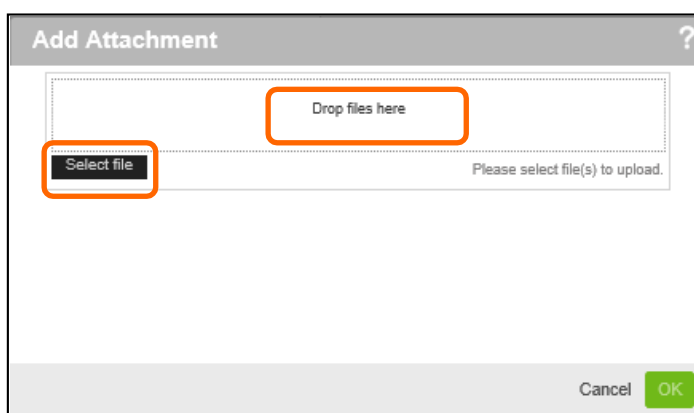
The dialog box closes and you return to the New Response to Communicator/Patient Follow-up form.

11. Scroll down to the *Attachment* section in the *Follow-up* form.



12. To attach a file to the form for reference, such as the follow-up letter that was sent to the complainant, click the **Add** action link in the *Attachments* section.

The Add Attachment dialog box opens.

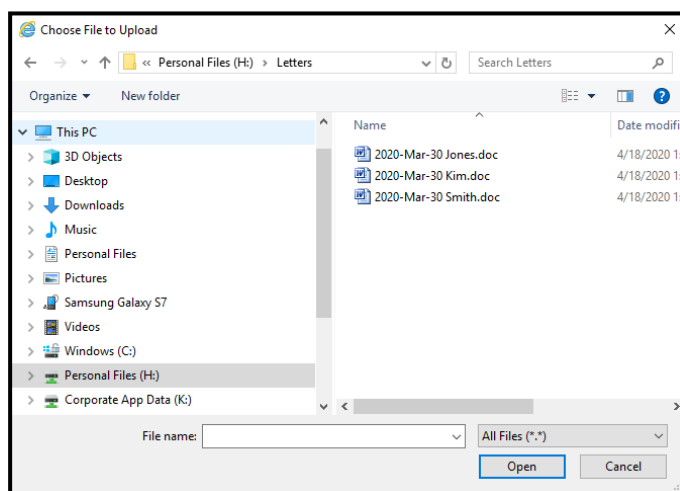


13. Drag the file(s) you want to attach to the “**Drop files here**” box.

OR

Click on the **Select file** box.

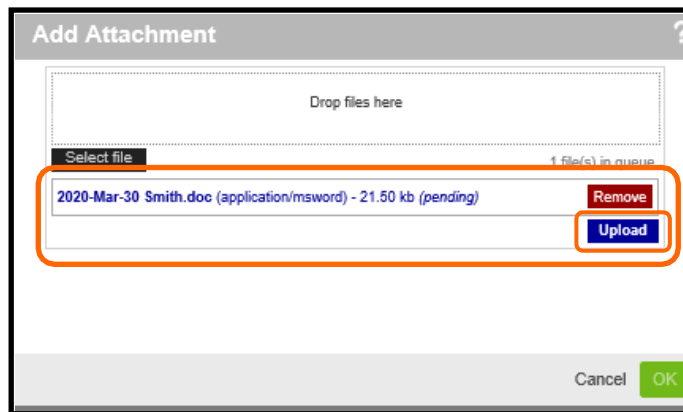
The Choose File to Upload dialog box opens.



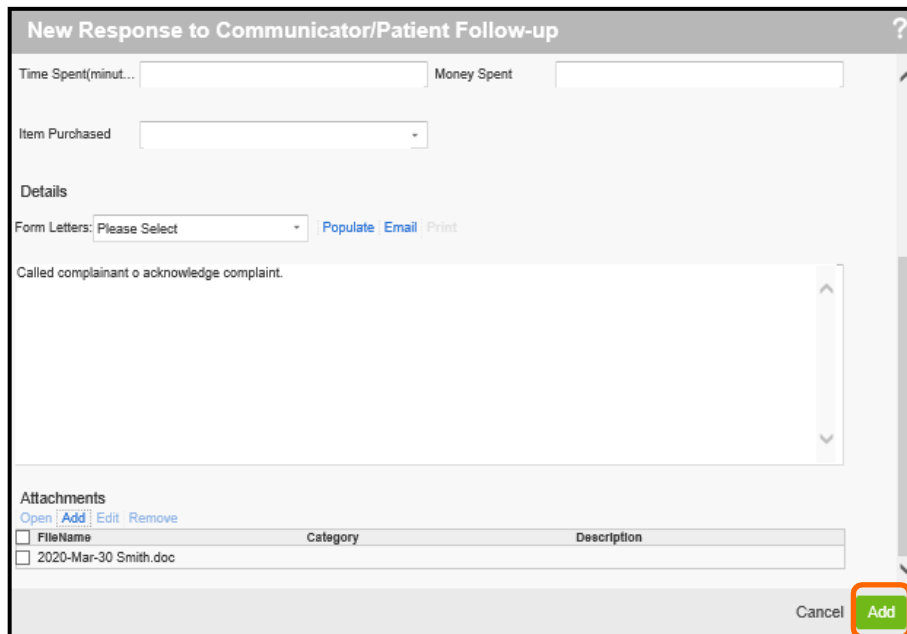
Select the desired file and click **Open** to attach the file.

The attached file is shown in the Add Attachment dialog box.

14. Click the **Upload** button to attach the file and click **OK** to close the *Add Attachment* dialog box.



The New Response to Communicator/Patient Follow-up dialog box reappears.


The image shows a software dialog box titled "New Response to Communicator/Patient Follow-up". It has a header bar with the title and a question mark icon. The main area contains several input fields: "Time Spent(minut..." and "Money Spent" (text boxes), and "Item Purchased" (a dropdown menu). Below these is a "Details" section with a "Form Letters: Please Select" dropdown and three buttons: "Populate", "Email", and "Print". A large text area with a scrollbar is labeled "Called complainant o acknowledge complaint.". At the bottom, there is an "Attachments" section with a table. The table has columns for "FileName", "Category", and "Description". One row is visible: "2020-Mar-30 Smith.doc". At the bottom right of the dialog are "Cancel" and "Add" buttons. The "Add" button is highlighted with an orange rectangular box.

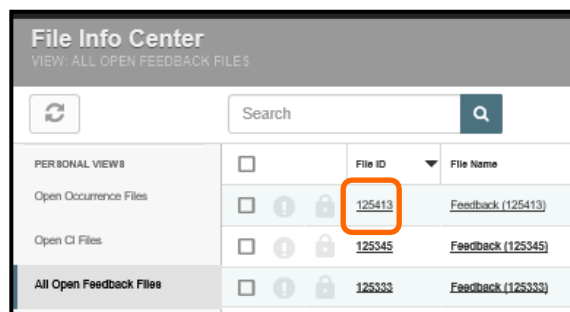
15. Click **Add** to close the *New Response to Communicator/Patient Follow-up* dialog box.

ADDING RESOLUTION & OUTCOMES

The Resolution & Outcomes section is used to add information regarding the resolution and outcomes to a file and to close the file.

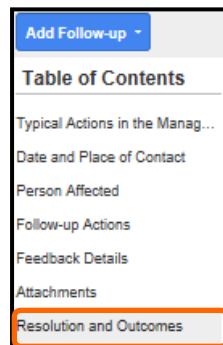
1. To open up the file.

- a) Click the **File Info Center**  icon.
- b) Select the desired file to open by clicking on the File ID link before the file name.



File Info Center	
VIEW: ALL OPEN FEEDBACK FILES	
PERSONAL VIEWS	File ID
Open Occurrence Files	125413 Feedback (125413)
Open CI Files	125345 Feedback (125345)
All Open Feedback Files	125333 Feedback (125333)

2. Select **Resolution and Outcomes** from the *Table of Contents* (left-hand side of screen).



Add Follow-up +
Table of Contents
Typical Actions in the Manag...
Date and Place of Contact
Person Affected
Follow-up Actions
Feedback Details
Attachments
Resolution and Outcomes

Note: If you do not see the **Resolutions and Outcomes** option place your mouse above the 3 dots in the Table of Contents section to expand the selection list.

3. In the *Satisfaction Level with Resolution* drop-down select the appropriate option.
4. In the *Feedback Process Satisfaction Level* drop-down select the appropriate option.
5. In the *Learning Opportunity* drop-down select the appropriate option.
If you select Yes, the *Specify Learning Summary* text box appears where you can enter in the learning opportunity from your perspective.
6. In the *Resolution Date* drop-down select the appropriate date.
7. In the *Outcome Notes* text box enter in the appropriate notes. In our example, type "Letter was sent and complainant is satisfied with outcome".

Resolution and Outcomes

Satisfaction Level with Resolution

Feedback Process Satisfaction Level

Complexity

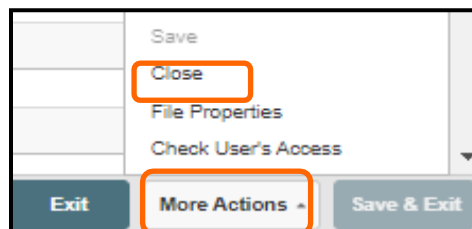
Learning Opportunity

Resolution Date

Outcome Notes

Exit More Actions Save & Exit

8. When you are ready to close the file and all issues click the **More Actions** button and select **Close**.



The *Information* dialog box opens.

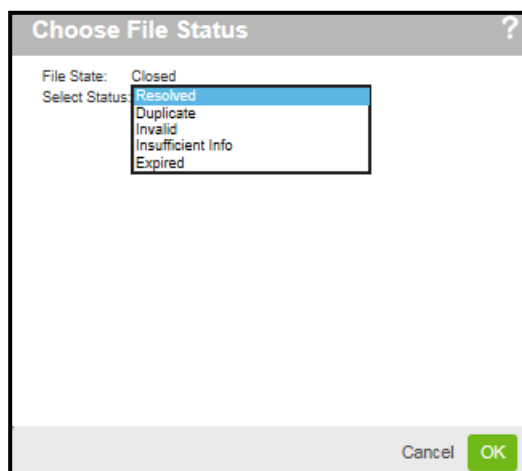
Information

Please note that if you make changes to the file status, all changes you have made to the form will be saved.

Cancel OK

9. Click **OK** to close the *Information* dialog box.

10. The *Choose File Status* dialog box opens.
11. In the *Select Status* drop-down select the appropriate status. In our example select **Resolved**.



12. Select **OK** to close the *Choose File Status* dialog box.

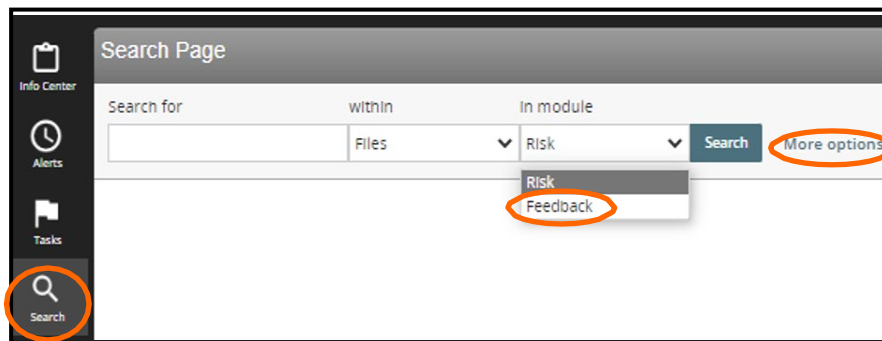
Status Type	Description
Resolved	The issue has been looked after.
Duplicate	The issue is a duplicate of one already entered into RL.
Invalid	The issue is not Feedback related.
Insufficient Info	Complainant did not leave adequate contact information so they cannot be contacted to find out details of the issue.
Expired	Attempted contact with complainant but no response so the issue is terminated.

Note: After the file is closed it is no longer visible in the *Open Feedback Files* list. If you would like to view it you can do a Search to find it and then open it.

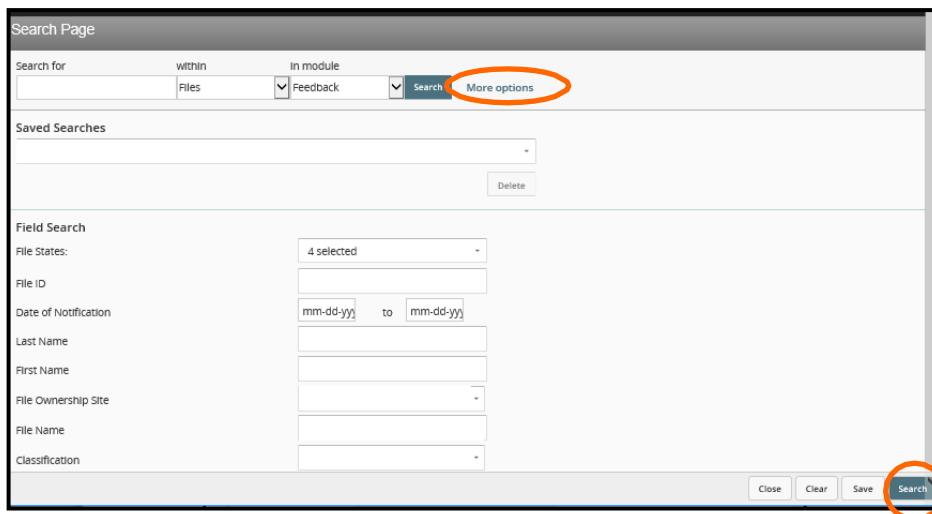
SEARCHING FOR FILES

You can use the Search feature to search for file by specific search criteria.

1. Click the **Search**  icon on the *Navigation* toolbar.



2. Click the **Feedback** option.
3. Click the **More options** button expand the search criteria window.



4. Select the desired criteria (e.g. First Name, Last Name, and Classification) from the *Search Page* window.
Use the scroll bar to access additional search fields, if necessary.
5. Click the **Search** button.
Files matching your search criteria are displayed in the *Search Results* section.

6. Select the desired file by clicking in the selection bubble before the file name.

Search Page

Search for within In module [More options](#)


(1 to 2 of 2 files found in Feedback module)

	File ID	File Name	Date of Notification	Last Name	First Name	Method of Notification	File Ownership Site	File State	Feedback Status	Owner Name	Last Name	First Name
<input checked="" type="checkbox"/>	125192	Feedback (125192)	06-05-2019	SMITH	JOAN	Telephone	Grace Hospital	In-Progress	Waiting - Staff	Sandy Pereira	SMITH	JANE
<input type="checkbox"/>	125193	Feedback (125193)		SMITH	JOAN	Telephone	Corporate	Incomplete		Judy Ridley		

Per Page:

QUICK SEARCH

With a Quick Search you can enter search criteria without clicking the search arrow and entering the criteria in the search criteria window.

1. Click the **Search**  icon on the *Navigation* toolbar.
2. Enter the criteria you are search for in the text box, for example, "Swan".
3. Select **Feedback** from the "In module" option.
4. Click the **Search** button.

Search Page

Search for within In module

	File ID	File Name	Date of Notification	Last Name	First Name	Method of Notification
<input type="checkbox"/>	125091	Feedback (125091)	11-28-2018	SWAN	JASON	E-mail
<input type="checkbox"/>	125093	Feedback (125093)	11-28-2018	SWAN	BEV	E-mail

Note: The Quick Search method will search for your criteria through all fields

LOGGING OUT

Click the **Logout** link on the *Info Center* toolbar (right-hand side). Do not click the X (Close) on the RL6 menu bar to exit because this is not the proper way to exit and may lock up your file for up to 30 minutes. If your file is locked call RL_Support at 204-926-1070 to have it unlocked.

Logged In as Cheryl Harder

- Help
- About
- Preferences
- Logout**
- Admin Center