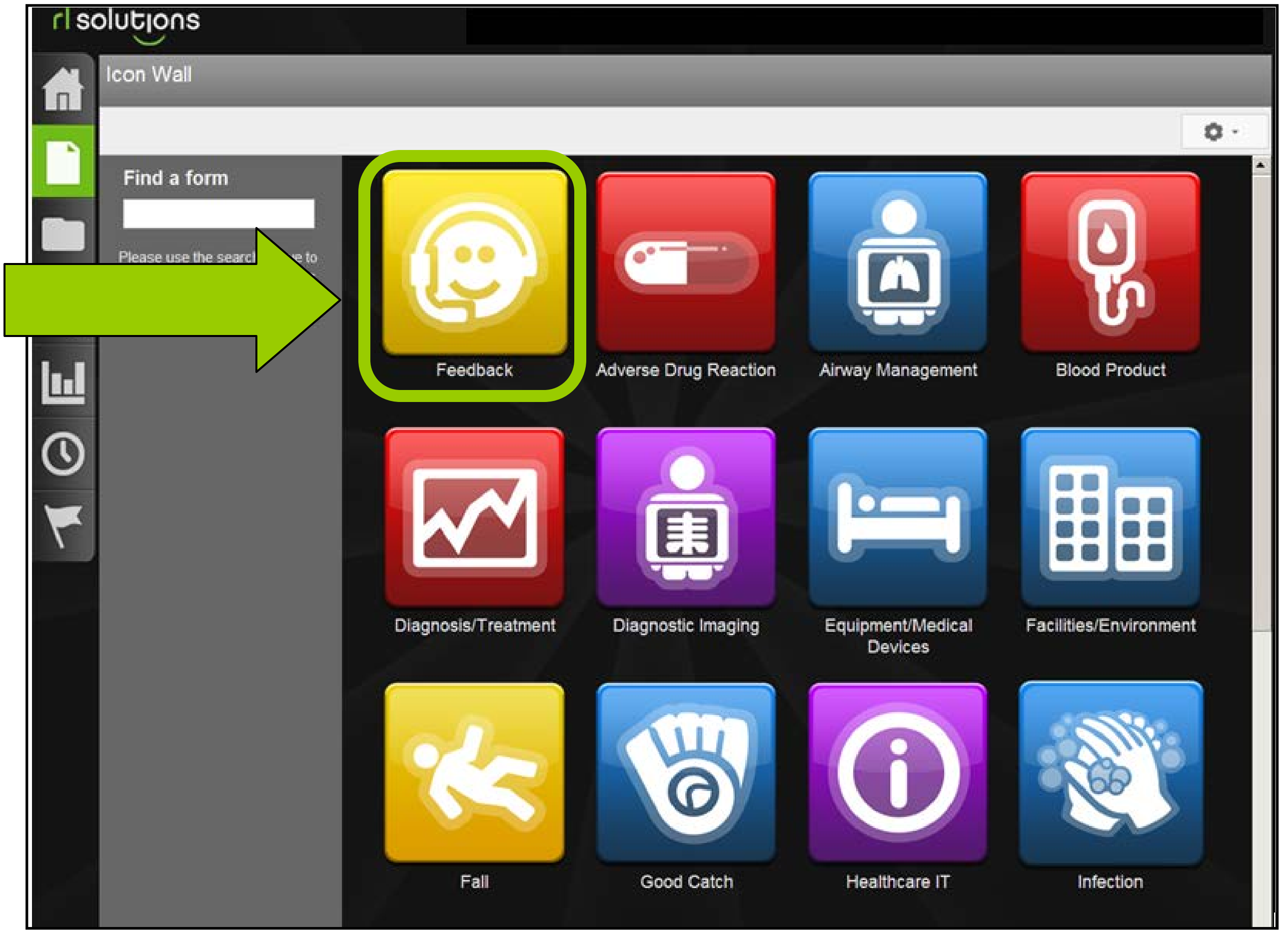
RL6 – Feedback



Reference Manual

RL6 Feedback Process Support – (204) 926-7825 clientrelations@wrha.mb.ca
RL6 Feedback Software Support – (204) 926-8077 rl6_support@wrha.mb.ca

WRHA Quality Improvement & Patient Safety
Version: 1, August 1, 2014

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 WRHA Client Relations for more information.

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 **204-926-8077** or email rl6_support@wrha.mb.ca

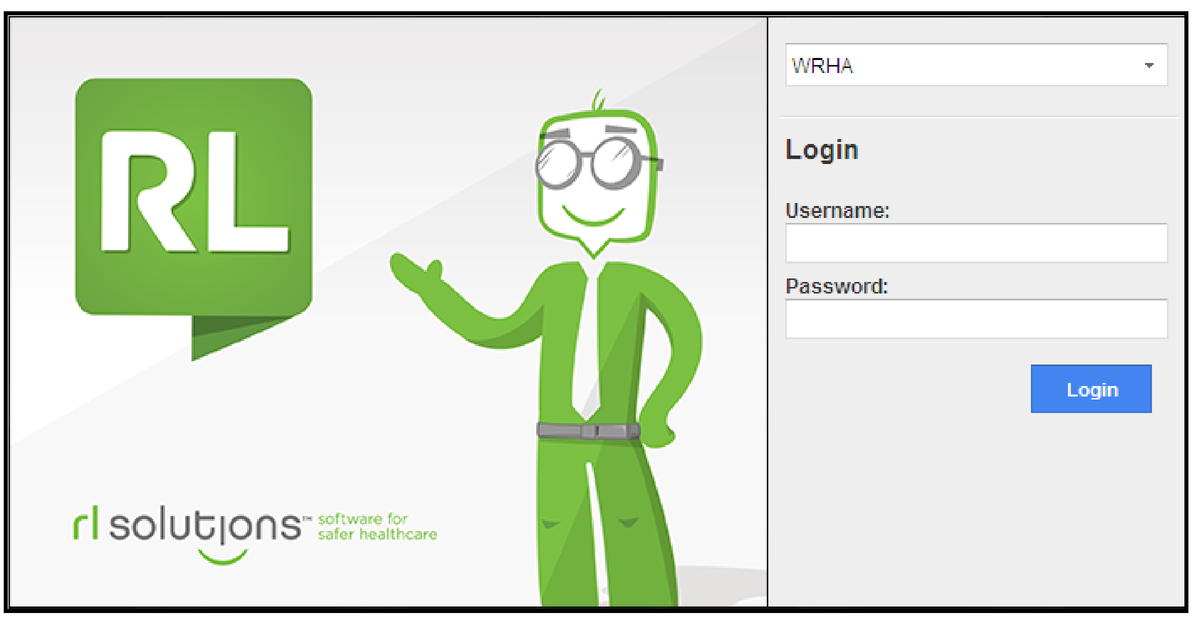
Logging In

1. Double-click on the **RL6** icon on the Desktop.
   The RL login screen opens.

2. Ensure **WRHA** is selected from the drop-down box.

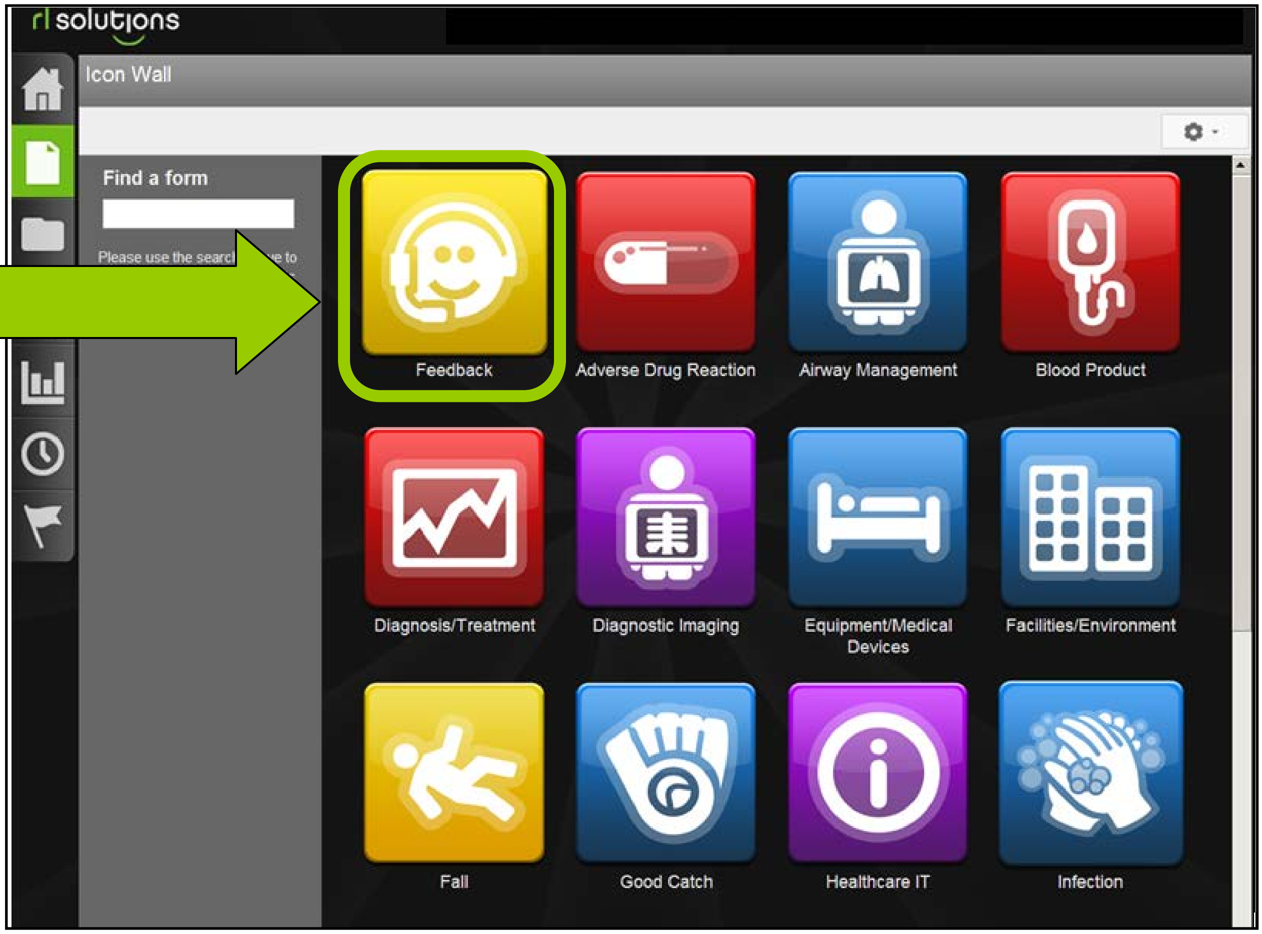
3. Type in your windows username and password that you use to access your work computer.

4. Click **Login**.



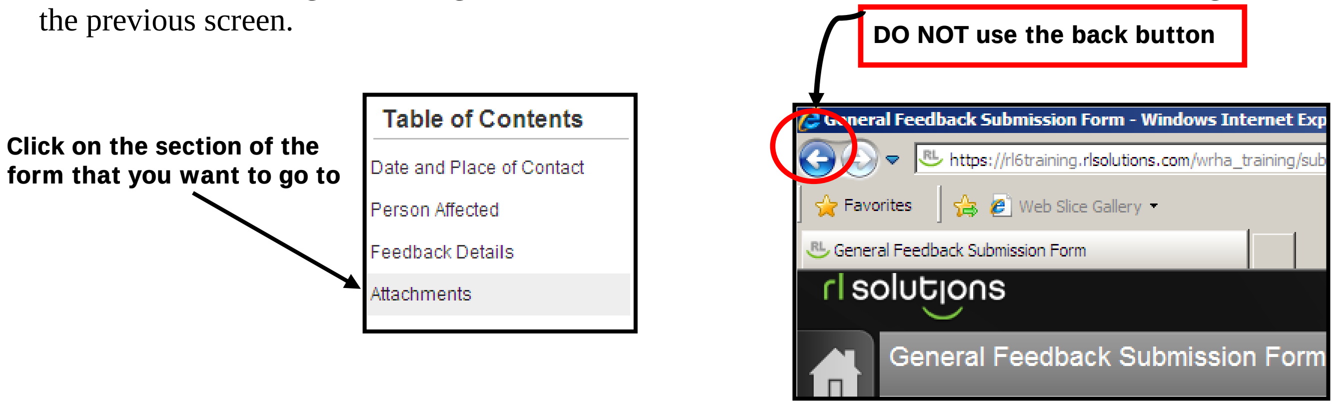
Icon Wall

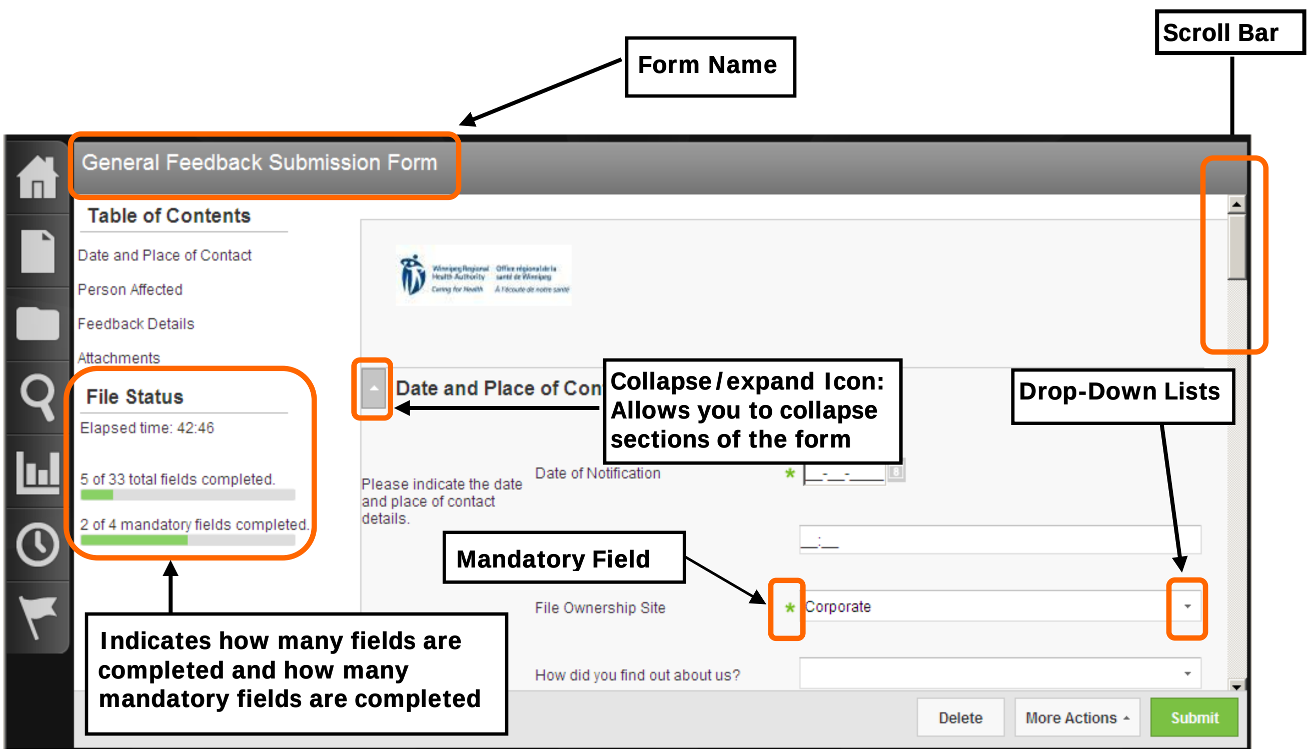
5. Click on the **Feedback**  icon on the *Icon Wall*.
   The General Feedback Submission Form opens.



NAVIGATING IN RL6

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





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

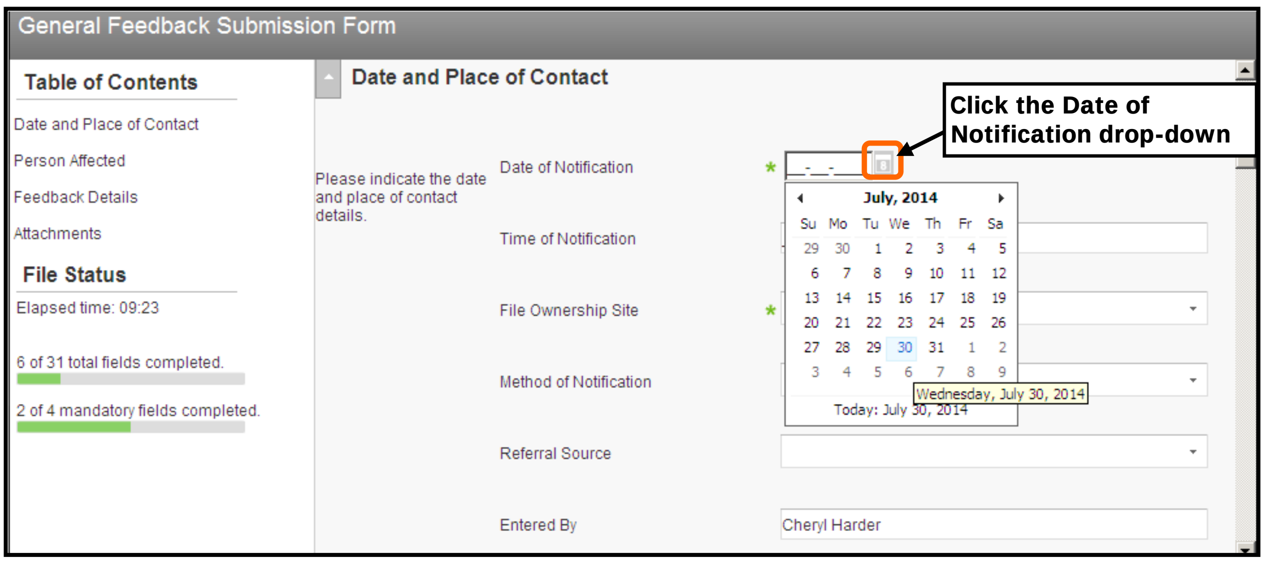
7. Click the Submit button.

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

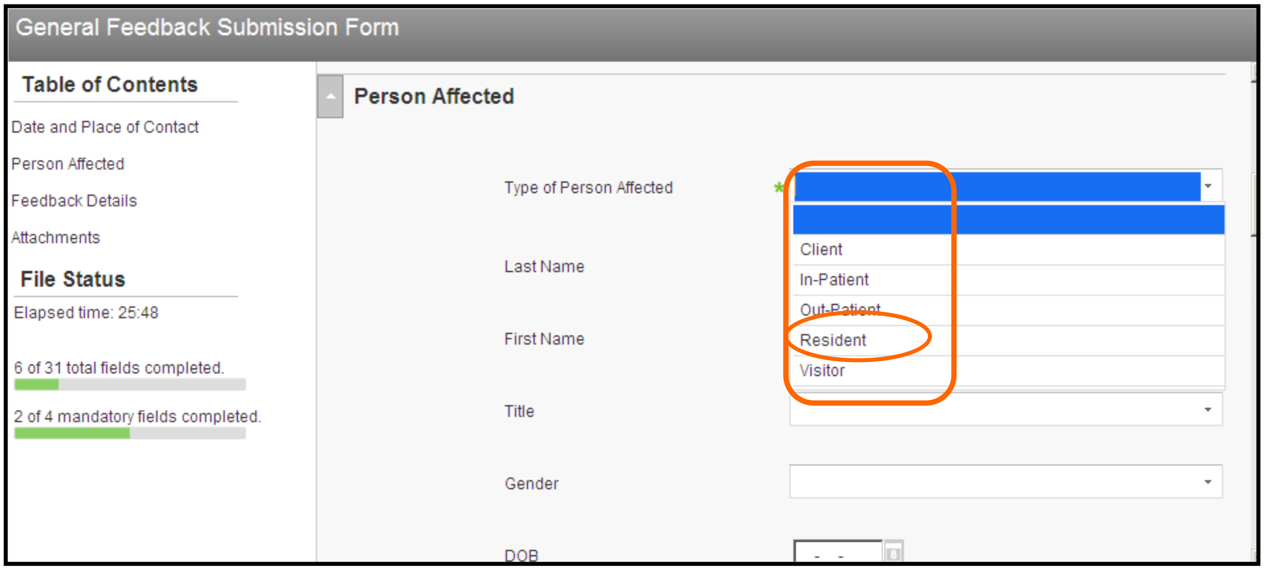
3. Click the *Date of Notification* drop-down box and select the appropriate date. For our example select **August 6, 2014**.

4. Click the File Ownership Site drop-down and select the appropriate option. For our example select **Holy Family**.
   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 **Telephone**.

6. The *Entered By* text box defaults to the username who is logged into RL.

Person Affected



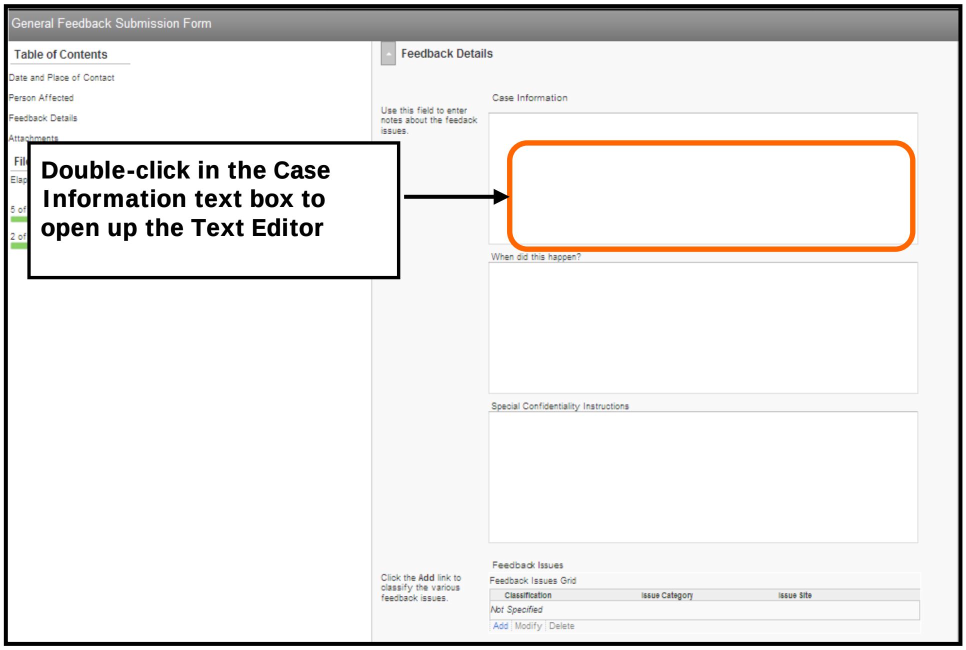
7. Click the *Type of Person Affected* drop-down and select the appropriate option. For our example select **Resident**.

8. For this example, make up and enter in a complainant's name, DOB, address, phone, email, etc.

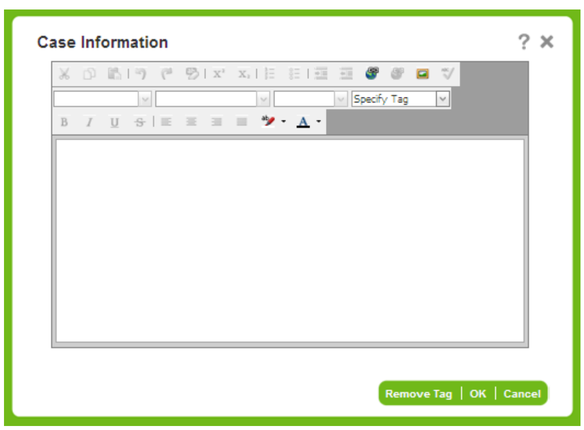
9. Click the *Communicated By* drop-down and select the appropriate option. In this example select **Self**; we assume the complainant reported feedback himself/herself.

Feedback Details

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



The Text Editor opens.



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.

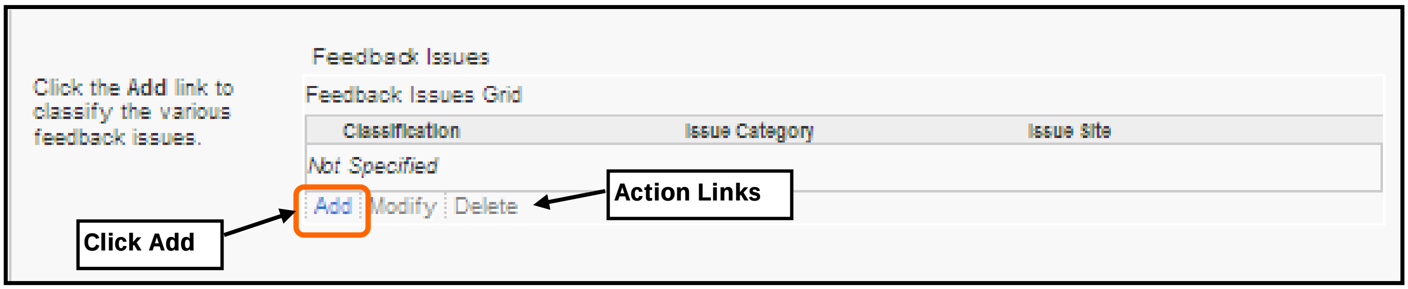
12. Click **OK** to close the Text Editor.
The dialog box closes and you return to the Feedback form.

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.

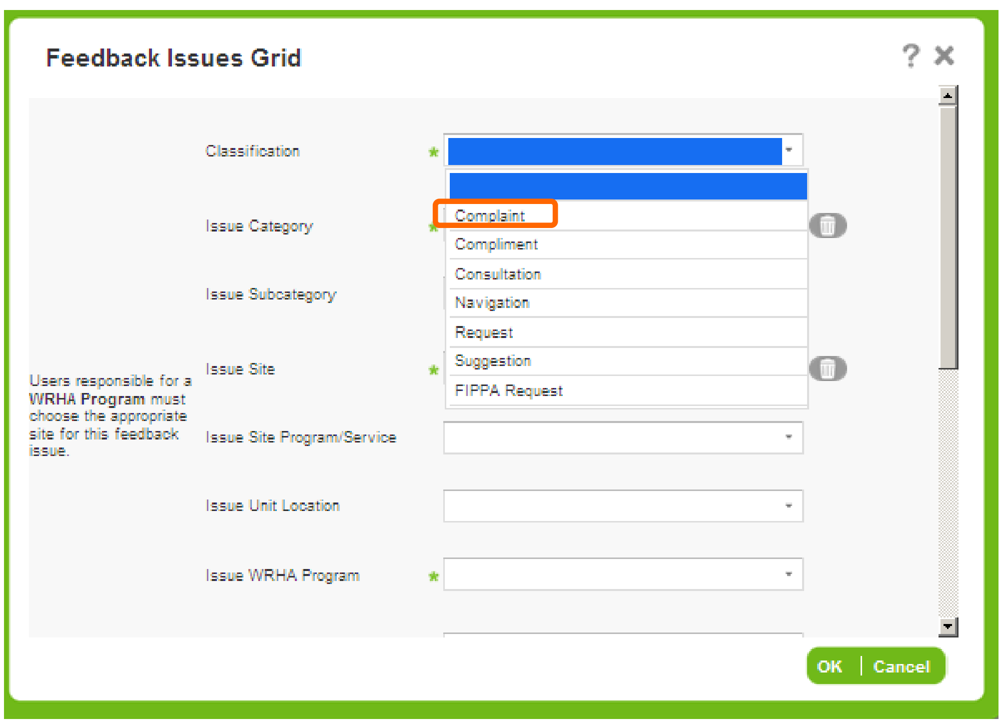
14. Click in the *Special Confidentially Instructions* text box to open up the Text Editor and type in appropriate information.

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

16. In the *Feedback Issues* section click the **Add** action link.



The Feedback Issues grid opens.



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

18. In the *Issue Category* drop-down select the appropriate category. For our example select **Environment**.

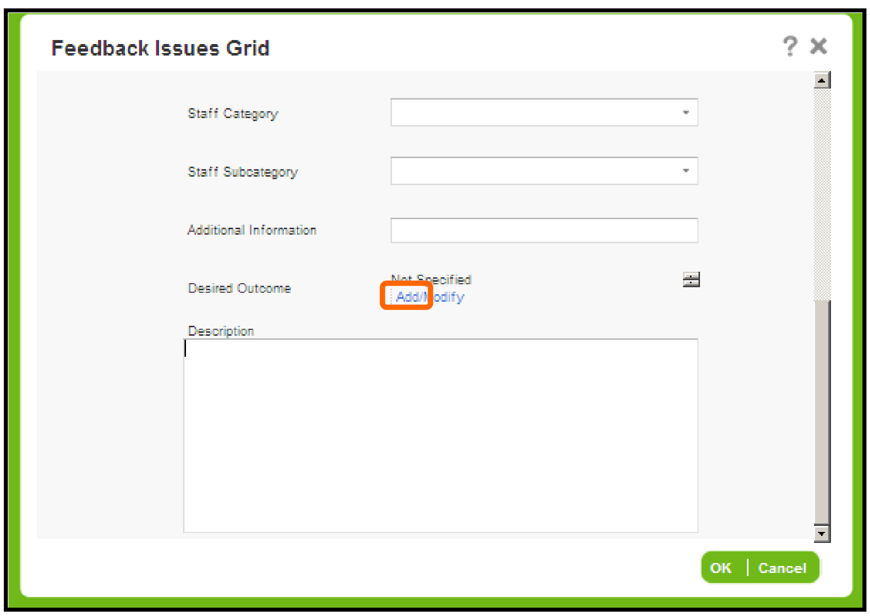
19. In the ***Issue Site*** drop-down select the appropriate location. For our example select **Holy Family**.
    Note: The Issue Site defaults to the site of the user that is logged into RL and completing the Feedback form.

20. If appropriate select an *Issue Site Program/Service*, *Issue Unit Location* and *Issue Subcategory*.

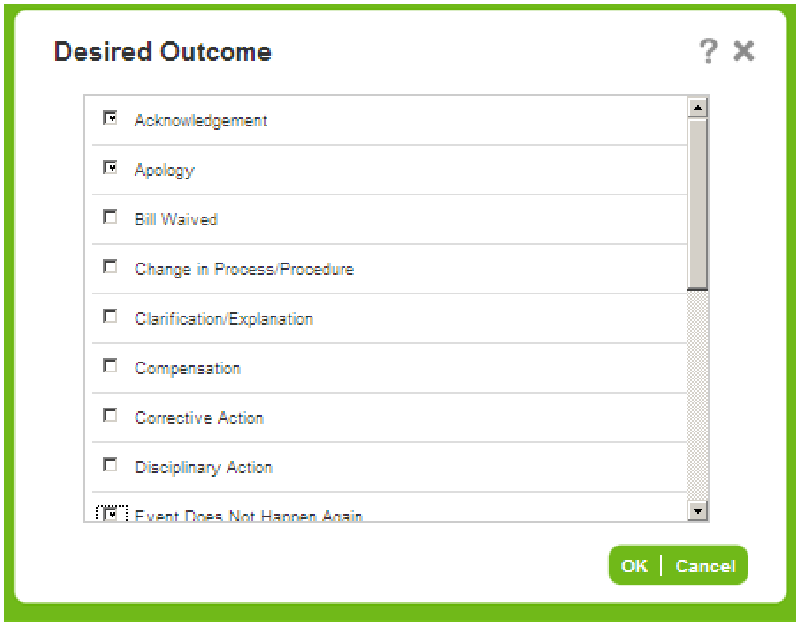
21. In the *Issue WRHA Program* drop-down select the appropriate program. For our example select **Facility Management**.

22. Continue filling out relevant information within the text boxes.

23. In the *Desired Outcome* section click the **Add** action link.



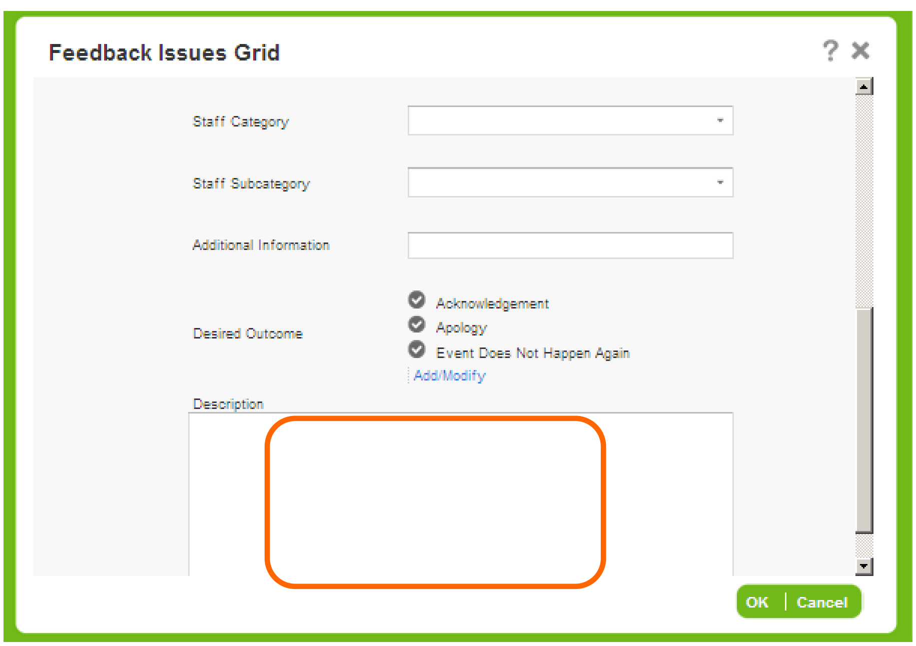
The Desired Outcome dialog box opens.



24. Click the appropriate boxes to select the desired outcomes. You can select as many that applies.

25. Click **OK** to close the *Desired Outcome* dialog box.

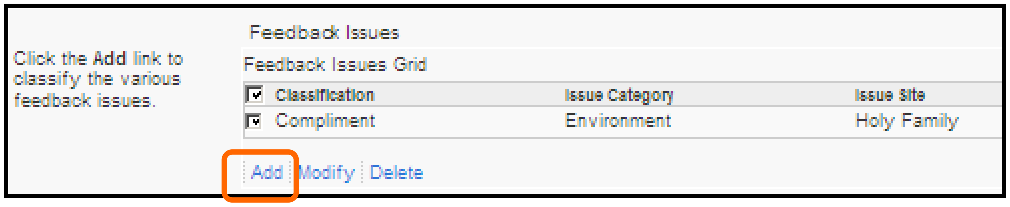
26. Double-click in the *Description* text box to open the Text Editor. Enter in details of what the complainant would like as a resolution to the issue.



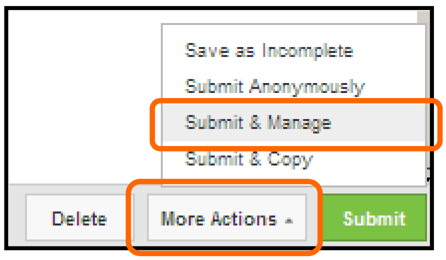
27. Click **OK** to close the Text Editor.

28. Click **OK** to close the *Feedback Issue Grid*.

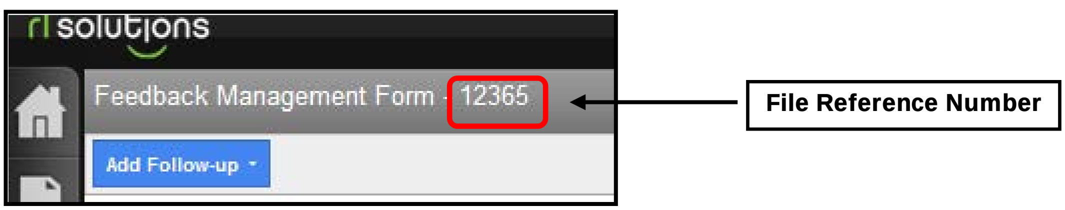
29. If the complainant has another feedback issue click the **Add** action link to add another issue.



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



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

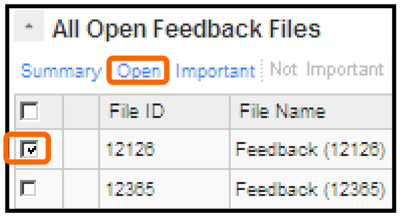


ADDING FOLLOW-UP

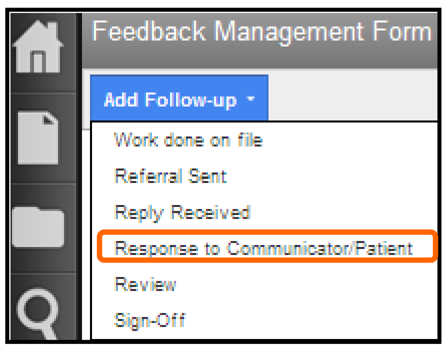
Once the form is submitted follow-up can be added to the file as it is being worked on.

1. Ensure the file that you want to add follow-up to is open.

   a) Click the **Info Center**  icon.
   b) Select the desired file to open by clicking in the selection bubble before the file name.
   c) Click the **Open** link.

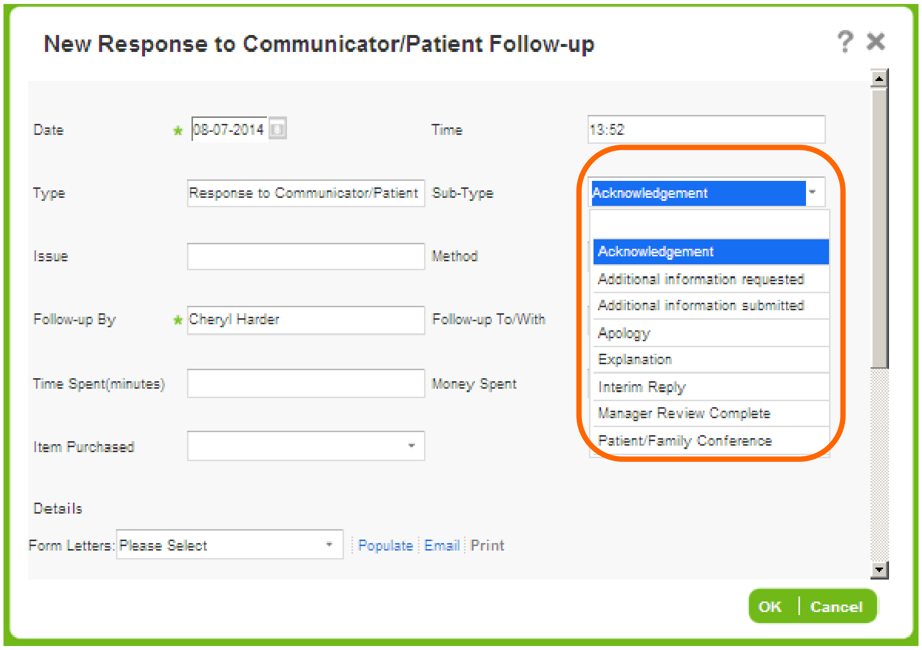


2. Click the **Add Follow-up** button at the top-left screen.



3. 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.

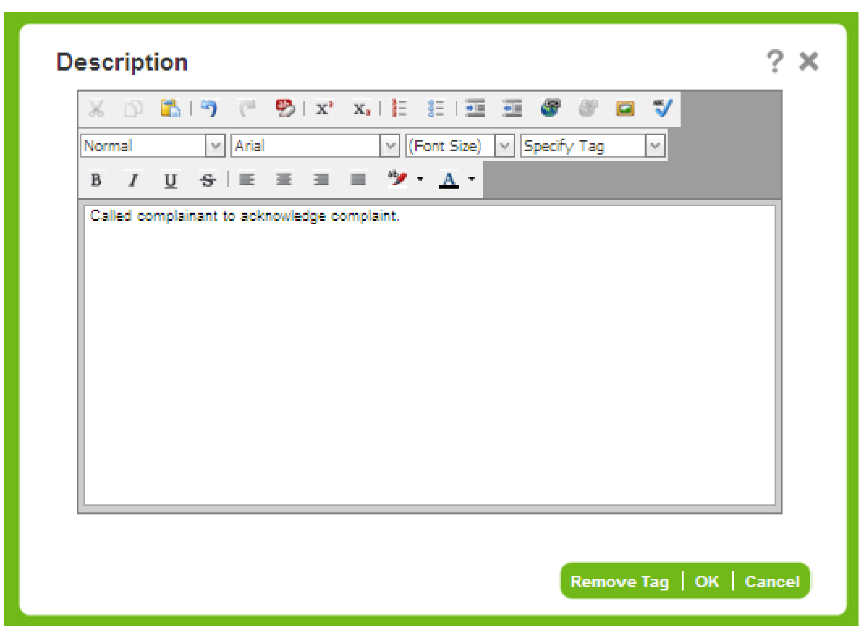


4. Select the date of this follow-up (today's date).

5. In the *Sub-Type* drop-down select the appropriate type of feedback response. In our example select **Acknowledgement**.

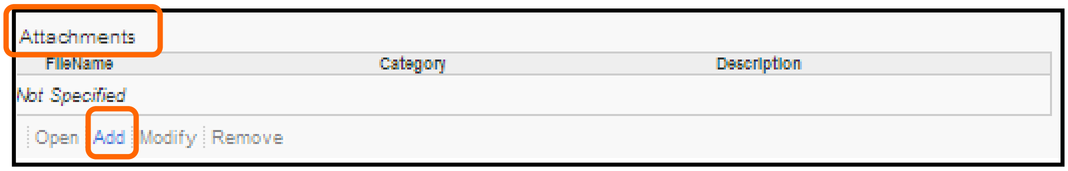
6. Scroll down to the *Details* section.

7. 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".



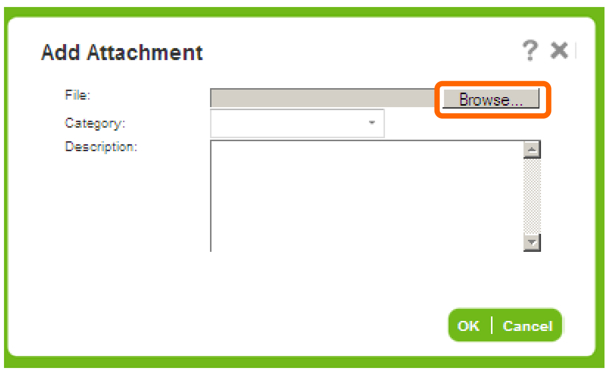
8. Click **OK** to close the Text Editor.
   The dialog box closes and you return to the New Response to Communicator/Patient Follow-up form.

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

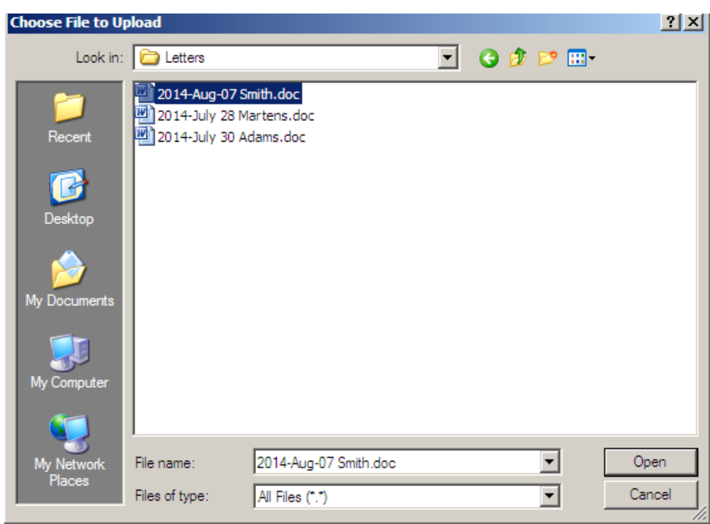


10. To attach a file to the form for reference, such as the follow-up letter that was sent to the complainant, click the **Add** action link in the *Attachments* section.

    The Add Attachment dialog box opens.

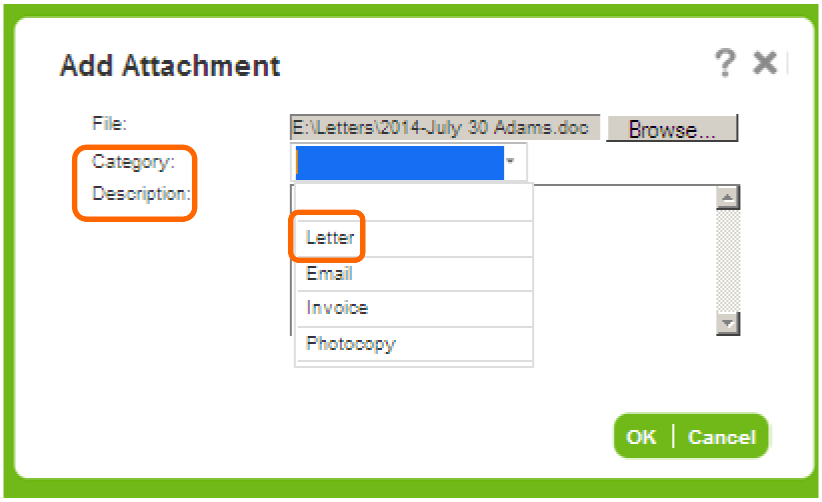


11. Click the **Browse** button.
    The Choose File to Upload dialog box opens.



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

13. In the *Category* drop-down select the appropriate option. In our example select **Letter**.



14. In the *Description* text box type a description of what you are attaching. In our example type the text "Letter to complainant".

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

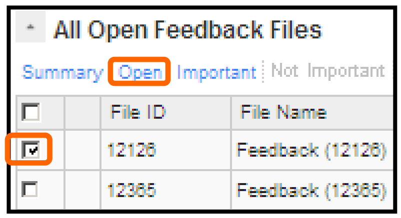
16. Click **OK** to close the *New Response to Communicator/Patient Follow-up* dialog box.

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. Ensure the file that you want to add follow-up to is open.

   a) Click the **Info Center**  icon.
   b) Select the desired file to open by clicking in the selection bubble before the file name.
   c) Click the **Open** link.



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

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.

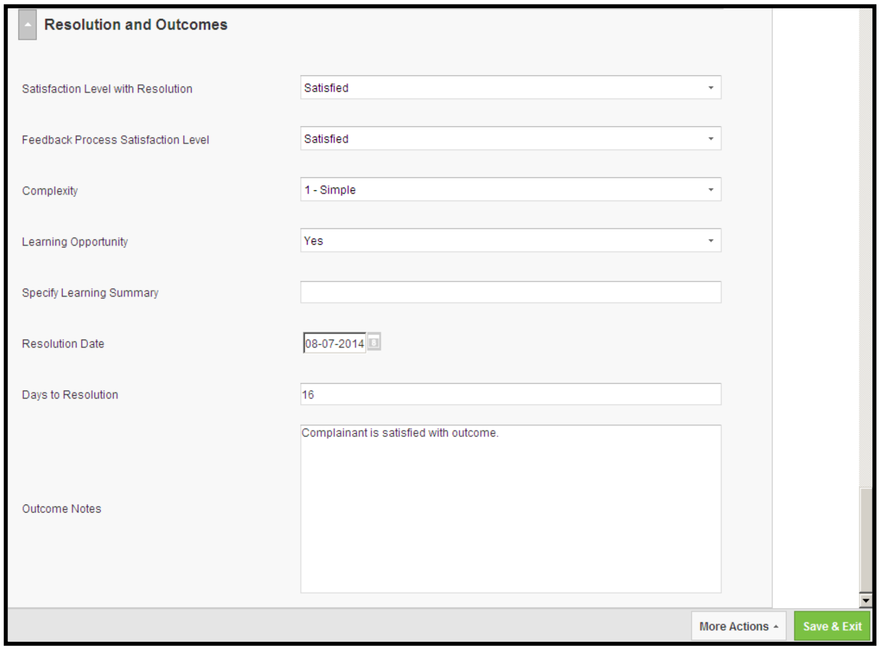
3. In the *Satisfaction Level with Resolution* drop-down select the appropriate option.

4. In the *Feedback Process Satisfaction Level* drop-down select the appropriate option.

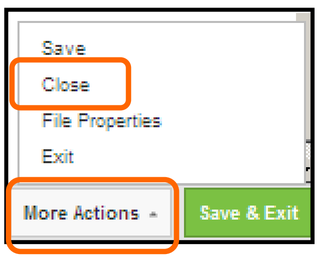
5. In the *Learning Opportunity* drop-down select the appropriate option.
   If you select *Yes*, the *Specify Learning Summary* text box appears where you can enter in the learning opportunity from your perspective.

6. In the *Resolution Date* drop-down select the appropriate date.

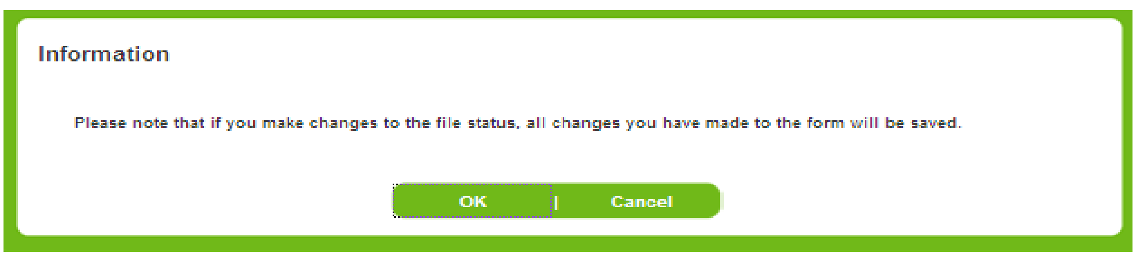
7. In the *Outcome Notes* text box enter in the appropriate notes. In our example, type "Letter was sent and complainant is satisfied with outcome".



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



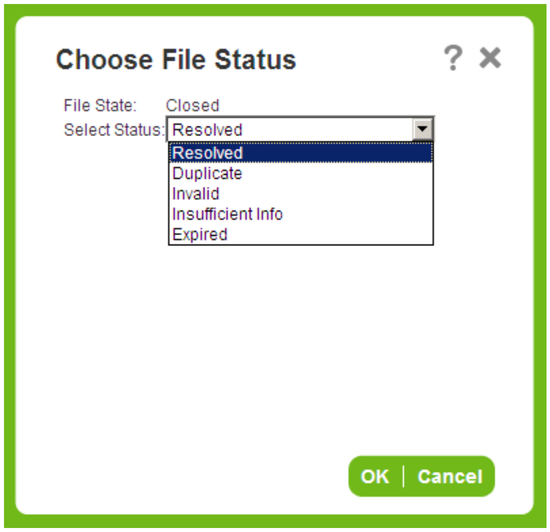
The *Information* dialog box opens.



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.

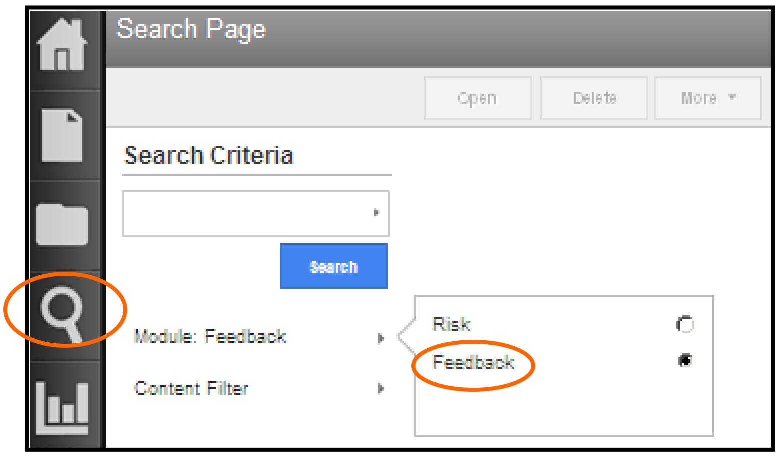
Status Type	Description
Resolved	The issue has been looked after.
Duplicate	The issue is a duplicate of one already entered into RL.
Invalid	The issue is not Feedback related.
Insufficient Info	Complainant did not leave adequate contact information so they cannot be contacted to find out details of the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

Note: After the file is closed it is not longer visible in the *Open Feedback Files* list. It you would like to view it you can do a Search to find it and then open it.

SEARCHING FOR FILES

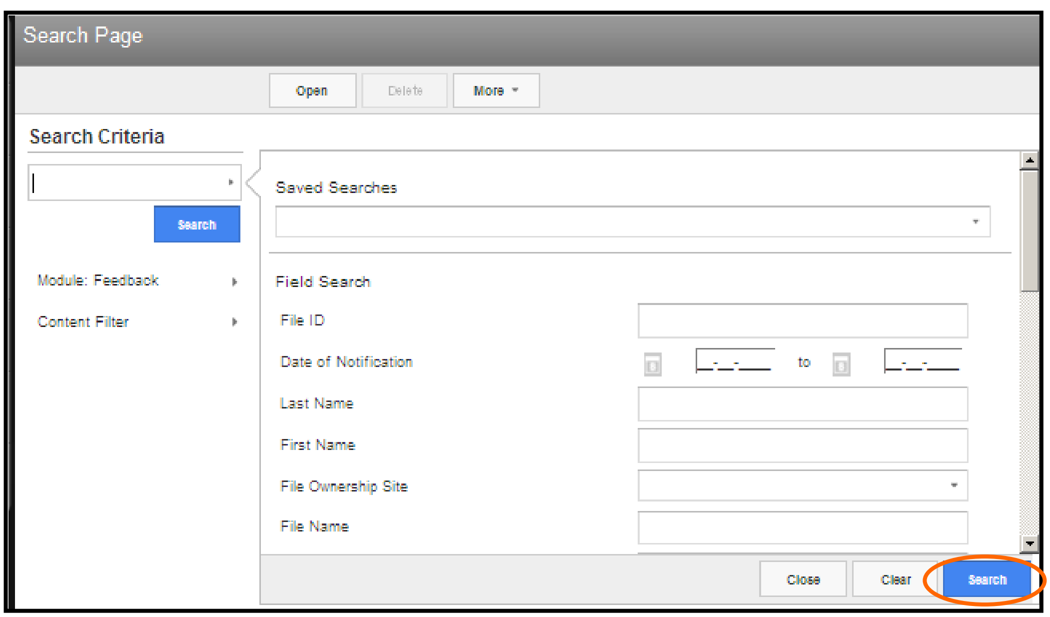
You can use the Search feature to search for file by specific search criteria.

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



2. Click the *Module* option and select **Feedback**.

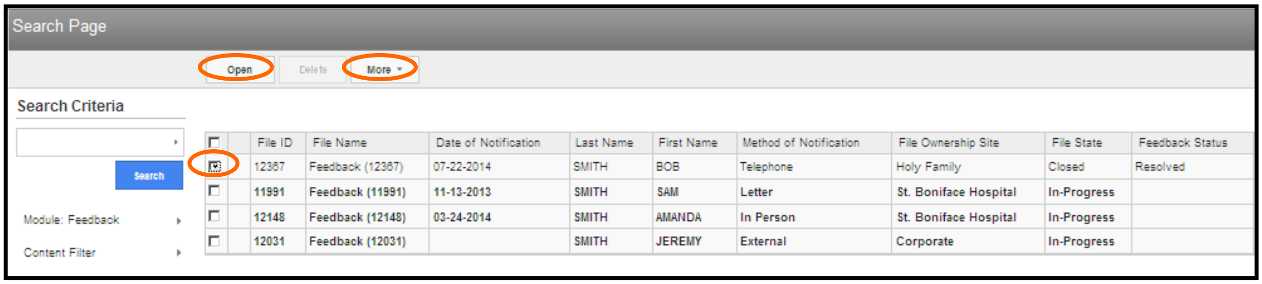
3. Click the *Search* arrow to expand the search criteria window.



4. Select the desired criteria (e.g. name, general event type, MRN) from the *Search* 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.



7. Select the **Open** or **More** button and select the desired option (open, view, close, email or print summary).

Quick Search

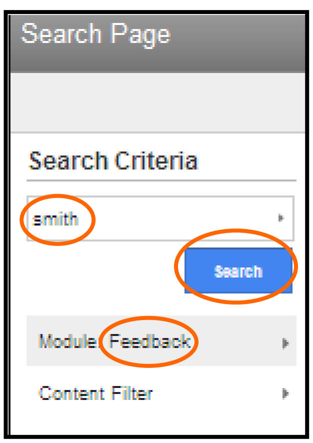
With a Quick Search you can enter search criteria without clicking the search arrow and entering the criteria in the search criteria window.

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

2. Enter the criteria you are search for in the text box, for example, “Smith”.

3. Click the *Module* option and select **Feedback**.

4. Click the **Search** button.



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 Christy Rogowski at 204-926-7171 to have it unlocked.