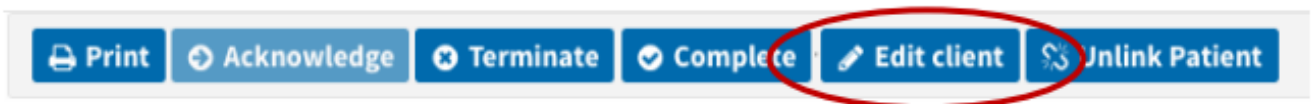
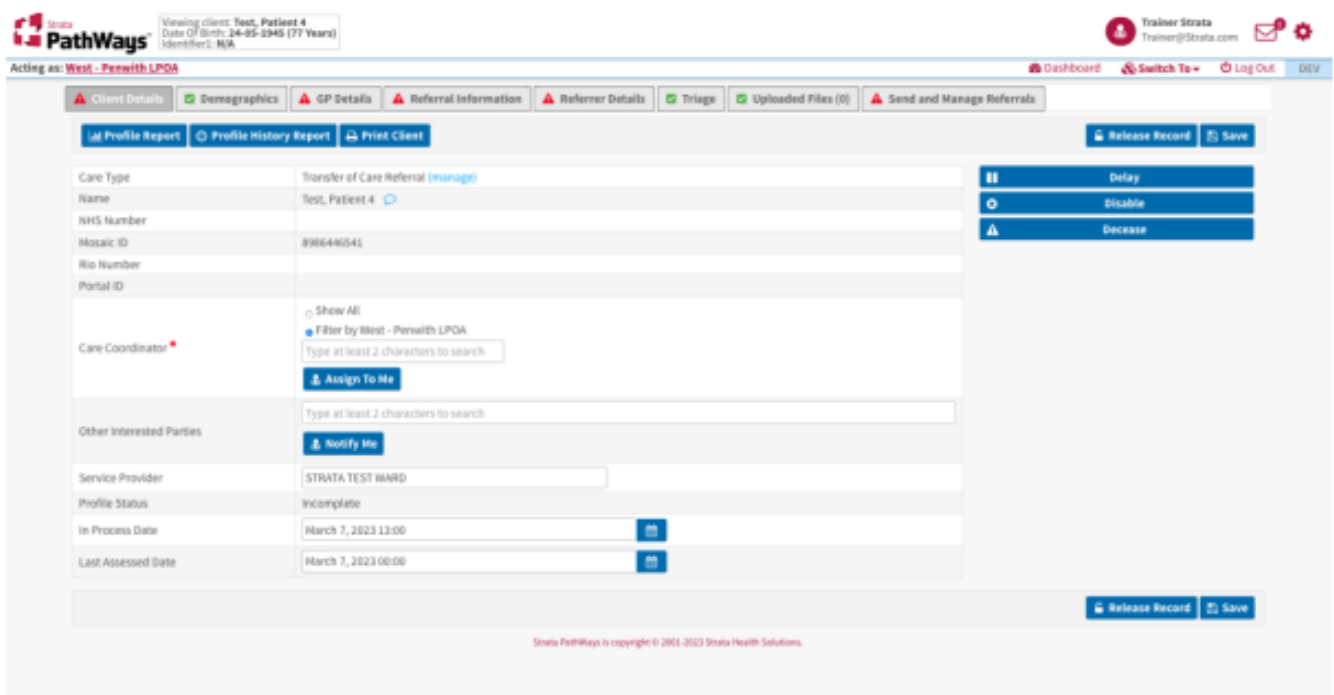


How to create a referral from a Service Request

To create a referral upon acknowledging this Request, click on the Edit Client button.



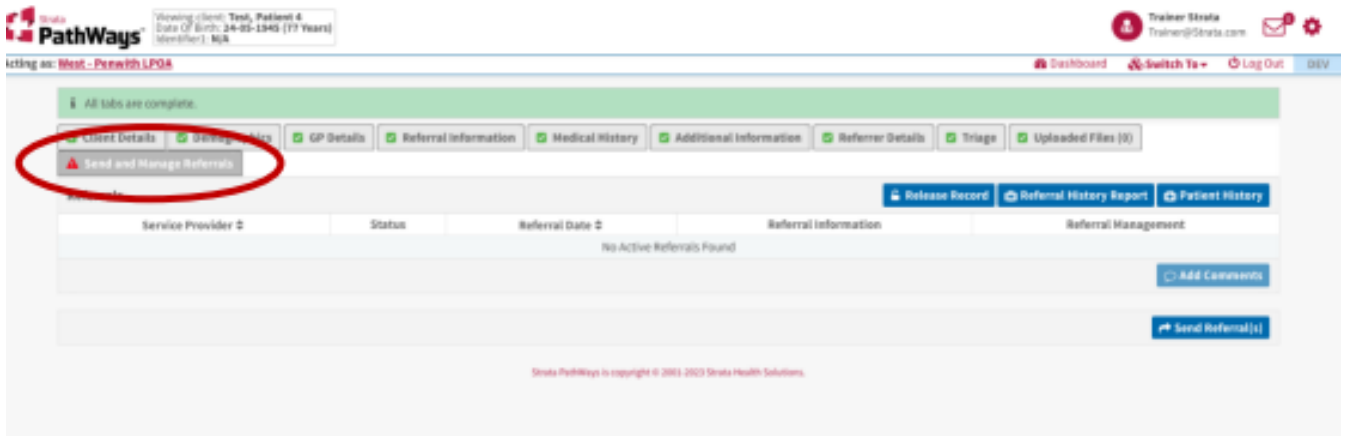
A referral form will load which has been pre-populated with the information sent through with the Request.

A screenshot of the Strata Pathways web application. The top navigation bar shows 'Acting as: West - Penwith LPOA' and 'Trainer Strata'. The main content area has several tabs: 'Client Details', 'Demographics', 'GP Details', 'Referral Information', 'Referrer Details', 'Triage', 'Uploaded Files (0)', and 'Send and Manage Referrals'. The 'Send and Manage Referrals' tab is active. Below the tabs is a form with various fields and buttons. The form includes a 'Profile Report' button, a 'Release Record' button, and a 'Save' button. The form fields include: 'Care Type' (Transfer of Care Referral), 'Name' (Test, Patient 4), 'NHS Number', 'Mosaic ID' (8986490541), 'Rio Number', 'Portal ID', 'Care Coordinator' (with a search box and 'Assign To Me' button), 'Other Interested Parties' (with a search box and 'Notify Me' button), 'Service Provider' (STRATA TEST WARD), 'Profile Status' (Incomplete), 'In Process Date' (March 7, 2023 13:00), and 'Last Assessed Date' (March 7, 2023 06:00). The bottom of the page has a copyright notice: 'Strata Pathways is copyright © 2001-2023 Strata Health Solutions.'

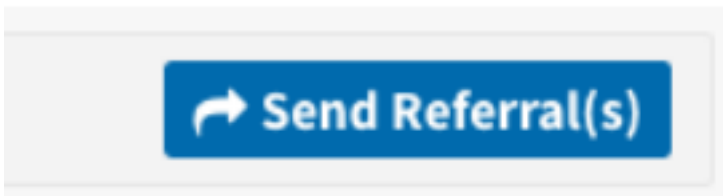
****Please note - the Triage tab is for view only purposes until the referral has been sent to and accepted by the ITOC hub. ****

Review each tab to confirm the information is complete, updating the current location on the Demographics page as necessary, until each tab displays with a green check.

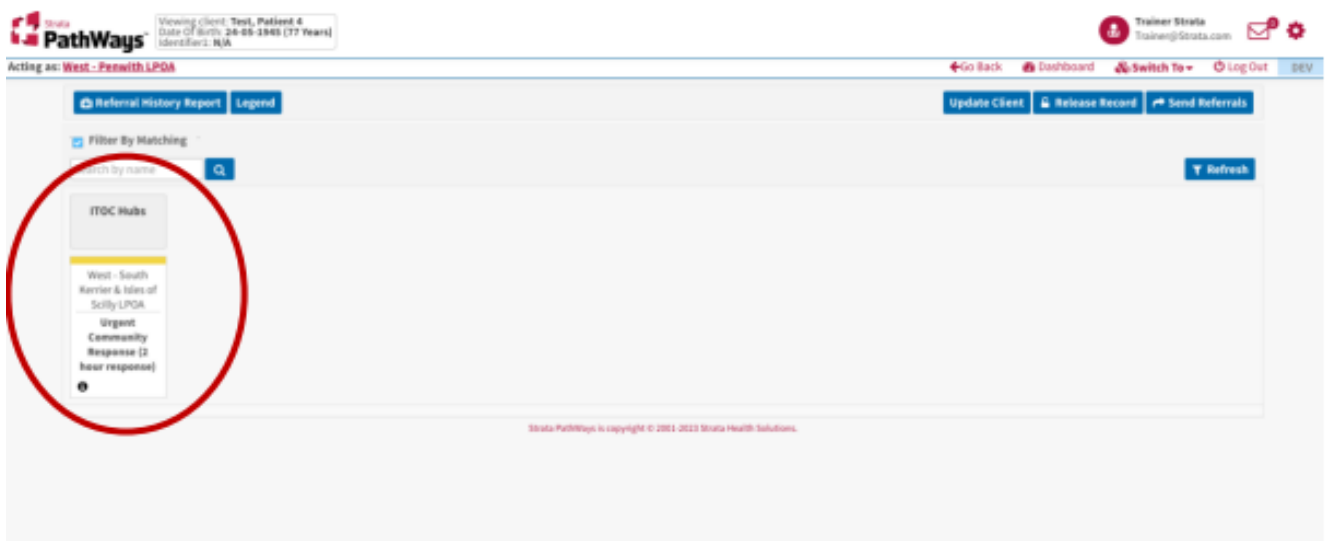
Click on the Send and Manage Referrals tab.



Click on Send Referrals.



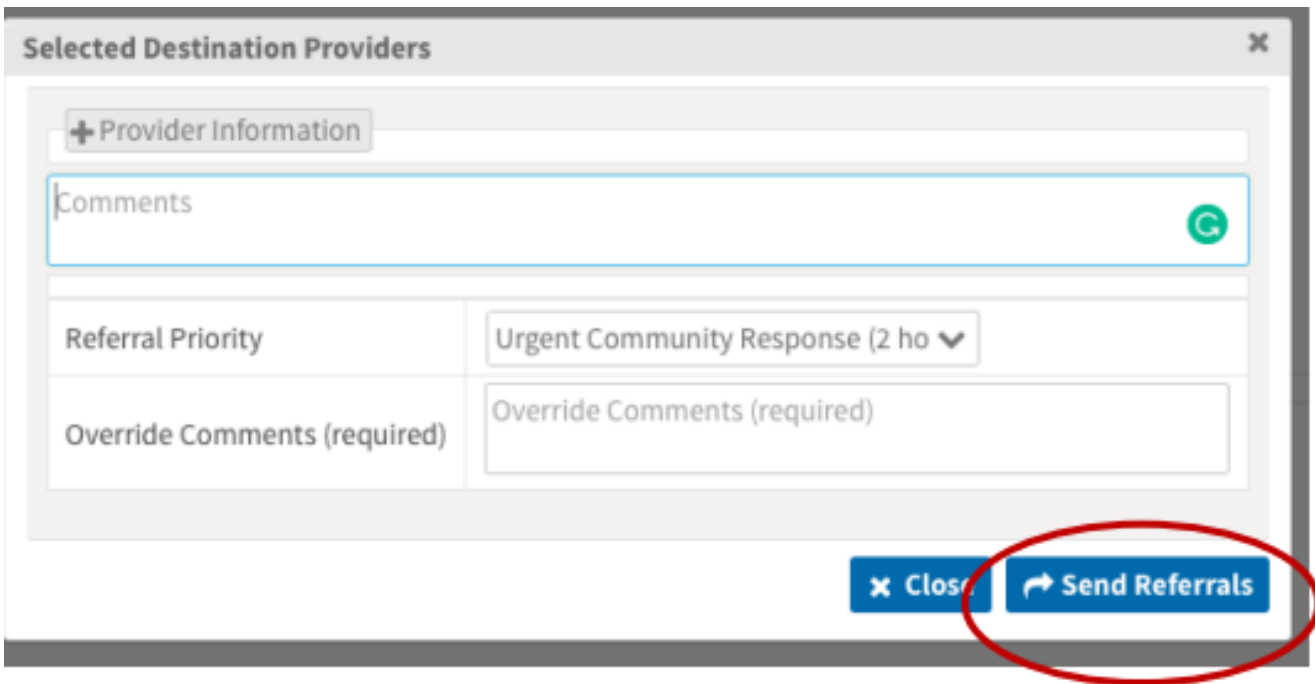
The Provider Menu will load and match to the appropriate ITOC hub



Click on the box, it will highlight blue, and then click on Send Referrals.



Confirm your selection in the window that opens by clicking on Send Referrals.



The referral has now been sent to the ITOC hub and is in a Pending status.

Viewing client: Test, Patient 4
Date Of Birth: 24-05-1945 (77 Years)
Identifier: N/A

Trainer Strata
Trainer@strata.com

Acting as: West - Penwith LPGA

All tabs are complete.

Client Details Demographics GP Details Referral Information Medical History Additional Information Referrer Details Triage Uploaded Files (0)

Send and Manage Referrals

Referrals

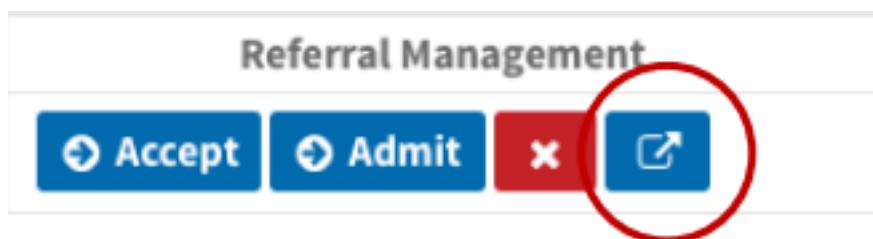
Service Provider	Status	Referral Priority	Referral Date	Referral Information	Referral Management
West - South Kerrier & Isles of Scilly LPGA	Pending	Urgent Community Response (2 hour response)	March 7, 2023 13:43	details Print	Accept Admit Cancel Add Comments

Send Referral(s)

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Now **add a comment** to the referral, using the speech bubble icon with, **“Original referral was a web-referral. RFI function should not be used.”**

Return to the hub dashboard by using the view referral icon at the end of the referral row.



The ITOCH triage process continues as normal from this stage.

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=340>