

# Strata IToCH SOP: Email Referral Processing V1.0

## Procedure overview

Describes how Integrated Care Area Transfer of Care Hubs (IToCHS) convert an emailed referral from GP practice to a Strata referral.

## Other (reference documentation)

N/A

## Requirements

Exceptional use only. Most referrals will come via

Strata Pathways

Strata Web referrals

Phone for urgent crisis response

Request for Information functionality should not be used

Email and attachments should be uploaded to referral

Comment must be created on original referral 'Email referral. Do not use RFI'

IToCHS should provide support to those GP practices emailing referrals. Practices will be encouraged to switch to Strata Pathways or the web-referral link

## Procedure

### Launch Strata Pathways

Access Strata Pathways via provided link

Login with your Strata issued username and password.

Click on the ASSESSMENT module icon.

Select your ITOCH from the Select a Vendor drop-down list.

### Client Search

Click on the Client Search tab.

Search for the Patient you wish to refer.

Select a Patient from the return list and click View or Import Client.

Or click on + New Client to add a patient who does not exist in PathWays or the PDS.

## **Referral Form**

Click on +Start New Referral across from Transfer of Care Referral for a new patient,

Click In Process to start a new referral for an existing patient.

The incomplete referral form will load.

Click on each tab to load the page,

Using information from the emailed referral, complete each page, until there is a green check in all but the last tab.

The red bannered fields are mandatory, you will not be able to continue until they are complete. If the information is unavailable and you deem essential to referral please contact the practice as normal (phone or email to generic practice inbox), else please enter dummy data to progress the referral.

## **Referral Information Page**

Upon selecting the type of referral, further conditional fields and tabs will display.

If it is an urgent crisis response referral (UCR), please call the GP practice and follow the SOP for handing 2 hour UCRs.

For other referral types, use information from the emailed referral to complete all tabs apart from the Triage tab which will be completed by the IToCH triager. If the information is unavailable and you deem essential to referral please contact the practice as normal (phone or email to generic practice inbox), else please enter dummy data to progress the referral.

Upload a copy of the email and attachment (Click on uploaded files, Click on +SelectFiles, Navigate to the required document, upload as many documents as necessary by clicking on +SelectFiles again)

## **Send and Manage referrals**

Click on Send Referral(s),

Select the appropriate ITOC Hub by clicking on the associated box,

Click on Send Referrals,

In the window that opens, select and attach uploaded documents and confirm your ITOCH selection by clicking on Send Referrals,

Now add a comment to the referral, using the speech bubble icon with, “Email referral. Do not use RFI”

The newly sent referral will display under the Referrals section,

A referral can be cancelled (withdrawn) by clicking on the red X.

A referral can be disabled (closed) on the Client Details page by clicking on the Disable button and completing the window that opens.

## **ITOCH Dashboard**

To view this referral on the ITOCH dashboard, click the View Referral icon on the far right side of the referral row.

The referral will display in a Pending status on the ITOCH dashboard.

Action the referral as per ITOCH process.

**NOTE** - The second field on the Triage page asks for the Method of Referral – at the time of writing, an option of ‘Email referral’ was still to be added. If it not an option, please leave blank.

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=355>