

Strata IToCH SOP: Handling urgent phone calls v2.0

Quick Reference Guide

Launch Strata PathWays

- Enter <https://cios.stratahealth.com> to access the Strata PathWays LIVE login screen.
- 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 (specific document available)

- 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.
- 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.

Referral Information Page

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

Triage Page

- This page is to be completed once this referral has been sent to and accepted by the ITOCH.


Uploaded Files

- To add any documents to this referral, Click on **Upload Files**.
- Click on **+Select Files**.
- Navigate to the required document,
- Upload as many documents as necessary by clicking on **+Select Files** 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**.
- 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- A referral can be cancelled (withdrawn) by clicking on the red X.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.

View Referral

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

ITOCH Dashboard

- 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**, this is where you capture the referral was received by phone.

Logout of Pathways

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=357>