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- A referral can be cancelled (withdrawn) by clicking on the red X.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 Referra**l 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