# How Referrers Use Comments in Strata PathWays V0.1

#### Section 1 - Comments Overview

Comments can be added against a specific referral or, on a group basis, by using the group comment button.

The TOC referral and the receiver service referral(s) are separate and independent referrals. Therefore, it is important to add comments to the appropriate referral(s).

Only the sender and receiver of a specific referral can see a comment unless the group comment button is used. This function allows a user to add a comment to both the ITOCH referral and the receiver servicers referral(s) simultaneously.

**Example:** If a referrer adds a comment to the TOC referral, only the ITOCH will see that comment. Once the ITOCH have triaged a referral and it is sent to a receiver service(s), the referrer is able to add a comment to a receiver service referral individually or as a group comment for both the ITOCH and receiver service(s) to review.

COMMENTS ADDED ON	COMMENTS VIEWABLE BY		
	Referrers	ITOCH	Receivers
ITOCH Referral - Active Referrals Dashboard - Via the group comment button	Y	Y	N
	Y	Y	Y
Receiver Service Referral - Active Referrals Dashboard - Via the group comment button	Y	N	Y
	Y	Y	Y

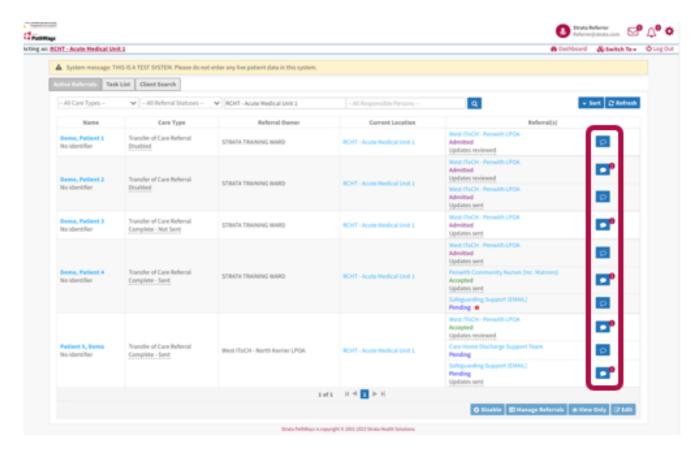
## **Section 2 – Adding Comments**

Referrers can add and review comments to a referral from both their Active Referrals Dashboard and from within the referral form, on the Send and Manage Referrals tab.

- 1. For both processes, first enter the **Assessment Module** and select a **Vendor** to act on behalf of.
- 2. The Active Referrals Dashboard will load.

### **Active Referrals Dashboard**

1. To add a comment to a specific referral from the Active Referrals Dashboard, click on the **speech bubble icon**, in the far right column, **associated with that referral**.



**Note** - A comment meant for the ITOCH must align with the speech bubble associated with the ITOCH referral.

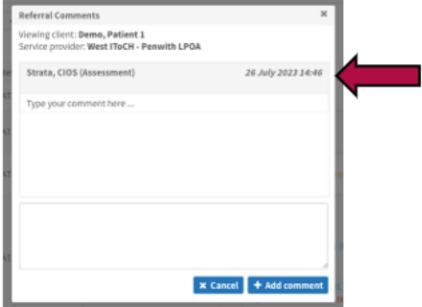




2. Type your comment in the window that opens. Then click **+Add Comment**.



3. Comments will be stacked in date order and will display with the name of who sent each comment.



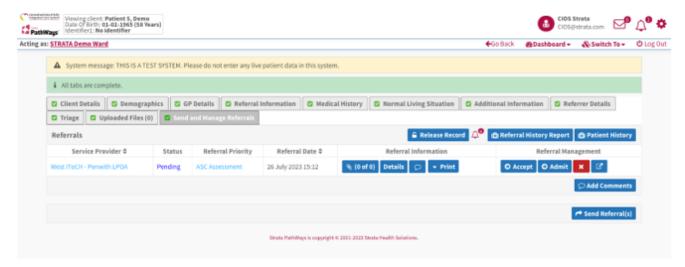
- 4. Once finished, click the X in the top right corner to close the window.
- 5. After adding a comment, the speech bubble will display as opaque to indicate a comment has been added.



6. There will also be an "Updates Sent" notice under the status.



1. To add a comment while you are within the referral form, this can be done on the **Send and Manage Referrals tab**.



2. From this tab there are two ways to add a comment. By adding comments to individual referrals **or** by group comments to more than one referral at a time.

#### **Comments to Individual Referrals**

1. By using the **speech bubble** icon within a referral row, a comment will be added to that specific referral.



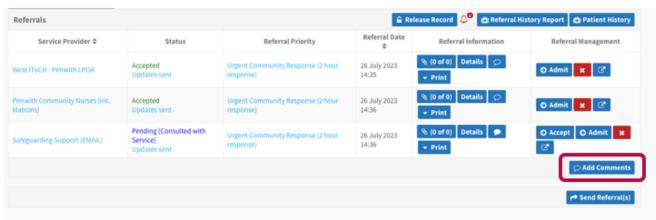
2. To do this, click on the icon and add a comment into the window that opens and click +Add Comment.



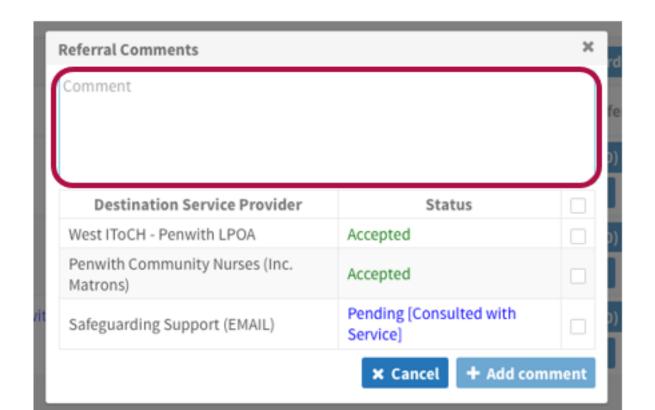
3. The speech bubble will turn opaque to indicate there is a comment added



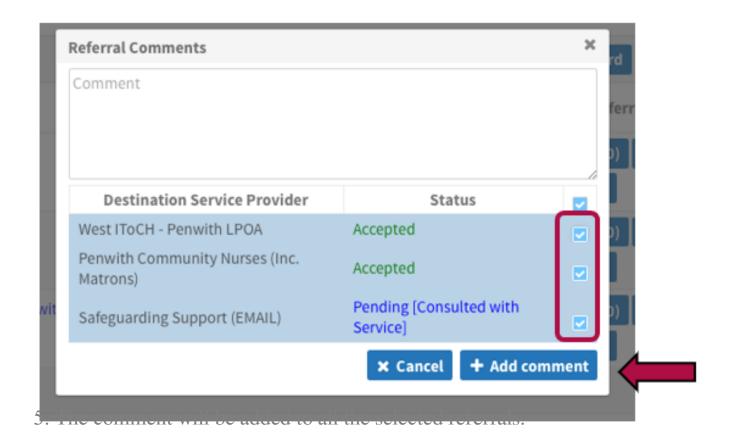
- 1. The other way to add a comment is to use the group **Add Comments button**. Using this button will allow you to add a comment to more than one referral simultaneously.
- \*\*Use this button when the ITOCH and a receiver service require visibility of a comment\*\*



- 2. To do this, click on the **Add** comments button.
- 3. Add a comment into the window that opens.



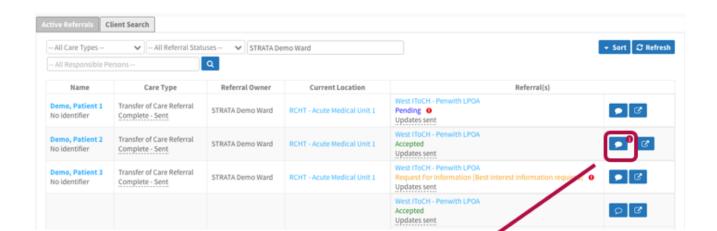
4. Then put a tick in each box associated with the referral you would like to send this comment to and click **+Add Comment**.



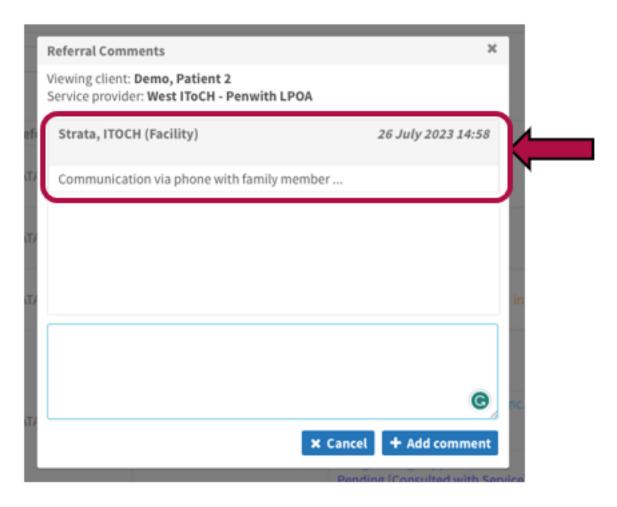
NOTE – It is advisable to always use the +Add Comment button so the ITOCH have access to all communication between referrers and receivers.

## **Section 3 – Reviewing Comments**

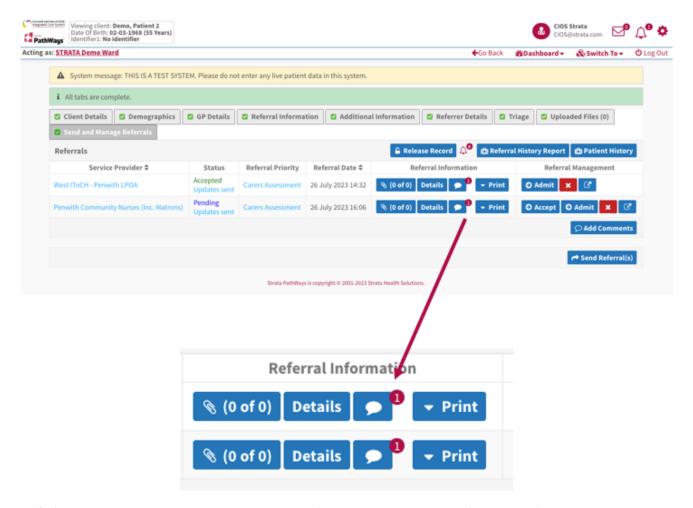
- 1. When a comment is added to a referral by someone other than yourself, the speech bubble will denote with a number.
  - 2. From the Active Referrals dashboard it will display like this,



- 3. To review the comment, click on the speech bubble icon.
- 4. Comments added by others will be listed in date order with the name of who sent it clearly labelled.



5. From the referral form a comment will, likewise, be denoted with a number to indicate the number of comments added by others that are waiting for your review.



6. Click on the speech bubble to review the comment in the window that opens. Once you have reviewed a comment made by another team member, the number against the speech bubble will disappear.



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