

# How Referrers Use Comments in Strata PathWays V0.1

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## 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 services 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	Y	Y	N
- Via the group comment button	Y	Y	Y
Receiver Service Referral			
- Active Referrals Dashboard	Y	N	Y
- Via the group comment button	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**.

System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.

Active Referrals Task List Client Search

-- All Care Types -- -- All Referral Statuses -- RCHT - Acute Medical Unit 1 -- All Responsible Persons --



Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 1 No identifier	Transfer of Care Referral Disabled	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Admitted Updates reviewed
Demo, Patient 2 No identifier	Transfer of Care Referral Disabled	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Admitted Updates reviewed
Demo, Patient 3 No identifier	Transfer of Care Referral Complete - Not Sent	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Admitted Updates sent
Demo, Patient 4 No identifier	Transfer of Care Referral Complete - Sent	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Admitted Updates sent
Demo, Patient 5 No identifier	Transfer of Care Referral Complete - Sent	West IToCH - North Kerrier LPOA	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Accepted Updates sent
				Penwith Community Nurses (Inc. Matrons) Accepted Updates sent
				Safeguarding Support (EMAIL) Pending
				West IToCH - Penwith LPOA Accepted Updates reviewed
				Care Home Discharge Support Team Pending
				Safeguarding Support (EMAIL) Pending
				Updates sent

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Disable Manage Referrals View Only Edit

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

Demo, Patient 2 No identifier	Transfer of Care Referral Complete - Sent	West IToCH - North Kerrier LPOA	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Accepted Updates sent	
				Penwith Community Nurses (Inc. Matrons) Pending Updates sent	

A comment meant for the Receiver Service must align with the speech bubble associated with Receiver Service referral.

Demo, Patient 2 No identifier	Transfer of Care Referral Complete - Sent	West IToCH - North Kerrier LPOA	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Accepted Updates sent	
				Penwith Community Nurses (Inc. Matrons) Pending Updates sent	

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

The screenshot shows a software window titled "Referral Comments" with a close button (X) in the top right corner. Below the title bar, it displays "Viewing client: Demo, Patient 1" and "Service provider: West ITech - Penwith LPOA". A message box states "There are no referral comments." Below this is a large text input area with the placeholder text "Type your comment here ...". A red rectangular box highlights this input area. To the right of the input area is a green circular button with a plus sign. A large red arrow points from the right towards this green button. At the bottom of the window are two buttons: "Cancel" and "Add comment".

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



Referral Comments

Viewing client: Demo, Patient 1  
Service provider: West IToCH - Penwith LPOA

Strata, CIO5 (Assessment) 26 July 2023 14:46

Type your comment here ...

Cancel Add 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.

Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 1 No identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Pending Updates sent

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



West IToCH - Penwith LPOA  
Pending  
Updates sent

Send and Manage Referrals Tab

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

Viewing client: **Patient 5, Demo**  
Date Of Birth: 01-02-1965 (58 Years)  
Identifier: No Identifier

Acting as: **STRATA Demo Ward**

System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.

All tabs are complete.

Client Details Demographics GP Details Referral Information Medical History Normal Living Situation 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 IToCH - Penwith LPOA	Pending	ASC Assessment	26 July 2023 15:12	(0 of 0) Details Print	Accept Admit Add Comments

Send Referral(s)

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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.

Referrals

Service Provider	Status	Referral Priority	Referral Date	Referral Information	Referral Management
West IToCH - Penwith LPOA	Pending	ASC Assessment	26 July 2023 15:12	(0 of 0) Details  Print	Accept Admit Add Comments

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

Referral Comments

Viewing client: **Patient 5, Demo**  
Service provider: **West IToCH - Penwith LPOA**

There are no referral comments.

+Add Comment

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

Referrals						Release Record	Referral History Report	Patient History
Service Provider	Status	Referral Priority	Referral Date	Referral Information		Referral Management		
West IToCH - Penwith LPOA	Pending Updates sent	ASC Assessment	26 July 2023 15:12	(0 of 0)	Details	Print	Accept	Admit
						Add Comments		

## Group Comments

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\*\***

Referrals						Release Record	Referral History Report	Patient History
Service Provider	Status	Referral Priority	Referral Date	Referral Information		Referral Management		
West IToCH - Penwith LPOA	Accepted Updates sent	Urgent Community Response (2 hour response)	26 July 2023 14:35	(0 of 0)	Details	Print	Admit	
Penwith Community Nurses (Inc. Matrons)	Accepted Updates sent	Urgent Community Response (2 hour response)	26 July 2023 14:36	(0 of 0)	Details	Print	Admit	
Safeguarding Support (EMAIL)	Pending [Consulted with Service] Updates sent	Urgent Community Response (2 hour response)	26 July 2023 14:36	(0 of 0)	Details	Print	Accept	Admit
						Add Comments		
						Send Referral(s)		

2. To do this, click on the **Add comments** button.

3. Add a comment into the window that opens.

### Referral Comments

Comment

Destination Service Provider	Status	
West IToCH - Penwith LPOA	Accepted	<input type="checkbox"/>
Penwith Community Nurses (Inc. Matrons)	Accepted	<input type="checkbox"/>
Safeguarding Support (EMAIL)	Pending [Consulted with Service]	<input type="checkbox"/>

Cancel

Add comment



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

**Referral Comments**

Comment

Destination Service Provider	Status	
West IToCH - Penwith LPOA	Accepted	<input checked="" type="checkbox"/>
Penwith Community Nurses (Inc. Matrons)	Accepted	<input checked="" type="checkbox"/>
Safeguarding Support (EMAIL)	Pending [Consulted with Service]	<input checked="" type="checkbox"/>

**Cancel** **+ Add comment**

5. The comment will be added to all the selected referrals.

**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,

Active Referrals

Client Search

-- All Care Types --

-- All Referral Statuses --

STRATA Demo Ward

Sort

Refresh

-- All Responsible Persons --

Q

Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 1 No Identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	<div>West IToCH - Penwith LPOA</div> <div>Pending 1</div> <div>Updates sent</div> <div> </div>
Demo, Patient 2 No Identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	<div>West IToCH - Penwith LPOA</div> <div>Accepted</div> <div>Updates sent</div> <div> </div>
Demo, Patient 3 No Identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	<div>West IToCH - Penwith LPOA</div> <div>Request For Information [Best interest information required] 1</div> <div>Updates sent</div> <div> </div>
				<div>West IToCH - Penwith LPOA</div> <div>Accepted</div> <div>Updates sent</div> <div> </div>

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.

**Referral Comments** [X]

Viewing client: **Demo, Patient 2**  
Service provider: **West IToCH - Penwith LPOA**

**Strata, ITOCH (Facility)** *26 July 2023 14:58*

Communication via phone with family member ...

[X] Cancel [ + Add comment

Pending (Consulted with Service

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.

Viewing client: **Demo, Patient 2**  
 Date Of Birth: 02-03-1968 (55 Years)  
 Identifier 1: No Identifier

Acting as: **STRATA Demo Ward**



System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.

All tabs are complete.

Client Details Demographics GP Details Referral Information 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 ITtoCH - Penwith LPOA	Accepted Updates sent	Carers Assessment	26 July 2023 14:32	(0 of 0) Details  Print	Admit X
Penwith Community Nurses (Inc. Matrons)	Pending Updates sent	Carers Assessment	26 July 2023 16:06	(0 of 0) Details  Print	Accept Admit X

Add Comments

Send Referral(s)

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Referral Information

(0 of 0)	Details		Print
(0 of 0)	Details		Print

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.

Do not enter any live patient data in this system.

### Referral Comments

Viewing client: **Demo, Patient 2**  
Service provider: **West ITOCH - Penwith LPOA**

Strata, ITOCH (Facility)	26 July 2023 16:05
Comment added by ITOCH	
Strata, ITOCH (Facility)	26 July 2023 14:58
Communication via phone with family member ...	

✕ Cancel + Add comment

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=371>