# How ITOCH Use Comments in Strata PathWays V0.1

#### **Section 1 – Comments Overview**

Comments can be added against an individual 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. Only the sender and receiver of a specific referral can see a comment. However, the group comment button can be used as a short cut to allow a user to add a comment to both the TOC referral and the receiver service referral(s) simultaneously. Therefore, it is important to be aware of who a comment is intended for and to add it to the appropriate referral(s).

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

Note: If a referrer adds a comment to the TOC referral (or vice versa), the receiver service will not see it. It will be up to the ITOCH to communicate the comment to the receiver, if relevant.

	COMMENTS VIEWABLE BY					
COMMENTS ADDED ON	Referrers	ITOCH Dashboard	ITOCH via Assessment Module*	Receivers		
ITOCH Referrals Dashboard - Comments tab	Y	Y	Y	N		
Send and Manage Referrals tab - Receiver Service Referral - Via the group comment button	Y Y	N Y	Y Y	Y Y		
Active Referrals Dashboard - Receiver Service Referral - TOC Referral	Y Y	N Y	Y Y	Y N		

\*Assessment Module = Send & Manage Referrals Tab and Active Referrals Dashboard.

# **Section 2 – Adding Comments**

Comments added on the Comments tab of the ITOCH dashboard, are visible between the ITOCH and the referrer only.

If a comment is intended for a receiver service it must be made on the Send and Manage Referrals tab or the Active Referrals Dashboard.

A view of all referrals and their comments (referrers, ITOCHs, receivers) is visible from the Active Referrals Dashboard within the Assessment Module.

This section will review the three ways in which ITOCH can add and review comments against a referral(s).

- 1) From the Comments tab.
- 2) From the Send and Manage Referrals tab.
- 3) From the Active Referrals Dashboard.

# **Comments Tab**

Note - Comments added to the Comments tab, are visible by the referrer only.

Enter the Service Provider module and select a Vendor to act on behalf of.
 To add a comment, open the referral and click on the Comments tab.



#### 1. Click on the + Add Comments button

1	Viewing client: Demo, Patient 1 Date Of Birth: 03-04-1969 (54 Years) Identifier1: No identifier	CIOS Strat CIOS Strat	ta.com	¢ <b>° ≎</b>
A	ting as: West IToCH - Penwith LPOA Viewin	g: Referrals 👻 😰 Dashboard 👻 🖧	Switch To 🕶	😃 Log Out
	Sort Status: 4 selected V Updates: All Pr	iority: V C Apply Filters Search refer	rals Q	Advanced
	2 View more referrals	▲ System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.		
PEN	Demo, Patient 1 Non-Urgent / (H Team) Routine Community Response	→ Print & Assign → Edit client O Accept O Admit C <sup>*</sup> Redirect O Deny O Request For Information		<b>0</b>
	From: STRATA Demo Ward Transfer of Care Referral: 26 July 2023 (0 day )	Updates Details Matching Profile Clinical Profile Comments (1) Attachments (0)		
	Referral Updated: 26 July 2023 17:02	+ Add comment		
		Strata, CIOS (Assessment)	26 July 202	23 17:02
		Patient family communication via phone detailed for team discussion.		
		Strata PathWays is copyright © 2001-2023 Strata Health Solutions.		

2. Type your comment in the window that opens, then Click +Add.

Add comment	×
Type your comment here	
	× Cancel + Add

3. The comment will be added to the list of comments and display in date/time order.

Updates Details Matching Profile	Clinical Profile	Comments (2)	Attachments (0)
+ Add comment			
Strata, CIOS (Facility)			26 July 2023 17:42
Patient's family requests have been revi	ewed.		
Strata, CIOS (Assessment)			26 July 2023 17:02
Patient family communication via phone	e detailed for team d	liscussion.	
	Strata PathWay	s is copyright © 2001-202	23 Strata Health Solutions.

## Send and Manage Referrals Tab

Note - Comments on the Send and Manage tab can be made to individual receiver services OR as a group to include all the receiver services.

#### **Individual Comments**

1. Comments can be added within the referral, on the Send and Manage Referrals tab, by using the Edit Client function.

2. To do so, open the referral and click on the **Edit Client** button.

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2 View more referrals	▲ System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.	
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	© Referral History R Referral History R	
	Strates Changed to Medical Initizery Strate, ClOS Normal Living Situation Additional Information	26 July 2023 17:50
	Referrer Details	
	Strata, CIOS Uphaded Files Send and Manage Referrals Patient's family research Nove Them requested.	26 July 2023 17:42
	<ul> <li>Sender Comment Addad</li> </ul>	
	Strata, CIOS	26 July 2023 17:02
	Patient family communication via phone detailed for team discussion.	
	Last update reviewed by Strata, CIOS on 26 July 2023 17:18	
	Simata Pathilikeyn in copyright © 2000-2003 Simata Health Solutions.	

3. Then click on Send and Manage Referrals.

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	Client Details			ł
1	Demographics			Ē
ļ	GP Details			
	Referral Information			
2	Medical History			
	Normal Living Situation	1		
	Additional Information			
	Referrer Details			
1	Triage			
	Uploaded Files			
4	Send and Manage Refer	Send and Mana	ge Referrals	s tab v

5. To send a comment to a specific receiver service, click on the speech bubble icon in line with that receiver service's referral.

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					C Send Referral(s)
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6. Add your comment to the window that opens and click +Add comment.

Referral Comments	×
Viewing client: Patient 5, Demo Service provider: Care Home Discharge Support Team	
There are no referral comments.	
Add your comment here	
	- 10
🗙 Cancel 🕇 Add come	ment

7. The comment will become visible to the Receiver service and the speech bubble will turn opaque.



#### **Group Comments**

1. To add a comment to multiple referrals at the same time, click on the group **+Add Comments** button above the Send Referrals button.

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2. Add your comment to the text box in the window that opens.

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**Note** - By including the ITOCH in the group comment, this comment will display on the ITOCH Referrals dashboard.

## **Active Referrals Dashboard**

Note – Comments by all teams (referrers, ITOCH, receivers) are visible on the Active Referrals Dashboard.

- In order for patients to display on the ITOCH Active Referrals Dashboard (Assessment Module), the ITOCH must first change the Referral Owner on the Client Details tab within the referral.
- 2. This is done by opening the referral and clicking on the **Edit Client** button.



3. Click on Client Details.

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	Additional Information		
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	Triage		
	Uploaded Files		
d by	Send and Manage Referrals		23 10
	Strata Path	Ways is copyrig	ht © 2001

4. Scroll down the page to the **Service Provider** field and delete the location that is listed.

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1 All tabs are complete. You may visit 5	nd and Manage Referrals, tab	
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Send and Hanage Referrals		
ial Profile Report O Profile Note	s Report & Print Client	🔶 Back To Referral 🔒 Release Record 🖾 Save 🖉
( and an		
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	Pype at least 2 characters to search	
Other Interested Parties	& Nuclity Me	
Service Provider	STRATA Demo Ward United Kingdom	
Profile Status	Complete - Sent	
In Process Date	26 July 2023 15:58	
I art dependent Ports	No. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.	

5. Begin to type the name of your ITOCH, the system will display possible options for you to select. **Select your ITOCH** by clicking on the name.

	Type at least 2 characters to search				
Other Interested Parties	🍰 Notify Me				
Service Provider	[ТТОСН]				
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	West IToCH - Penwith LPOA				
	West IToCH - South Kerrier & Isles of Scilly LPOA				

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#### 6. Click Save.

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7. To view this referral on the Active Referrals Dashboard, click on **Dashboard** on the top right of the screen, then click on **Assessment Dashboard** from the drop-down list.



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System message	THIS IS A TEST SYSTEM. Plea	se do not enter any live patient data in	this system.		
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heme, Patient 4 No identifier	Transfer of Care Referral Complete - Sent	West IToCH - North Kerrier LPGA	ROIT - Acute Medical Unit 1	Penaith Community Nurses (Inc. Matrons) Accepted Updates sent	0 8
				Safeguarding Support (ENNL) Pending (Consulted with Service) Updates sent	••
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9. To add a comment to a specific referral, click on the **speech bubble** associated with a referral, under the Referrals column.

Referral(s)	
West IToCH - Penwith LPOA Accepted Updates sent	• •
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Penwith Community Nurses (Inc. Matrons) Pending O Updates sent	▶ ♂
West IToCH - Penwith LPOA Request For Information [Best interest information required] Updates sent	• C
West IToCH - Penwith LPOA Accepted Updates reviewed	0 B
Penwith Community Nurses (Inc. Matrons) Accepted Updates sent	<b>•</b>
Safeguarding Support (EMAIL) Pending [Consulted with Service]  Updates sent	• •

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

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e	Viewing client: Demo, Patient 4 Service provider: Penwith Community Nurses (In	ic. Matrons)	
N	Strata, Receiver (Facility)	27 July 2023 10:3	15
	Please provide Insulin RX		
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12. To return to the ITOCH dashboard, click on the Switch to button on the top right hand side of the screen, select Service Provider.



13. Then select your Vendor.

#### **Section 3 – Reviewing Comments**

Note: If a referrer adds a comment to the TOC referral, the receiver service will not see it. It will be up to the ITOCH to communicate the comment to the receiver, if relevant.

#### **ITOCH Referrals Dashboard**



- 1. To view the comment, open the referral.
- 2. Click on the Comments tab.



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3. A comment will display with the name of the person who sent it and a date and time stamp.

4. Once you have reviewed the comment, mark that you have done so by clicking on the blue **Reviewed** button.



# Send and Manage Referrals Tab

Note – Comments from Receivers will only display in the speech bubble associated with their referral.

1. From the referral form, the speech bubble will be denoted with a number to indicate the number of comments added by others which are waiting for your review.

a STRATA Demo Ward				<b>€</b> Go Ba	ck 🔹 🕸 Dashboard 🕶	🗞 Switch To 👻 🤇
A System message: THIS IS A TEST SYST	EM. Please do no	t enter any live patient	t data in this system.			
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Service Provider \$	Status	Referral Priority	Referral Date 🕏	Referral Information	Referr	al Management
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2. Click on the speech bubble to review the comment. Once you have reviewed a comment made by another team member, the number against the speech bubble will disappear.

## **Active Referrals Dashboard**

Note – Comments from Receivers will only display in the speech bubble associated with their referral.

1. When viewing comments from the Active Referrals Dashboard, they will display under the Referral column.

2. When a comment is added to a referral, by someone other than yourself, the speech bubble will denote with a number.

Nama	Care Ture	Deferrel Owner	Current Location	Before Val	
Demo, Patient 1 lo identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Pending O Updates sent	• 3
Demo, Patient 2 Io identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	West ITOCH - Penwith LPDA Accepted Updates sent	
Demo, Patient 3 Io identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	West ITOCH - Penwith LPOA Request For Information [Best interest information equired] Updates sent	• 6
				West IToCH - Penwith LPOA Accepted Updates sent	D G

3. To review the comment, click on the speech bubble icon.

4. Comments will be listed in date order with the name of who sent it clearly labelled.

ľ	Referral Comments X	
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ſ	Strata, ITOCH (Facility) 26 July 2023 14:58	
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5. Once a comment has been read the number denoting the comment will disappear.

Online URL: <u>https://elearning.cornwall.nhs.uk/site/kb/article.php?id=372</u>