

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 ADDED ON	COMMENTS VIEWABLE BY			
	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	Y	N	Y	Y
- Via the group comment button	Y	Y	Y	Y
Active Referrals Dashboard - Receiver Service Referral	Y	N	Y	Y
- TOC Referral	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.

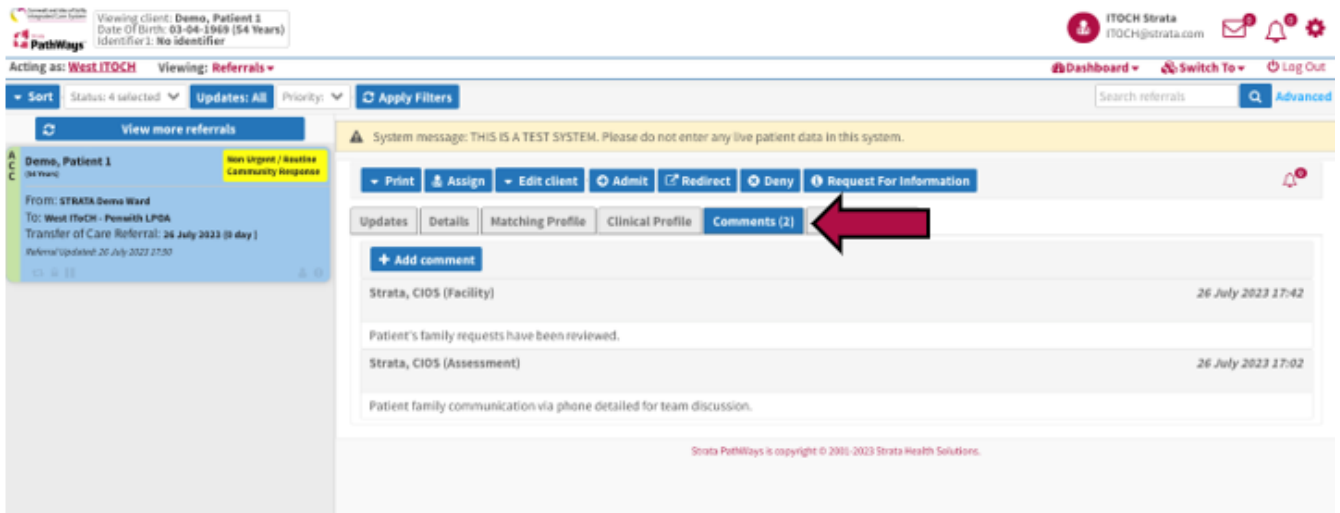
This section will review the three ways in which ITOCH can add and review comments against a referral(s).

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

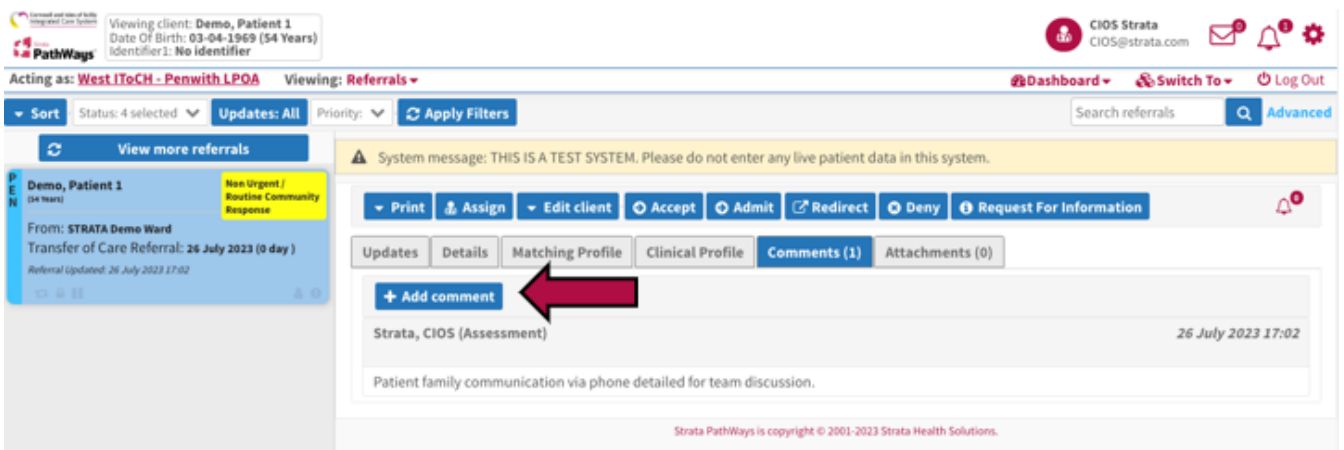
Comments Tab

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

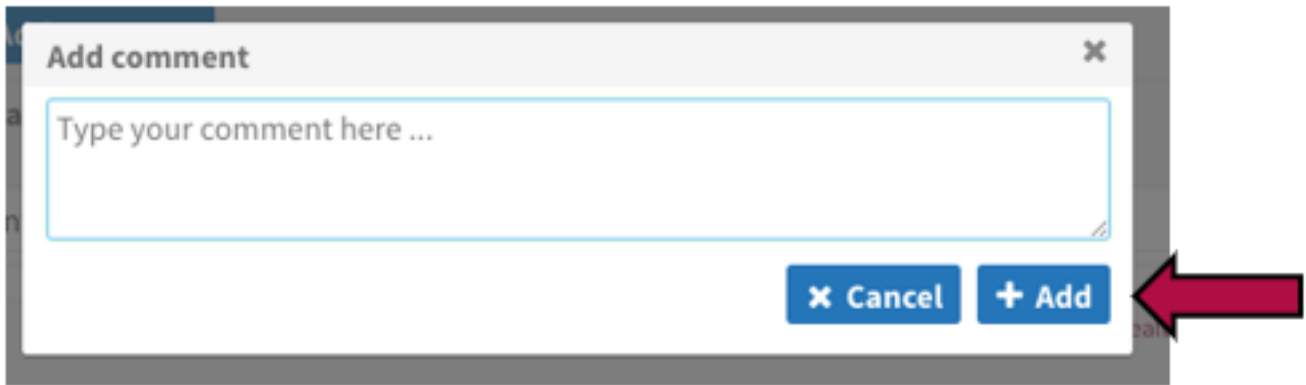
1. Enter the Service Provider module and select a **Vendor** to act on behalf of.
2. To add a comment, open the referral and click on the **Comments** tab.



1. Click on the + Add Comments button



2. Type your comment in the window that opens, then Click +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 reviewed.					
Strata, CIOS (Assessment)					26 July 2023 17:02
Patient family communication via phone detailed for team discussion.					

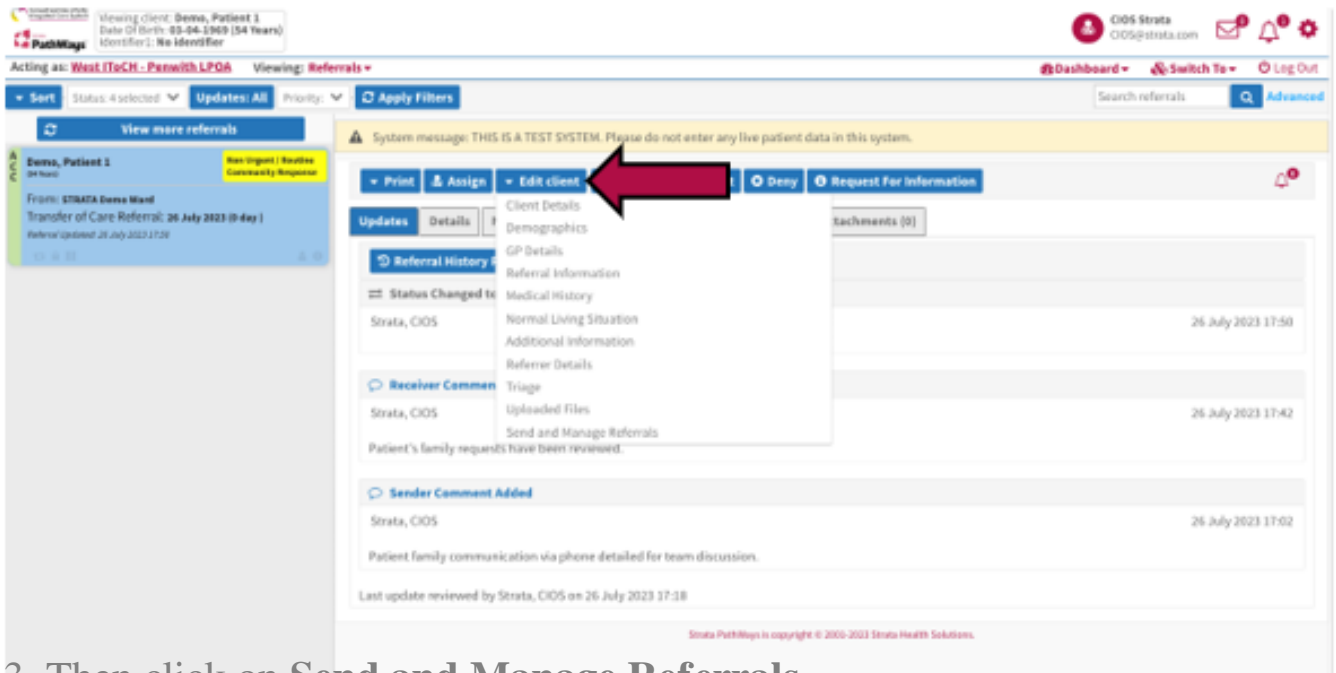
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Send and Manage Referrals Tab

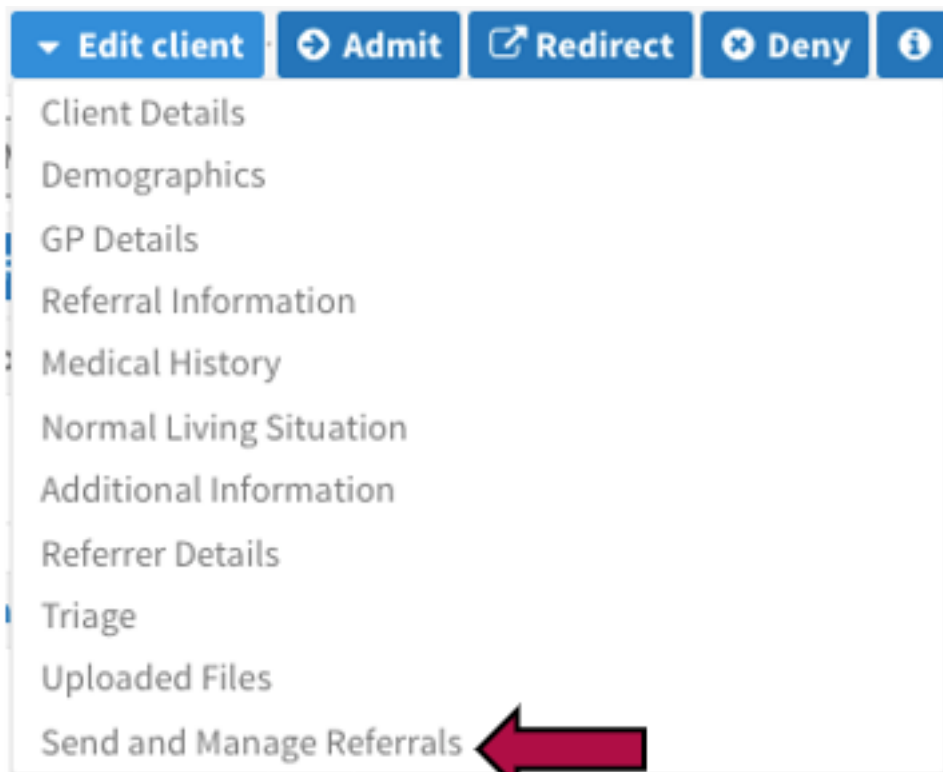
Note - Comments on the Send and Manage tab can be made to individual receiver services OR as a group to include all the receiver services.

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.



3. Then click on **Send and Manage Referrals**.



4. This takes you to the **Send and Manage Referrals** tab within the referral.

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

Viewing client: Patient 5, Demo
Date Of Birth: 03-02-1965 (58 Years)
Identifier: No Identifier

ITOCN Strata
ITOCN@strata.com

Acting as: BCHT - Acute Medical Unit 1

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 (ToCH - Panwith LPOA)	Accepted Updates reviewed	ASC Assessment	26 July 2023 15:12	[0 of 0] Details Print	Admit
Care Home Discharge Support Team <small>Alert: 22 Hour(s) to MHA(s) old</small>	Pending	No Priority	15 August 2023 14:24	[0 of 0] Details Print	Accept Admit
Safeguarding Support (EMWL) <small>Alert: 12 Hour(s) to MHA(s) old</small>	Pending Updates sent	ASC Assessment	15 August 2023 14:24	[0 of 0] Details Print	Accept Admit

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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 ..

Cancel + Add comment

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.

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

Service Provider	Status	Referral Priority	Referral Date	Referral Information	Referral Management
West ITDCH - Penwith LPGA	Accepted Updates reviewed	ASC Assessment	26 July 2023 15:32	[0 of 0] Details [1] Print	Accept Admit [X] [E]
Care Home Discharge Support Team	Pending	No Priority	15 August 2023 14:24	[0 of 0] Details Print	Accept Admit [X] [E]
Safeguarding Support (EMAIL)	Pending Updates sent	ASC Assessment	15 August 2023 14:24	[0 of 0] Details [1] Print	Accept Admit [X] [E]

[Add Comments] [Send Referral(s)]


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

Referral Comments ✕

Comment



Destination Service Provider	Status	<input type="checkbox"/>
West IToCH - Penwith LPOA	Accepted	<input type="checkbox"/>
Care Home Discharge Support Team	Pending	<input type="checkbox"/>
Safeguarding Support (EMAIL)	Pending	<input type="checkbox"/>

✕ Cancel + Add comment

5. Then put a tick in the box across from the referrals, under the Destination Service Provider, according to who you want to have visibility of our comment.

Referral Comments ✕

Comment

Destination Service Provider	Status	<input checked="" type="checkbox"/>
West IToCH - Penwith LPOA	Accepted	<input checked="" type="checkbox"/>
Care Home Discharge Support Team	Pending	<input checked="" type="checkbox"/>
Safeguarding Support (EMAIL)	Pending	<input checked="" type="checkbox"/>

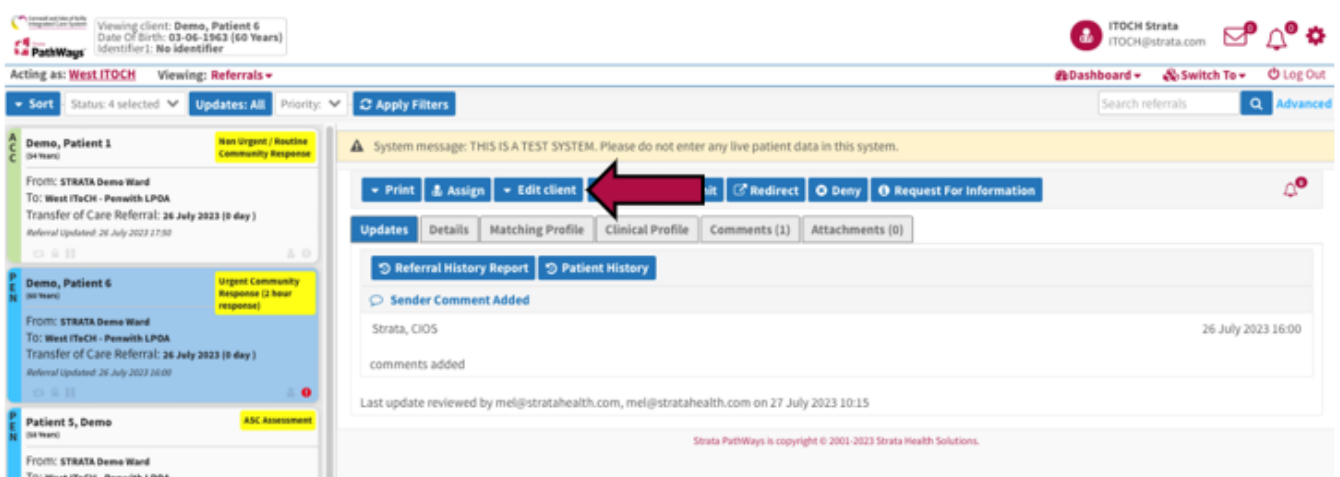
✕ Cancel + Add comment

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

Active Referrals Dashboard

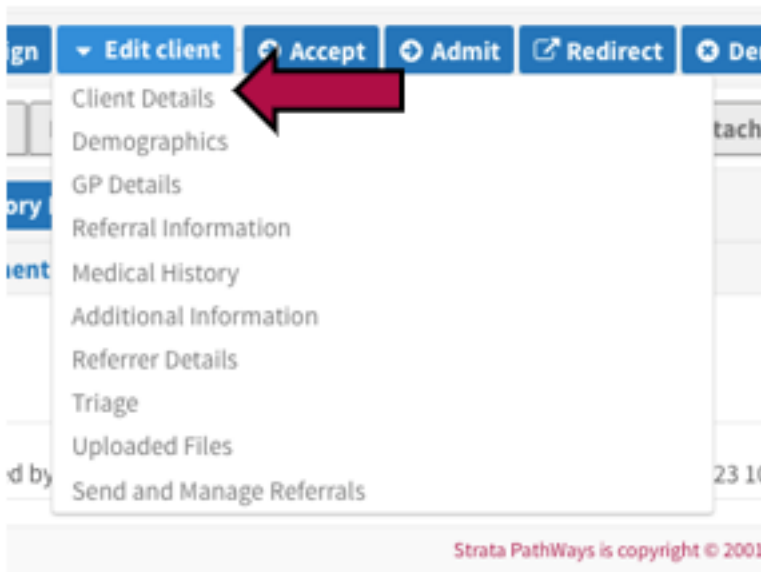
Note – Comments by all teams (referrers, ITOCH, receivers) are visible on the Active Referrals Dashboard.

1. 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.

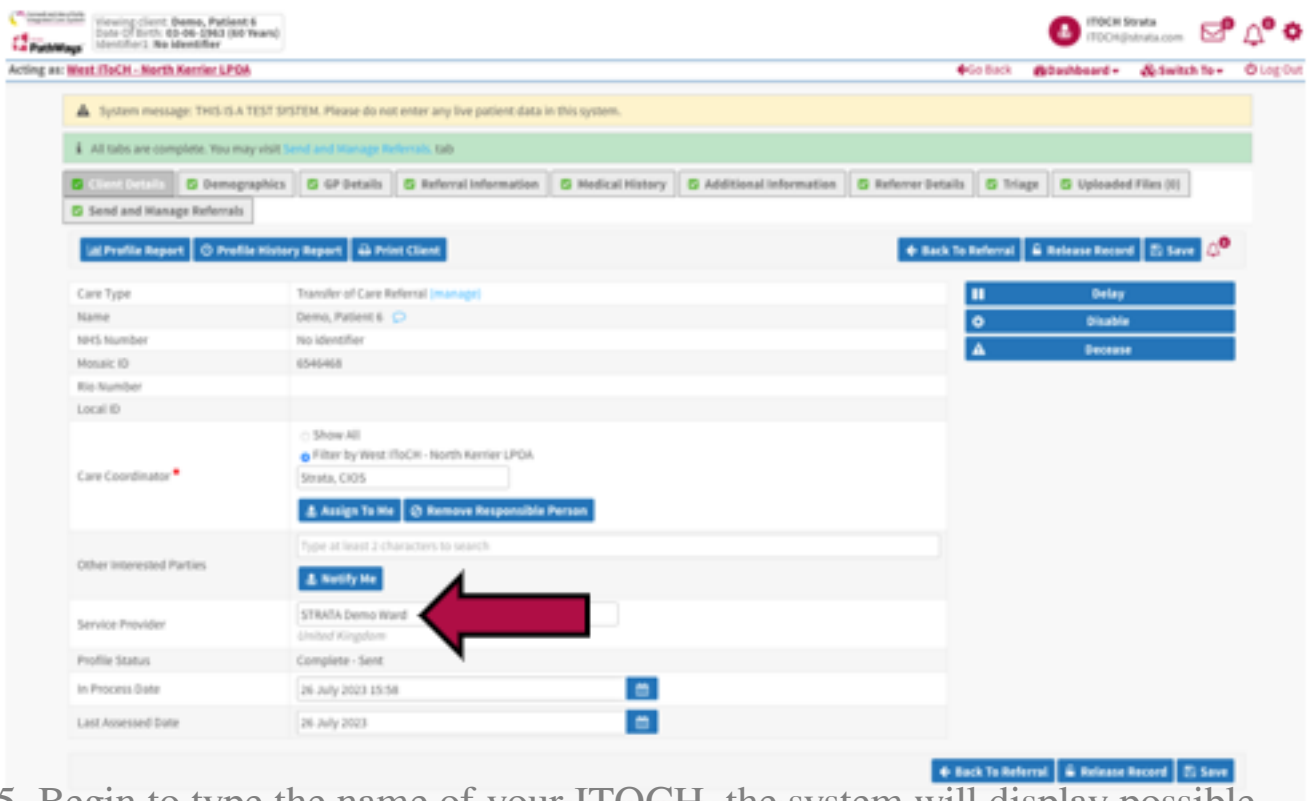


The screenshot displays the ITOCH Active Referrals Dashboard. On the left, a list of referrals is shown, including 'Demo, Patient 1', 'Demo, Patient 6', and 'Patient 5, Demo'. The main area shows the details for 'Demo, Patient 6', which is a 'Transfer of Care Referral' from 'STRATA Demo Ward' to 'West ITOCH - Penwith LPOA'. The 'Edit client' button is highlighted with a red arrow. The dashboard also includes a system message, a search bar, and various navigation options like 'Print', 'Assign', 'Edit client', 'Redirect', 'Deny', and 'Request For Information'.

3. Click on **Client Details**.



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



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.

Other Interested Parties	Type at least 2 characters to search	Notify Me
Service Provider	IToCH	Central IToCH
Profile Status	North & East IToCH - East LPOA	
In Process Date	North & East IToCH - North LPOA	Calendar
Last Assessed Date	North & East IToCH - Valley LPOA	Calendar
	West IToCH - North Kerrier LPOA	
	West IToCH - Penwith LPOA	
	West IToCH - South Kerrier & Isles of Scilly LPOA	

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6. Click Save.

The screenshot shows the ITOCH Strata web application interface. At the top right, there is a navigation bar with 'Dashboard', 'Switch To', and 'Log Out' options. Below this, a system message states: 'THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.' A green banner indicates 'All tabs are complete. You may still Send and Manage Referrals, tab.' Below the banner are several tabs: 'Client Details', 'Demographics', 'GP Details', 'Referral Information', 'Medical History', 'Additional Information', 'Referrer Details', 'Triage', and 'Uploaded Files (0)'. The 'Send and Manage Referrals' tab is active. The main content area shows a referral form with fields for 'Care Type', 'Name', 'NHS Number', 'Mosaic ID', 'WIA Number', 'Local ID', 'Care Coordinator', 'Other Interested Parties', 'Service Provider', 'Profile Status', 'In Process Date', and 'Last Assessed Date'. On the right side of the form, there are three buttons: 'Delay', 'Disable', and 'Dequeue'. A red arrow points to the 'Save' button located at the bottom right of the form area.

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.

The screenshot shows the top navigation bar of the ITOCH Strata web application. It includes the ITOCH Strata logo and contact information (ITOCH@strata.com), along with icons for email, notifications, and settings. Below the navigation bar, there are three main buttons: 'Dashboard', 'Switch To', and 'Log Out'. The 'Dashboard' button is highlighted with a red box, indicating it is the next step in the process.

8. The Active Referrals Dashboard will load.

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

Active Referrals Client Search

-- All Care Types -- -- All Referral Statuses -- West IToCH - North Kerrier LPOA

-- All Responsible Persons --

Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 1 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
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
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 Request For Information (Best interest information required) Updates sent
Demo, Patient 4 No identifier	Transfer of Care Referral Complete - Sent	West IToCH - North Kerrier LPOA	RCHT - Acute Medical Unit 1	West IToCH - Penwith LPOA Accepted Updates reviewed Penwith Community Nurses (Inc. Matrons) Accepted Updates sent Safeguarding Support (EMAIL) Pending (Consulted with Service) Updates sent

1 of 1

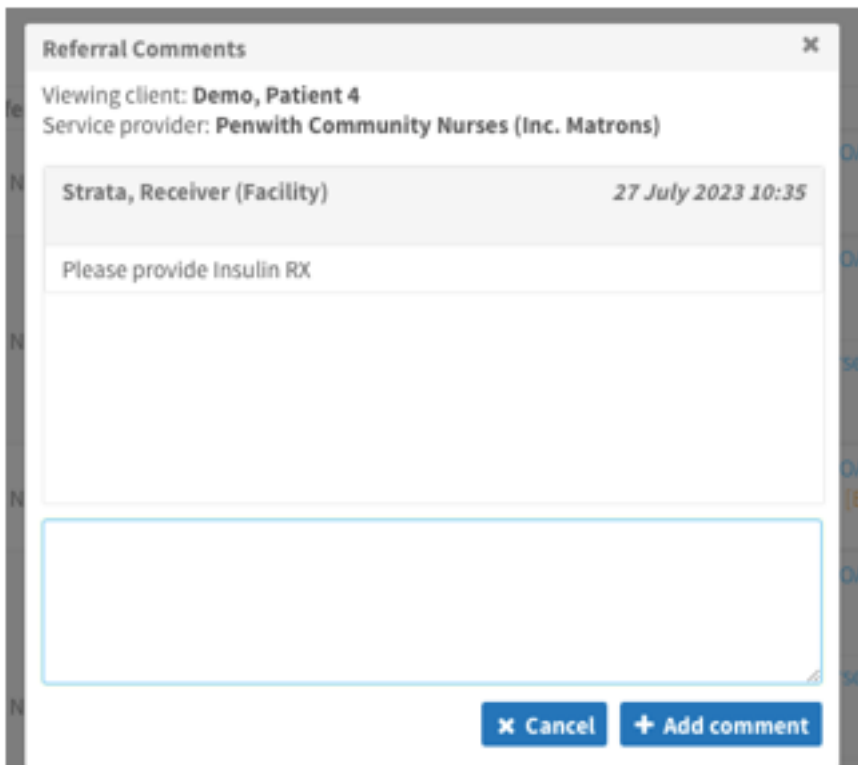
Disable Manage Referrals View Only Edit

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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.

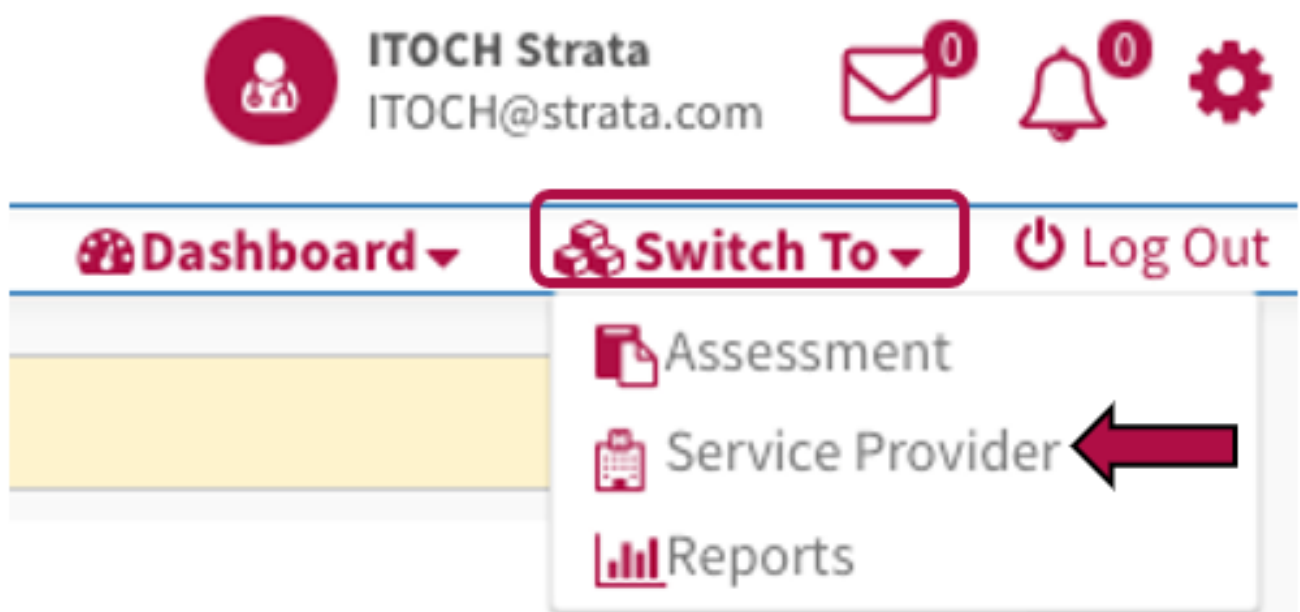
Referral(s)
West IToCH - Penwith LPOA Accepted Updates sent
West IToCH - Penwith LPOA Accepted Updates sent
Penwith Community Nurses (Inc. Matrons) Pending Updates sent
West IToCH - Penwith LPOA Request For Information (Best interest information required) Updates sent
West IToCH - Penwith LPOA Accepted Updates reviewed
Penwith Community Nurses (Inc. Matrons) Accepted Updates sent
Safeguarding Support (EMAIL) Pending (Consulted with Service) Updates sent

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



11. The speech bubble will turn opaque once a comment has been added.

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.

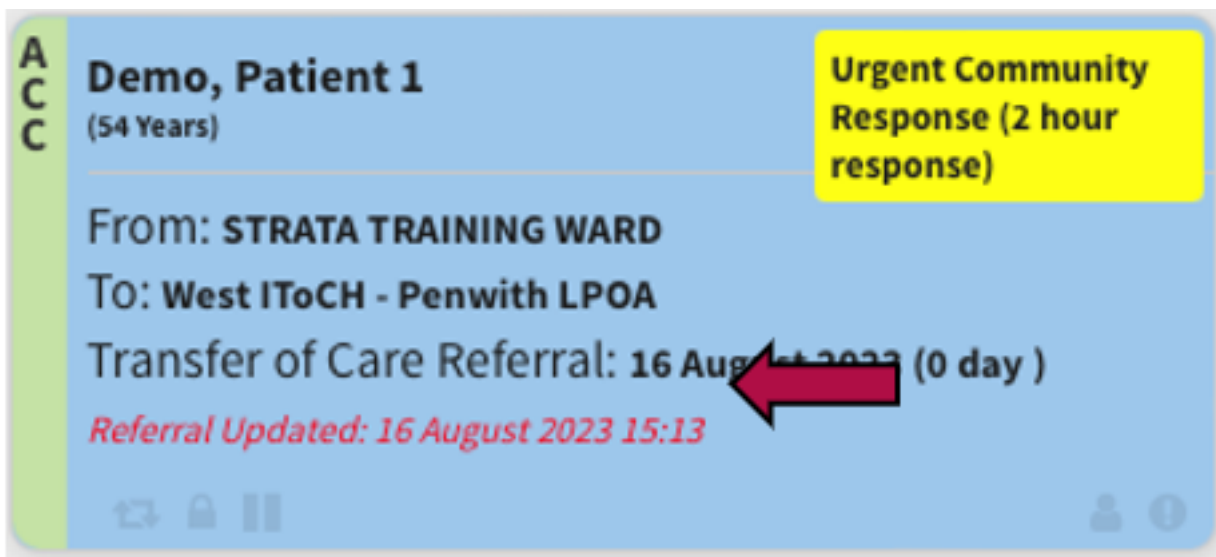


13. Then select your Vendor.

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



The screenshot shows a patient referral card for "Demo, Patient 1 (54 Years)". A yellow badge in the top right corner indicates "Urgent Community Response (2 hour response)". The referral details are: "From: STRATA TRAINING WARD", "To: West IToCH - Penwith LPOA", and "Transfer of Care Referral: 16 August 2023 (0 day)". A red arrow points to the date "16 August 2023". Below the date, it says "Referral Updated: 16 August 2023 15:13". At the bottom left, there are icons for refresh, lock, and pause. At the bottom right, there are icons for a user profile and a help icon.

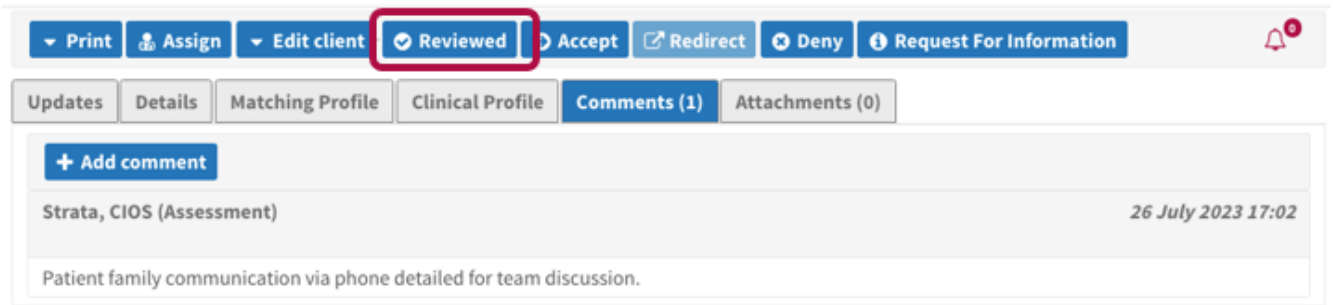
1. To view the comment, open the referral.
2. Click on the Comments tab.



The screenshot shows the "Comments (1)" tab selected in the referral details. A red arrow points to the "Comments (1)" tab. Below the tabs, there is a "+ Add comment" button. A comment is displayed: "Strata, CIOS (Assessment)" with a date and time stamp of "26 July 2023 17:02". The comment text is "Patient family communication via phone detailed for team discussion." At the bottom, there is a copyright notice: "Strata PathWays is copyright © 2001-2023 Strata Health Solutions."

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.



The screenshot displays a software interface with a top toolbar containing buttons for 'Print', 'Assign', 'Edit client', 'Reviewed', 'Accept', 'Redirect', 'Deny', and 'Request For Information'. The 'Reviewed' button is highlighted with a red box. Below the toolbar are tabs for 'Updates', 'Details', 'Matching Profile', 'Clinical Profile', 'Comments (1)', and 'Attachments (0)'. A comment box is visible with the text 'Strata, CIOS (Assessment)' and a timestamp '26 July 2023 17:02'. The comment content reads: 'Patient family communication via phone detailed for team discussion.'

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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.

Viewing client: Demo, Patient Z
Date Of Birth: 02-03-1968 (55 Years)
Identifier: No identifier

CIOS Strata
CIOS@strata.com

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 IToCH - 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


Release Record Referral History Report Patient History


Add Comments

Send Referral(s)

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Referral Information

(0 of 0) Details  Print

(0 of 0) Details  Print

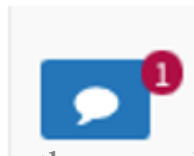
2. Click on the speech bubble to review the comment. Once you have reviewed a comment made by another team member, the number against the speech bubble will disappear.

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.

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
Demo, Patient 2 No Identifier	Transfer of Care Referral Complete - Sent	STRATA Demo Ward	RCHT - Acute Medical Unit 1	West ITOCH - Penwith LPOA Accepted Updates sent
Demo, Patient 3 No 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 required] Updates sent
				West ITOCH - Penwith LPOA Accepted Updates sent



- To review the comment, click on the speech bubble icon.
- Comments 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

- Once a comment has been read the number denoting the comment will disappear.

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