

Strata How to Review Historical Referrals

Historical Referrals

- 1.To review a patient's historical referrals, navigate to the **Assessment Dashboard**.
- 2.From the **Active Referrals** page, select the patient record by clicking on the row next to their name.
- 3.Then click on **Edit**.

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

Service Catalogue Active Referrals Task List Client Search Assign

--All Care Types-- --All Referral Statuses-- STRATA TRAINING WARD --All Responsible Persons-- [Search] [Sort] [Refresh]

Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 3 No Identifier	Transfer of Care Referral Complete Sort	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	<ul style="list-style-type: none">Acute GP Service (Telephone) Pending View EditPeruwith Community Nurses (inc. Matrons) Pending View EditWest ITtoCH - Peruwith LPDA Accepted Updates sent View Edit

1 of 1 [Navigation icons]

[Disable](#) [Manage Referrals](#) [View Only](#) [Edit](#)

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- 4.On the **Client Details** page, click on **Manage**, next to Transfer of Care Referral across from Care Type in the first field.

Viewing client: Demo, Patient 3
Date Of Birth: 05-02-1956 (67 Years)
Identifier: No Identifier

Acting as: STRATA TRAINING WARD

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

All tabs are complete. You may visit [Send and Manage Referrals](#). Tab

Client Details | Demographics | GP Details | Referral Information | Additional Information | Referrer Details | Triage | Voluntary Sector Information | Uploaded Files (0)

Send and Manage Referrals

Profile Report | Profile History Report | Prescription Report | Print Client

Release Record | Save

Care Type	Transfer of Care Referral (manage)
Name	Demo, Patient 3
NHS Number	No identifier
Mosaic ID	58465465
Rio Number	
Local ID	
Care Coordinator	<input type="radio"/> Show All <input checked="" type="radio"/> Filter by STRATA TRAINING WARD Schick, Mel <input type="button" value="Assign To Me"/> <input type="button" value="Remove Responsible Person"/>
Other Interested Parties	<input type="text" value="Type at least 2 characters to search"/> <input type="button" value="Notify Me"/>
Service Provider	STRATA TRAINING WARD <i>United Kingdom</i>
Profile Status	Complete - Sent
In Process Date	26 July 2023 14:33 <input type="button" value="📅"/>
Last Assessed Date	26 July 2023 <input type="button" value="📅"/>

Release Record | Save

5. Click on **Historical** next to Transfer of Care Referral in the Existing Care Types section.

Viewing client: Demo, Patient 3
Date Of Birth: 05-02-1956 (67 Years)
Identifier: No Identifier

Acting as: STRATA TRAINING WARD

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

Existing Care Types

Care type	Status	
Transfer of Care Referral (Historical)	Complete - Sent	<input type="button" value="View"/> <input type="button" value="Edit"/>

Other Care Types

Search

Care type	Description	
Transfer of Care Referral	Referral for discharge into the Transfer of Care HUB.	<input checked="" type="radio"/> Already Exists

All Care Types

Client Profile (Non-Care Type Specific)	<input type="button" value="View Client"/> <input type="button" value="Edit Client"/>
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6. Each Profile Report represents an historical referral with the referral "In Process" dates listed on the left. Click on the **Profile Report** associated with the referral you would like to review.

Existing Care Types		Patient History
Care type	Status	
Transfer of Care Referral(Historical)	Disabled	In Process View
Historical Activity		
Other Care Types	In Process : 16 August 2023	Profile report
Search	In Process : 14 August 2023 Disabled : 16 August 2023	Profile report
Transfer of Care Referra	In Process : 26 July 2023 Disabled : 14 August 2023	Profile report

7. In the window that opens, select the sections you would like to review by adding/removing ticks in the associated boxes.

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

Output settings

Insert a page break after every section

Display blank fields

Print sections

Comments Referral Information Referrer Details

Triage Additional Information Referral Information

Voluntary Sector Information Demographics Medical History

GP Details

[Download](#) [View in browser](#) [Print](#)

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8. Then click **Download**, **View in Browser** or **Print** according to your requirements.

How to Compare Referrals

1. If a patient has more than one referral, it is possible to compare the differences in the content of the forms of each referral.
2. To do this, open the patient record.
3. On the Client Details page, click on **Profile History Report**.

Viewing client: Demo, Patient 3
Date Of Birth: 05-02-1996 (67 Years)
Identifier: No Identifier

Acting as: STRATA TRAINING WARD

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

All tabs are complete. You may visit [Send and Manage Referrals](#) tab

Client Details Demographics GP Details Referral Information Additional Information Referrer Details Triage Voluntary Sector Information Uploaded Files (0)

Send and Manage Referrals

Profile Report **Profile History Report** Print Client Release Record Save

Care Type	Transfer of Care Referral (manage)	Delay
Name	Demo, Patient 3	Disable
NHS Number	No Identifier	Decrease
Mosaic ID	50465465	
Rio Number		
Local ID		
Care Coordinator	<input type="checkbox"/> Show All <input checked="" type="checkbox"/> Filter by STRATA TRAINING WARD Schick, Mel Assign To Me Remove Responsible Person	
Other Interested Parties	Type at least 2 characters to search Notify Me	
Service Provider	STRATA TRAINING WARD United Kingdom	
Profile Status	Complete - Sent	
In Process Date	26 July 2023 14:33	
Last Assessed Date	26 July 2023	

Release Record Save

4.The window that opens details the transactions with each referral form.

5.Select which referral form(s) you would like to review in the Print Section at the bottom of the window. Keep all boxes ticked if all forms are relevant.

6.Then select to either **Download**, **View in Browser** or **Print**.

The screenshot displays the Strata PathWays interface. At the top left, the Strata logo and 'PathWays' are visible. Below the logo, the 'Care type' is set to 'Transfer of Care Referral'. A 'Select transactions' section contains a table with 13 rows, each with two columns: 'Compare transaction' and 'with transaction'. Each cell in the table contains a date and time followed by an email address (mel@stratahealth.com, mel@s) and a dropdown arrow. A red box highlights the 'Print sections' area, which includes several checked options: Demographics, GP Details, Referral information, Medical History, Normal Living Situation, Referrer Details, and IMPORTANT NOTICE. To the right of this area is an 'Invert selection' button. At the bottom right, there are three buttons: 'Download', 'View in browser', and 'Print'. A red arrow points to the 'View in browser' button. At the bottom center, there is a small copyright notice: 'Strata PathWays is copyright © 2001-2023 Strata Health Solutions.'

Example: If **View in Browser** is selected, the report will display as below. The most current referral will display first. Scrolling down the report will display previous referrals.

This change was made by	
me@stratahealth.com, me@stratahealth.com	5 October 2023 10:39
Composing against a change made by	
me@stratahealth.com, me@stratahealth.com	5 October 2023 10:28

IMPORTANT NOTICE		
Last modified by me@stratahealth.com, me@stratahealth.com at 5 October 2023 10:39		
Attribute	Value	Change by
:	This is only to be used for Professionals (i.e. GP's, Hospitals, Community Services) to make referrals - if you are a member of the public and need support, please contact your GP or 111 in the first instance. Not to be used to refer a person under the age of 18.	



Demographics		
Last modified by me@stratahealth.com, me@stratahealth.com at 5 October 2023 10:27		
Attribute	Value	Change by
Patient Name	Forename: Patient	
Patient Name	Surname: Demo	
Date of Birth	DOB: 1 January 1966	
NHS Number	NHS Number: No identifier	
Local ID	Local ID: 765478680-	
:	If no address is available, as appropriate, use one of the following address formats: ZZ99 3WZ = Not Known/Not Collected/Not Stated/Specified/In the Air/At Sea/Information Refused ZZ99 3VZ = No Fixed Abode	
Does the patient have a temporary address?	No	
:	Note of kin information is vital for hospital discharges and adult social care referrals. Please provide to avoid delays.	
Current Location	Current Location: STRATA Demo Ward	



If there are differences between what was entered in the current and previous referral's forms, the columns of the forms covering those differences will be highlighted in yellow.

		<p>Careers Assessment - To be used by a professional to request a careers assessment for someone in their own home. By providing requested details, the local transfer of care hub can decide the appropriate information format assessment route:</p> <p>.</p> <p>.</p> <p>Falls Assessment Referrals - for use by MH/LTE staff and 999 only for people in their own home post-falls follow-up and intervention:</p> <p>.</p> <p>.</p>	
What type of referral does the person require?:		Urgent community response (2-hour response)	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
Reason for Referral - Details	Details (Please include as much information as possible.):	xxxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27

Medical History

Last modified by mel@stratahealth.com, mel@stratahealth.com at 5 October 2023 18:27

Attribute	Value	Change by
Describe relevant health details including Past Medical History, Previous Admissions	Details: xxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27



Detail any advance decision or treatment escalation in place?	Details:	xxxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
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Referrer Details

Last modified by mel@stratahealth.com, mel@stratahealth.com at 5 October 2023 18:27

Attribute	Value	Change by
Referrer Name	Name: mel@stratahealth.com, mel@stratahealth.com	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
Referrer Organisation and Role	Organisation: STRATA Demo Ward	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
Referrer Organisation and Role	Role: xxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
Referrer Contact Number	Contact Number: xxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27
Referrer Email Address (must be a monitored generic email address)	Email: xxxxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 18:27



Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=390>