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**.

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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.

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

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	Strata PathWays is copyright © 2	2011-2023 Strata Health Solutions.				

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.

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

in this system.
≓ Invert selection

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**.

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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**.

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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.

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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.

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