

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 --

Name	Care Type	Referral Owner	Current Location	Referral(s)
Demo, Patient 3 No Identifier	Transfer of Care Referral Complete - Sent	STRATA TRAINING WARD	RCHT - Acute Medical Unit 1	Acute GP Service (Telephone) Pending Penwith Community Nurses (Inc. Matrons) Pending West ToCH - Penwith LPOA Accepted

1 of 1

Disable Manage Referrals View Only Edit

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: 05-02-1936 (67 Years)
Identifier: No Identifier

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

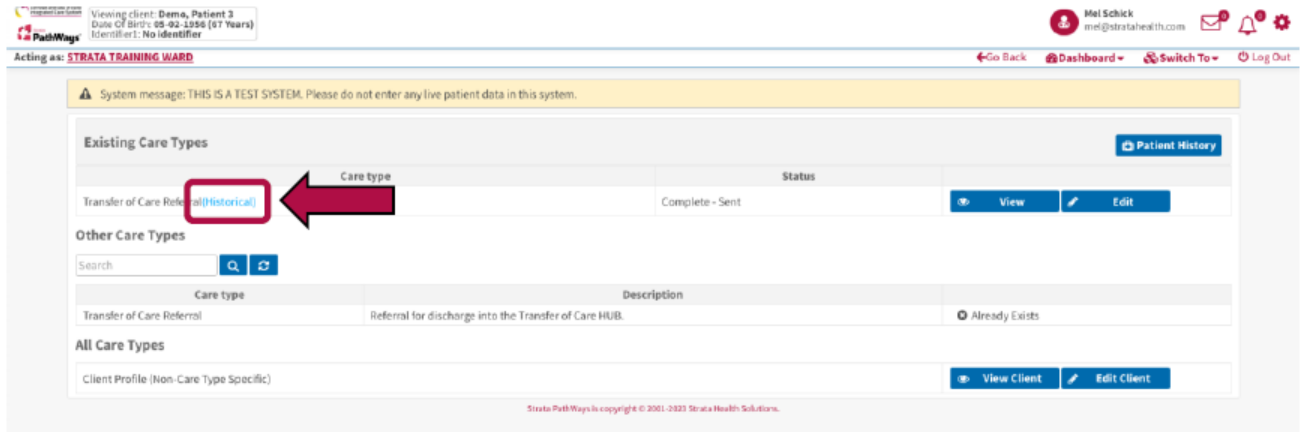
Profile Report Profile History Report Prescription Report Print Client Release Record Save

Care Type	Transfer of Care Referral (manage)
Name	Demo, Patient 3
NHS Number	No Identifier
Mosaic ID	58465465
Rio Number	
Local ID	
Care Coordinator	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

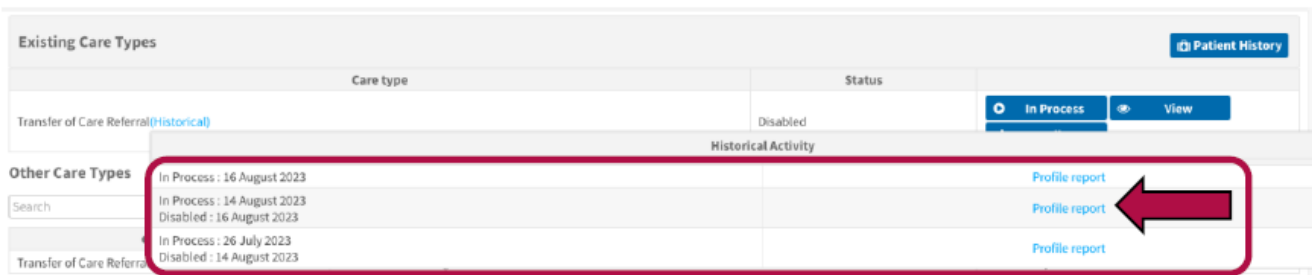
Delay
Disable
Dequeue

Release Record Save

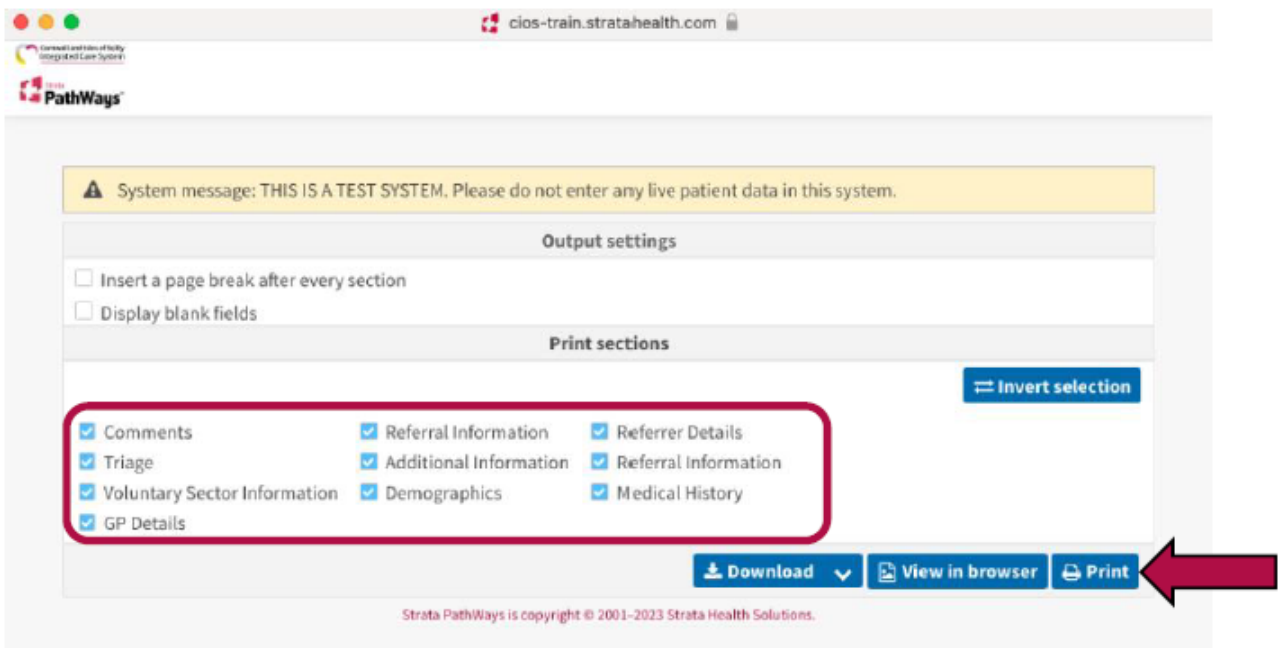
5. Click on **Historical** next to Transfer of Care Referral in the Existing Care Types section.



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.



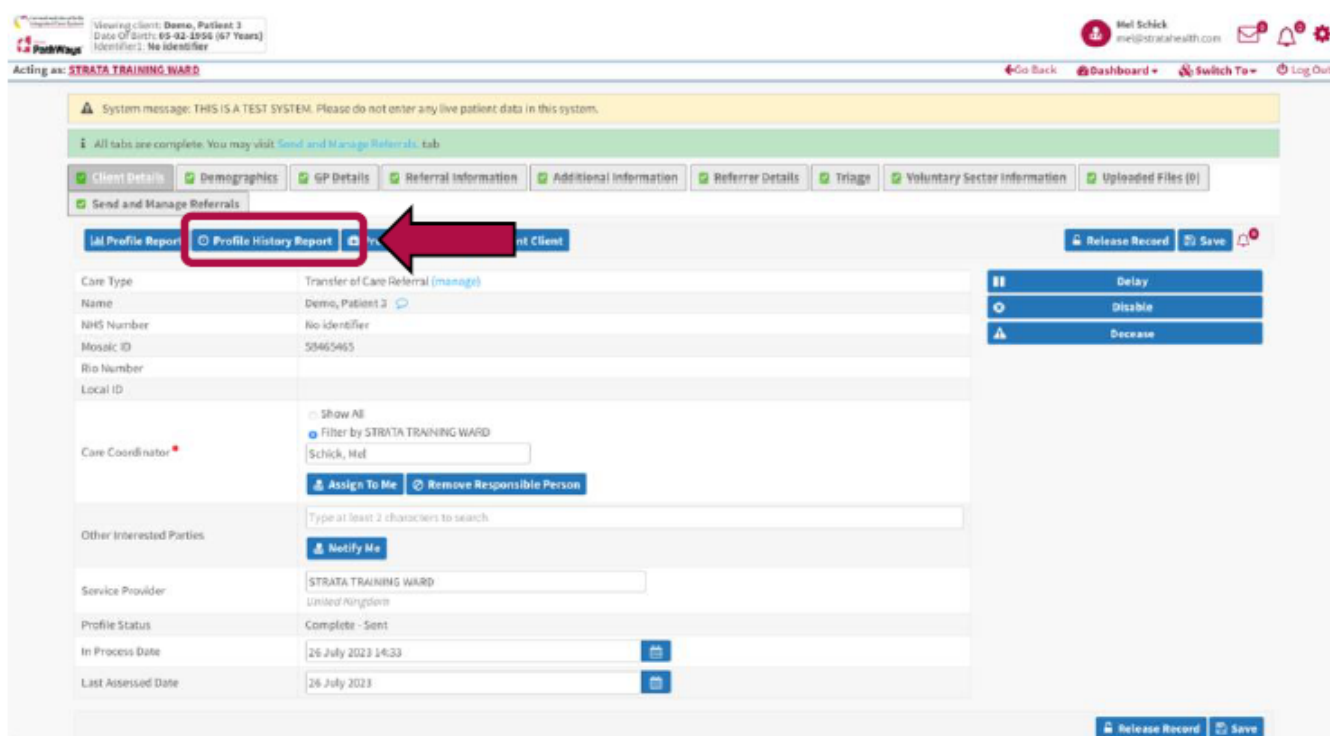
7. In the window that opens, select the sections you would like to review by adding/removing ticks in the associated boxes.



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**.



- 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**.

Care type
Transfer of Care Referral

Select transactions Reset

	Compare transaction	with transaction
1	5 October 2023 10:39: mel@stratahealth.com, mel@s	5 October 2023 10:28: mel@stratahealth.com, mel@s
2	5 October 2023 10:28: mel@stratahealth.com, mel@s	5 October 2023 10:28: mel@stratahealth.com, mel@s
3	5 October 2023 10:28: mel@stratahealth.com, mel@s	5 October 2023 10:28: mel@stratahealth.com, mel@s
4	5 October 2023 10:28: mel@stratahealth.com, mel@s	5 October 2023 10:28: mel@stratahealth.com, mel@s
5	5 October 2023 10:28: mel@stratahealth.com, mel@s	5 October 2023 10:27: mel@stratahealth.com, mel@s
6	5 October 2023 10:27: mel@stratahealth.com, mel@s	5 October 2023 10:27: mel@stratahealth.com, mel@s
7	5 October 2023 10:27: mel@stratahealth.com, mel@s	5 October 2023 10:26: mel@stratahealth.com, mel@s
8	5 October 2023 10:26: mel@stratahealth.com, mel@s	5 October 2023 10:26: mel@stratahealth.com, mel@s
9	5 October 2023 10:26: mel@stratahealth.com, mel@s	5 October 2023 10:26: mel@stratahealth.com, mel@s
10	5 October 2023 10:26: mel@stratahealth.com, mel@s	5 October 2023 10:25: mel@stratahealth.com, mel@s
11	5 October 2023 10:25: mel@stratahealth.com, mel@s	5 October 2023 10:25: mel@stratahealth.com, mel@s
12	5 October 2023 10:25: mel@stratahealth.com, mel@s	5 October 2023 10:25: mel@stratahealth.com, mel@s
13	5 October 2023 10:25: mel@stratahealth.com, mel@s	5 October 2023 09:49: mel@stratahealth.com, mel@s

Print sections Invert selection

- Demographics
- GP Details
- Referral information
- Medical History
- Normal Living Situation
- Referrer Details
- IMPORTANT NOTICE

Download View in browser 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.

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: 765478660-	
:	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	
:	Next 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.

Career Assessments-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.

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Falls Assessment Referrals-For use by MHH/UTC staff and 999 only for people in their own home post falls follow up and intervention.

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What type of referral does the person require?	Urgent community response (2-hour response)		mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
Reason for Referral - Details	Details (Please include as much information as possible.):	xxxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27

Medical History

Last modified by mel@stratahealth.com, mel@stratahealth.com at 5 October 2023 10:27

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 10:27



Detail any advance decision or treatment escalation in place?	Details: xxx		mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
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Referrer Details

Last modified by mel@stratahealth.com, mel@stratahealth.com at 5 October 2023 10:27

Attribute	Value	Change by
Referrer Name	Name: mel@stratahealth.com, mel@stratahealth.com	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
Referrer Organisation and Role	Organisation: STRATA-Demo-Ward	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
Referrer Organisation and Role	Role: xxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
Referrer Contact Number	Contact Number: xxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27
Referrer Email Address (must be a monitored generic email address)	Email: xxxxx	mel@stratahealth.com, mel@stratahealth.com 5 October 2023 10:27



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