



Service Request

Web Link

This User Guide covers how the CIOS ITOCHs will use Strata PathWays' Service Request Web Link

If you require further information, please contact

Strata Support

(PathWays Version 13)



0333 002 0233



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<https://stratahealth.com>

Version Control

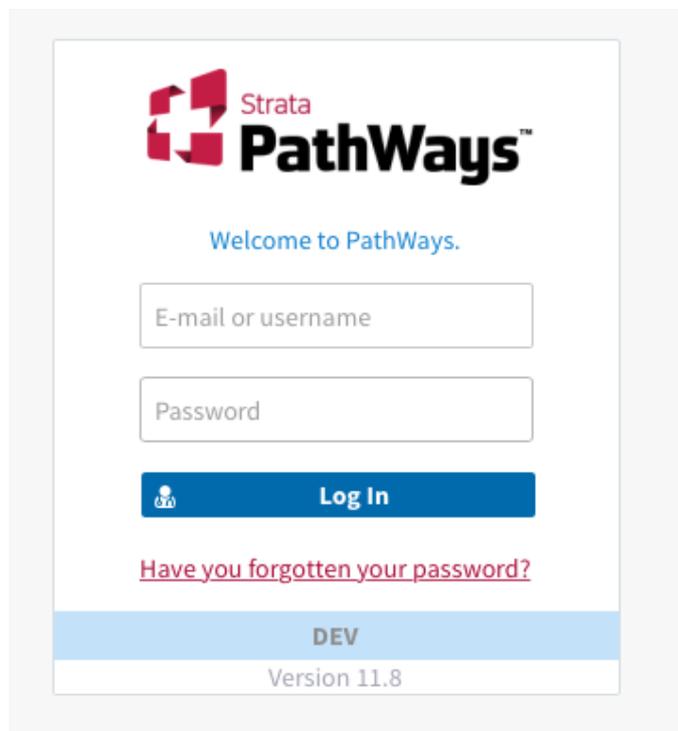
Version	Date	Changes made	Author
13	10/08/2023	1. Amended format to adhere to Accessibility Standards	ECook
12	07/08/2023	2. Page 7 – added text re: 2-hour UCR process	ECook

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Section 1 – Login & Home Page

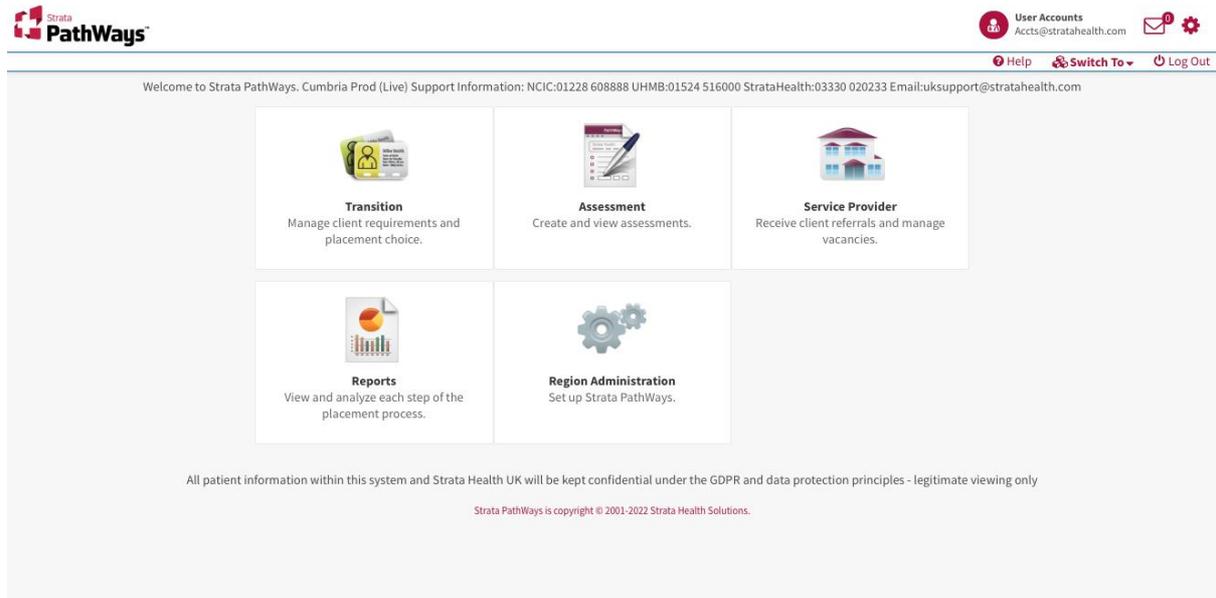
1. Open the **Strata Health Pathways - LIVE SYSTEM** - by clicking on the **Desktop Icon**.
2. Alternatively, open via **Internet Explorer** or **Google Chrome** by typing in the unique weblink you have been provided.
3. Login to Strata PathWays using your **Email** or **Username** and **Password**.



The screenshot shows the Strata PathWays login interface. At the top left is the logo, which consists of a red square with a white cross-like shape inside, followed by the text "Strata PathWays™". Below the logo is the text "Welcome to PathWays." in blue. There are two input fields: the first is labeled "E-mail or username" and the second is labeled "Password". Below these fields is a blue button with a white user icon and the text "Log In". Underneath the button is a red link that says "Have you forgotten your password?". At the bottom of the page, there is a light blue bar with the text "DEV" and a white bar below it with the text "Version 11.8".

4. Upon logging in you will land on your **Home Page**.

5. You will have one or more icons (representing modules) depending on your account permissions.



The screenshot shows the Strata Pathways dashboard. At the top left is the Strata Pathways logo. At the top right, there are links for 'User Accounts' (Accts@stratahealth.com), 'Help', 'Switch To', and 'Log Out'. Below the header, a welcome message reads: 'Welcome to Strata Pathways. Cumbria Prod (Live) Support Information: NCIC:01228 608888 UHMB:01524 516000 StrataHealth:03330 020233 Email:uksupport@stratahealth.com'. The main area contains five module cards:

- Transition**: Manage client requirements and placement choice.
- Assessment**: Create and view assessments.
- Service Provider**: Receive client referrals and manage vacancies.
- Reports**: View and analyze each step of the placement process.
- Region Administration**: Set up Strata Pathways.

At the bottom, a disclaimer states: 'All patient information within this system and Strata Health UK will be kept confidential under the GDPR and data protection principles - legitimate viewing only'. Below that is the copyright notice: 'Strata Pathways is copyright © 2001-2022 Strata Health Solutions.'

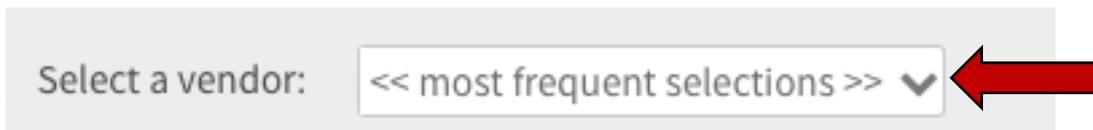
6. To access Service Requests, you must enter the **Service Provider** Module.



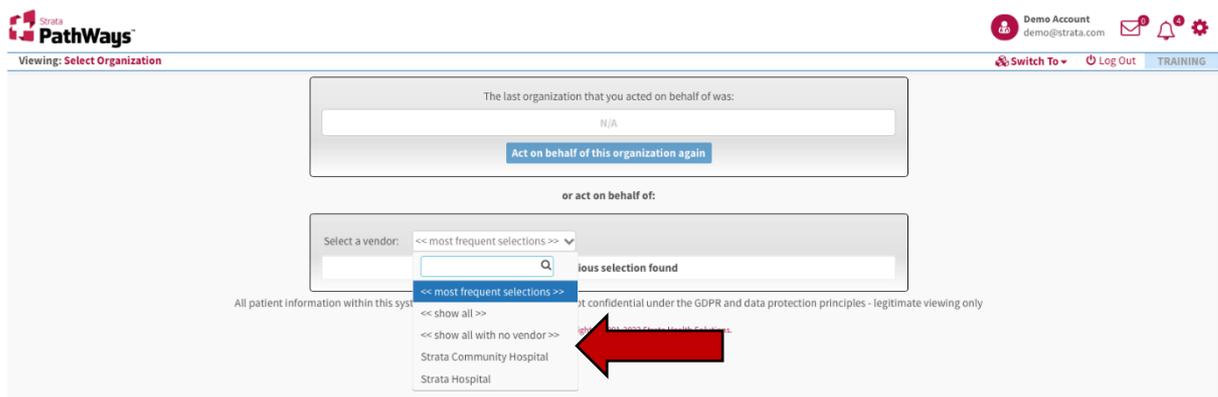
Service Provider
Receive client referrals and manage
vacancies.

Section 2 – Select a Vendor

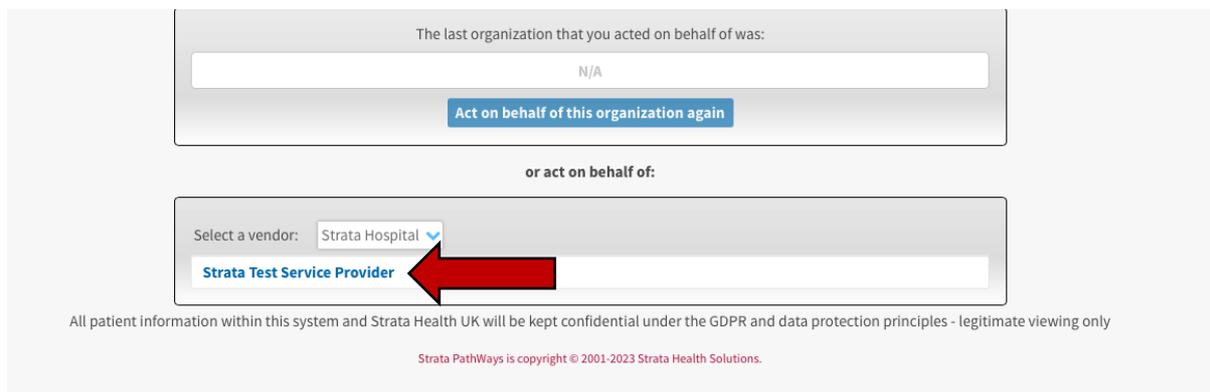
1. If you work for more than one team/ward/location, you must first select where you would like to act on behalf of by selecting a vendor. Do so by clicking on the drop-down arrow.



2. Select the appropriate Vendor (ie Hospital, Organisation etc) from the list displayed.

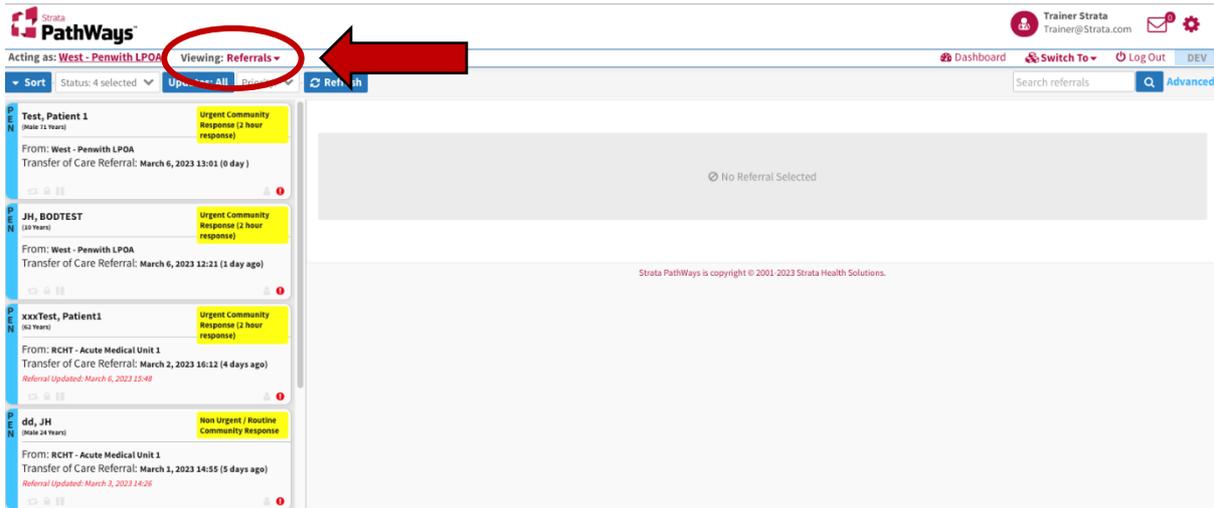


3. Then select your team/ward/location.

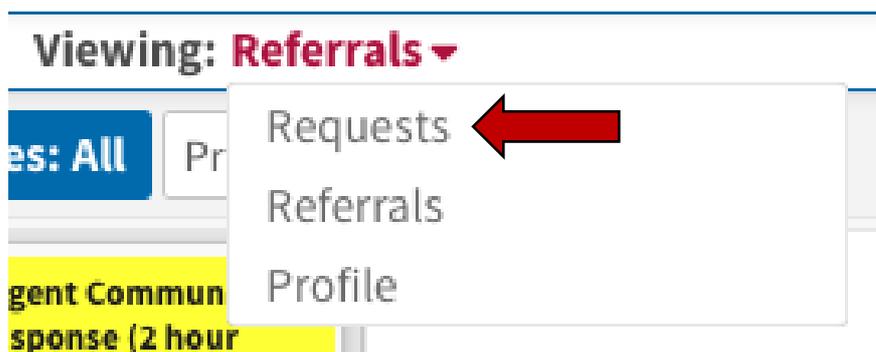


Section 3 – ITOCH Dashboard

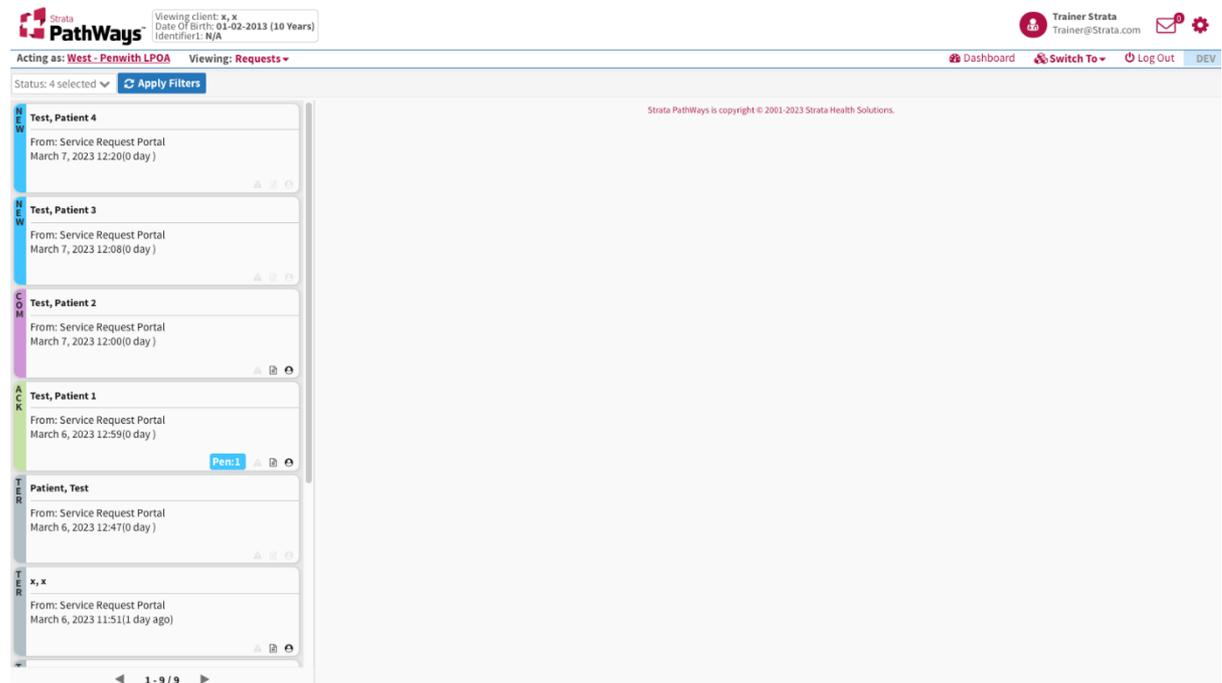
1. The ITOCH dashboard opens on the **Referrals page**, as displayed across from **Viewing**.



2. To view your Service Requests, **you must change to the Requests page**.
3. Do so by clicking on the drop-down arrow and clicking on **Requests**.



4. Your Service Requests will load.



5. Each tile represents a Service Request.

6. They are colour coded to represent the status they are currently in.

****Please note: Service Request status changes are not sent back to senders****

If a referral is for 2-hour UCR – Do NOT transcribe onto Strata pathways – instead, PDF the web referral and email to the assigned UCR Prioritiser (notify them via Teams that the referral has been sent). They will then review and if meets criteria for 2-hour UCR, process and record onto RiO (see Managing 2-Hour UCR's SOP)

Service Request Statuses

NEW – A service request has been received but has not been actioned.

ACKNOWLEDGED – A service request has been accepted and a referral has been started.

COMPLETE – A service request has been actioned; converted into a referral.

TERMINATED - A service request has been determined to be not appropriate for service.

1. To open a Service Request, **click on the tile**.
2. The Information will load on the right-hand side of the page.

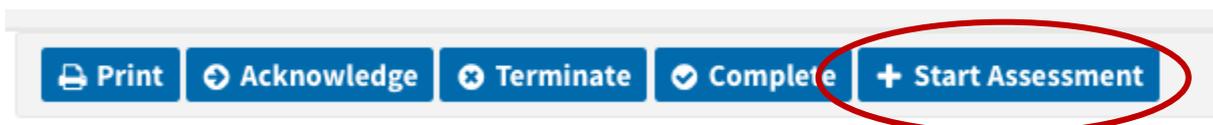
The screenshot displays the Strata Pathways interface. On the left, a vertical list of service request tiles is shown, each with a status indicator (NEW, ACKNOWLEDGED, COMPLETE, TERMINATED) and a brief description. The selected tile is 'Test, Patient 4', which is in the 'NEW' status. On the right, the detailed view for this request is displayed, including a table of request details and a comments section.

Category	Request Value
Demographics	
Title	Mr
Patient Name	Surname: Test Forename: Patient 4
Date of Birth	24-05-1945 (77 Years)
Gender	Male
Mosaic ID	Mosaic ID: 8986446541
Patient Address	Postcode: XX1 2XX Street Address: 25 Green St City: Town
Patient Main Phone Number	Phone Number: 071234123456 Telephone number: 012356478569 Mobile number: 071234123456
Next of Kin / Emergency Contact Details	Relationship / Legal status: Wife Address: 25 Green St Next of Kin Name: Sally Smith
GP Details	
Registered GP Practice	Atlantic Medical Group - L82038
Practice Code	Code: 12345
Practice Address	Address: 25 Queen St
Referral Information	
What type of referral does the person require?	Urgent Community Response (2 hour response)
Reason for Referral	Details (Please include as much information as possible.): Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor
Does the person have any communication needs?	No
Are there any Safeguarding issues?	No
Medical History	

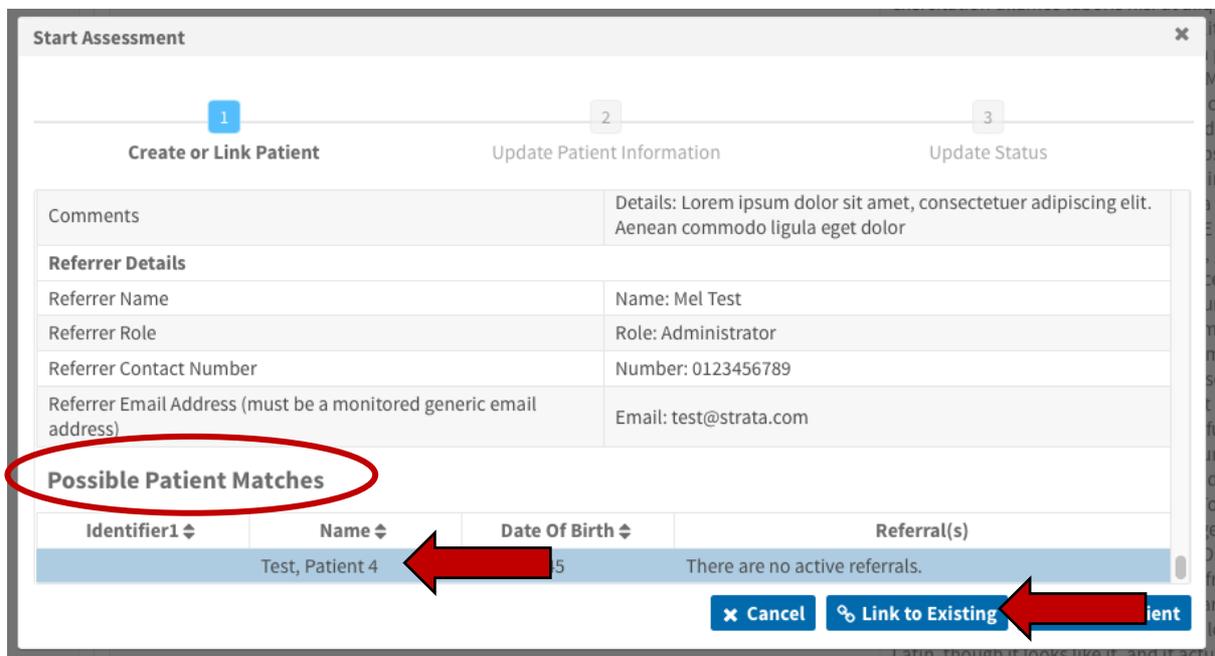
3. Scroll down the page to review the information.

Section 4 – How to Link a Service Request to an Existing Patient Record

1. To determine if this patient exists in PathWays, click on **+Start Assessment**



2. In the window that opens, scroll to the bottom of the information displayed.
3. If a **Possible Patient Match** exists in PathWays, they will be listed here.
4. **Select this patient** by clicking on the row next to their name. The row will highlight blue.
5. Then click **Link to Existing**.



The 'Start Assessment' window shows a progress bar with three steps: 1. Create or Link Patient (active), 2. Update Patient Information, and 3. Update Status. Below the progress bar is a form with the following fields:

Comments	Details: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor
Referrer Details	
Referrer Name	Name: Mel Test
Referrer Role	Role: Administrator
Referrer Contact Number	Number: 0123456789
Referrer Email Address (must be a monitored generic email address)	Email: test@strata.com

Below the form is a section titled 'Possible Patient Matches' (circled in red). It contains a table with the following data:

Identifier1	Name	Date Of Birth	Referral(s)
	Test, Patient 4	5	There are no active referrals.

At the bottom of the window are two buttons: 'Cancel' and 'Link to Existing' (with a magnifying glass icon). A red arrow points to the 'Link to Existing' button.

6. In the window that opens, a new column appears capturing the patient details of the record the request has been linked to.

Start Assessment

1 Create or Link Patient 2 **Update Patient Information** 3 Update Status

— Patient 4 Test

Active Referrals: None

Update Patient Information:

Category/Attribute	Request	Patient	
Demographics			
Patient Name: Surname	Test	Test	
Patient Name: Forename	Patient 4	Patient 4	
Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Postcode	XX3 4YY		

Cancel Merge Contents Next Step

7. Scroll through the information to determine if there are any differences between the Request and the existing patient record in PathWays.
8. To pull the information from the Request into the PathWays record, use the **Merge Contents** button.

Start Assessment

1 Create or Link Patient 2 **Update Patient Information** 3 Update Status

Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Postcode	XX3 4YY		
Patient Address: City	Town		
Patient Address: Street Address	25 Green St		
Patient Main Phone Number: Phone Number	xxxxx		
Next of Kin / Emergency Contact Details: Relationship / Legal status	Married		
Next of Kin / Emergency Contact Details: Address	25 Green St		

1 of 4 1 2 3 4

Cancel Merge Contents Next Step

9. This action updates the patient record in PathWays with the information provided in the Service Request.

Start Assessment

1 Create or Link Patient 2 **Update Patient Information** 3 Update Status

Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Street Address	25 Green St	25 Green St	
Patient Address: City	Town	Town	
Patient Address: Postcode	XX3 4YY	XX3 4YY	
Patient Main Phone Number: Phone Number	xxxxx	xxxxx	
Next of Kin / Emergency Contact Details: Next of Kin Name	John Smith	John Smith	
Next of Kin / Emergency Contact Details: Address	25 Green St	25 Green St	

1 of 4 << 1 2 3 4 >>

Cancel **Merge Contents** **Next Step**

10. If further editing is required, use the **pencil icon** on the far right-side of the window. By clicking on this icon, you are able to manually update the patient record in PathWays.

Start Assessment

1 Create or Link Patient 2 **Update Patient Information** 3 Update Status

Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Street Address	25 Green St	25 Green St	
Patient Address: City	Town	Town	
Patient Address: Postcode	XX3 4YY	XX3 4YY	
Patient Main Phone Number: Phone Number	xxxxx	xxxxx	
Next of Kin / Emergency Contact Details: Next of Kin Name	John Smith	John Smith	
Next of Kin / Emergency Contact Details: Address	25 Green St	25 Green St	

1 of 4 << 1 2 3 4 >>

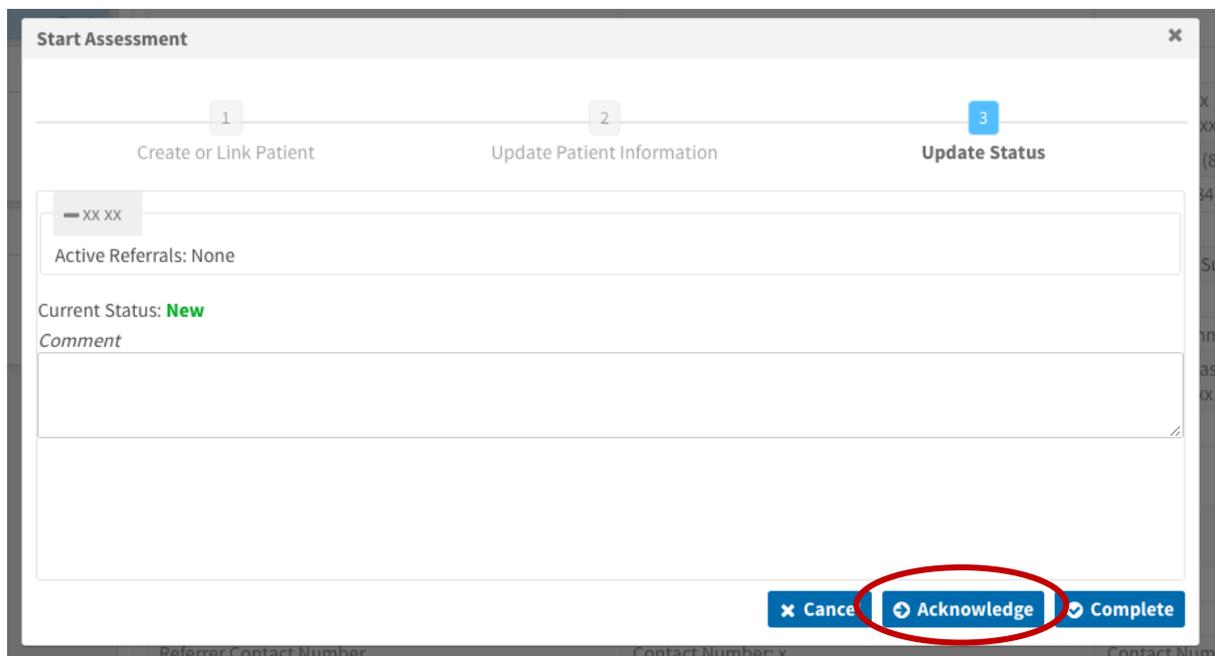
Cancel **Merge Contents** **Next Step**

Section 5 – How to Acknowledge a Service Request

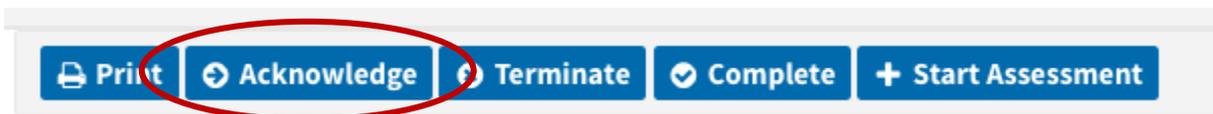
1. After linking & merging a Service Request to an existing patient, click **Next Step** within the window.



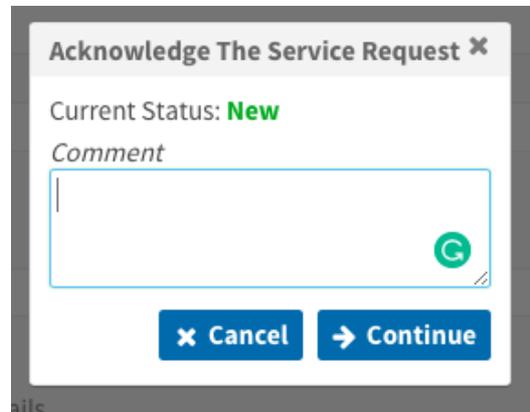
2. In the window that opens, click on the **Acknowledge** button,
3. **This action formally accepts this Service Request.**

A screenshot of a software window titled 'Start Assessment'. At the top, there is a progress bar with three steps: '1 Create or Link Patient', '2 Update Patient Information', and '3 Update Status'. The '3 Update Status' step is highlighted. Below the progress bar, there is a dropdown menu showing 'XX XX', a text area for 'Active Referrals: None', a 'Current Status: New' indicator, and a 'Comment' text area. At the bottom right, there are three buttons: 'Cancel', 'Acknowledge', and 'Complete'. The 'Acknowledge' button is circled in red.

4. It is also possible to Acknowledge the Service Request upon opening the request and using the **blue Acknowledge button**.

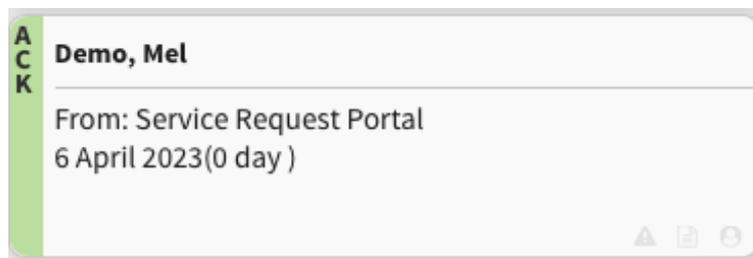


5. Add any relevant comments into the window that opens and click **Continue**.



The screenshot shows a dialog box titled "Acknowledge The Service Request" with a close button (X) in the top right corner. Below the title, it displays "Current Status: **New**". Underneath, there is a text input field labeled "Comment" with a green circular icon containing a white 'G' on the right side. At the bottom of the dialog, there are two buttons: "Cancel" with a close icon (X) and "Continue" with a right-pointing arrow icon.

6. The Service Request tile status will update.

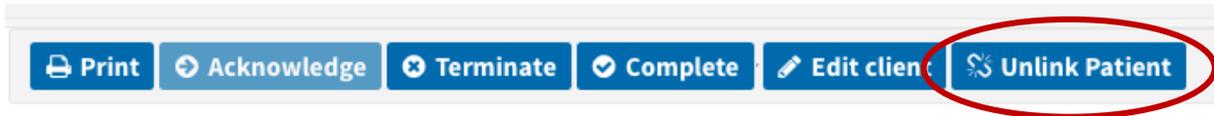


The screenshot shows a service request tile for a patient named "Demo, Mel". On the left side of the tile, the word "ACK" is written vertically in green. The main text of the tile reads "From: Service Request Portal" and "6 April 2023(0 day)". In the bottom right corner, there are three small icons: a triangle, a document, and a person.

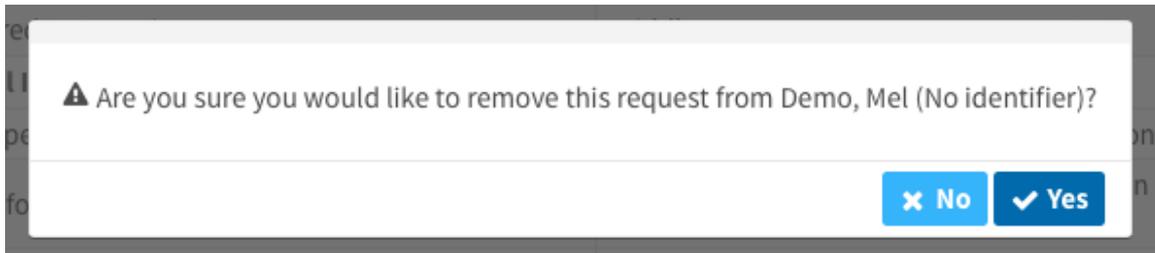
Note - Acknowledging a Service Request will simultaneously start a referral for the patient.

Section 6 - How to Unlink a Patient Record

1. If appropriate, you can unlink the request to the patient in PathWays by clicking on the **Unlink Patient** button.



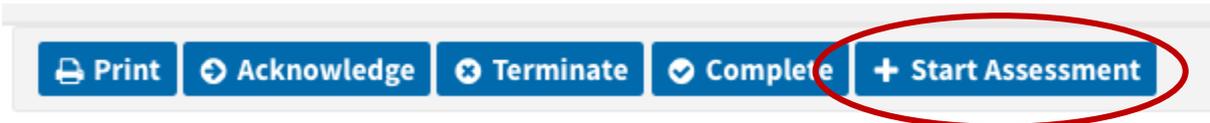
2. Confirm the action within the window that opens, by clicking on **Yes**.



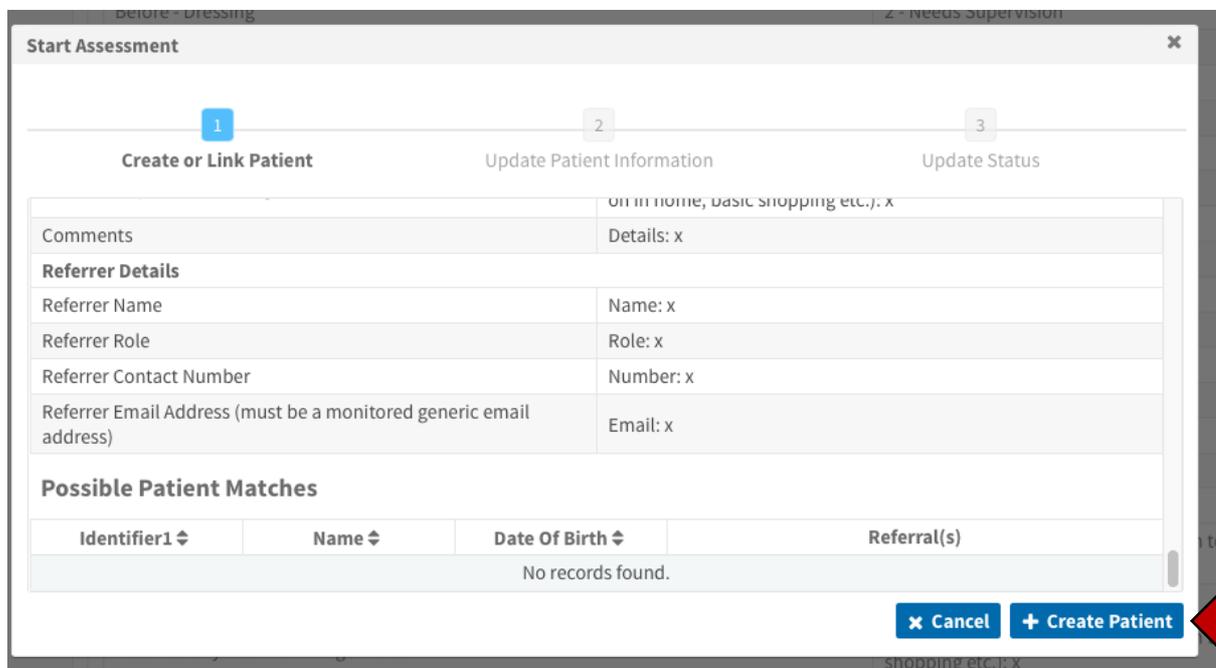
3. The Service Request is now unlinked to the previous record. If no further possible patient matches are available, a new patient record must be created.

Section 7 – How to Create a New Patient Record

1. After clicking on +Start Assessment, if no record is returned as a Possible Patient Match, **you must start a new patient record.**



2. In the window that opens, click on **+Create Patient**



The 'Start Assessment' window is shown with three tabs: '1 Create or Link Patient', '2 Update Patient Information', and '3 Update Status'. The '1 Create or Link Patient' tab is active. It contains a 'Comments' field with the text 'on in home, basic shopping etc.): x' and 'Details: x'. Below this is a 'Referrer Details' section with the following fields: 'Referrer Name' (Name: x), 'Referrer Role' (Role: x), 'Referrer Contact Number' (Number: x), and 'Referrer Email Address (must be a monitored generic email address)' (Email: x). Below the referrer details is a 'Possible Patient Matches' table with columns: 'Identifier1', 'Name', 'Date Of Birth', and 'Referral(s)'. The table is empty and contains the text 'No records found.' at the bottom. At the bottom right of the window, there are two buttons: 'Cancel' and '+ Create Patient'. A red arrow points to the '+ Create Patient' button.

3. A new patient record is created using the information provided on the Service Request.

Viewing client: Test, Patient 3
Date Of Birth: 07-08-1930 (92 Years)
Identifier: N/A

Acting as: West - Penwith LPOA Viewing: Requests

Status: 3 selected Apply Filters

Print Acknowledge Terminate Complete Edit client Unlink Patient

Category	Request Value	Patient Value
Demographics		
Title	Mrs	Mrs
Patient Name	Surname: Test Forename: Patient 3	Surname: Test Forename: Patient 3
Date of Birth	07-08-1930 (92 Years)	07-08-1930 (92 Years)
Gender	Female	Female
Mosaic ID	Mosaic ID: 8764654	Mosaic ID: 8764654
Patient Address	Street Address: xx City: xx Postcode: xx	Postcode: xx City: xx Street Address: xx
Patient Main Phone Number	Phone Number: xx	Phone Number: xx
Next of Kin / Emergency Contact Details	Relationship / Legal status: xx Next of Kin Name: xx Telephone number: xx Address: xx Mobile number: xx	Address: xx Relationship / Legal status: xx Telephone number: xx Mobile number: xx Next of Kin Name: xx
GP Details		
Registered GP Practice	Atlantic Medical Group - L82038	Atlantic Medical Group - L82038
Practice Code	Code: xx	Code: xx
Practice Address	Address: xx	Address: xx
Referral Information		
What type of referral does the person require?	Hospital Discharge	Hospital Discharge
Reason for Admission / Treatment	Details (Detail and initial presenting conditions and any developments.): xx	Details (Detail and initial presenting conditions and any developments.): xx
Does the person have any communication needs?	No	No
Detail the discussion had with the patient and family / carers about personal wishes.	Details (Include what the person and family feel they need to get them home.): xx	Details (Include what the person and family feel they need to get them home.): xx

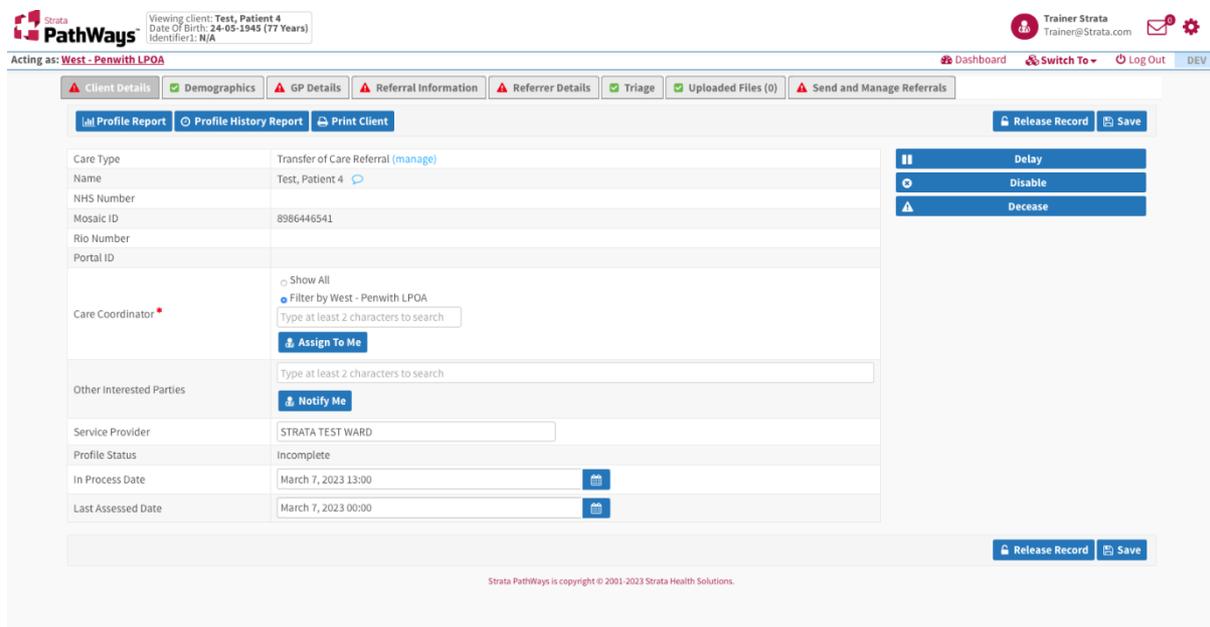
Section 8 – How to Complete a Referral Made from a Service Request

1. To complete the referral that has been started upon acknowledging this Request, click on the **Edit Client** button.

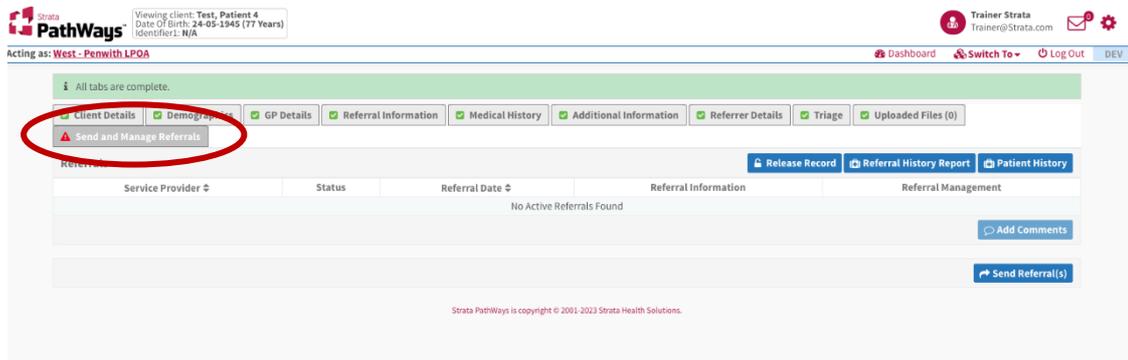


2. A referral form will load and is pre-populated with the information sent through with the Request.

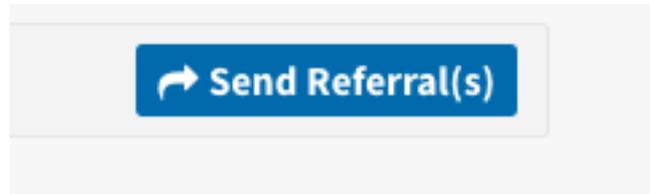
****Please note - the Triage tab is for view only purposes until the referral has been sent to and accepted by the ITOC hub. ****

The screenshot shows the Strata Pathways web application interface. At the top, it says 'Viewing client: Test, Patient 4' with 'Date Of Birth: 24-05-1945 (77 Years)' and 'Identifier: N/A'. The user is logged in as 'Trainer Strata' (Trainer@Strata.com). The main navigation bar includes 'Client Details', 'Demographics', 'GP Details', 'Referral Information', 'Referrer Details', 'Triage', 'Uploaded Files (0)', and 'Send and Manage Referrals'. Below this, there are tabs for 'Profile Report', 'Profile History Report', and 'Print Client'. The main content area displays a form for 'Test, Patient 4' with fields for 'Care Type' (Transfer of Care Referral), 'Name', 'NHS Number', 'Mosaic ID' (8986446541), 'Rio Number', and 'Portal ID'. There are also sections for 'Care Coordinator' (with a search filter for 'West - Penwith LPOA'), 'Other Interested Parties', 'Service Provider' (STRATA TEST WARD), 'Profile Status' (Incomplete), 'In Process Date' (March 7, 2023 13:00), and 'Last Assessed Date' (March 7, 2023 00:00). On the right side, there are buttons for 'Delay', 'Disable', and 'Decease'. At the bottom right, there are 'Release Record' and 'Save' buttons. The footer contains the text 'Strata Pathways is copyright © 2001-2023 Strata Health Solutions.'

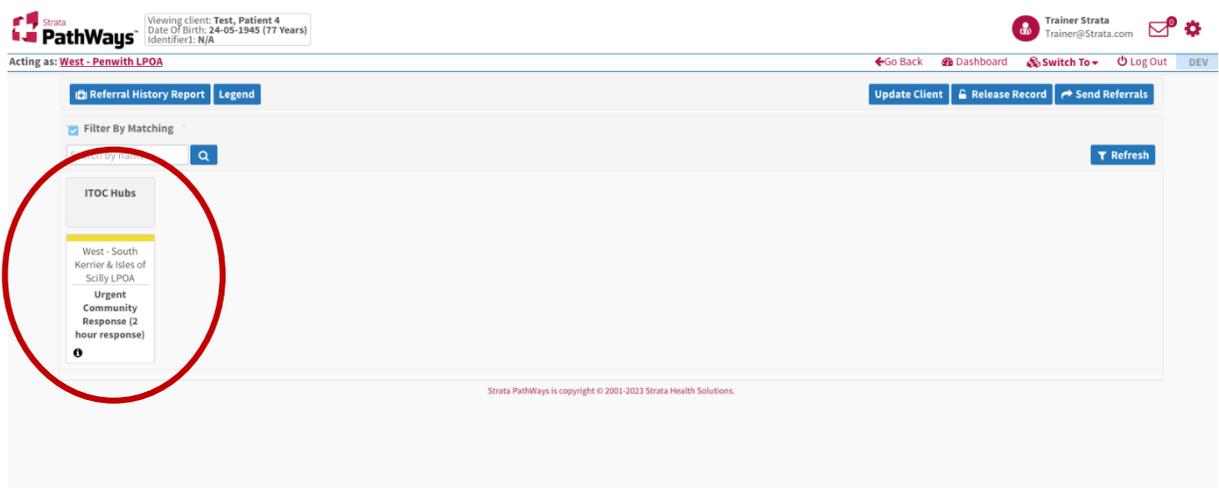
3. **Review each tab** to confirm the information is complete, updating the current location on the Demographics page as necessary, until each tab displays with a green check.
4. Click on the **Send and Manage Referrals** tab.



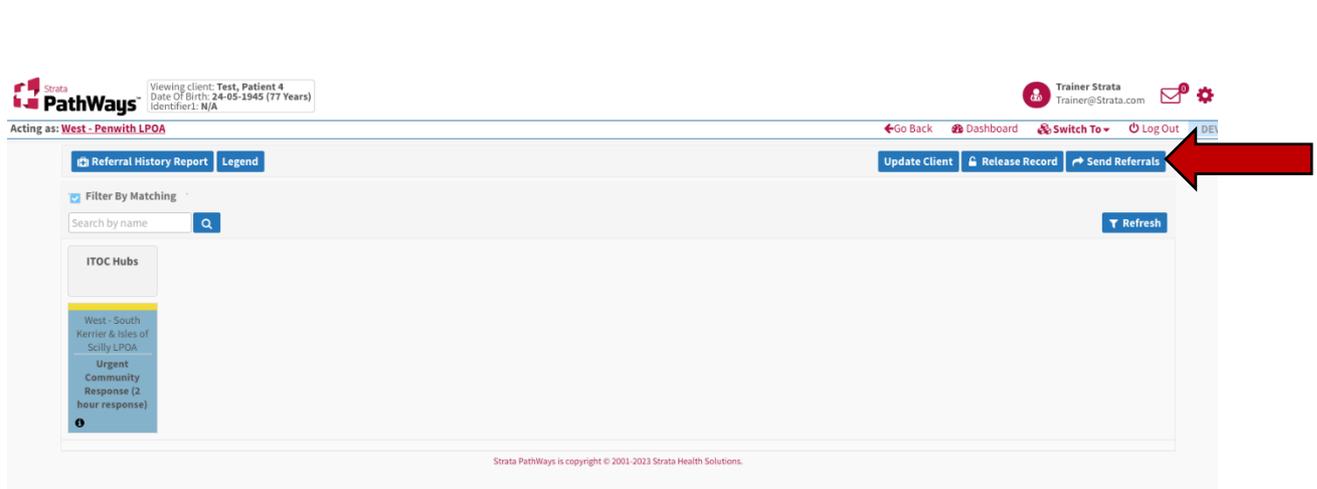
5. Click on **Send Referrals**.



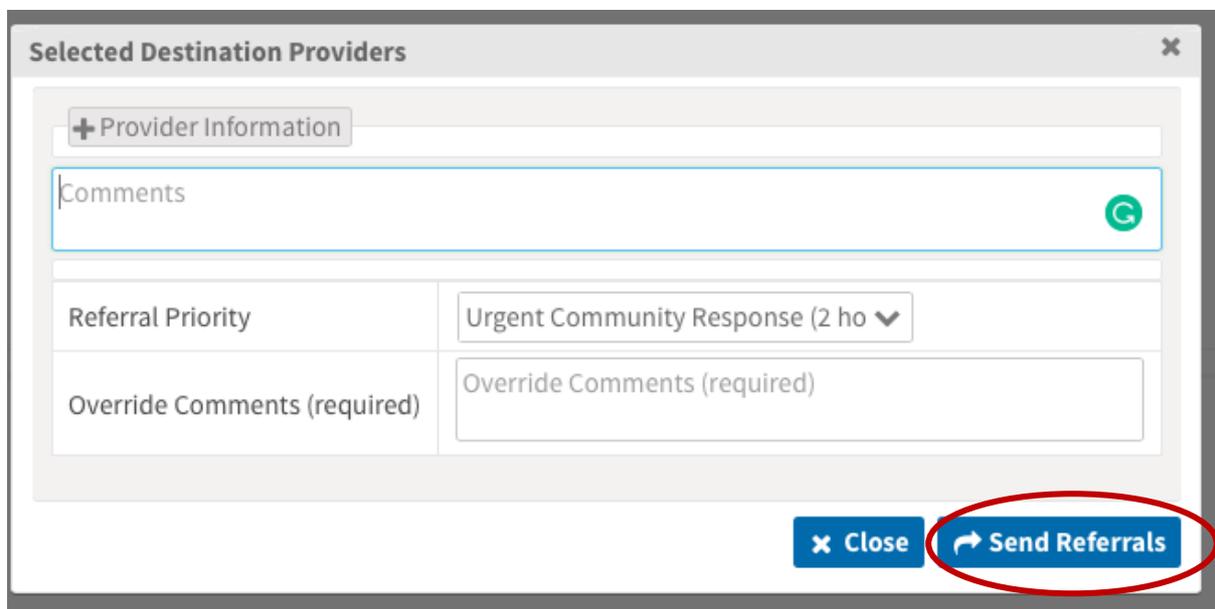
6. The Provider Menu will load and match to the appropriate ITOC hub.



7. Click on the box, it will highlight blue, and then click on **Send Referrals**



8. Confirm your selection in the window that opens by clicking on **Send Referrals**.



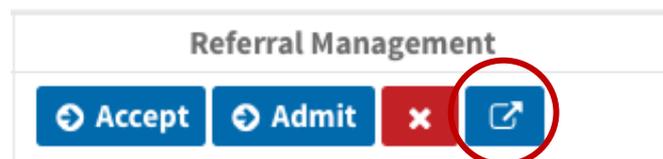
9. The referral has now been sent to the ITOC hub and is in a Pending status.

The screenshot displays the Strata Pathways interface. At the top, it shows the user is acting as 'West - Penwith LPOA'. The main content area features a 'Referrals' table with the following data:

Service Provider	Status	Referral Priority	Referral Date	Referral Information	Referral Management
West - South Kerrier & Isles of Scilly LPOA	Pending	Urgent Community Response (2 hour response)	March 7, 2023 13:43	Details, Print	Accept, Admit, X, Comment, Send Referral(s)

10. Now **add a comment** to the referral, using the speech bubble icon with, **“Original referral was a web-referral. RFI function should not be used.”**

11. Return to the hub dashboard by using the **view referral icon** at the end of the referral row.



12. The ITOCH triage process continues as normal from this stage.

Section 9 – How to Complete a Service Request

1. Once the Service Request has been converted into a referral, **it must be updated to Completed on the Request dashboard.**
2. Do so by opening the request, by clicking on the tile.
3. Then click on **Complete**.

The screenshot shows the Strata Pathways interface. At the top, it says 'Viewing client: Test, Patient 4' with details 'Date Of Birth: 24-05-1945 (77 Years)' and 'Identifier: N/A'. The user is acting as 'West - Penwith LPOA' and viewing 'Requests'. A navigation bar includes 'Dashboard', 'Switch To', 'Log Out', and 'DEV'. Below this, there's a status filter 'Status: 3 selected' and an 'Apply Filters' button. On the left, there are two tiles for 'Test, Patient 4' and 'Test, Patient 3'. The main area shows a 'Request Details' table with columns for 'Category', 'Request Value', and 'Patient Value'. The 'Complete' button in the top action bar is circled in red.

Category	Request Value	Patient Value
Demographics		
Title	Mr	
Patient Name	Surname: Test Forename: Patient 4	Surname: Test Forename: Patient 4
Date of Birth	24-05-1945 (77 Years)	24-05-1945 (77 Years)

4. In the window that opens, add a comment if appropriate and click **Continue**.

The dialog box is titled 'Complete The Service Request'. It shows the 'Current Status' as 'Acknowledged'. Below this is a text input field labeled 'Comment'. At the bottom, there are two buttons: 'Cancel' and 'Continue'.

5. The status of the Service Request tile will update and drop off the dashboard once the screen is refreshed.

This screenshot shows the same interface as before, but the 'Test, Patient 4' tile is now highlighted in blue. A red arrow points to the tile, indicating it has been completed and is being removed from the dashboard.

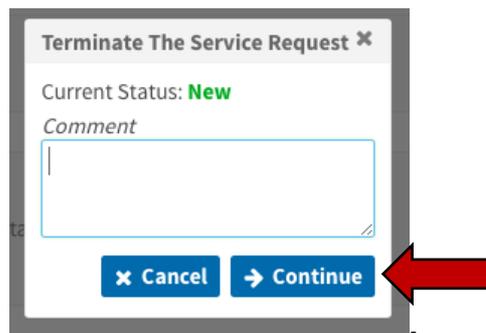
NOTE - When a referral is completed, the referrer is notified by email of the status with an attached PDF copy of the referral.

Section 9 – How to Terminate a Service Request

1. If a Service Request is reviewed and determined that it does not meet the criteria for service, it must be denied by using the **Terminate** button.



2. In the window that opens, add a comment if appropriate and click **Continue**.



3. The tile will update to a grey TER label, indicating it has been terminated (denied) and will drop off the dashboard once you refresh your screen.

NOTE - When a referral is terminated (denied), the referrer is notified by email of the status with an attached PDF copy of the referral.

Section 10 – How to Add Comments

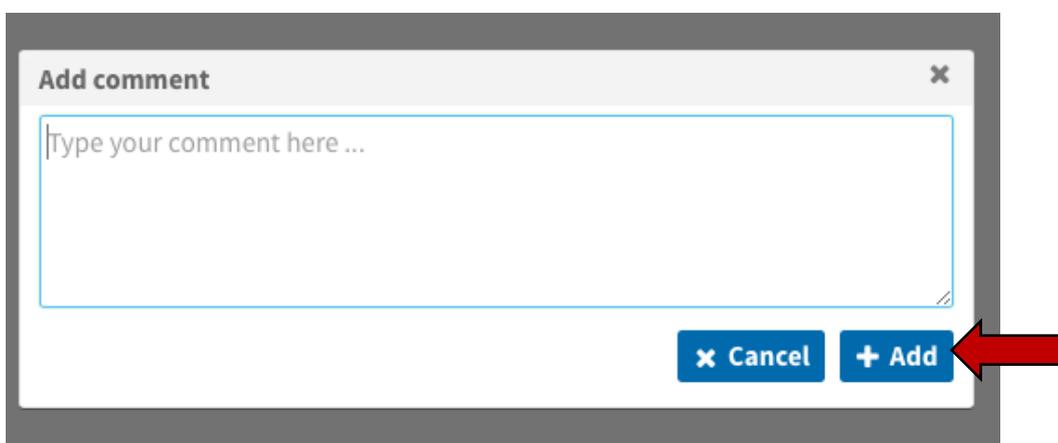
1. Although there is no write-back functionality with a Service Request, comments can be added to a request to capture communication relevant to the request and will be viewable by other ITOCH team members.
2. This is done from the **Comments tab**.



3. Then click **+Add comment**.



4. Add your comments in the text box that opens. And click **+Add**.



5. Comments will stack in date/order on the Comments page.

Print Acknowledge Terminate Complete + Start Assessment

Request Details **Comments**

+ Add comment

Strata, Trainer 5 April 2023 12:48

Add comments here ...

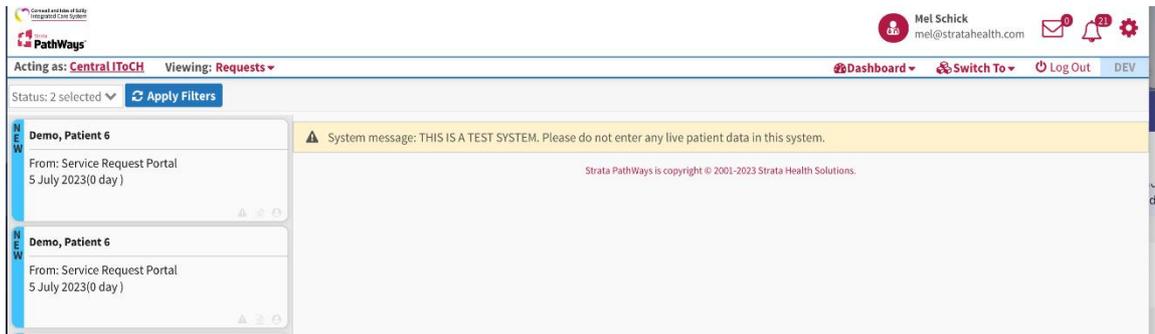
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Section 11 – Multiple Requests

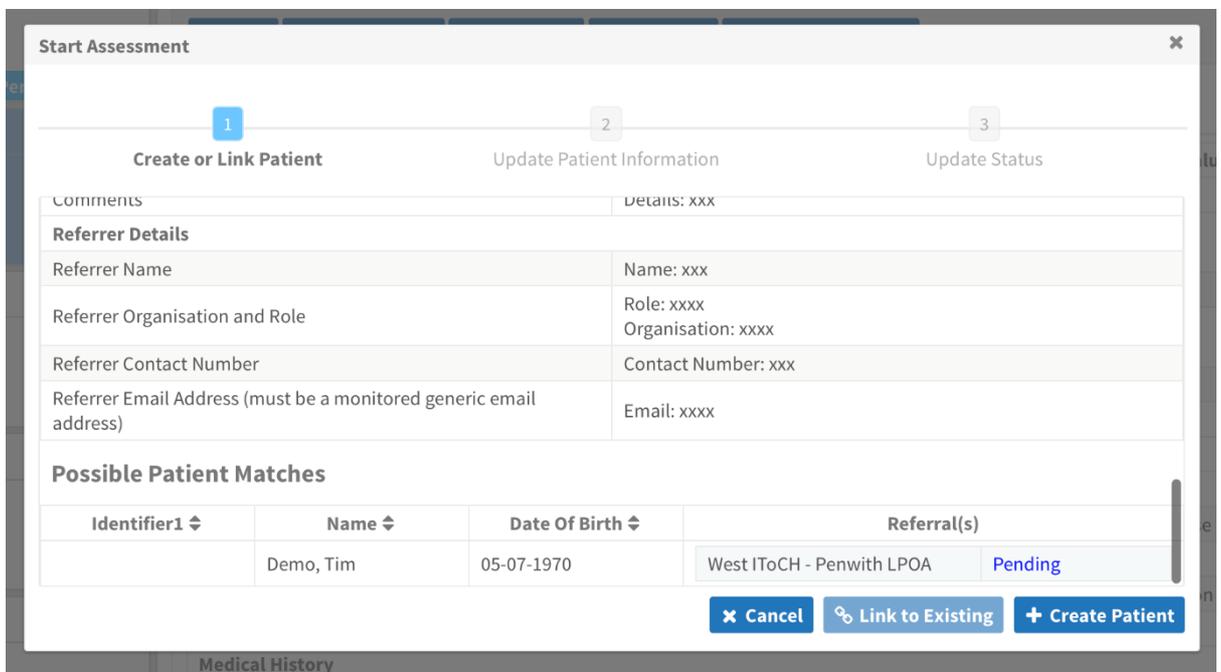
1. In the event duplicate requests arrive open the first request by clicking in the tile.
2. Click start assessment – scroll to the bottom of the window – no records found.

3. Create patient, next step, acknowledge.

4. Edit client, care coordinator – assign to me.
5. Send referrals, select ITOCH, send referrals.
6. View referral: to return to dashboard.
7. Select Viewing: Requests



- Open second referral, start assessment, scroll down in the window that has opened - possible matches.



- Select patient's name, link to existing.
- Scroll down in window to parallel view 1 referral and 1 request.

Viewing client: Demo, Tim
Date of Birth: 05-07-1970 (53 Years)
Identifier: N/A

Acting as: Central ITOCH Viewing: Requests

Status: 2 selected Apply Filters

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

Buttons: Print Acknowledge Terminate Complete Edit client Unlink Patient

Category	Request Value	Patient Value
Demographics		
Patient Name	Surname: Demo Forename: Tim	Surname: Demo Forename: Tim
Date of Birth	05-07-1970 (53 Years)	05-07-1970 (53 Years)
Patient Address	Postcode: TR50HH Address: The White House	Address: The White House Postcode: TR5 0HH
Does the patient have a temporary address?	No	No
GP Details		
Registered GP Practice	Bodriggy Health Centre - L82036	Bodriggy Health Centre - L82036
Referral Information		
What type of referral does the person require?	Non Urgent / Routine Community Response	Carers Assessment
Reason for Referral	Assessment	
Reason for Referral - Details	Details (Please include as much information as possible.): xx	Details (Please include as much information as possible.): www
When does care need to start?	5 July 2023 14:42	
Medical History		
Describe relevant health details including Past Medical History, Previous Admissions	Details: xxx	

11. Read information – referral types/ referral information.

Start Assessment

1 Create or Link Patient 2 Update Patient Information 3 Update Status

Tim Demo
Active Referrals: West ITOCH - Penwith LPOA Pending

Category/Attribute	Request	Patient
Demographics		
Patient Name: Forename	Tim	Tim
Patient Name: Surname	Demo	Demo
Date of Birth: DOB	05-07-1970	05-07-1970
Patient Address: Postcode	TR50HH	TR5 0HH
Patient Address: Address	The White House	The White House

Buttons: Cancel Merge Contents Next Step

12. Next steps, acknowledge – tile will turn green.

13. Print, select PDF, save to laptop.

Printer HP OfficeJet Pro 7740 series

The printer is offline.

Presets None

Copies 1

Pages

- All 2 Pages
- Range from 1 to 1
- Selection
Select pages from the sidebar

Print in Colour

Double-sided On

Paper Size A4 210 by 297 mm

Orientation Portrait Landscape

Scaling 100%

Safari

- Print backgrounds
- Print headers and footers

Media & Quality

? PDF

Cancel Print

14. Select Viewing: Referrals

15. Open the first referral.

16. Attachments – upload files, select the file saved above, save (ensure delete from PC once attached).

Viewing client: Demo, Tim
Date Of Birth: 05-07-1970 (53 Years)
Identifier: N/A

Acting as: West ITOCH Viewing: Referrals

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

Print Assign Edit client Accept Admit Redirect Deny Request For Information

Updates Details Matching Profile Clinical Profile Comments (0) Attachments (1) Tasks (0)

Name	Category	Description	Date	Added by
Strata Pathways - Requests.pdf			5 July 2023 14:56	Schick, Mel

1 of 1

Upload Files

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17. Comments, add comment 'Two referrals received via web-link, please review attached PDF to enable triage of both requests. Select add.

Viewing client: Demo, Tim
Date Of Birth: 05-07-1970 (53 Years)
Identifier: N/A

Acting as: West ITOCH Viewing: Referrals

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

Print Assign Edit client Accept Admit Redirect Deny Request For Information

Updates Details Matching Profile Clinical Profile Comments (1) Attachments (1) Tasks (0)

+ Add comment

Schick, Mel (Facility) 5 July 2023 15:02

Two referrals received via web-link, please review attached PDF to enable triage of both requests.

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18. Return to Requests page, select complete, this will remove from the page.

Viewing client: Demo, Tim
Date Of Birth: 05-07-1970 (53 Years)
Identifier: N/A

Acting as: Central ITOCH Viewing: Requests

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

Print Acknowledge Terminate Complete Edit client Unlink Patient

Request Details Comments Referrals

Category	Request Value	Patient Value
Demographics		
Patient Name	Surname: Demo Forename: Tim	Surname: Demo Forename: Tim
Date of Birth	05-07-1970 (53 Years)	05-07-1970 (53 Years)
Patient Address	Postcode: TR5 0HH Address: The White House	Address: The White House Postcode: TR5 0HH
Does the patient have a temporary address?	No	No
GP Details		
Registered GP Practice	Bodriggy Health Centre - L82036	Bodriggy Health Centre - L82036
Referral Information		
What type of referral does the person require?	Carers Assessment	Carers Assessment

Admin process completed.

Prioritiser Process – imperative to filter by updates to capture the duplicate requests.

1) ITOCH Referrals Dashboard

The screenshot shows the ITOCH Referrals Dashboard. At the top, it displays the user 'Mel Schick' with the email 'mel@stratahealth.com'. The dashboard is titled 'Acting as: West ITOCH' and 'Viewing: Referrals'. There are navigation buttons for 'Dashboard', 'Switch To', 'Log Out', and 'DEV'. A search bar for 'Search referrals' and an 'Advanced' search option are also present. The main content area shows a list of referrals on the left and a large grey area on the right with the message 'No Referral Selected'. A system message at the top right states: 'System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.' The referrals list includes:

- Demo, Tim** (53 Years) - Carers Assessment. From: Central ITOCH. To: West ITOCH - Penwith LPOA. Transfer of Care Referral: 5 July 2023 (0 day). Referral Updated: 5 July 2023 15:02.
- TestXX, Jordan** (2 Days) - Non Urgent / Routine Community Response. From: RCHT - Roskear Ward. To: West ITOCH - Penwith LPOA. Transfer of Care Referral: 5 July 2023 (0 day). Referral Updated: 5 July 2023 09:49.

19. Open referral, blue updates tab will open to show new attachment and comment.

20. To view attachment, click on blue hyper link called Receiver Attachment Added.

The screenshot shows a detailed view of a referral for 'Demo, Tim' (53 Years). The dashboard is titled 'Viewing client: Demo, Tim' with 'Date of Birth: 05-07-1970 (53 Years)' and 'Identifier: N/A'. The user 'Mel Schick' is logged in. The dashboard is titled 'Acting as: West ITOCH' and 'Viewing: Referrals'. There are navigation buttons for 'Dashboard', 'Switch To', 'Log Out', and 'DEV'. A search bar for 'Search referrals' and an 'Advanced' search option are also present. The main content area shows a list of referrals on the left and a detailed view of the selected referral on the right. The selected referral is 'Demo, Tim' (53 Years) - Carers Assessment. From: Central ITOCH. To: West ITOCH - Penwith LPOA. Transfer of Care Referral: 5 July 2023 (0 day). Referral Updated: 5 July 2023 15:02. The detailed view shows a 'Receiver Attachment(s) Added' notification from 'Schick, Mel (Administrator)' on '5 July 2023 14:56'. The attachment is 'Strata PathWays - Requests.pdf'. The notification text reads: 'Two referrals received via web-link, please review attached PDF to enable triage of both requests.' The dashboard also shows a 'System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.'

2) Download the attached file by clicking on the download button.

The screenshot displays the Strata Pathways web application interface. At the top, it shows the user 'Mel Schick' with email 'mel@stratahealth.com' and a profile picture. The system message reads: 'System message: THIS IS A TEST SYSTEM. Please do not enter any live patient data in this system.' The main content area shows a referral for 'Demo, Tim' (53 Years) with a 'Carers Assessment' status. The referral details include: 'From: Central ITOCH', 'To: West ITOCH - Penwith LPOA', and 'Transfer of Care Referral: 5 July 2023 (0 day)'. Below this, there are two other referral entries: 'TestXX, Jordan' and 'Email_referral_Test'. The 'Attachments' tab is active, showing a table with one attachment: 'Strata Pathways - Requests.pdf', added on '5 July 2023 14:56' by 'Schick, Mel'. A blue oval highlights the 'Download' icon in the attachment row. The interface includes various navigation and action buttons like 'Print', 'Assign', 'Edit client', 'Accept', 'Admit', 'Redirect', 'Deny', and 'Request For Information'. The footer indicates 'Strata Pathways is copyright © 2001-2023 Strata Health Solutions.'

21. Download and open the attachment on a separate screen.

Request Details

Category	Request Value	Patient Value
Demographics		
Patient Name	Surname: Demo Forename: Tim	Surname: Demo Forename: Tim
Date of Birth	05-07-1970 (53 Years)	05-07-1970 (53 Years)
Patient Address	Postcode: TR50HH Address: The White House	Address: The White House Postcode: TR5 0HH
Does the patient have a temporary address?	No	No
GP Details		
Registered GP Practice	Bodriggy Health Centre - L82036	Bodriggy Health Centre - L82036
Referral Information		
What type of referral does the person require?	Non Urgent / Routine Community Response	Carers Assessment
Reason for Referral	Assessment	
Reason for Referral - Details	Details (Please include as much information as possible.): xx	Details (Please include as much information as possible.): www
When does care need to start?	5 July 2023 14:42	
Medical History		

22. Review PDF attachment to enable triage of both requests simultaneously (suggest using second screen).
23. Continue triage process, recording rationale.
24. Prioritiser to determine if different referral requests or a duplicate of same request.
25. In the case of multiple triage outcomes – select the highest priority and record in triage decision.

Strata PathWays Support

If you have any further questions, please contact our Support Desk.

Phone Number: 0333 002 0233

Email: uksupport@stratahealth.com