

Receiving and Managing Ocean eReferrals

Web Portal Users

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Notice of Living Document

This document is intended as a resource for Ocean eReferral sending clinicians and the staff who support them. Please use this as a guide and notify your Change Management Specialist if you have any questions or require support.

Your Ocean Portal

In the 'eReferrals & eConsults' page of your Ocean Portal, you will find your eReferrals categorized into different inboxes. As a receiver of referrals, please ensure your '**Received**' tab is open, and you can collapse the '**Sent**' section if you do not send/rarely send eReferrals.

To save the settings once you have the folders displayed the way you would like, click the refresh button (⌂) in your browser.

Filter	Search for referral by patient name, referring physician name, MRN, HCN, etc.
General	GENERAL FOLDER GROUP:
 Needs Review	Referrals that have a message or action needing to be acknowledged
For Me	Referrals that have been assigned to you for your review (<i>not used by every Ocean site</i>)
Recently Viewed	List of your most recently reviewed referrals
Received ▲	RECEIVED TAB – keep this tab open!
 New	All new received eReferrals that have not yet been Accepted or Declined
Pending Booking	Accepted eReferrals that do not yet have an appointment entered in Ocean
 Booked Unconfirmed	Accepted eReferrals that include appointments that have not yet been confirmed
Booked Confirmed	Accepted eReferrals that include appointments that have been confirmed
Awaiting Reply	eReferrals that have been marked as awaiting reply (see Ocean for more details)
Received (All)	All eReferrals your site has received regardless of the current status
Completed	eReferrals that have been marked as 'Complete' following the appointment date
Forwarded (All)	eReferrals that you have forwarded to another site (<i>not used by every Ocean site</i>)
Declined	eReferrals that you have declined
Cancelled	eReferrals that have been cancelled by the referral source
Sent ▼	SENT TAB – you can collapse this folder if you do not send referrals/requisitions
Deletion Warnings	eReferrals that will be deleted from Ocean within 14 days (<i>eReferrals move to this folder 1 year after they are sent from/received in Ocean</i>)

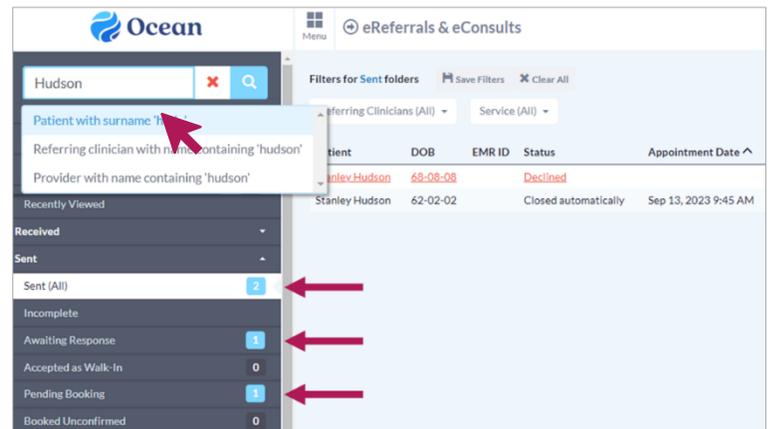
Filters can be applied in the status folders in your Ocean site, giving the user the ability to focus their view on only referrals that are relevant to them. This is valuable for Ocean sites that have a large number of clinicians. For instructions on setting up your filters, please see Ocean's support article on [Filtering Status Folders](#).

 The '**Needs Review**', '**New**' and '**Booked Unconfirmed**' folders are important folders to keep an eye on. These folders contain items that require something to action and/or something that needs review. Please see the [Needs Review Folder](#) and the [Booked Unconfirmed Folder](#) sections of this document for more detailed information.

Searching for an eReferral

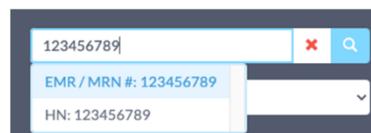
To search for a specific referral within your Ocean site, you can use the search bar in the top left corner on your 'eReferrals & eConsults' page. Upon entering your search criteria in the upper left corner, the grey status folder(s) containing the referral(s) that meet your search criteria will display a blue number to help you locate what you are searching for.

In the example to the right, when searching for a patient with the last name 'Hudson', blue number flags are only displayed in the folders that contain eReferrals for a patient with the matching last name of 'Hudson'.



There are several other ways you can search from this one search bar:

- **Patient with Surname**, as in the example above, filters to include only referrals with the matching surname.
- **Referring Clinician with Name Containing** filters to include only referrals sent by that specific clinician.
- **Provider with Name Containing** filters to include only referrals sent to the Directory Listing(s) with the matching name.
- **EMR/MRN** filters to include only referrals for patients with the matching EMR ID/MRN value.
- **HN** filters to include only referrals for the patient with the matching health card number.
- **Sent On** filters to include only referrals that were sent on the chosen day.
- **Received On** filters to include only referrals that were received on the chosen day.
- **Booked On** filters to include only referrals that have appointment information added on the chosen day.

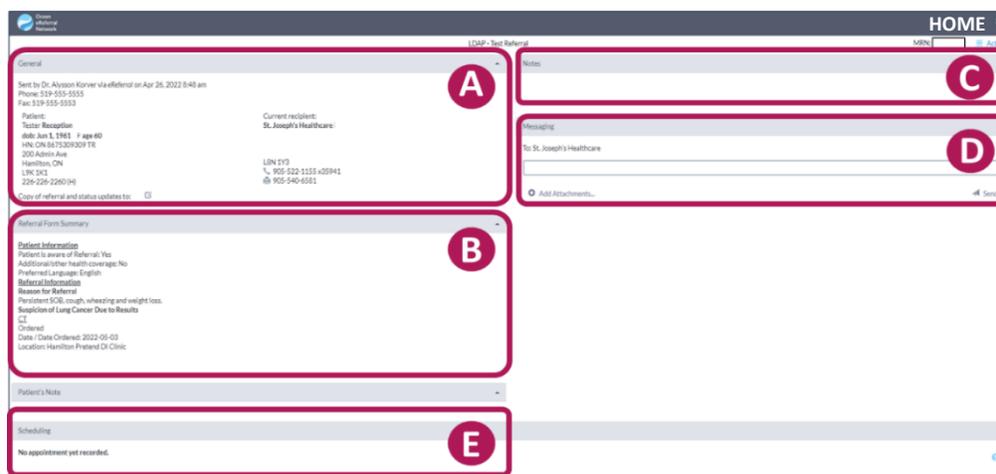


Examples of search options when searching by date or a number

Ocean eReferrals – A Closer Look

Below is an example of what a referral will look like.

- A. **General section:** Contains patient demographics and the referral-sender’s contact information and billing information.
- B. **Referral Form Summary:** Contains the information populated into your Ocean eReferral form by the sender.
- C. **Notes section:** Can be used for internal notes to help coordinate between staff members (i.e. left message for patient).
NOTE: Any user on your Ocean site and the recipient’s Ocean site can see the notes in this section! You can left-click on the “New Note” header and then select “Make Private for Site” to have the notes only viewable to your site, and not the referral-receiver. The font will be *italicized* once the note has been made private.
- D. **Messaging section:** Information exchange section to securely message between sending and receiving provider. This information can include text communication and/or attachments.
- E. **Scheduling section:** The patient’s appointment date and other pertinent appointment information that you wish to share with the referral-sender and the patient will be entered in this section.



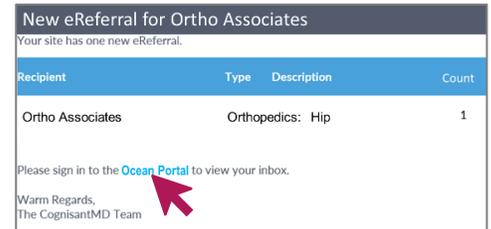
The screenshot shows an eReferral form with the following sections highlighted:

- A (General):** Sent by Dr. Alisson Korver via eReferral on Apr 26, 2022 8:40 am. Patient: Taylor, Jacqueline (DOB: Jun 1, 1961, F, Age 60). Current recipient: St. Joseph's Healthcare. Includes contact info for both sender and recipient.
- B (Referral Form Summary):** Patient Information (Patient is aware of Referral: Yes), Referral Information (Reason for Referral: Suspicious of Lung Cancer Due to Results), and Ordered (Date / Date Ordered: 2022-05-03).
- C (Notes):** A section for internal notes.
- D (Messaging):** A section for secure messaging between providers.
- E (Scheduling):** A section for appointment scheduling, currently showing "No appointment yet recorded."

Click the ‘HOME’ button to return to the eReferral home page, where you can view all your referrals.

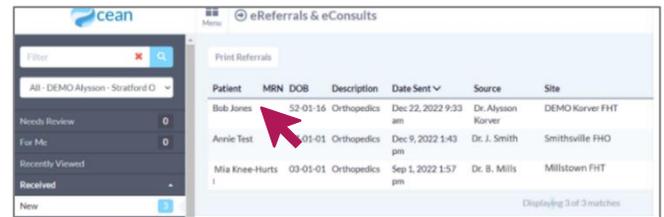
Receiving a New Ocean eReferral

1. The workflow of the user who manages the incoming referrals would typically begin with an email notification informing your site that a new referral has been sent. Click the [Ocean Portal](#) link in the email.



If your site does not use email notifications, you can routinely monitor the *New* folder in your Ocean site by logging into your Ocean account at <https://ocean.cognisantmd.com/>. Chrome or Firefox are recommended.

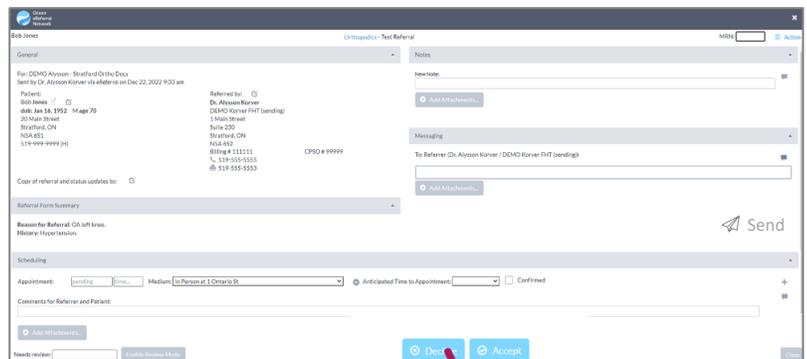
2. In the *New* folder of your 'eReferrals & eConsults' page, click anywhere in the row of the new referral that you would like to review.



3. If you would like to assign a new eReferral to another user on your Ocean site for review (e.g. for triaging), please see [Ocean's support page](#) for instructions.

If you triage the referrals yourself, review the referral to see if it is appropriate for your practice.

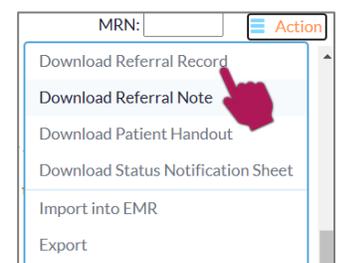
- a. **If the referral is not appropriate** for your practice, click the **Decline** button at the bottom of the referral. Enter the reason for declining the referral when prompted to do so.



The referring clinician will be notified, and this referral will move to the *Declined* folder in your Ocean Portal.

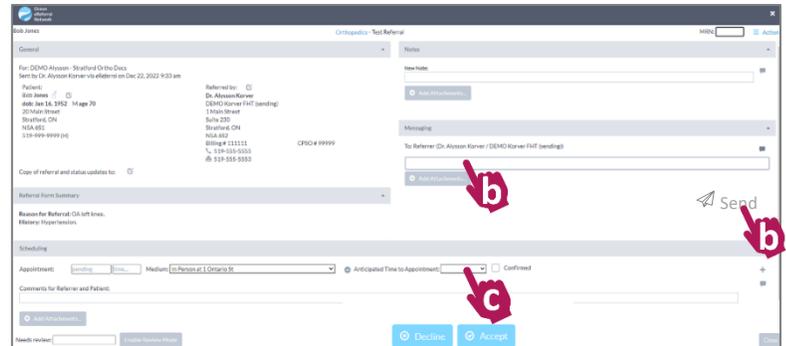
If you wish to add the referral to your EMR for documentation purposes after declining it:

- locate the referral in the *Declined* folder, or from your *Recently Viewed* folder
- open the referral and then open the **Action menu** in the top right corner
- select **Download Referral Record** to save a PDF of the referral and any attachments that were sent.



- b. If you require more information before accepting, you can type your request to the referring clinician in the Messaging section of the referral, and then click **Send**.**

If you have email notifications enabled, you will be notified via email when they have added a response. You can also monitor the [Needs Review](#) folder for their response.



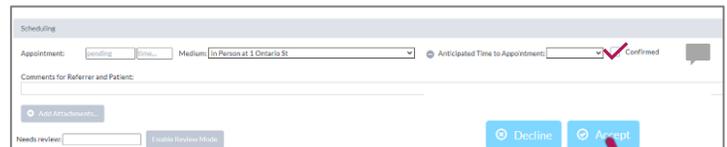
- c. If the referral is appropriate but you will be putting the patient on a waitlist, you can communicate this wait time to the referring clinician and to the patient (if the patient email address is in the demographic section). Select the amount of time you anticipate until the appointment from the **Anticipated Wait Time to Appointment** dropdown (see image above).**

You may wish to include a note in the Comments field of the Scheduling section for the referring clinician and the patient.

Once complete, click the **Save & Close** button. This referral will move to the *Pending Booking* folder until you are ready to make an appointment for the patient.

- d. If the referral is appropriate and you are ready to Accept the referral and book the appointment:**

- book the appointment in your system as you normally would
- enter this appointment date, time and location into the Ocean eReferral's Scheduling section
- you can manually enter comments/instructions for the patient (the referral source and patient will receive these if the patient email address is in the demographic section), **OR**
- if there are canned messages already saved to your Ocean site, simply click on the speech bubble icon to be presented with the options, and select the text you wish to insert (*if you haven't already created canned texts, see [Ocean's support page](#)*)
- When you contact the patient about their appointment, click the '**Confirmed**' checkbox. This will log in the referral that the appointment has been confirmed. The referral-sender will be able to see this as well.
- Once you have entered all of the appointment information, click the **Accept** button
 - if you checked the 'Confirmed' button, the eReferral will then move to the '*Booked Confirmed*' folder
 - if you did not check off the 'Confirmed' button, the eReferral will move to '*Booked Unconfirmed*'.



- e. If you wish to Accept the referral but want to enter the appointment information later, click the **Accept** button and locate the eReferral at another time in the *Pending Booking* folder.**

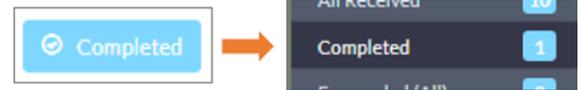
Completing eReferrals:

Once the scheduled date for the patient’s appointment has passed, it is important for this referral to be marked as ‘Completed’.

There are two ways that a referral can be marked as ‘Completed’ to finish off the eReferral process in your Ocean Portal:

i) **Manually Marking as Complete:**

The ‘Completed’ button appears along the bottom of an eReferral after the appointment date has passed. Click this button to move these referrals to the *Complete*’ folder of your Ocean site.



ii) **Automatic Completion:**

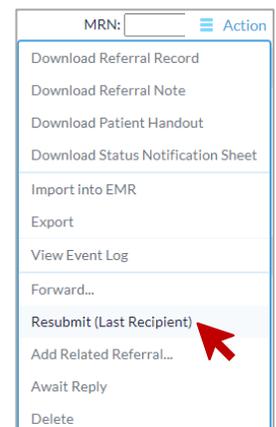
Your site can be configured to automatically close referrals after a set number of days from the appointment. If this has not been set up for your site, and you would like to do so, please refer to [Ocean’s support page](#).

Accepting a Previously Declined Referral

If you previously declined an eReferral that was sent to you in Ocean but you are now able to accept it (e.g. you declined due to missing information that has now been sent), you can **Resubmit** the referral to your Ocean site, which will move it back to your *New* folder. The original referral-sender will not have to resubmit the referral to you.

To do this:

1. Locate the previously declined referral in the *Declined* folder.
2. Open the referral and then click the **Action** menu button in the top right corner.
3. Select **Resubmit (Last Recipient)** from the menu.
4. You will see a pop-up saying your referral has been successfully resubmitted. The screen will then refresh itself, and you will see in the Scheduling pane that the **Accept** and **Decline** buttons are available again.
5. Proceed with scheduling an appointment, or you can retrieve this referral at another time from your *New* folder.

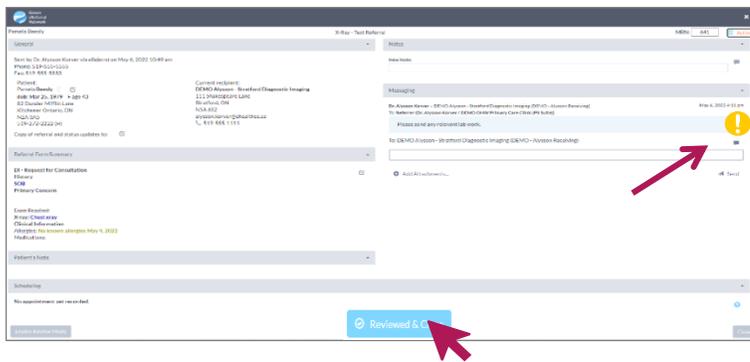


Needs Review Folder

Any referrals in the *Needs Review* folder inbox have a message that needs to be acknowledged. Similar to the diagram below, you will see icons in the Message column flagging this. (Note: If you entered an email address in Ocean to receive email notifications, you will also receive an email letting you know you have something to review).



Open the referral and you will see an icon in the section that needs your attention.



Please ensure you click **'Reviewed & Close'** once you have reviewed the referral. It will then move to the appropriate folder according to its status and can continue to be managed from there.

Booked Unconfirmed Folder

In the *Booked Unconfirmed* folder, you will find the referrals that you have booked, but it has not yet been logged in Ocean as being confirmed with the patient.

If the patient has consented to receive email notifications from Ocean, they will receive an email with their appointment date, time, and any instructions that you included in the Scheduling section of the eReferral. In this email notification, they are encouraged to click a **Confirmation** button. If they do this, the referral will move to *the Booked Confirmed* folder, and there will be no further actions required by you in Ocean.

If you contact a patient with their appointment details, please ensure that you check off the **Confirmed** box in the Scheduling pane of the eReferral. This will log in the eReferral that the appointment has been confirmed, and the referral-sender will also be able to see that the appointment was confirmed.

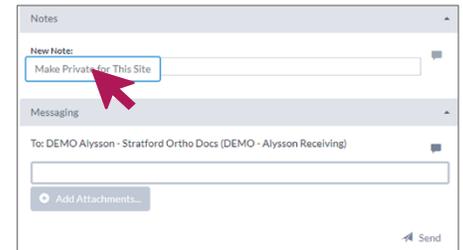


Notes Section:

The Notes area within an eReferral can be used for general internal documentation regarding the referral.

It is **important to note** that any user on your Ocean site **and** the sending clinic's Ocean site can see the notes in this section unless you make it private.

To make the note visible for only your site, click on the 'New Note' header, and then click ***Make Private for this Site***. The 'New Note' header will italicize, as will your note, indicating that this note can only be seen by users of your Ocean site.



Action Menu:

You will note an 'Action' menu in the top right corner of your eReferrals. This menu contains additional options.

Please refer to the '[What do the different Action Menu items mean?](#)' page on Ocean's website for more information.

eReferral Icon Legend

Icons from your Ocean Portal Main Page:

-  - there is a message associated with the eReferral
-  - view the patient's previous eReferrals
-  - there is an attachment with the eReferral
-  - a copy of the eReferral has been exported from Ocean
-  - this patient has notes that are ready to be downloaded
-  - the eReferral has been electronically forwarded to another site

Icons Within the eReferral

-  - edit details
-  - highlights the area of the eReferral that needs review
-  - the area of the eReferral previously requiring review, has been reviewed
-  - opens a list of canned notes or protocol forms to add to the eReferral
-  - delete an attachment, or previously-entered appointment information when selecting in the Scheduling Pane
-  - the eReferral will be included in wait time calculations