

# Sending 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 sender of referrals, please ensure your '**Sent**' tab is open, and you can collapse the '**Received**' section if you do not receive/rarely receive eReferrals.

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

<input type="text" value="Filter"/> 	Search by patient name, referring physician name, MRN, HCN, etc.
<b>General</b>	
 Needs Review	eReferrals/eConsults that have a message or action needing to be acknowledged
For Me	eReferrals 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
<b>Received</b> ▼	<b>RECEIVED TAB</b> – keep this tab closed unless you also receive referrals
<b>Sent</b> ▲	<b>SENT TAB</b> – keep this tab open!
Sent (All)	All eReferrals/eConsults that have been sent from your site
Incomplete	Any outgoing eReferrals/eConsults that have been saved for later completion (will save for 30 days)
Awaiting Response	eReferrals/eConsults you have sent, but that have not yet been accepted or declined
Accepted as Walk-In	eReferrals accepted by receiver as a walk-in appointment
Pending Booking	eReferrals accepted by the receiver, but have not yet been given an appointment date
 Booked Unconfirmed	eReferrals that have been accepted and scheduled, but not yet confirmed with patient
Booked Confirmed	eReferrals that have been accepted and scheduled, and confirmed by either patient or provider
Completed	eReferrals/eConsults that have been marked as completed after the scheduled appointment
Declined	eReferrals that have been declined by receiving site
Cancelled	eReferrals that have been cancelled by yourself, the referral sender
<b>Deletion Warnings</b>	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>

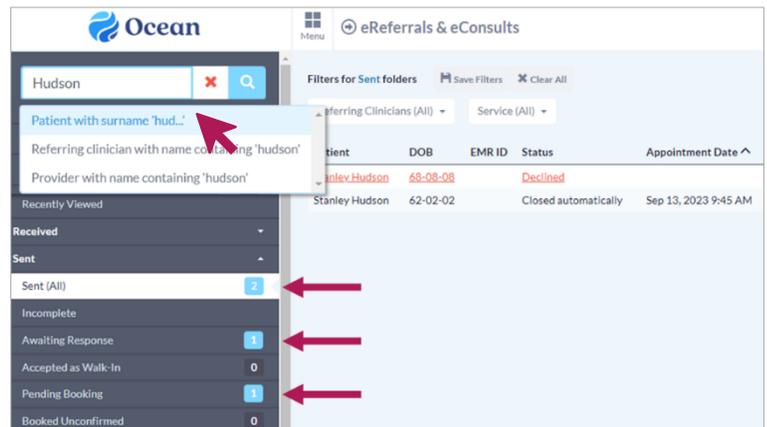
**Filters** can be applied in the status folders in your Ocean site, giving the user the ability to focus their view on only referrals that are relevant to them. This is valuable for Ocean sites that have a large number of clinicians. For instructions on setting up your filters, please see Ocean's support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

 The '**Needs Review**' folder and the '**Booked Unconfirmed**' folder 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

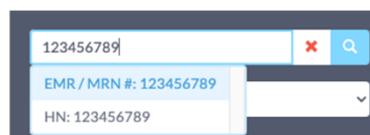
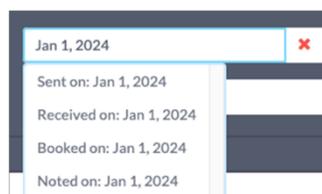
To search for a specific referral within your Ocean site, you can use the search bar in the top left corner on your 'eReferrals & eConsults' page. Upon entering your search criteria in the upper left corner, the grey status folder(s) containing the referral(s) that meet your search criteria will display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

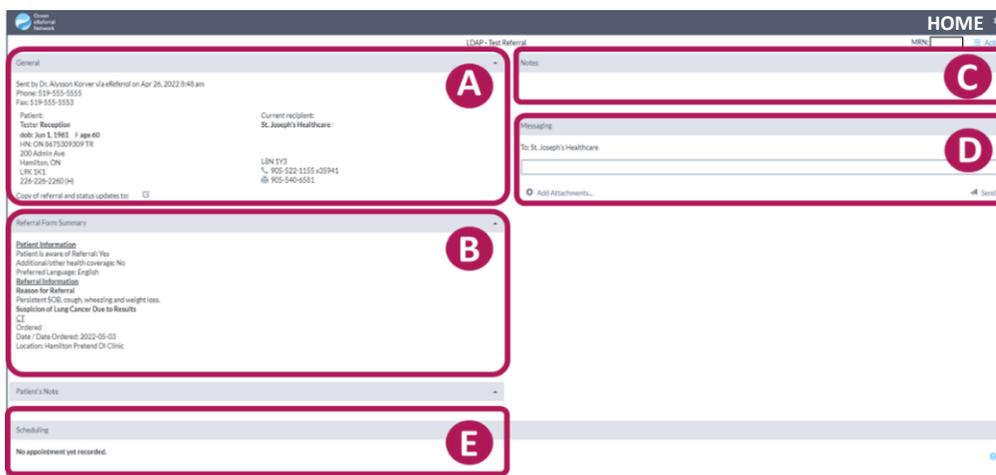


Examples of search options when searching by date or a number

## Ocean eReferrals – A Closer Look

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

- A. **General section:** Contains your sending site contact information, patient demographics, and the referral recipient’s information.
- B. **Referral Form Summary:** Contains the information generated from the referral form you submitted.
- 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 information will be entered by the receiving site/specialist in this section.

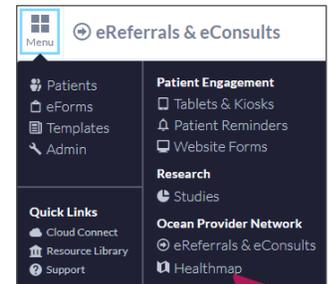


Click the ‘HOME’ button to return to the eReferral home page, where you can view all your referrals.

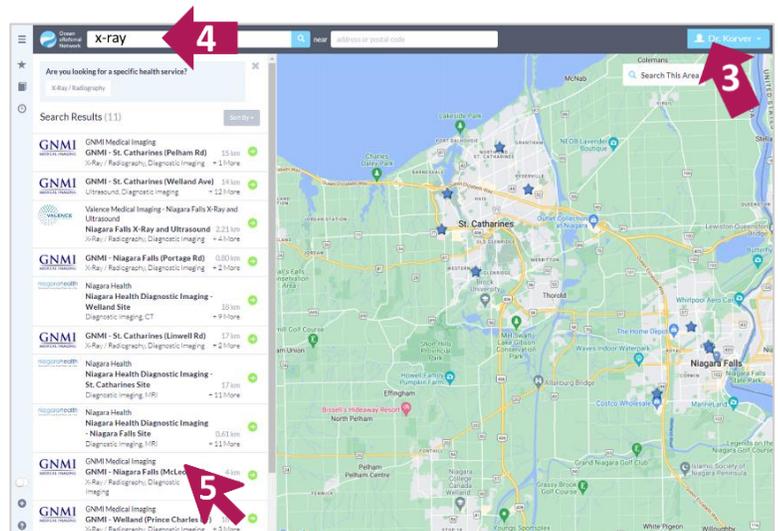
# Sending an Ocean eReferral

The following steps demonstrate how to send an eReferral from an Ocean site that has not been integrated an EMR:

1. Log into your Ocean account at <https://ocean.cognisantmd.com/>. Chrome or Firefox are recommended.
2. From the ‘eReferrals & eConsults page’, open the **Menu** in the top left and select **Healthmap** from the dropdown menu.



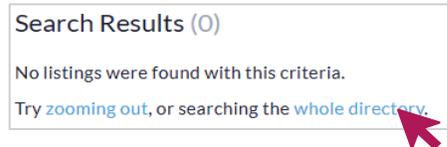
3. A new browser tab will open to display the Ocean Healthmap directory. You should already be logged into Ocean (please confirm that you see your name in the top right corner – see arrow #3 in image to the right).



4. In the Ocean Healthmap, you can search for the service or physician to whom you wish to refer. In the image to the right, we have searched by ‘x-ray’.

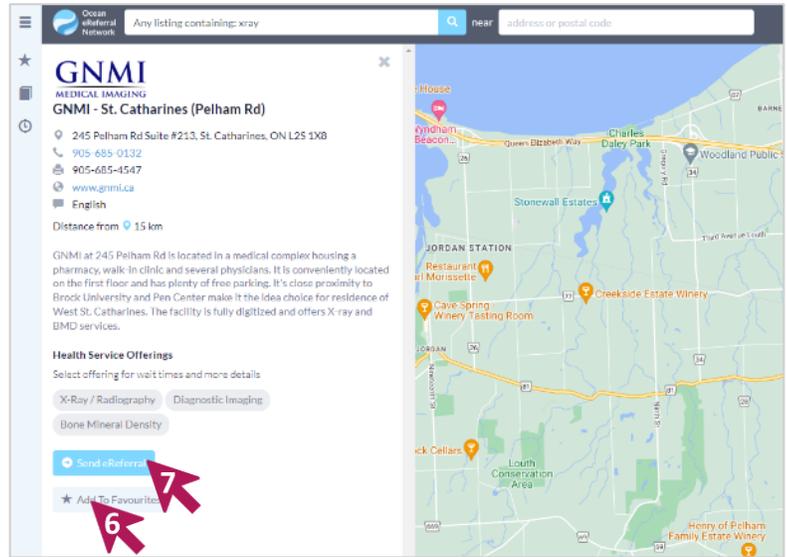
**NOTE!**

If you are presented with ‘**Search Results (0)**’ after searching, click the ‘**whole directory**’ link to ensure Ocean is searching beyond the portion of the map visible on your screen!



5. The green arrow beside each listing indicates that the site is accepting eReferrals. Click on the site of your choice to open their Directory Listing.

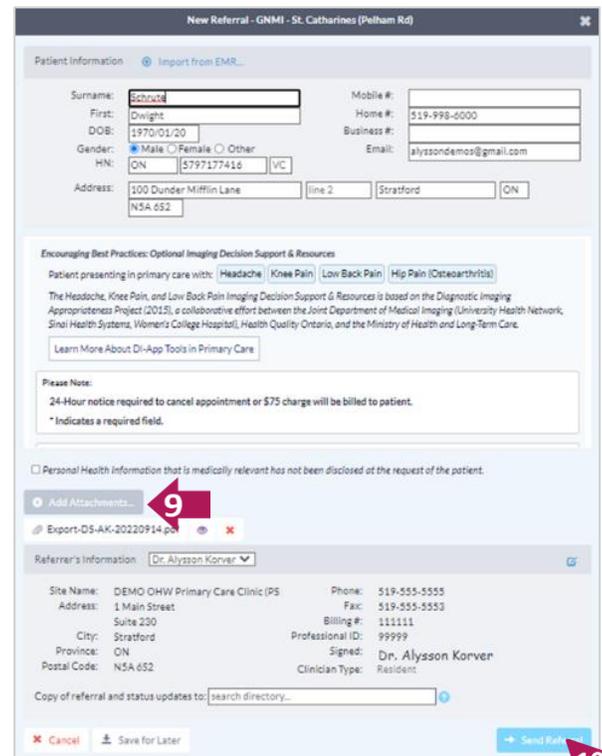
6. If you would like to add this site as a Favourite so you can access it more quickly in the future, click the **Add to Favourites** button. The next time you send a referral to that site, you will see it listed in a Favourites list when you first open the Healthmap.



7. Click **Send eReferral** on the Directory Listing page. If there is no blue 'Send eReferral' button, then the site is not yet receiving referrals via Ocean.

8. Enter your patient's information in the Patient Information section. Note that if you enter the patient's email address, they will receive the following email notifications:

- When the eReferral is first sent
- If the eReferral is forwarded from a central intake to another site
- When their appointment has been booked
- Appointment reminders if the receiving site has this activated



9. Complete the remaining fields in the referral form.

You can add attachments by clicking the **'Add Attachment'** button (see arrow to the right) and uploading from your computer. To view the attachment, click the icon beside the attachment name.

10. Click **Send eReferral** when form is complete.

If an email address was included in the Patient Information section, you will be prompted to confirm whether you have the patient's consent to email. Confirm that the referrer and patient information are correct.

A Referral Sent confirmation screen will be displayed once the referral is sent.



## Managing Sent eReferrals

If you have email notifications enabled, you will receive email updates when the status of your clinic's eReferral changes (e.g. when an appointment has been booked, cancelled, or when there is a message to review).

In this email example to the right, the clinic is being notified that a referral previously sent has been declined. Click the link to open the eReferral for more information.

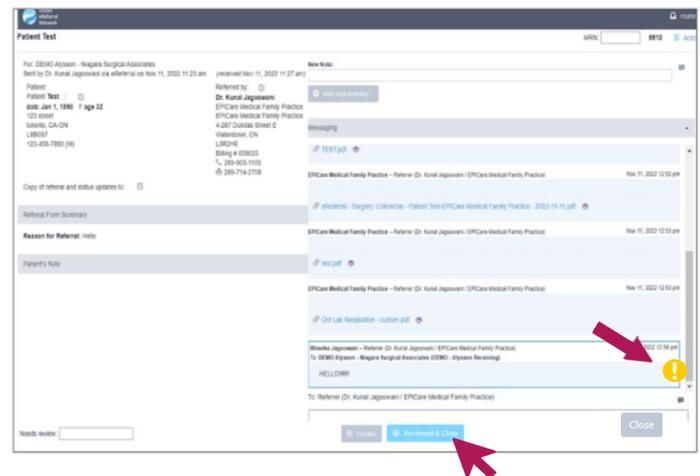


### TIP!

The email notifications are a helpful way of alerting you that something requires your attention, but you can also routinely monitor your **Needs Review** folder for messages regarding your referrals. You can likewise routinely monitor the **Booked Unconfirmed** folder for appointments made that still need to be confirmed with the patient.

When you have an eReferral with a message that has been sent to you, the message/item for your review will be marked with a  symbol. In the case to the right, a new message for the referral-sender has been flagged. You may receive messages such as “Please forward relevant blood work”, etc.

Once you have reviewed the referral and actioned anything being asked of you, please click the blue **Reviewed & Close** button. This logs in the system that the message has been addressed, and also assists the Ocean users on your site in tracking which items have been addressed and which items still need attention. After clicking **Reviewed & Close**, the eReferral will move back to the folder where it belongs according to its status (e.g. Pending Booking folder).

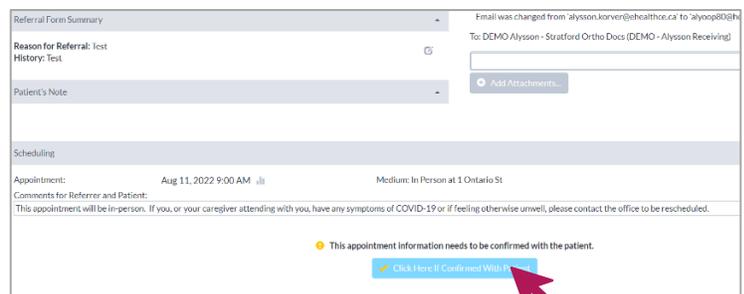


If you are not able answer the question/address the issue at this time, you can click 'Close' in the bottom right corner, and you will be able to find this referral in the *Needs Review* folder at a later time.

(More about the Needs Review folder can be found later in this document [HERE](#)).

Another typical email notification that you will receive will be to inform you that an appointment has been booked for your patient.

When you open the referral, you will see the appointment information at the bottom in the Scheduling section. If you call the patient to provide them with this information, please select the **Click Here If Confirmed With Patient** button. This will log the confirmation in Ocean for both your clinic and the site where the patient has been referred.



## Managing eReferrals Sent to Receiving Sites Using eFax

You may come across sites that are a part of an eFax Proof of Concept project, which enables clinicians to send Ocean eReferrals to sites that are not yet onboarded with Ocean eReferral. The Ocean eReferrals sent by your site will convert to fax on the receiving end.

eFax sites will be identified in the Ocean Healthmap, in the eReferral itself, and in your Ocean portal. In the image to the right, you can see the status **'Sent via eFax'**, and this will also be noted in the Recipient column.

Patient	DOB	EMR ID	Status	Appointment Date	Service	Referral Date	Recipient
Jones, Bob		8640	Sent via eFax		Hip and Knee	Sep 25, 2024 1:58 pm	Rapid Access MSK (eFax)
Smith, Sally		8640	Sent via eFax		Gastroenterology	Jun 17, 2024 6:58 am	Dr. P. Miller (eFax)

The clinicians you support can send their referrals through Ocean to eFax listings, however, you will receive the appointment information back for these eFax listings **via fax**.

When you receive the fax, enter the appointment information provided into the Scheduling section of the patient's eReferral. If you notify the patient of the appointment, or if the fax states that they notified the patient, click the blue **Confirmed with Patient** button.

Click **Save** after updating the eReferral with the appointment information. If their email address had been included in their demographics on the eReferral, you will be prompted to confirm if you wish the appointment information to be sent to the patient.

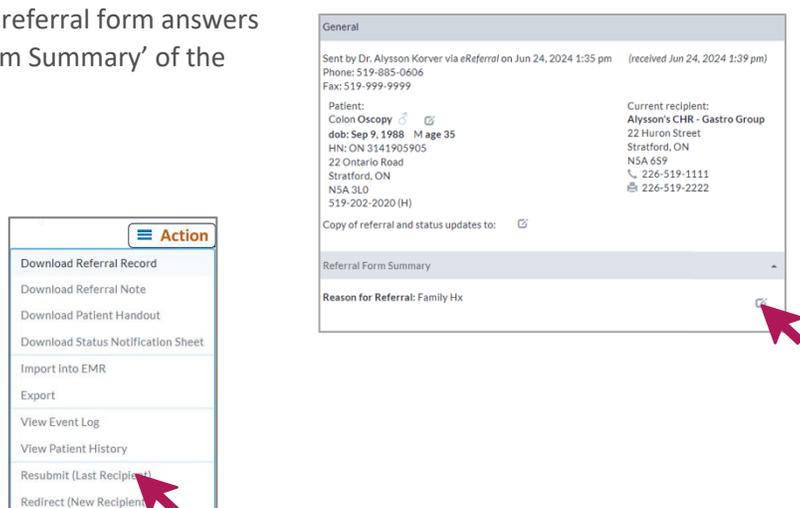
## Resubmitting a Declined or Cancelled eReferral

If an eReferral is cancelled by the sending clinician or declined by the receiving site, you have the option to resubmit to the last recipient, or to redirect it to a new recipient.

### Resubmitting to Last Recipient

If a previously sent referral was declined, perhaps due to missing information, you can update the referral with the additional information and resubmit without having to start the referral all over again.

1. If necessary, you can add/edit information to the referral form answers by clicking the pencil icon within the 'Referral Form Summary' of the eReferral.
2. Add any attachments or messages as required.
3. From the Action menu in the top right corner, select **'Resubmit (Last Recipient)'**.
4. A message will be displayed, confirming that your eReferral was resubmitted.

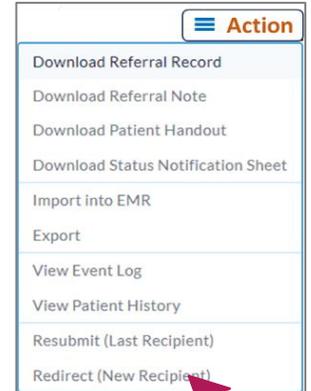


The image shows two parts of the interface. On the left is an 'Action' menu with the following options: Download Referral Record, Download Referral Note, Download Patient Handout, Download Status Notification Sheet, Import into EMR, Export, View Event Log, View Patient History, Resubmit (Last Recipient), and Redirect (New Recipient). A red arrow points to the 'Resubmit (Last Recipient)' option. On the right is a 'General' section of the eReferral form. It contains patient information (Colon Oscopy, dob: Sep 9, 1988, M age 35, HN: ON 3141905905, 22 Ontario Road, Stratford, ON, NSA 3LO, 519-202-2020 (H)), current recipient information (Alysson's CHR - Gastro Group, 22 Huron Street, Stratford, ON, NSA 6S9, 226-519-1111, 226-519-2222), and a 'Referral Form Summary' section with the text 'Reason for Referral: Family Hx'. A red arrow points to a pencil icon in the bottom right corner of the 'Referral Form Summary' section.

## Redirecting to New Recipient

If you need to redirect a previously sent referral to a new recipient on the Ocean Healthmap, you can redirect the referral and use the patient demographic information and any attachments you had included in the initial eReferral without having to start over completely.

1. In the original eReferral, open the Action menu in the top right corner, and select **'Redirect (New Recipient)'**.
2. You will be asked to include a reason for the redirect, which will be shared with the patient (if their email is included in the demographics section) and the new referral recipient. This will also be recorded in the Messaging section of the new referral. NOTE: If no reason is provided, no indication will be made to the new recipient that this referral was previously sent elsewhere.
3. The Ocean Healthmap will open, where you can search for the new recipient. When you open the referral form for the new recipient, the patient demographics and attachments will populate.
4. Complete the referral form and send the eReferral as usual.

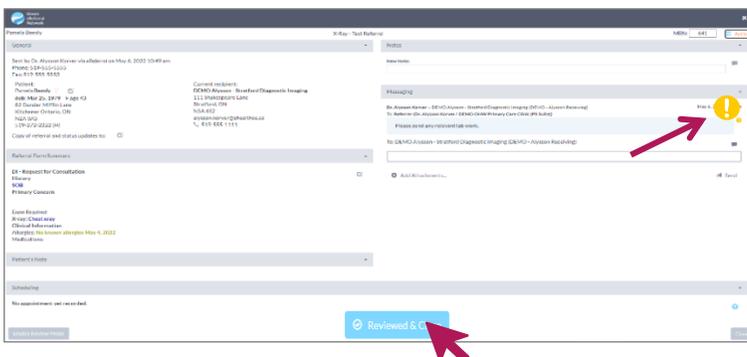


## Needs Review Folder

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.

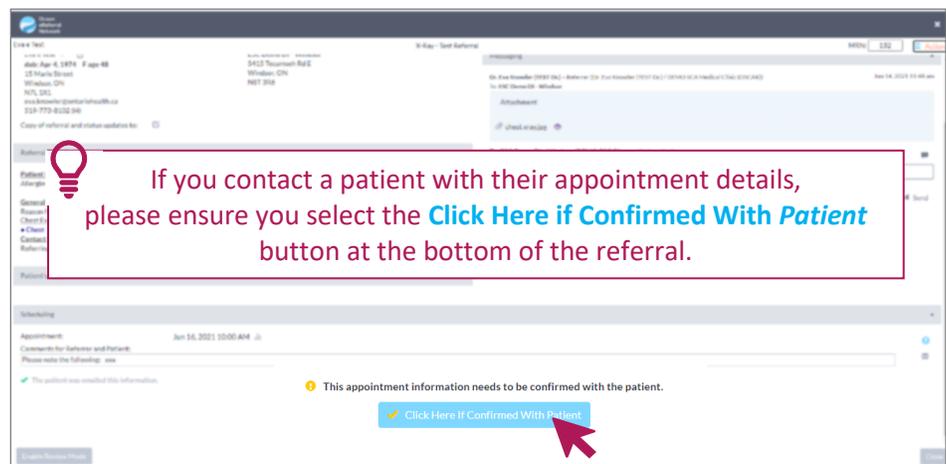
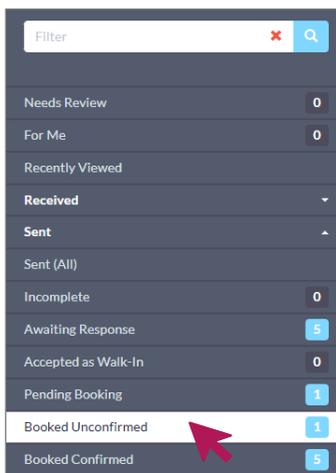
## Booked Unconfirmed Folder & Accepted as Walk-In Folder

In the *Booked Unconfirmed* folder, you will find the referrals that you have sent that have been accepted and given an appointment date, but the appointment is awaiting confirmation with the patient.

If the patient has consented to receive email notifications from Ocean, they may click the 'Confirmation' button in the email they receive with their appointment date and time. If they do this, the referral will move to *the Booked Confirmed* folder, and there will be no further actions required by you.

You may also need to contact the patients in the *Accepted as Walk-In* folder. These are often for Diagnostic Imaging Clinics where the patient can present without an appointment.

As the referral sender, it will be important to keep an eye on these folders to ensure your patients have been notified about their appointments.

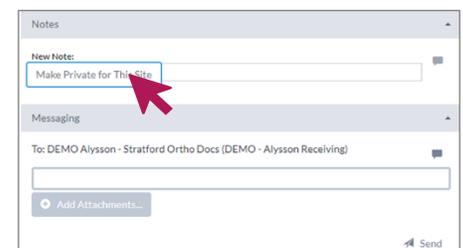


## Notes Section:

The Notes area within an eReferral can be used for internal documentation.

It is **important to note** that any user on your Ocean site **and** the receiving 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