Receiving and Managing Ocean eReferrals

Telus PS Suite Users with Cloud Connect

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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 (C) 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 *(not used by every Ocean site)*
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 (*not used by every Ocean site*)
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 *(eReferrals move to this folder 1 year after they are sent from/received in Ocean)*

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 especially 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.

Please see the Needs Review Folder and the Booked Unconfirmed Folder sections of this document for more detailed information on these important folders.

You can also find more information about the eReferrals & eConsults view of Ocean HERE.

Ocean eReferrals – A Closer Look

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

A. General section: Contains patient demographics and the referring clinician's information.

B. Referral Form Summary: Contains the information generated from the referral form 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.

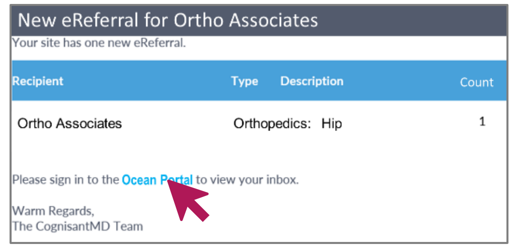
D. Messaging section: Information exchange section to securely message between sending and receiving provider. This information can include text communication and/or attachments.

E. Scheduling section: The patient's appointment date and other pertinent information/instructions. Note the referring clinician will receive the information in this section, as will the patient if their email address is included in the patient demographics section.

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

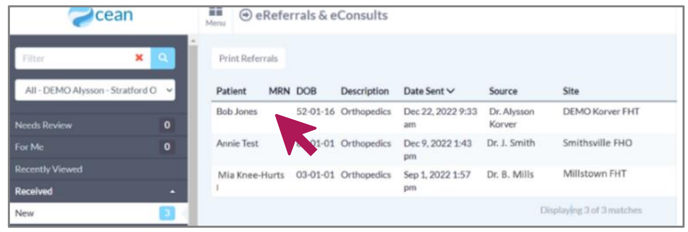
Receiving a New Ocean eReferral

1. The workflow of the user who manages the incoming referrals would typically begin with an email notification, which informs 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.

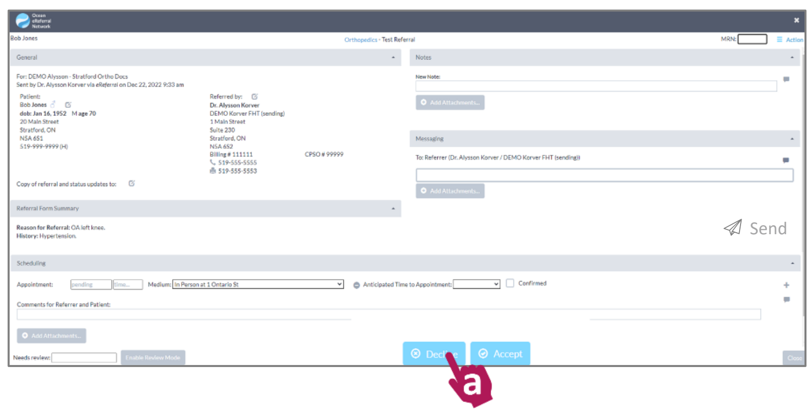
Click anywhere on the line of your selected referral to open it.



2. 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.

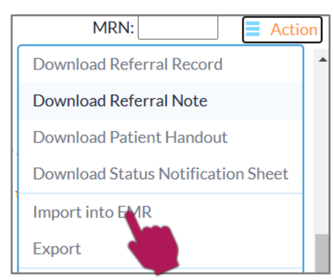
   If you triage the referrals yourself, review the referral to see if it is appropriate for your organization.

   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.

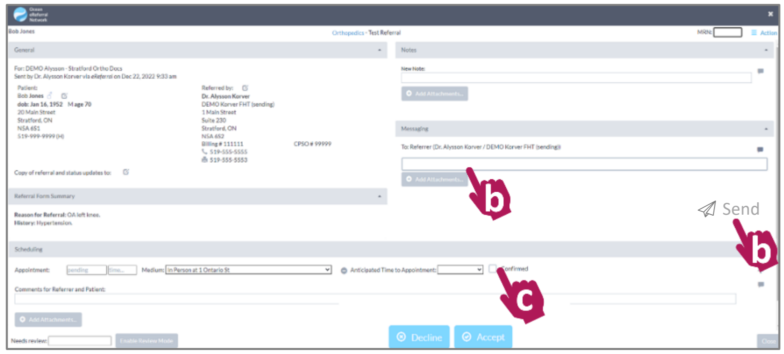


   If you wish to add the referral to your EMR for documentation purposes after declining it:

   - 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 **Import to EMR** and Ocean will automatically create a patient chart and upload a copy of the referral.



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.

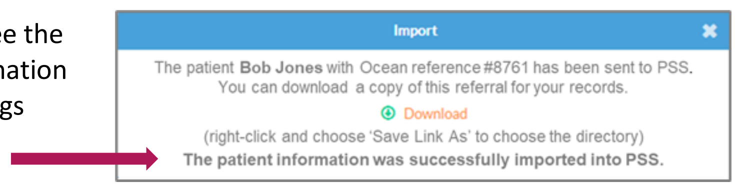
c. If the referral is appropriate but you will be putting the patient on a waitlist, you can communicate this wait time to the referring clinician and to the patient (if the patient email address is in the demographic section). Select the amount of time you anticipate until the appointment from the **Anticipated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

You may wish to include a note in the Comments field 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, click the **Accept** button.

The Import box will then be displayed. Once you see the confirmation on the last line that the patient information was successfully imported into PSS, one of two things has happened:



i) Ocean has automatically created a new chart if the health card number was not found in your EMR

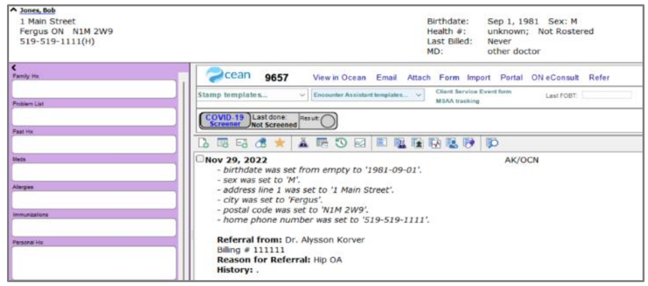
OR

ii) If a chart with a matching health card number was found, Ocean has updated that chart if required (i.e. new phone number).

NOTE: If the Import box (image above) notifies you that there was an issue importing into PSS, please refer to the Troubleshooting section below.

3. After Accepting, the referral will automatically move to the *Pending Booking* status folder in Ocean until you add an appointment date and time to the eReferral.

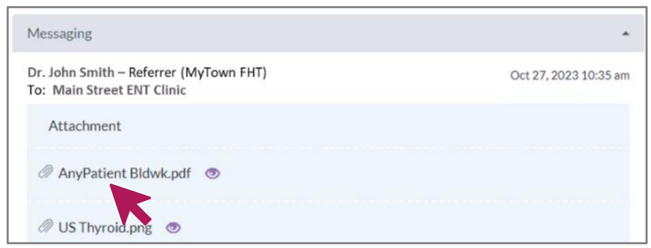
4. When you navigate back to the patient's chart in PS Suite, you will see that Ocean has created the patient's chart for you, including the patient demographics and a summary of the eReferral added as a progress note, similar to the image on the right.

   NOTE: If the referring physician is not already in your PSS address book, you will have to manually enter this information into the chart.

5. If you would like **one** PDF containing the referral form and any attachments that were sent from the referring clinician, open the **Action** menu from the top right corner of the referral in Ocean. Select **Download Referral Record** and then upload to your EMR per your usual process.

   If you instead would like to import the referral form and any attachments separately in order to categorize them in your EMR, click **Download Referral Note** in the Action menu to download the referral as one separate PDF document.

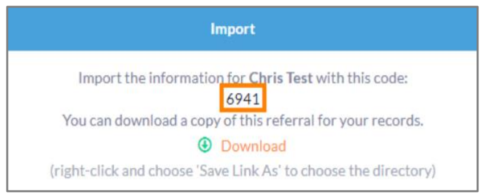
   

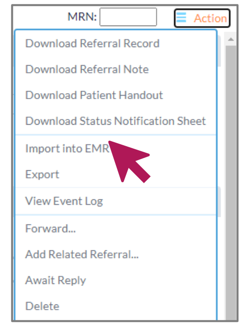
   To download any attachments that were sent, open each attachment from the **Messaging** section in the eReferral. Click on the attachment to open it, download and save to your EMR per your usual process.

Troubleshooting – Issue with Ocean Creating Chart:

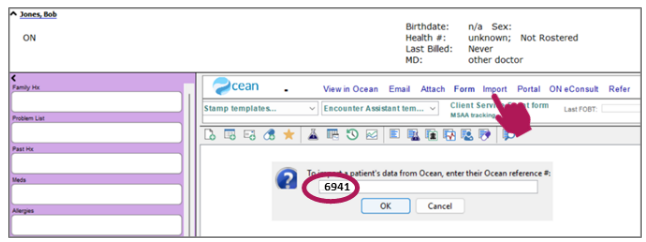
If Ocean does not automatically create the chart for you in PS Suite, the reason is likely that the Health Card Number was entered incorrectly on the referral. Please confirm with the referring clinician. Once you have the correct Health Card Number:

- If the patient chart does not exist in PSS, create a 'stub chart' by creating a new patient chart – you only need to enter the patient's First and Last Names.
- Open the referral, click the **Action** menu in the top right corner, and select '**Import into EMR**'.
- Take note the 4-digit code that displays on the Import window that opens.





- Toggle back to the Patient Record in PSS that you just created and click **Import** from the Ocean toolbar.
- Enter the unique 4-digit code that you were given for this referral, click **OK**, and the patient's information will populate and complete the 'stub' chart that you created.
- Ensure you enter the correct Health Card Number.

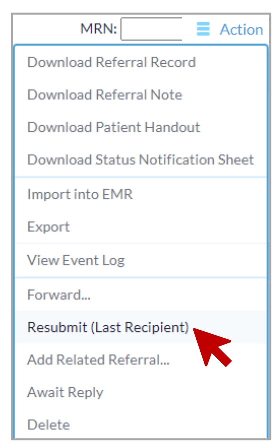


Accepting a Previously Declined Referral

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.



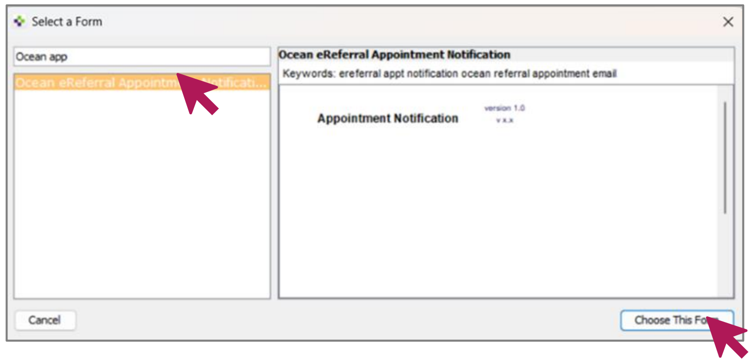
Booking the Appointment

(**NOTE**: As mentioned above in Step 2c of the Receiving a New Referral section, if you are not scheduling an appointment immediately, you can communicate a wait time to the patient and the referring clinician).

1. Book the appointment in your PS Suite schedule as you normally would.

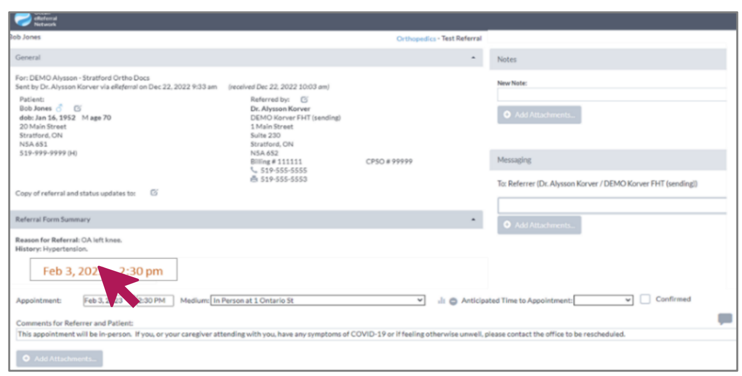
2. The appointment you made will need to be documented in the Ocean eReferral so that the referring clinician and patient (if their email address is included on the referral) are notified. This can be done in one of two ways:

   i. In the patient chart, press **F2** to open the custom form window. Locate and select the **Ocean eReferral Appointment Notification** custom form, and select the **Choose This Form** button.



   The Ocean Patient Dashboard view will be displayed. Select the eReferral for which you made the appointment.

   The appointment date and time that you scheduled in your EMR will be displayed in orange font in the bottom left corner of the eReferral. Click on this appointment to transfer the information into the appropriate fields.



   OR

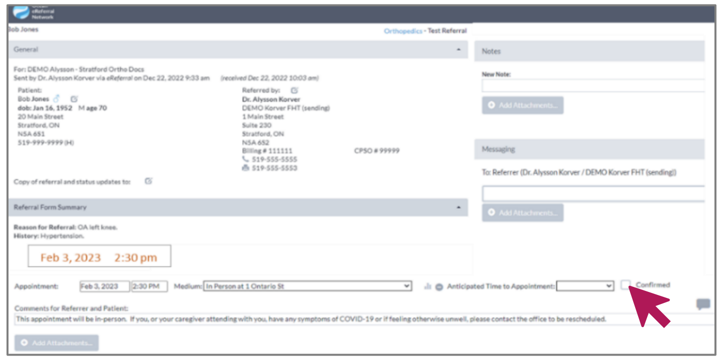
   ii. You may choose to manually enter the appointment date and time by clicking the **View in Ocean** button in the Ocean toolbar in the patient's chart.

   As above, the Ocean Patient Dashboard view will be displayed. Select the referral to open it, and manually enter the appointment date and time in the Scheduling pane at the bottom of the referral.

3. After the appointment date and time have been entered in the Scheduling section, select the appropriate medium, (i.e. In Person, Phone, etc.).

   Click the **Confirmed** box (on far right) if you are calling the patient with the appointment details.

   Enter any comments or instructions that you wish to include. The comments in the Scheduling section will be sent to the referring clinician and to the patient, if their email address is included in their demographics on this eReferral.



   You can add canned responses for messaging that you would send frequently. For instructions on entering Canned Responses, visit [Ocean's support page].

4. Click **Save & Close**. This referral will move to either the *Booked Unconfirmed* or the *Booked Confirmed* folder in your Ocean Portal - depending on whether you confirmed with the patient.

NOTE: When an appointment has been confirmed – either by your clinic, the referring clinician, or if the patient confirms their appointment from an eReferral email notification – a green **Confirmed** icon will be automatically added to the scheduled appointment in your EMR.

Completing eReferrals in Ocean:

Once the scheduled date for the appointment has passed, it is important for eReferrals 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:

1. **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 t *Completed* folder of your Ocean Portal.

2. **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].

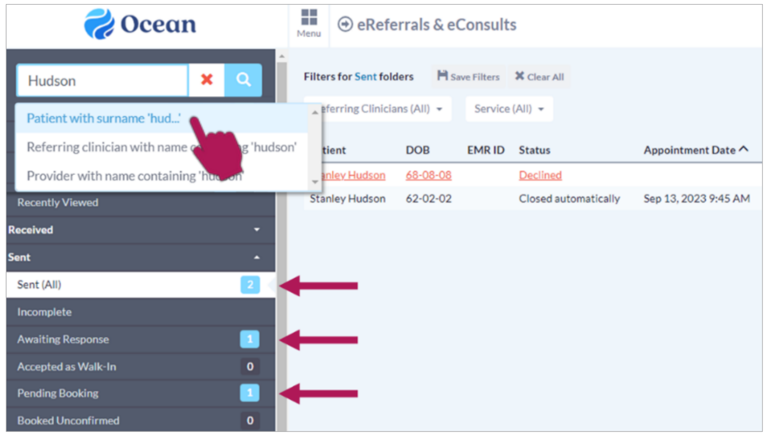
Searching for an eReferral

There are different ways to search for an eReferral, or group of eReferrals, in Ocean.

If the eReferral has been imported into your EMR, you can easily view a patient's eReferral at any time by clicking the **View in Ocean** button from their chart.

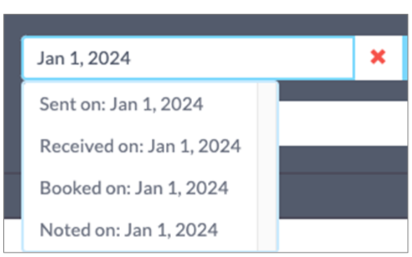
You can also search within your Ocean site itself. Upon entering your search criteria in the upper left corner, the grey status folder(s) containing the referral(s) that meet your search criteria will display a blue number to help you locate what you are searching for.

In the example to the right, when searching by 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 to the referral on the chosen day.

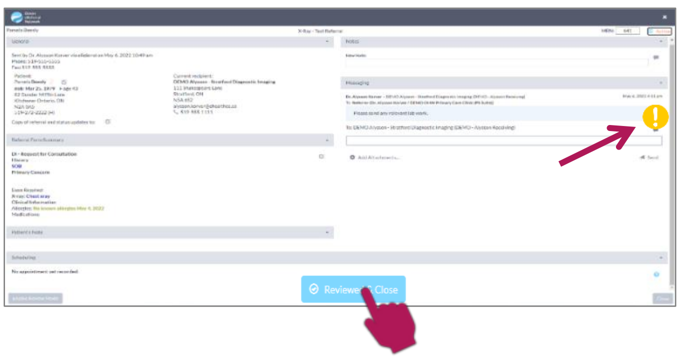


Examples of search options when searching by date or a number

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).

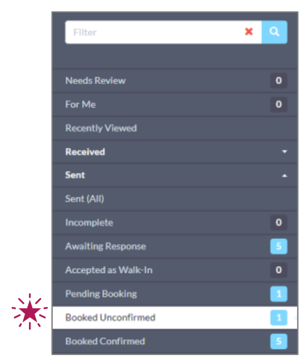
Open the referral and you will see an icon in the section that needs your attention.



*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.*

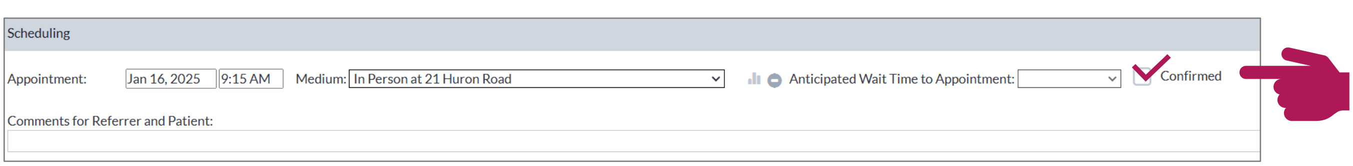
Booked Unconfirmed Folder

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.



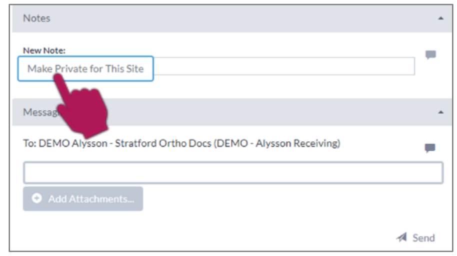
If the patient has consented to receive email notifications from Ocean, they will receive an email with their appointment date, time and any instructions that you included in the Scheduling section of the eReferral. In this email notification, they are encouraged to click a **Confirmation** button. If 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 the note you entered itself, 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