

# Sending and Managing Ocean eReferrals

Accuro

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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.

<div>Filter</div> <div>Q</div>	Search by patient name, referring physician name, MRN, HCN, etc.
<div>General</div>	<b>GENERAL FOLDER GROUP:</b>
<div>Needs Review</div>	eReferrals/eConsults that have a message or action needing to be acknowledged
<div>For Me</div>	eReferrals that have been assigned to you for your review <i>(not used by every Ocean site)</i>
<div>Recently Viewed</div>	List of your most recently reviewed referrals
<div>Received</div>	<b>RECEIVED TAB</b> – keep this tab closed unless you also receive referrals
<div>Sent</div>	<b>SENT TAB</b> – keep this tab open!
<div>Sent (All)</div>	All eReferrals/eConsults that have been sent from your site
<div>Incomplete</div>	Any outgoing eReferrals/eConsults that have been saved for later completion (will save for 30 days)
<div>Awaiting Response</div>	eReferrals/eConsults you have sent, but that have not yet been accepted or declined
<div>Accepted as Walk-In</div>	eReferrals accepted by receiver as a walk-in appointment
<div>Pending Booking</div>	eReferrals accepted by the receiver, but have not yet been given an appointment date
<div>Booked Unconfirmed</div>	eReferrals that have been accepted and scheduled, but not yet confirmed with patient
<div>Booked Confirmed</div>	eReferrals that have been accepted and scheduled, and confirmed by either patient or provider
<div>Completed</div>	eReferrals/eConsults that have been marked as completed after the scheduled appointment
<div>Declined</div>	eReferrals that have been declined by receiving site
<div>Cancelled</div>	eReferrals that have been cancelled by yourself, the referral sender
<div>Deletion Warnings</div>	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 an Ocean site, giving the user the ability to focus their view only on 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 '[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.

## 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.



The screenshot displays the Ocean eReferral interface for a 'LIDAP - Test Referral'. The interface is divided into several sections, each highlighted with a red box and a letter:

- A. General:** Contains sending site contact information (Phone: 519-555-5555, Fax: 519-555-5553), patient information (Patient: Tester Reception, MRN: 000, DOB: Jun 1, 1961, F, Age: 60, HMO: ON, B475309309 TR, 200 Admin Ave, Hamilton, ON, L9K 3K3, 226-226-2560 (H), 226-226-2560 (H)), and current recipient information (Current recipient: St. Joseph's Healthcare, LBN: 1Y3, TEL: 905-522-1155 x25941, ID: 905-540-4581).
- B. Referral Form Summary:** Contains patient information (Patient is aware of Referral: Yes, Additional/other health coverage: No, Preferred Language: English), referral information (Reason for Referral: Persistent SOB, cough, wheezing and weight loss, Suspicion of Lung Cancer Due to Results, CT, Ordered: Date / Date Ordered: 2022-05-03, Location: Hamilton Pretend DR Clinic), and a patient note section.
- C. Notes:** A section for internal notes to help coordinate between staff members.
- D. Messaging:** A section for secure messaging between sending and receiving providers, including a 'To: St. Joseph's Healthcare' field and an 'Add Attachments...' button.
- E. Scheduling:** A section for entering the patient's appointment date and other pertinent information, currently showing 'No appointment yet recorded.'

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

## Sending an eReferral from Accuro

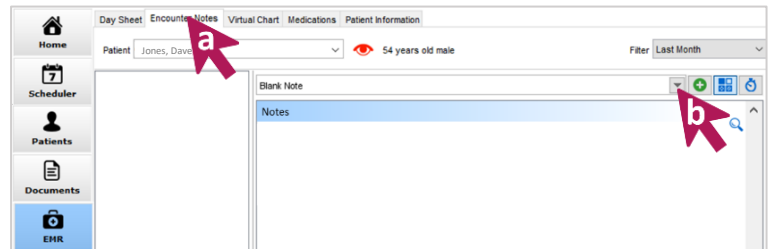
The following steps demonstrate how to send an eReferral through Ocean directly from a patient chart in Accuro:

### 1. If you do not have any attachments to add to your eReferral, skip to Step 4.

If you would like to attach blood work, diagnostic imaging, etc. to the eReferral that you are about to send, your first step would be to create a referral package by Generating a Letter:

- a) Select the **Encounter Notes** tab in the EMR module...

**OR**



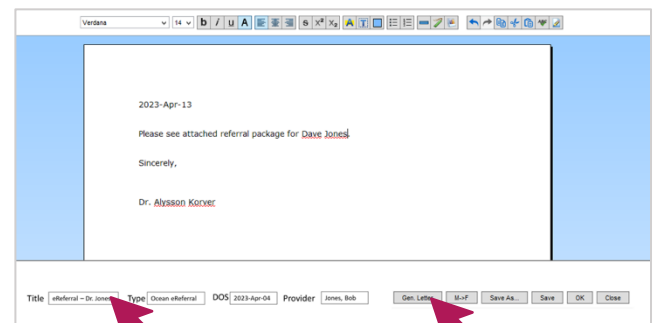
...click the Attachment Quick Action button if present in your toolbar (**NOTE:** if you do not have this Quick Action button but would like to add one, please see [the Adding Attachment Button section](#) below).




- b) select the appropriate letter type from the dropdown (a blank letter, or you may have an Ocean-specific template like the image below in Step 2).

### 2. In the new window that opens, click in the 'Title' field in the bottom left corner and specify a name (e.g. 'Jones eReferral Letter').

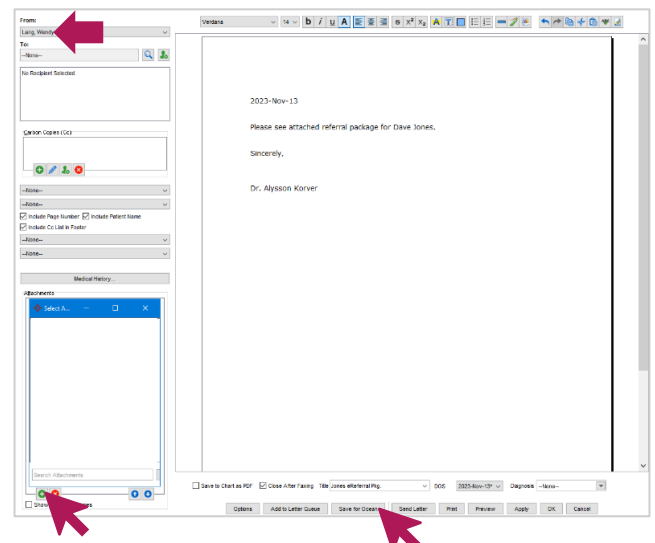
Click the '**Gen. Letter**' button.



### 3. Ensure you have the correct provider selected in the 'From' field. The 'To' field should be empty.

Select the  in the Attachments section and choose the item(s) that you would like to attach from the Virtual Chart.

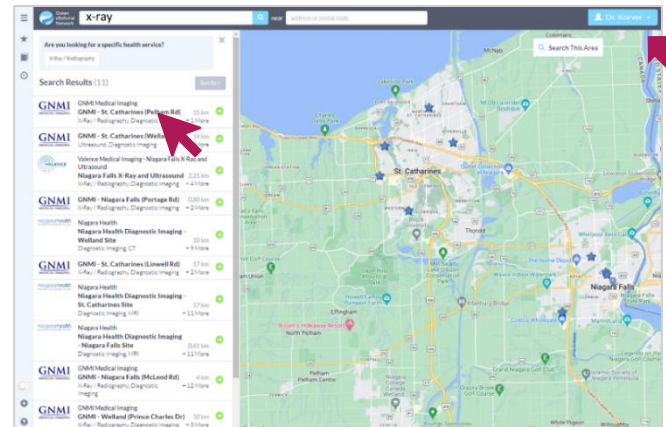
Click the '**Save for Ocean**' button in the bottom centre of your screen. The attachment package will now have been saved in the patient chart.



4. Click the **'Send eReferral'** Quick Action button, or select the CDS link to launch into the Ocean Healthmap.



5. Your web browser will open to display the Ocean Healthmap. You should already be logged into Ocean (please confirm that you see your name in the top right corner – see arrow in the image to the right).

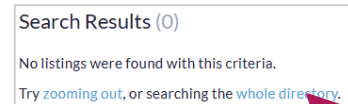


In the Ocean Healthmap, you can search for the service or physician to whom you wish to refer. In the image to the right, we have searched by 'x-ray'.

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.

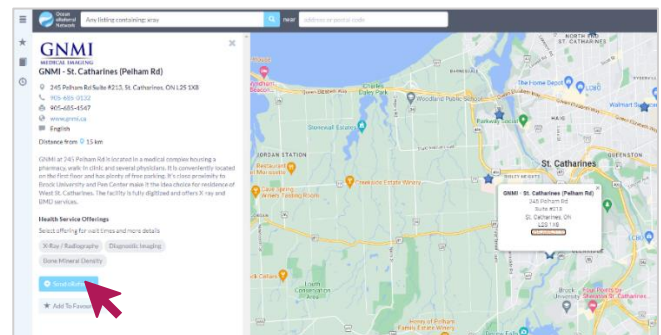
### NOTE!

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



6. Click the blue **Send eReferral** button in the Directory Listing page to open the site's eReferral form. (If there is no blue 'Send eReferral' button, then the site is not yet receiving referrals via Ocean eReferral).

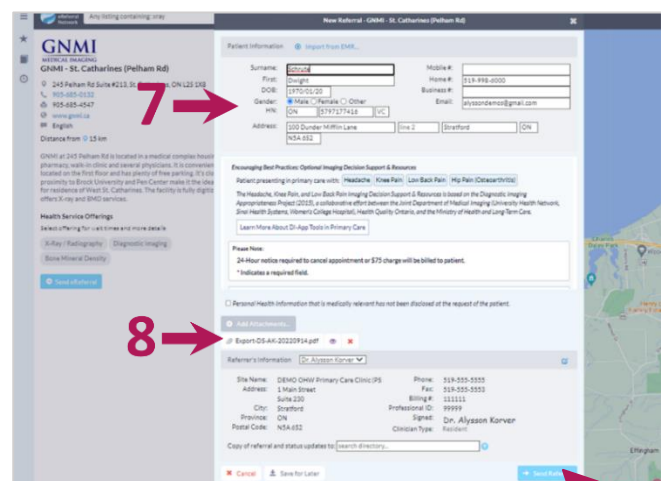
**TIP:** If you would like to add this site as a favourite so you can access it more quickly in the future, click the **Add to Favourites** button. The next time you send an eReferral, you will see it listed in your Favourites List when you first open the Healthmap.



7. The patient demographic information, health card, etc. will be automatically pulled in from your EMR.

8. Complete the remaining fields in the referral form. Mandatory fields will be marked with an asterisk.

If you created an attachment package in Accuro, this will be visible just above the 'Referrer's Information' section. To view the attachment, click the icon beside the attachment name (see arrow 8 to the right).



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

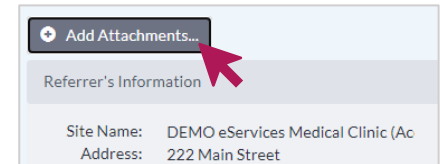
10. Depending on the way your EMR was set up, the eReferral information summary will automatically populate either as an Encounter Note, or as a PDF file in the Virtual Chart.

## Adding Attachments to a Referral

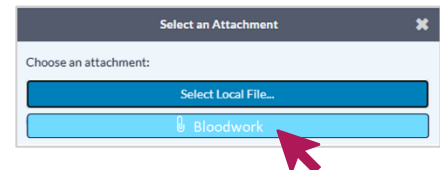
### Adding an Attachment Once You Have Begun Populating the eReferral Form

If you have begun populating the eReferral form in the Ocean Healthmap and decide you need to add additional attachments:

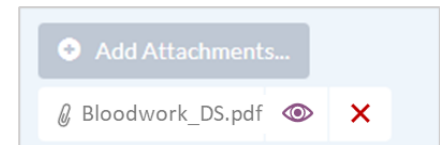
1. Leave the eReferral form open on your screen and toggle back to the patient's chart in Accuro.
2. Follow Steps 1 through 3 in the [Sending an eReferral From Accuro](#) section above.
3. Navigate back to the eReferral form that you had begun populating.
4. Click the **'Add Attachments'** button near the bottom of the eReferral form (just above the 'Referrer's Information' section).



5. Select the attachment from the 'Select an Attachment' window that presents.
- NOTE:** It may take a moment for the file to be displayed. You may see only the 'Select Local File' button for a moment.



6. You will then see your attachment(s) underneath the 'Add Attachments' button and you can continue with populating and sending your eReferral form.



If you would like to view the attachment before sending, click the  icon.


### Adding an Attachment After the eReferral Has Been Sent

At times you may need to attach results to an eReferral that has already been sent, perhaps because some new results became available or perhaps the specialist/clinic to whom you referred has requested more information. You can attach reports or notes to your eReferrals even after they have been sent by taking the following steps:

1. Follow Steps 1 through 3 in the [Sending an eReferral From Accuro](#) section above.
2. From the patient's chart, click the **'View Pt. eRefs'** button in your Accuro toolbar (note that sites may have this button labelled differently, e.g. 'Patient Dashboard', 'View Pt. eRefs', etc.).

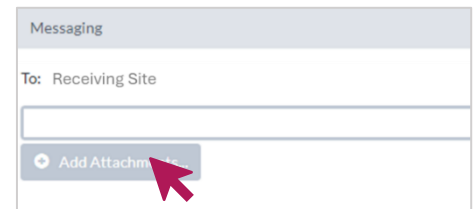


3. A list of your patient's eReferrals sent through Ocean will be displayed. Select the referral that you to which you would like your attachment added.

Active Referrals			
Sent			
			
Date Sent	Description	Referrer	Source Site
Feb 22, 2024 10:57 am	Orthopedics	Dr. Alysson Accuro	DEMO eServices Medical Clinic (Accuro)
Sep 26, 2023 9:58 am	Colonoscopy	Dr. Alysson Accuro	DEMO eServices Medical Clinic (Accuro)

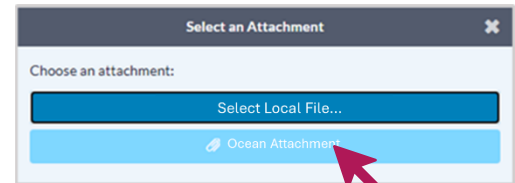



- Click the **'Add Attachments'** button in the Messaging section of the eReferral.

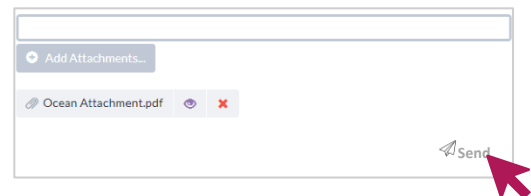


- Select the attachment from the 'Select an Attachment' window that presents.

**NOTE:** It may take a moment for the file to be displayed. You may see only 'Select Local File' for a moment.



- You will then see your attachment(s) in the Messaging section. If you would like to view the attachment before sending, click the  icon.

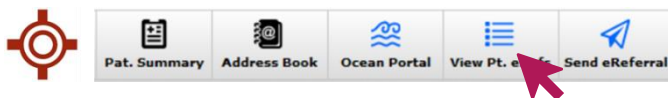


- Click the **'Send'** button in the Messaging section. The receiving site will be notified that there has been an update to your referral.

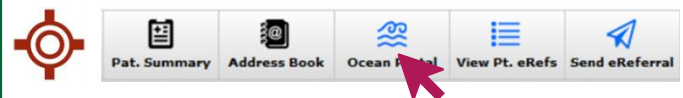
## Searching for an eReferral

To view a referral that has previously been sent for your patient, you can do so in one of the following ways right from a patient record in Accuro:

- To view a specific patient's referral that has been sent, click the **View Patient eReferrals** Quick Action button (or CDS link) from the patient's chart.

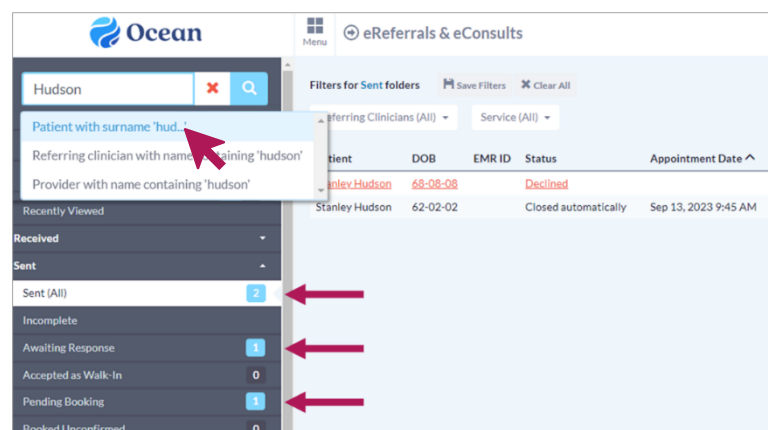


- To view the Ocean Portal where you can see all of your clinic's referrals, select the **Ocean Portal** Quick Action button (or CDS link) from the patient's chart.



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.

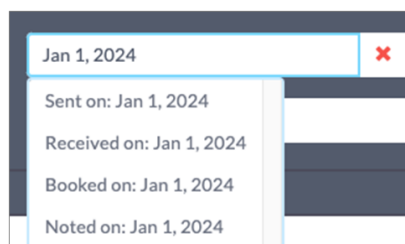
In the example to the right, when searching by the last name 'Hudson', blue number flags are only displayed in the folders that contain eReferrals for a patient with the matching last name of 'Hudson'.





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.



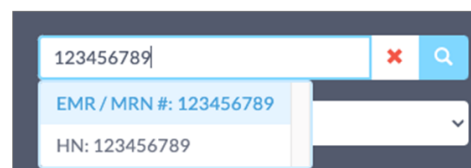
Jan 1, 2024

Sent on: Jan 1, 2024

Received on: Jan 1, 2024

Booked on: Jan 1, 2024

Noted on: Jan 1, 2024



123456789

EMR / MRN #: 123456789

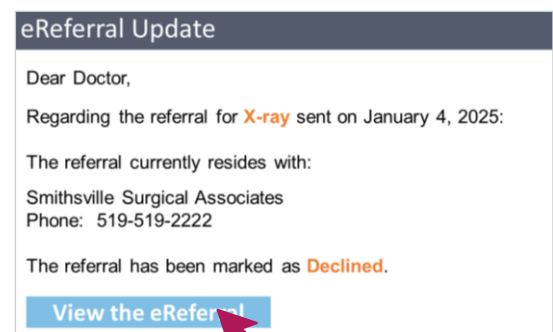
HN: 123456789

Examples of search options when searching by date or a number

## 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.



**eReferral Update**

Dear Doctor,

Regarding the referral for **X-ray** sent on January 4, 2025:

The referral currently resides with:


Smithsville Surgical Associates  
Phone: 519-519-2222

The referral has been marked as **Declined**.

[View the eReferral](#)



**TIP!** The email notifications are a helpful way of alerting you that something requires your attention, but you can also routinely review and manage eReferrals by clicking the **Portal** CDS button in Accuro at any time.

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 message was sent. You may receive messages such as “Please forward relevant blood work”, etc.

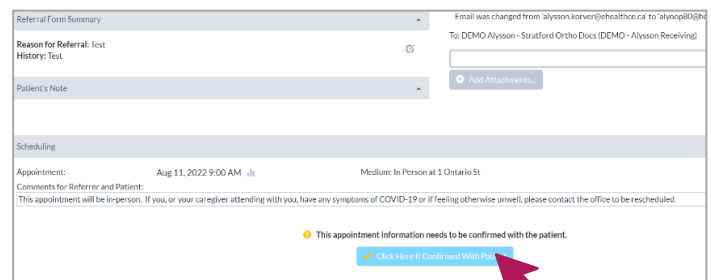
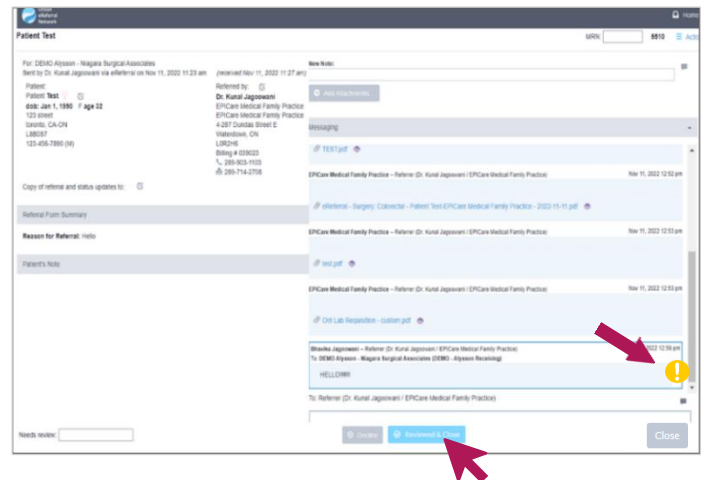
Once you have reviewed the referral and actioned anything being asked of you, please click the blue **Reviewed & Close** button. This logs in the system that the message has been addressed, and also assists the Ocean users on your site with tracking which items have been addressed and which items still need attention.

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, in the bottom left corner you will see the appointment information. If you call the patient to give them this information, please select the **Click Here If Confirmed With Patient** button. This will log the confirmation in the system for both yourself and for 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.

Filters for Sent folders					Filters for Sent (All) folder only			
Referring Clinicians (All) Service (All)					Appt Date - Start Appt Date - End Patient Em			
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.

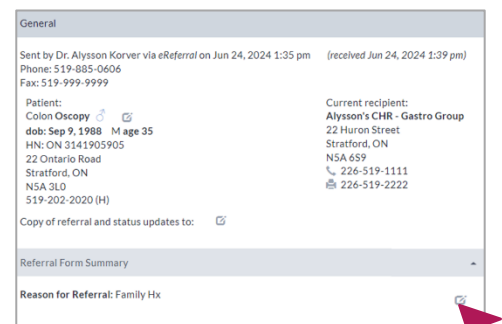
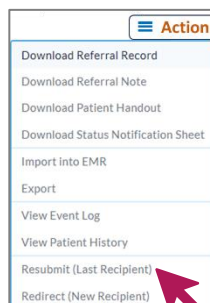
## Resubmitting a Declined or Cancelled eReferral

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 submitted 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.

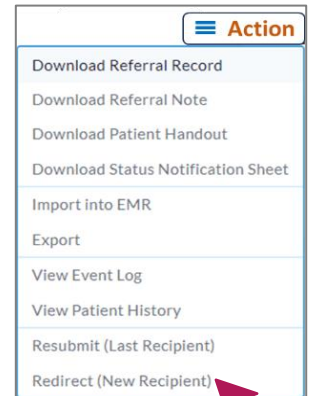
1. If necessary, you can add/edit information to the referral form answers by clicking the pencil icon within the 'Referral Form Summary' of the eReferral.
2. Add any attachments or messages as required.
3. From the Action menu in the top right corner, select '**Resubmit (Last Recipient)**'.
4. A message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




## 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.

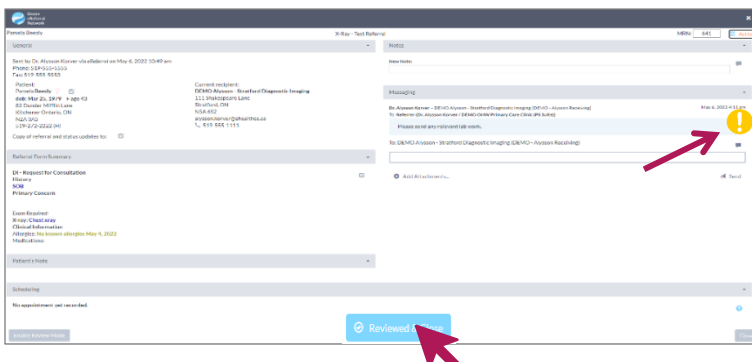


## Needs Review Folder

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.

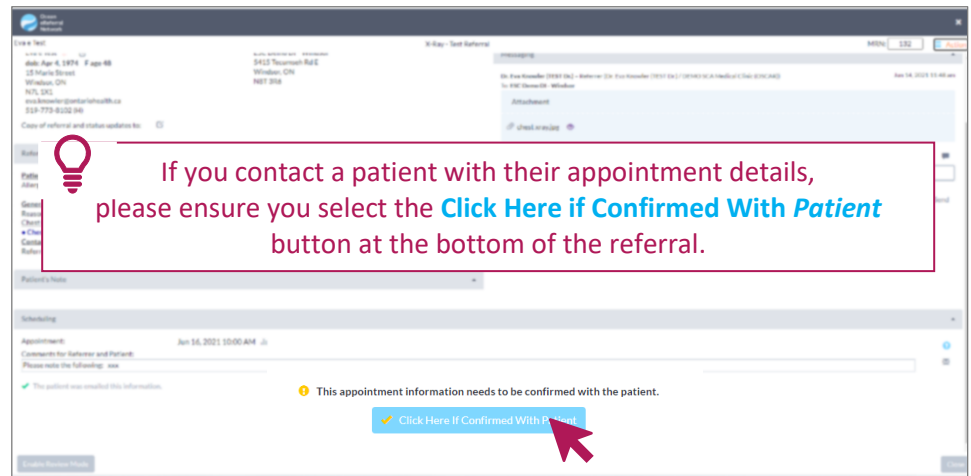
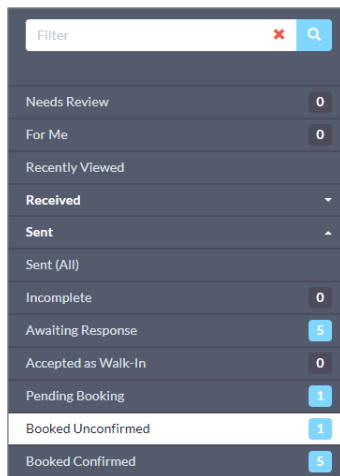
## Booked Unconfirmed Folder & Accepted as Walk-In Folder:

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 most often for Diagnostic Imaging Clinica 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.

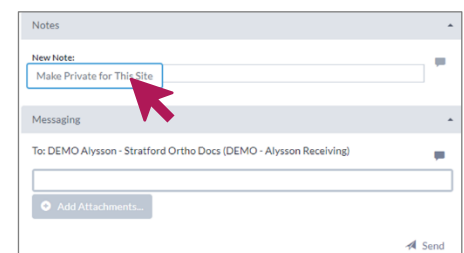


## Notes Section:

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

## Appendix: Adding Letter Template and Quick Button for Ocean Attachments

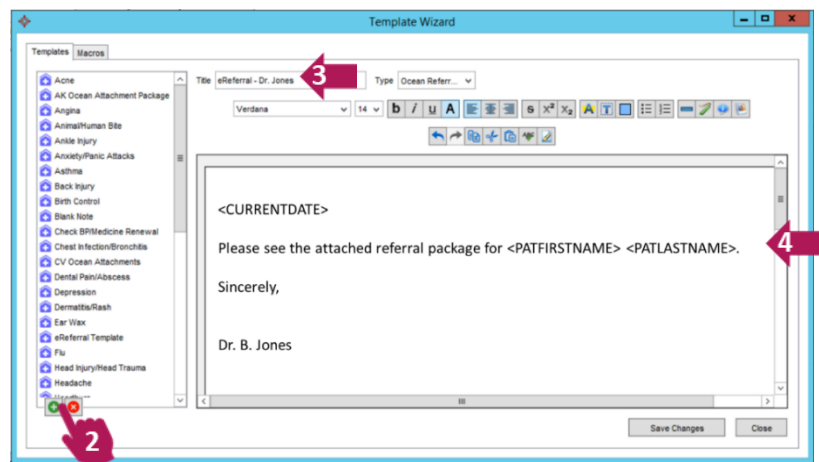
Adding a Quick Button for Attachments will help streamline the attachment/letter generation steps in your EMR.

### Step 1 – Adding an Encounter Note Template:

(Note: If you already have an Encounter Note letter template that you use when you send Ocean eReferrals or eConsults through Ocean, please skip to Step 2 below.

If you would like to create an Encounter Note template to include when you have attachments to send with your eReferrals or eConsults through Ocean, from a test patient chart:

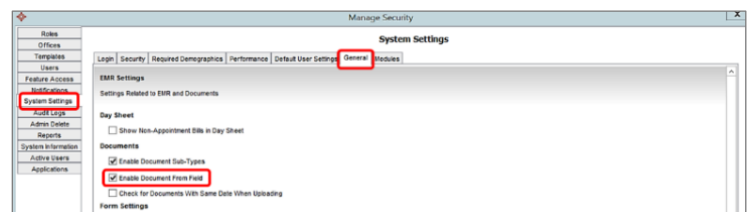
1. From the red Accuro main menu, choose the **Tools** menu option and then select '**Template Wizard**'.
2. Click the green '+' button at the bottom of the template list to add a new template.
3. Enter a name for your referral package, i.e. 'eReferral – Dr. Jones'.
4. Enter your desired text to go along with your eReferral. Please see the example to the right, which shows how to automatically pull in the current date and the patient name.
5. Click '**Save Changes**'.



### Step 2 – Enabling Settings:

Ensure these Accuro settings are in place in your EMR:

- Click the red Accuro main menu icon.
- Search by entering in **Manage** and pick **Manage Security** from the options (*if you do not have this option in your menu, someone with Admin access to the EMR at your site will have to do this step for you*).
- Select **System Settings** in the vertical toolbar left-sided toolbar (*see image to right*) and then select the **General** tab.
- Scroll down to the **EMR Settings** header and under Documents, check the '**Enable document from field**' if not already selected (*see diagram*).
- Scroll down further to find '**Show Ocean eReferral Letter Shortcut Button**' and check this box if not already selected (to enable the easier attachment process)
- **Save Settings** and then Close

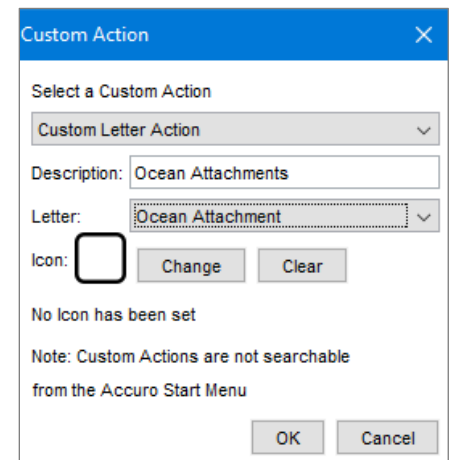
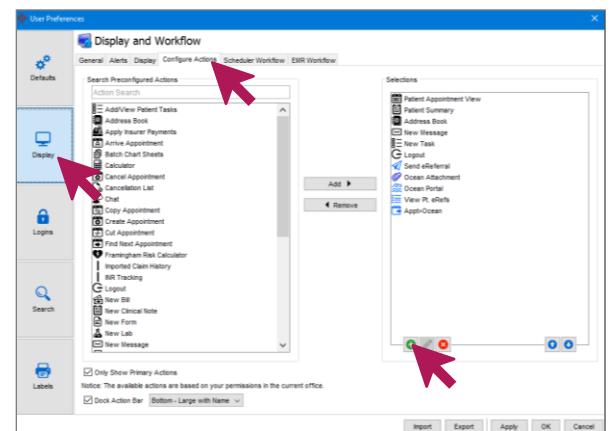
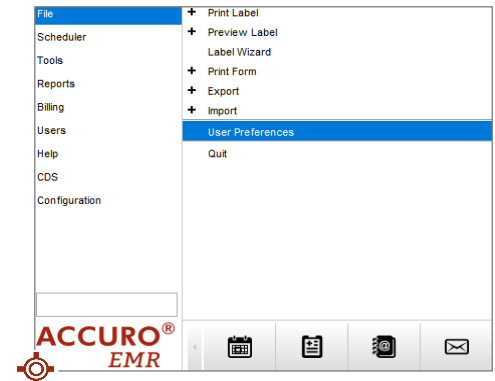




### Step 3 – Adding Quick Attachment Button:

To create a Quick Action button:

1. Click the red Accuro main menu icon.
2. Select **File** and then **User Preferences**.
3. In the **User Preferences** window, select **Display** in the toolbar on the left, and then open the **Configure Actions** tab.
4. Click the green '+' button sign in the 'Selections' column to add a new action.
5. Enter the following:
  - Choose **Custom Letter Action** from the dropdown
  - Description: Enter the label you'd like on the button (e.g. 'Ocean Attachments')
  - Letter: From the dropdown, select the Encounter Note template you would like to use when you send attachments (an existing template or the one you made in Step 1)
  - Click the **Change** button and search for 'attach' to use the paperclip icon
  - Change the colour if you wish, and then click OK
  - Click **OK** at the bottom of the Custom Action screen when done.



### VERY IMPORTANT!

Log completely out of Accuro to save your changes – not with the X, but by clicking the Logout button!

