

Sending and Managing Ocean eReferrals

Telus CHR

Table of Contents

Notice of Living Document.....	1
Your Ocean Portal	2
Ocean eReferrals – A Closer Look	3
Sending an Ocean eReferral from CHR	4
Searching for an eReferral	8
From the Referrals Dashboard:.....	8
From a Patient Chart:.....	8
From your Ocean Site:	8
Editing An Ocean eReferral.....	9
Managing Sent eReferrals.....	10
Managing eReferrals Sent to Receiving Sites Using eFax	11
Resubmitting a Declined or Cancelled eReferral	11
Resubmitting to Last Recipient	11
Redirecting to New Recipient	12
Needs Review Folder	12
Booked Unconfirmed Folder & Accepted as Walk-In Folder	13
Notes Section:.....	13
Action Menu:	14
eReferral Icon Legend	14

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.

Filter	Search by patient name, referring physician name, MRN, HCN, etc.
General	GENERAL FOLDER GROUP:
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
Received ▼	RECEIVED TAB – keep this tab closed unless you also receive referrals
Sent ▲	SENT TAB – 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
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>

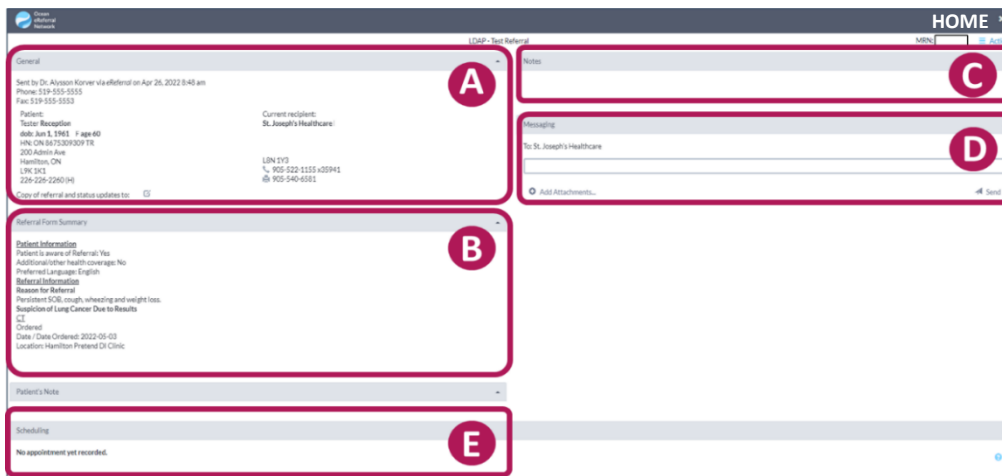
Filters can be applied in the status folders in your Ocean site, giving the user the ability to focus their view on only referrals that are relevant to them. This is valuable for Ocean sites that have a large number of clinicians. For instructions on setting up your filters, please see Ocean's support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

 The '**Needs Review**' 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.



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

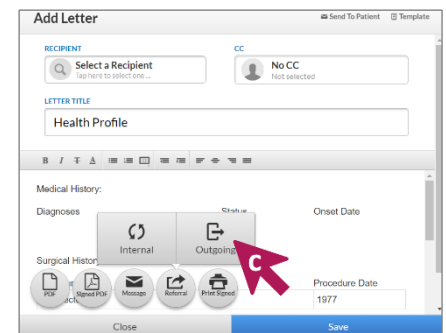
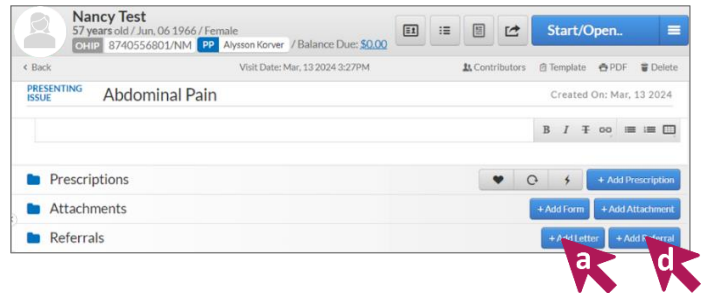
Sending an Ocean eReferral from CHR

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

1. There are several ways you can initiate an Ocean eReferral in CHR:

From a Patient Encounter:

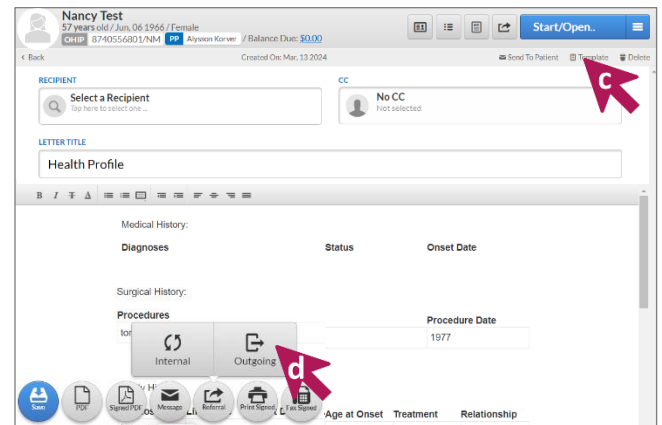
- a) In the Referrals tab at the bottom of your Patient Encounter, select **'Add Letter'** if you would like to send your patient's Health Profile information in a templated letter with your referral
- b) select the Health Profile template and **'Apply this template'**
- c) from the Add Letter screen, click the **'Referral'** button and select **'Outgoing'**
- d) If you do not wish to add the Health Profile information, you can simply begin by clicking **'Add Referral'** from the Referrals tab at the bottom of your Patient Encounter and select **'Outgoing'**



OR

From a Letter:

- a) Click the **'Start/Open'** menu in the top right corner of the patient's chart and select **'Letters'**
- b) select the **'New Letter'** button in the top right corner
- c) click **'Template'** and apply the **Health Profile** template
- d) click the **'Referral'** button at the bottom and then select **'Outgoing'**

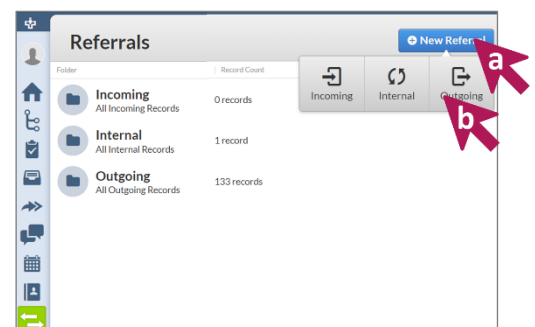


OR

From the Referral tab in the CHR Dashboard:

You can also initiate a referral directly from the **'Referrals'** button in the left sidebar:

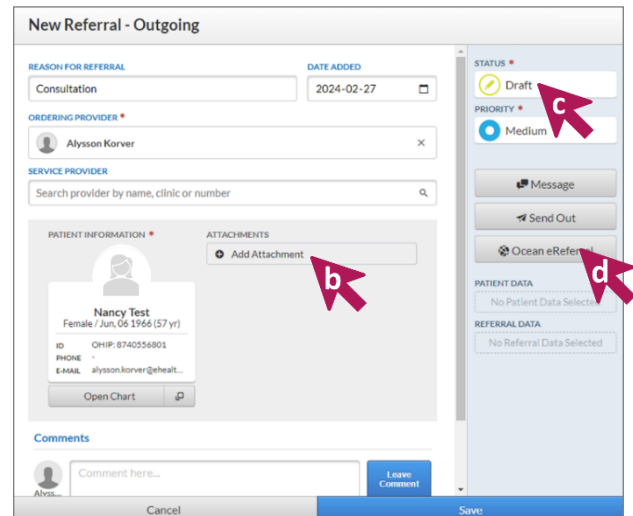
- a) select **'New Referral'** in the top right corner
- b) select **'Outgoing'** from the dropdown options.



! Please note if you choose to initiate your eReferrals this way, you will have 2 extra clicks to complete in the next step.

2. Whichever of the above methods you prefer to use for initiating your eReferral, you will end up at the ‘**New Referral – Outgoing**’ window.

! If you choose to initiate your eReferral from the CHR Dashboard, you will need to add the Ordering Provider name, and you will need to add your patient



a) You do not need to enter a service provider, as that will be chosen in Ocean shortly

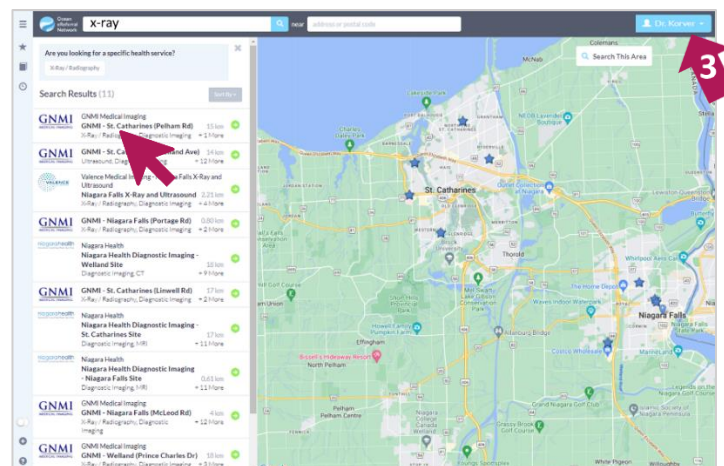
b) Add any attachments you would like included

c) Add ‘**Draft**’ status and choose your **Priority**
(note: you can create a default status and priority for your outgoing referrals in CHR to avoid entering these fields each time. Please see this [CHR support page](#) for more info).

d) Click the ‘**Ocean eReferral**’ button

e) Save your changes when the pop-up box requests you to save.

3. You will then be launched into the Ocean Healthmap in a new browser tab. You should already be logged into Ocean (please confirm that you see your name in the top right corner – see arrow 3 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)**’ after searching, click the ‘**whole directory**’ link to ensure Ocean is searching beyond the portion of the map visible on your screen!

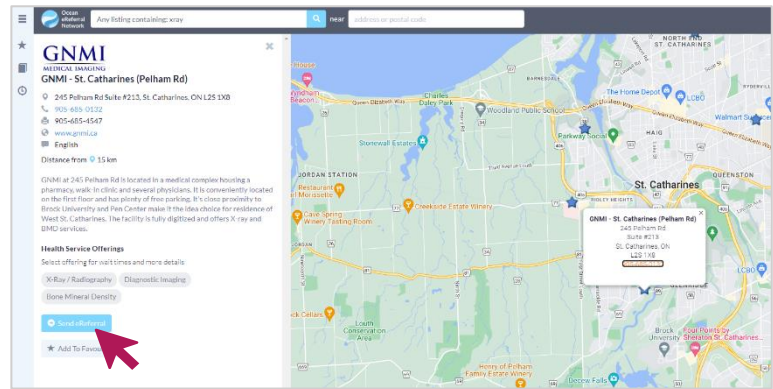
Search Results (0)

No listings were found with this criteria.

Try [zooming out](#), or searching the [whole directory](#).


- 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.

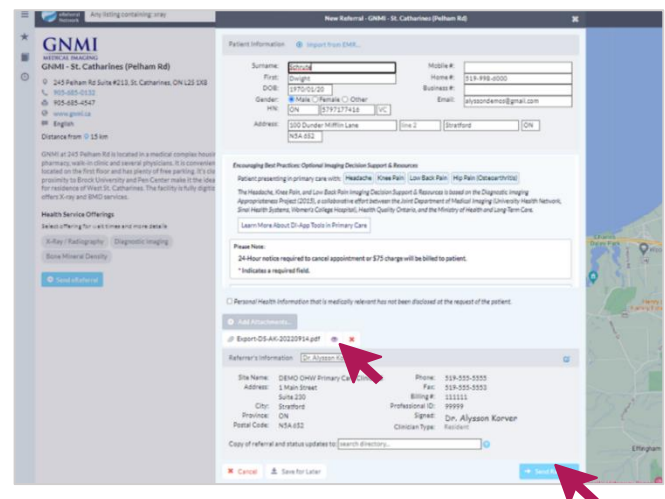
TIP: When you find a site that you refer to frequently, you can click the **Add to Favourites** button (underneath the blue 'Send eReferral' button). The next time you send a referral to that site, you will see it listed in a Favourites list when you first open the Healthmap.



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

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

Any attachments you selected in your EMR will be visible just above the 'Referrer's Information' section. To view the attachment, click the  icon beside the attachment name (see diagram to the right).



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

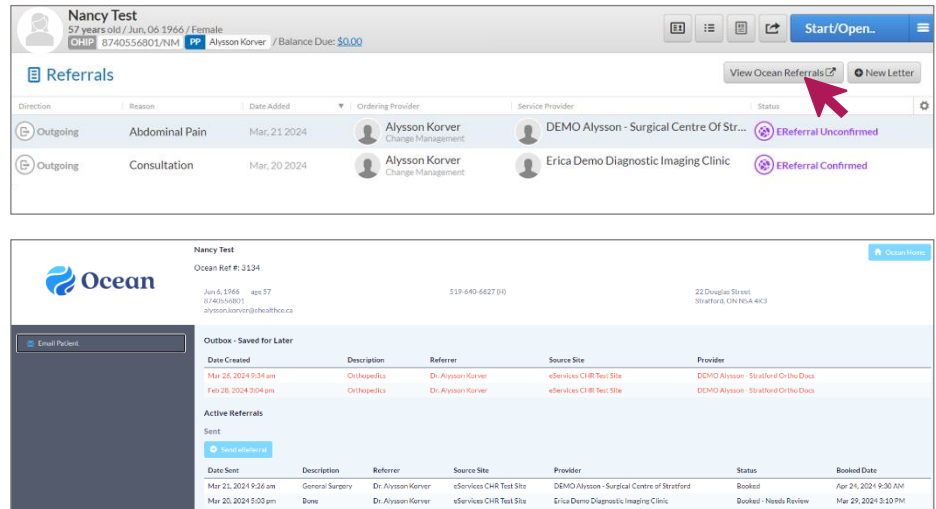
NOTE: You can also select 'Save for Later' in the bottom left corner of the eReferral form if you are not yet ready to send. Please see the last paragraph in Step 7 below to see how to locate and complete your Saved eReferrals.

- The sent eReferral will appear in the Outgoing Referrals list in the Referrals Dashboard, and also will be displayed in the Referrals section of the patient chart.

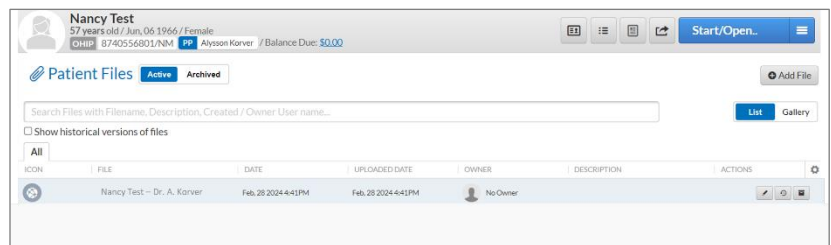
You will notice the status of your eReferral updating automatically:

- eReferral Sent** will be displayed after you have sent an eReferral
- eReferral Unconfirmed** will be displayed once an appointment has been entered by the receiving site
- eReferral Confirmed** will be displayed once the appointment has been confirmed in Ocean either by yourself, the receiving site, or if the patient confirms their appointment from an email notification.

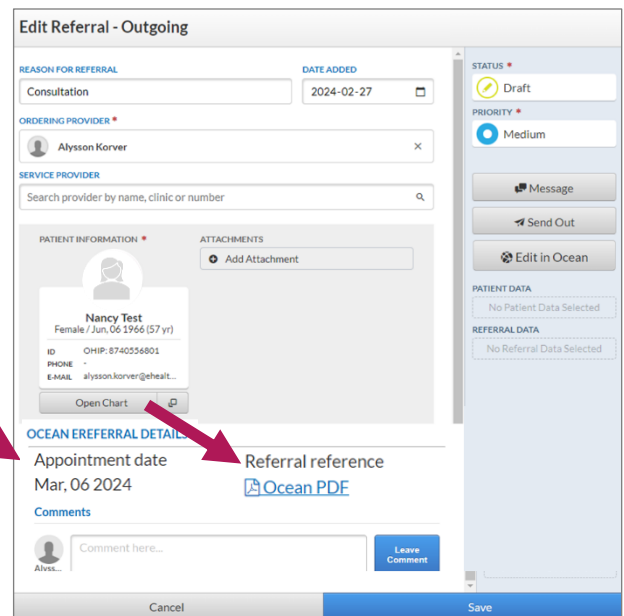
You can also view your patient's referrals from the Referrals section of their chart. Click the **'View Ocean Referrals'** button to be launched into Ocean's Patient Dashboard, where you can view all of your patient's Ocean referrals that have been made, as well as any that have been saved for completion later.



8. A PDF of the completed eReferral is saved in the patient's chart under **'Patient Files'**.



A PDF of the completed eReferral is also saved in the **Outgoing Referrals** under **'Ocean eReferral Details'**.



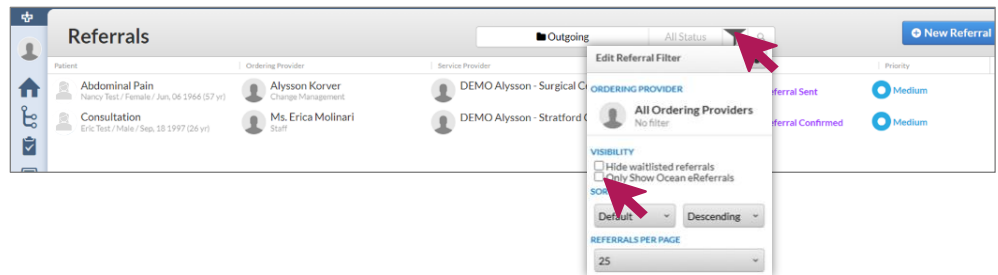
When your referral is accepted and an appointment scheduled, this will be reflected in the Ocean eReferral Details field (see image to right) as well.

Searching for an eReferral

From the Referrals Dashboard:

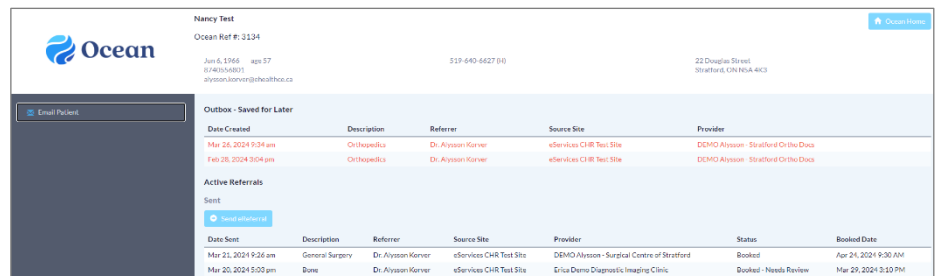
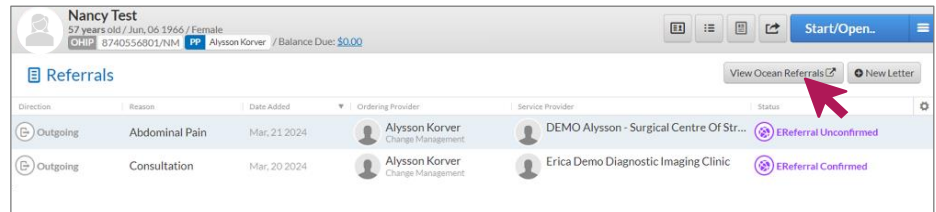
Any Ocean eReferrals sent through CHR will be listed in your referrals dashboard, providing CHR users with one central place to manage their referrals, whether sent by fax or through Ocean.

TIP! You can filter your outgoing referrals to see only those sent through Ocean by clicking on the filter icon (see image to right) and selecting 'Only Show Ocean eReferrals'.



From a Patient Chart:

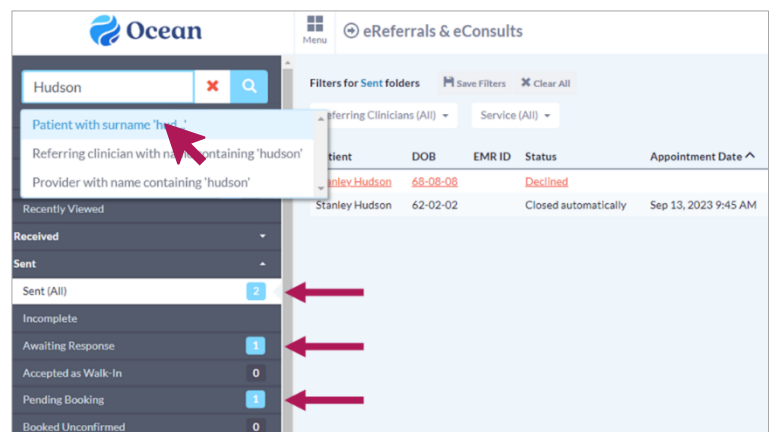
You can also view your patient's referrals from the Referrals section of their chart. Click the 'View Ocean Referrals' button to be launched into Ocean's Patient Dashboard, where you can view all of your patient's Ocean referrals that have been made, as well as any that have been saved for completion later.



From your Ocean Site:

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 in your Ocean site:

- **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.

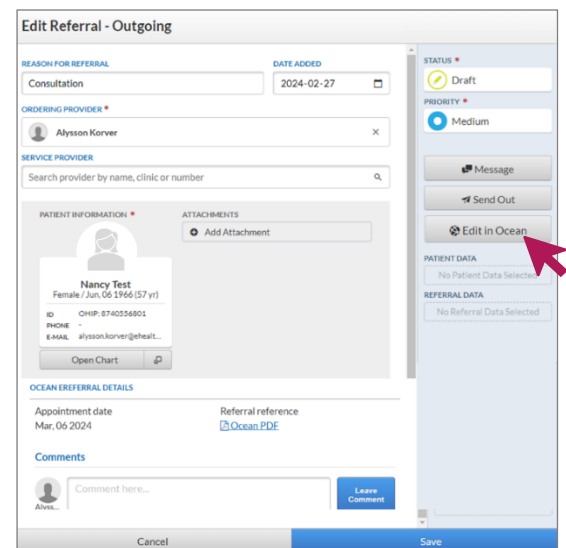



Examples of search options when searching by date or a number

Editing An Ocean eReferral

1. To edit an eReferral, open the referral from the Referrals dashboard, or from the Referrals section in the patient chart.
2. Click 'Edit in Ocean'.

This will take you directly into the eReferral in Ocean.




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).

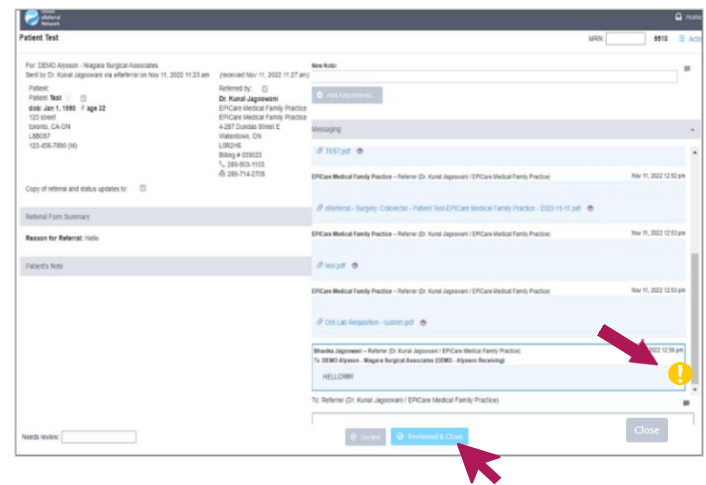
In this email example to the right, the clinic is being notified that a referral previously sent has been declined. Click the link to open the eReferral for more information.



TIP! The email notifications are a helpful way of alerting you that something requires your attention, but you can also routinely review & manage eReferrals by monitoring the status folders on your Ocean site.

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 to your site. You may receive messages such as “Please forward relevant blood work”, for example.

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).

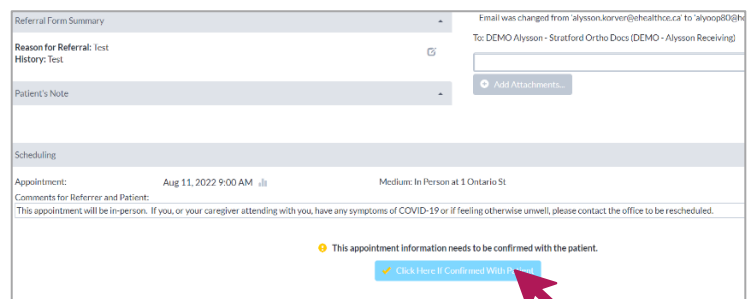


If you are not able answer the question/address the issue at this time, you can click ‘Close’ in the bottom right corner, and you will be able to find this referral in the *Needs Review* folder at a later time.

(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.

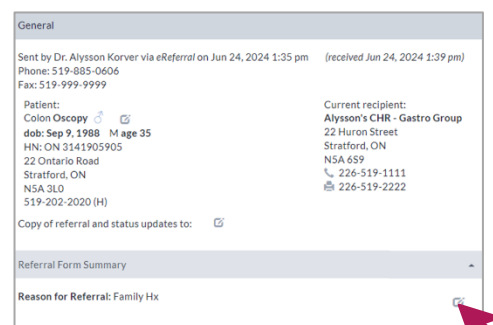
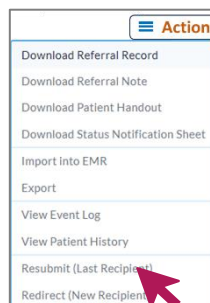
Resubmitting a Declined or Cancelled eReferral

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 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.

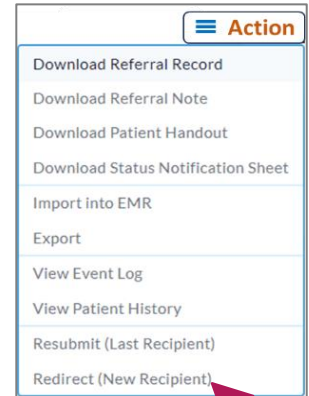


Redirecting to New Recipient

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.

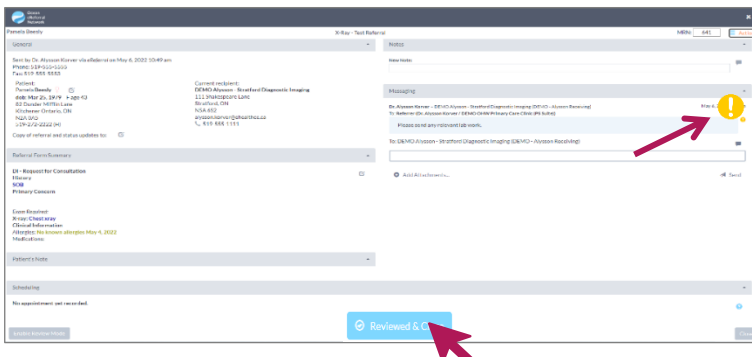


Needs Review Folder

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.

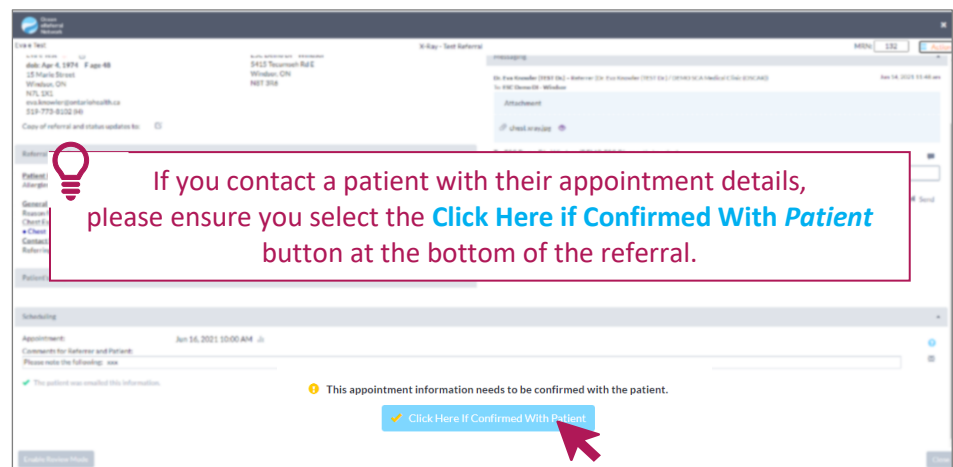
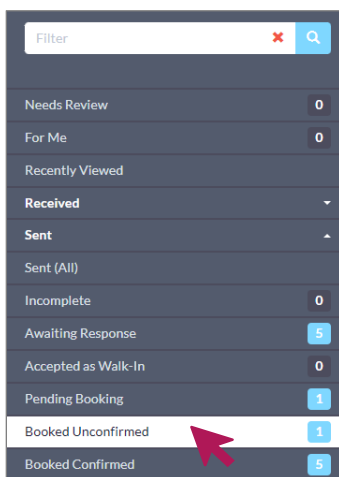
Booked Unconfirmed Folder & Accepted as Walk-In Folder

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 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.

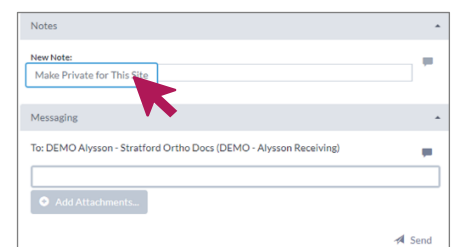


Notes Section:

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 the 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