

Sending and Managing Ocean eReferrals

OSCAR PRO

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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 (⌂) 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>)

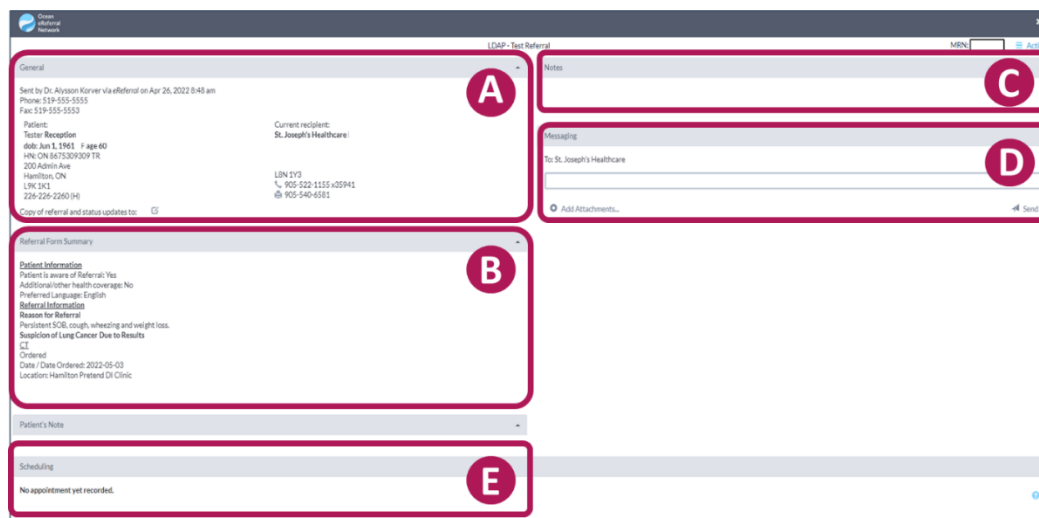
Filters can be applied in the status folders in an Ocean site, giving the user the ability to focus their view only on referrals that are relevant to them. This is valuable for Ocean sites that have a large number of clinicians. For instructions on setting up your filters, please see Ocean's support 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 shows a web interface for an eReferral. The top bar includes the 'Ocean eReferral Network' logo and a window title 'OSCAR - Text Referral'. The main content area is divided into several sections, each highlighted with a red box and a letter in a circle:

- A (General):** Contains sender and recipient contact information. Sender: Dr. Alysson Korver, 519-555-5555. Recipient: St. Joseph's Healthcare.
- B (Referral Form Summary):** Contains patient information (DOB: Jun 1, 1961, age 60) and referral details (Reason for Referral: Persistent SOB, cough, wheezing and weight loss).
- C (Notes):** A text area for internal notes.
- D (Messaging):** A text area for secure communication between providers.
- E (Scheduling):** A section for appointment dates, 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 OSCAR

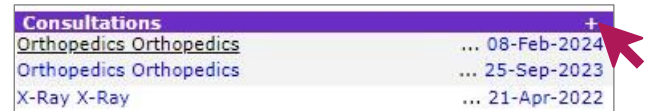
The following steps demonstrate how to send an eReferral through Ocean directly from a patient chart in OSCAR:

1. If you are sending a diagnostic imaging requisition or a referral without any attachments from your chart, click the arrow to expand the Ocean toolbar in your patient's eChart, and click **Refer**. You will then be launched into the Ocean Healthmap (skip to Step 4 below).



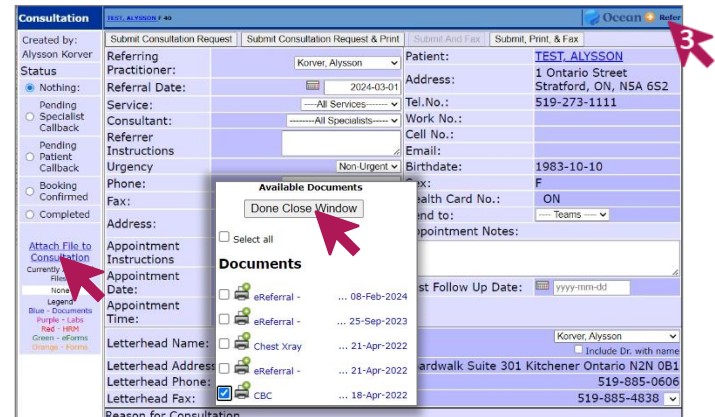
OR

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 click the '+' sign in the Consultations tab to start a new referral.



2. Click **Attach File to Consultation**, select the documents you wish to attach, and then click **Done Close Window**.

Note: You do not need to fill out any other fields in the Consultations screen, as this information will be entered within Ocean.

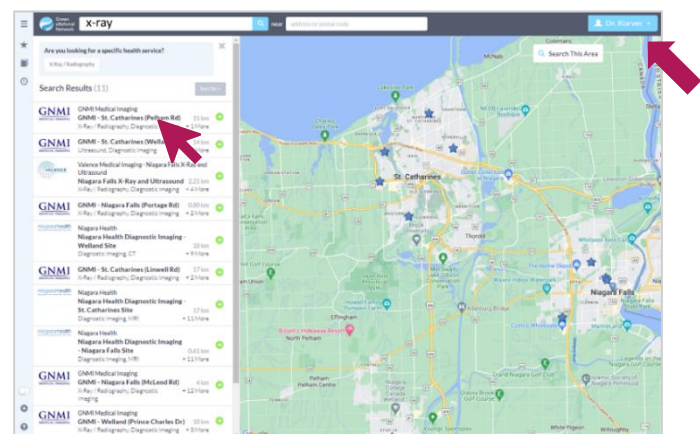


3. Select **Refer** in the top right corner of the Consultation screen.

4. You will then be launched into 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).

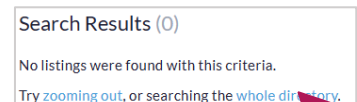
In the Ocean Healthmap, you can search for the service or physician to whom you wish to refer. In the image to the right, we have searched by 'x-ray'.

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.



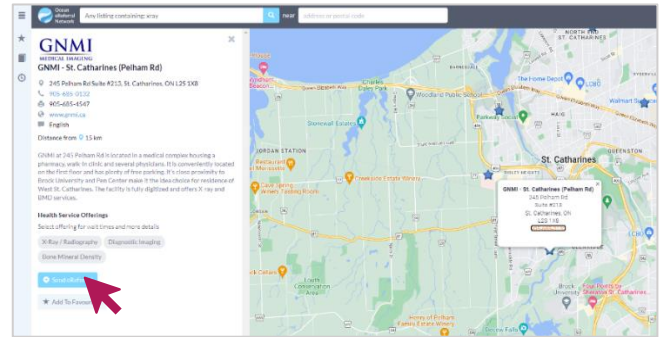
NOTE!

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!



- 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.

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.

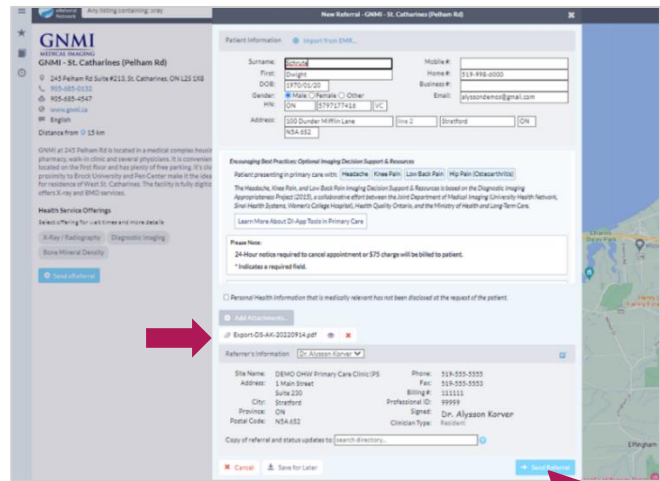


- The patient demographic information, health card, etc. will be automatically pulled in from your EMR.

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

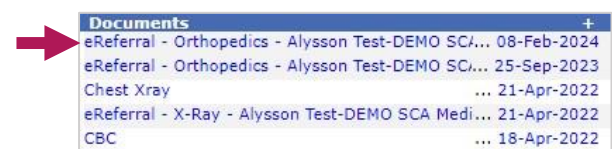
Any attachments you included will be visible just above the 'Referrer's Information' section. To view the attachment, click the icon beside the attachment name (see arrow to the right).

NOTE! If you begin to populate the referral form and realize you forgot to add attachments, please see the [Adding Attachments After Beginning to Populate The eReferral Form](#) section, below.



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

Refresh your OSCAR patient chart to see that the eReferral information summary will automatically populate as a PDF in the Documents area of the patient's chart.



A new Consultation will also be automatically generated in the patient's chart.



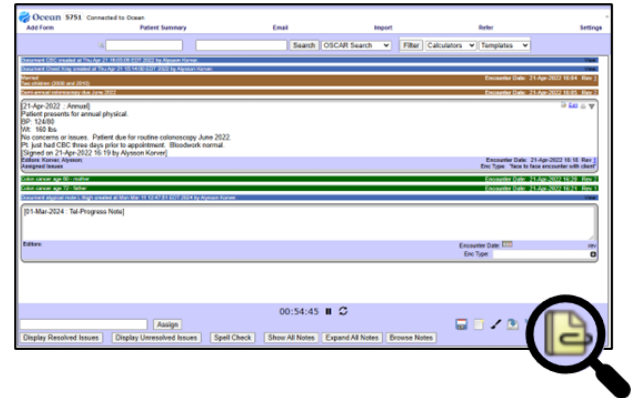
When you open the eReferral from the Consultation window, you will see that the status will automatically be updated by Ocean.



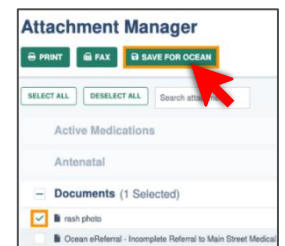
Adding Attachments After Beginning to Populate the eReferral Form

If you have begun populating the eReferral form in the Ocean Healthmap and decide that you need to add an attachment, or additional attachments:

1. At the bottom of the eReferral form, click **Save for Later**. Click **OK** to confirm.
2. Return to the patient chart in OSCAR and open the **Attachment Manager** in the bottom right corner of the patient's eChart.

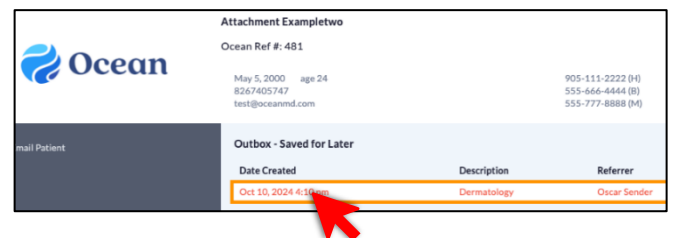


3. Select the document(s) you wish to attach and then click **Save For Ocean**.
4. Close the Attachment Manager window.

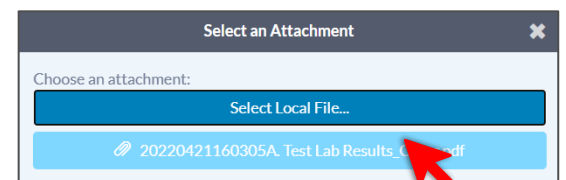


5. In the Ocean toolbar in the patient's eChart, click the **Patient Summary** link to open the patient's Ocean dashboard.

6. You will see the incomplete referral in red font in the 'Outbox – Saved for Later' section. Click on this referral to open it.



7. The incomplete referral will open again. Click the **Add Attachments** button and select the uploaded attachment.



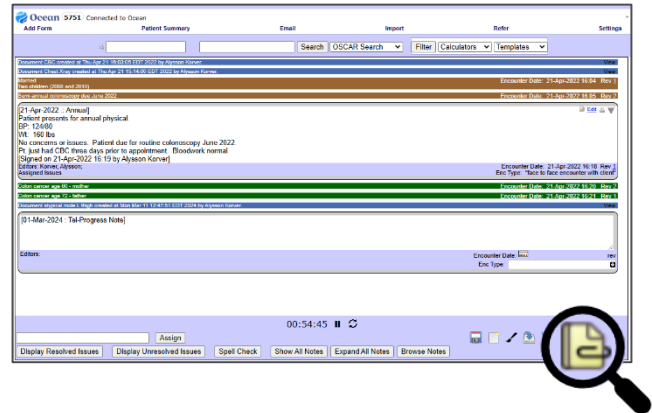
8. You can click on the purple eye icon after the attachment pulls in to ensure you have uploaded the document intended.

Adding Attachments After the eReferral Has Been Sent

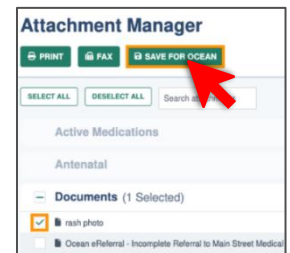
There are two ways that you can add attachments to an eReferral that has already been sent.

Method 1 – Attachment Manager:

1. From the chart of the patient you are adding attachments for, open the **Attachment Manager** in the bottom right corner of the eChart.

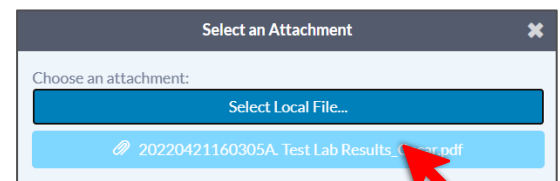


2. Select the document(s) you wish to attach and then click Save For Ocean.
Close the Attachment Manager window.

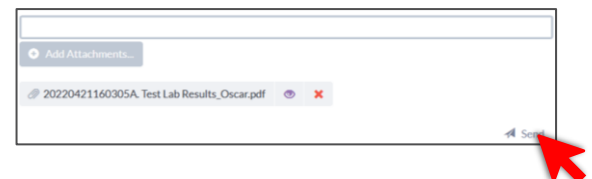


3. Click on **Patient Summary** in the Ocean toolbar in the patient’s chart to open their Ocean dashboard, and select the referral to which you are adding attachments.

4. Click the grey **Add Attachments** button in the Messaging section, then select the attachment(s) that present(s) in the ‘Select an Attachment’ popup.



5. You will see that the attachment is now in the Messaging Section of the eReferral. Click on the **Send** button, and then you can close this window in the bottom right corner of the eReferral.



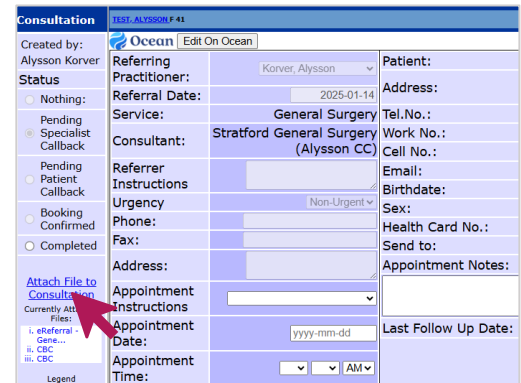
The clinic you sent this attachment to will be notified that they have a new message to review.

Method 2 – Consultations Window:

1. From the patient’s chart, locate and open the sent referral.

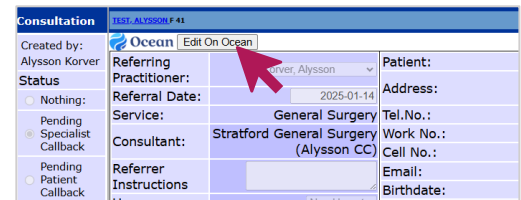


2. Click the **Attach File to Consultation** link in the Consultation window.

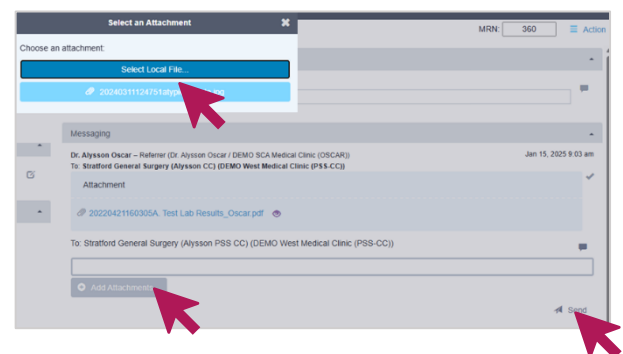


3. Select the document(s) you wish to send, and then click ‘Done Close Window’.

4. Back in the Consultation window, select **Edit On Ocean** to open the eReferral.



5. In the Messaging section, select the **Add Attachments** button. A window will be displayed containing the document you wish to attach. Select the document, and it will populate into the Messaging section.



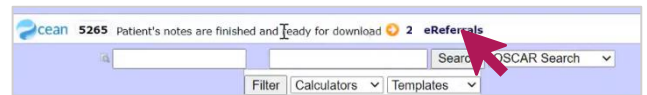
6. Click Send, and then Save the Changes in the bottom right corner.

The receiving clinic will be notified that they have a new message to review.

Searching for an eReferral

There are three ways to access a specific patient's referral that has been sent:

1. Click the number of active eReferrals in the Ocean toolbar in that patient's chart.



NOTE: It can take up to an hour after sending a referral for this link to be displayed.

The Patient Dashboard in Ocean will open, where you can review the status at a glance, or click on the referral to open it.

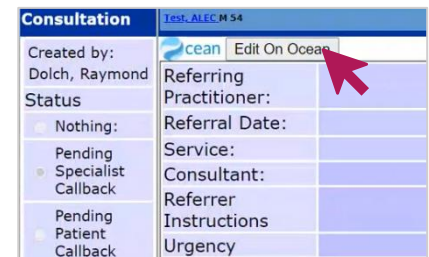


2. Expand the Ocean Toolbar in the patient's eChart and select **Patient Summary**. This will also open the Ocean Patient Dashboard, as above, where you can select the referral to open it.

3. Click on the referral in the patient's Consultations tab. Click the **Edit On Ocean** button in the top left corner.

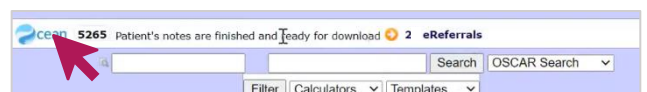
The eReferral will open, and you have the ability to review the referral, make any required edits, or send a message to the physician/clinic to which you referred.

NOTE: For more details on what the eReferral looks like, please refer to the [eReferrals – A Closer Look](#) section.



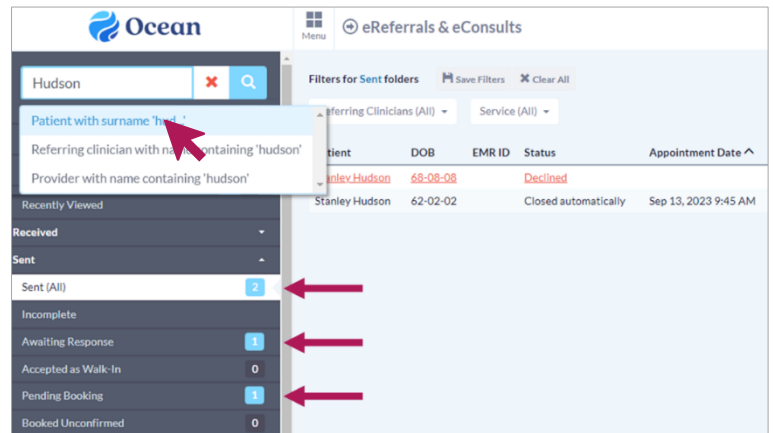
To view your Ocean Portal to view ALL eReferrals for ALL patients:

From any patient eChart, click on the Ocean logo in the Ocean toolbar and you will be launched into your Ocean site.



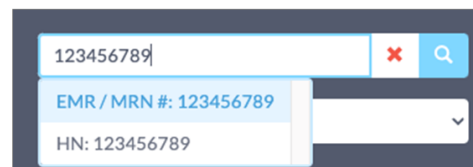
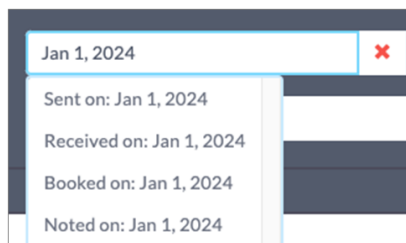
You can also search within your Ocean site itself. Upon entering your search criteria in the upper left corner, the grey status folder(s) containing the referral(s) that meet your search criteria will display a blue number to help you locate what you are searching for.

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:

- **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.

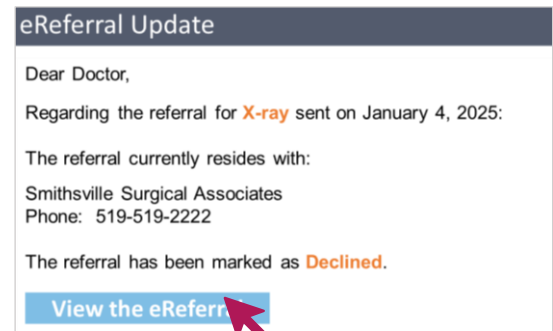


Examples of search options when searching by date or a number

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.

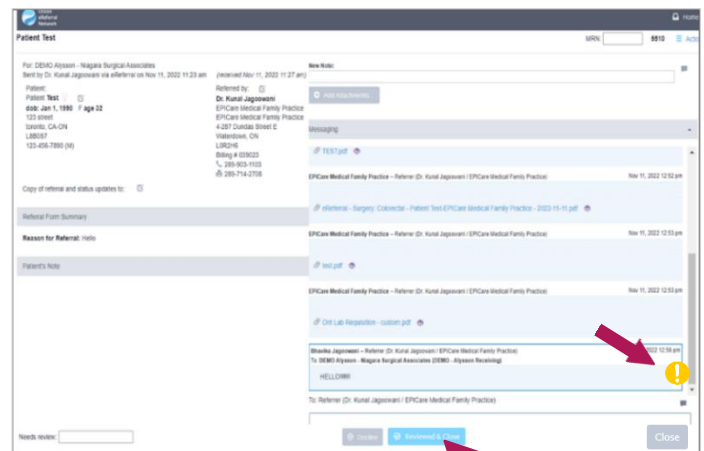


TIP!

The email notifications are a helpful way of alerting you that something requires your attention, but you can also routinely review and manage eReferrals by clicking the Ocean logo from any patient's eChart 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. After clicking **Reviewed & Close**, the eReferral will move back to the folder where it belongs according to its status (e.g. Pending Booking folder).

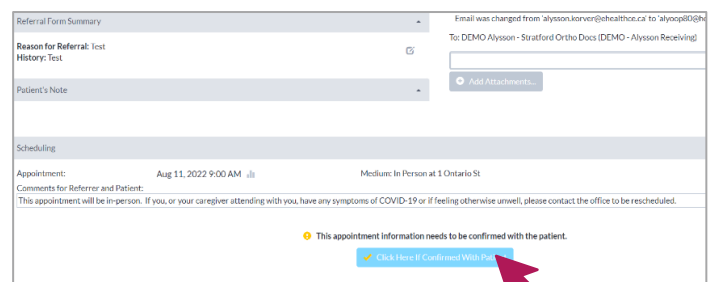


If you are not able answer the question/address the issue at this time, you can click 'Close' in the bottom right corner, and you will be able to find this referral in the *Needs Review* folder at a later time.

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

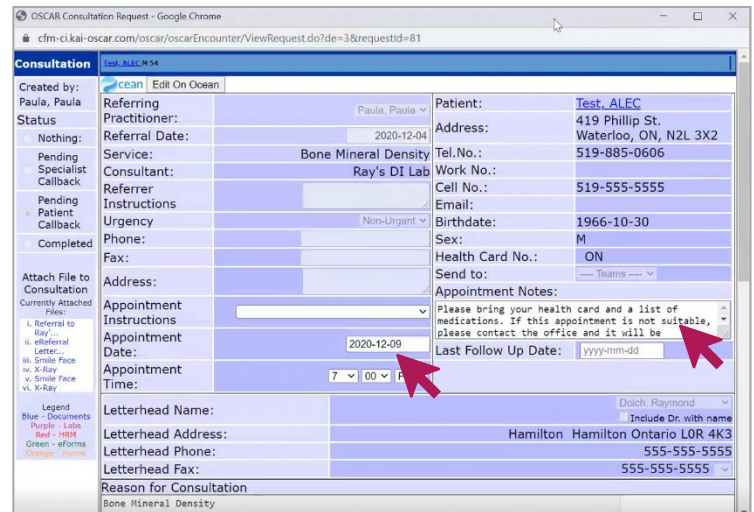
Another typical email notification that you will receive will be to inform you that an appointment has been booked for your patient.

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 the system for both yourself and for the site where the patient has been referred.



Ocean will also automatically update the Consultation when the appointment has been booked for your patient. In the example to the right, you can see that the appointment date and time have populated in the Consultation screen, along with instructions that were sent regarding the appointment.

The status of the referral will also be updated by Ocean and will reflect a 'Pending Patient Callback' status if the appointment has not yet been confirmed in Ocean.



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	EMRID	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.

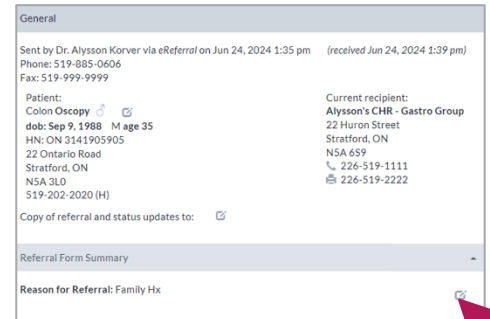
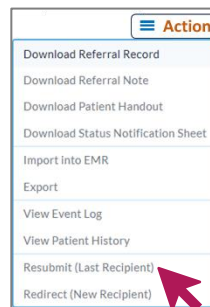
Resubmitting a Declined or Cancelled eReferral

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.

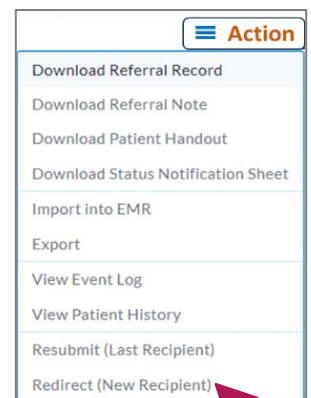
1. If necessary, you can add/edit information to the referral form answers by clicking the pencil icon within the 'Referral Form Summary' of the eReferral.
2. Add any attachments or messages as required.
3. From the Action menu in the top right corner, select '**Resubmit (Last Recipient)**'.
4. A message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

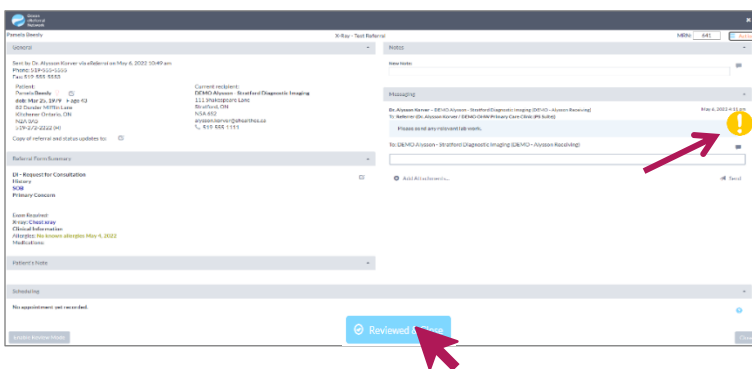


Needs Review Folder

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.

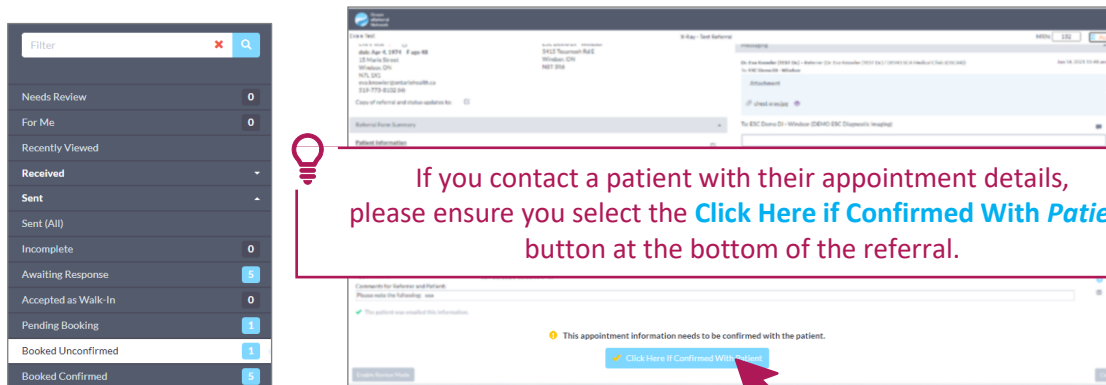
Booked Unconfirmed Folder & Accepted as Walk-In Folder

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.



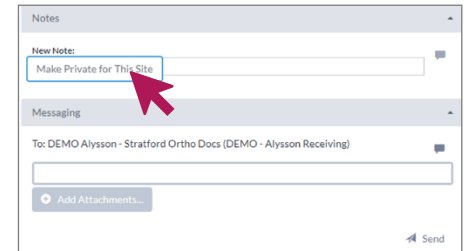
If you contact a patient with their appointment details, please ensure you select the **Click Here if Confirmed With Patient** button at the bottom of the referral.

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