

Externally Managed Referrals / Referrals Completed without Appointment Details

Ocean allows for flexibility in updating eReferrals and receiving notifications of status updates throughout their lifecycle. However, as a sender, certain features, like appointment details, may not always be available in Ocean depending on the receiving site's setup.

There are two possible ways these types of referrals may appear in Ocean:

1. Received and Managed Externally

With this functionality turned on, referrals will be automatically moved to a new status folder called "Externally Managed" in your Ocean site. These eReferrals will not get updated in Ocean, so you will need to follow-up with the receiving site through a different channel (i.e., phone, fax, email, etc.) to obtain status updates or appointment details regarding the referral.

Patient	DOB	EMR ID	Status	Appointment Date ^	Service	Referral Date	Recipient	Clinician	Messages
Mary Test	88-01-01		Received and Managed Externally		Physiotherapy	Mar 24, 2025 10:39 am	ECE Externally Manage Test Listing [Test Listing Only, Do not Send PHI, #11742]	Carla Vallee	

When this functionality is enabled, there will be a notification on the Healthmap Listing, as well as a confirmation after the referral has been sent:

Appointment details (status) will be provided by other means; sender will need to contact the receiver outside of Ocean with questions

2. Referrals Completed Without an Appointment

With this functionality turned on, referrals can be marked complete in Ocean without an appointment needing to be added to the scheduling pane. These referrals will automatically be moved to the "Completed" status folder.

Appointment date of the eReferral is blank and eReferral is in the "Completed" inbox

Patient	DOB	EMR ID	Appointment Date ^	Service	Referral Date	Recipient	Clinician	Messages
Monday Test	98-01-01			Physiotherapy	Mar 24, 2025 8:40 am	ECE Close Without Appointment Test Listing [Test Listing Only, do not send PHI, Site#11512]	Carla Vallee	

Scheduling pane does not have appointment details

