Externally Managed Referrals / Referrals Completed without Appointment Details
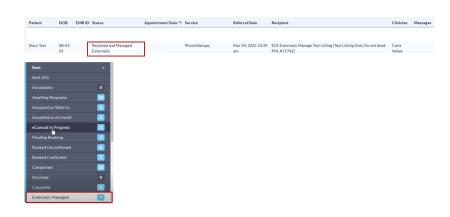
Ocean allows for flexibility in updating eReferrals and receiving notifications of status updates throughout their lifecycle. However, as a sender, certain features, like appointment details, may not always be available in Ocean depending on the receiving site's setup.

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.

   When this functionality is enabled, there will 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

   Scheduling pane does not have appointment details