



# Receiving an eReferral via Ocean Portal

**WHAT YOU WILL LEARN:** This reference guide will walk you through the steps to receive an eReferral via the Ocean portal. Additional options for managing received eReferrals are contained on page six+.

**TARGET AUDIENCE:** The reference guide is intended for eReferral receivers not currently using an integrated Electronic Medical Record (i.e. Telus Practice Solutions Suite, OSCAR or Accuro).

**PREREQUISITE:** Prior to receiving an eReferral via the Ocean portal, please ensure to set up your Ocean account (see *Setting up your Ocean Account [eReferral Receivers]* reference guide for instructions).

**TIME:** These steps will take approximately ten minutes to complete.

## ! NOTE

Ocean portal layout may appear slightly different from your current view in reference guide screenshots, however general steps remain applicable. Reference guide content is subject to change.

## Receiving an eReferral via Ocean Portal

### — Step 1 —

As a first step, go to <https://ocean.cognisantmd.com/> and enter your login information into the **User Name** and **Password** fields, and click the **Secure Sign In** button.

If you have not yet created your Ocean account, see the *Setting up your Ocean Account (eReferral Receivers)* reference guide for instructions.

#### ! NOTE

For privacy and security reasons, it is not encouraged to click the *Remember me on this computer* checkbox field.



### Sign In

User Name  
 [Forgot User Name?](#)

Password  
 [Forgot Password?](#)

Remember me on this computer

**Secure Sign In** [New to Ocean? Sign up here!](#)

### — Step 2 —

Once login is successful, you should see the Ocean portal, complete with a set of tabs as shown here.

#### ! NOTE

Depending on your configuration, you may not have the *Patients* tab. The *Patients* tab is only necessary if you are sending eReferrals or using other Ocean products.

To view new eReferrals, click the **eRequests** tab, then click the **New** side tab.

#### ! NOTE

If you have set your email address as the *Referral Notification Email* then you will be notified via email when new eReferrals are sent to you (to set your email address as the *Referral Notification Email*, see *Streference* guide for instructions).



Filter

All - Centre for Specialist Care

- New** 1
- Deletion Warnings 0
- All Received
- For Me 0
- Needs Review 3
- Outstanding 5
- Pending Contact 9
- Booked Unconfirmed 1
- Booked Confirmed 0
- Awaiting Reply
- Processed
- Forwarded
- Sent 0
- Actions
- Support

Centre for Specialist Care | Dr. Doc

Patients **eRequests** Studies Tablets eForms Admin

Patient	MRN	DOB	Description	Date Sent	Source	Site	Protocol	Priority
John Doe		55-07-20	Lower Limb Services, Chropody, or Podiatry	Feb 7, 2017 10:16 am	Dr. Primary Doc	CEPHealth Family Medicine		

Displaying 1 of 1 matches

## — Step 3 —

Select a newly received eReferral from the list available from the **New** side tab, which will open the eReferral window.

In the eReferral window, **click the Accept button** if you plan to take the patient on upon quick review of the eReferral information.

The eReferral sender and patient will not be sent emails until further action is taken, however the eReferral sender will see *Accepted* as the status of their sent eReferral in both Ocean and their EMR (if configured).

The eReferral will be moved to the *Pending Contact* side tab.

Click the **Decline** button if you do not plan to take the patient on upon review of the eReferral information. Complete the Reason for *Decline* and *Message for Referrer* fields when prompted.

The eReferral sender and patient will be sent emails to notify them of your decision to decline the eReferral.

The eReferral will be moved to the *Declined* side tab, which is available from the *Processed* drop-down menu.

This first step involves a quick review, to move the eReferral out of the *New* side tab. The next steps are to be done when you have the time to process the eReferral.

**NOTE**

If an eReferral was sent to you containing more than one health service, you will see the *Split* button which you can click to separate the eReferral into individual eReferrals for each health service. You can then process each eReferral separately.

The screenshot shows the Ocean eReferral Portal interface. At the top, there are navigation tabs: Patients, eRequests, Studies, Tablets, eForms, and Admin. The current view is for 'eRequests'. A table lists eReferrals with columns: Patient, MRN, DOB, Description, Date Sent, Source, Site, Protocol, and Priority. The first entry is for John Doe, with MRN 55-07-20, description 'Lower Limb Services, Chiropody, or Podiatry', and date sent Feb 7, 2017 10:16 am.

The detailed view for John Doe shows the following information:

- Request sent by:** Dr. Primary Doc via Directory on Feb 7, 2017 10:16 am
- Sent by:** Dr. Primary Doc
- Billing #:** 12345
- CPSO #:** 54321
- John Doe** (MRN: [blank])
- dob:** Jul 20, 1955
- age:** 61
- john.doe@gmail.com**
- 647-260-7777 (M)**

The view also includes sections for:

- Referral Note:** Patient Information (Height: 160 cm, Weight: 70 kg, BMI: 27.3, Allergies: KNA, Language Spoken: En)
- Referral:** Diabetes Assessment: Symptomatic, Diabetes Diagnosis: Established (>1yr), Previous Diabetes Education: Yes, Diabetes Type: Type 2 Diabetes
- Reason for Referral:** Foot Care Education; Foot Care Treatment
- Current Therapy and Medical History:** Current Therapy and Medical History Attached
- Lab Results:** Lab Results Provided: Attached
- Consult:** Chiropodist Consult
- Comments:** [Text input field]

At the bottom of the detailed view, there are buttons for 'Decline', 'Close', 'Save', and 'Accept'. The 'Decline' and 'Accept' buttons are highlighted with red boxes. There is also a 'Send Message to Referrer...' button.

On the left side of the interface, there is a sidebar with a search filter and a list of eReferral status tabs: New (3), Deletion Warnings (0), All Received, For Me (0), Needs Review (3), Outstanding (8), Pending Contact (10), Booked Unconfirmed (1), Booked Confirmed (0), Awaiting Reply, Processed (dropdown), Forwarded, and Sent (0). At the bottom of the sidebar are 'Actions' and 'Support' tabs.

## — Step 4 —

To process the eReferral, click the **Pending Contact** side tab and re-select the eReferral from the list.

Review the eReferral information in more depth.

To book the patient's appointment date and time, complete the **Book** fields and click the **Save** button in the eReferral window.

The eReferral sender will be sent an email to notify them of your decision to book the appointment date and time (note: if the eReferral sender is not able to receive electronic notifications regarding the eReferral, you will be notified and prompted to contact them via fax, telephone, etc.). The patient will be sent an email asking them to confirm the proposed appointment date and time (note: patients will only receive email notifications if the eReferral sender has given consent for eReferral Receivers to contact the patient via email).

The eReferral will be moved to the **Booked Unconfirmed** side tab, until the patient confirms the appointment at which time it will be moved to the **Booked Confirmed** side tab.

**NOTE**

If the patient's email is not available from the eReferral, you will need to contact the patient over the phone or through the eReferral sender to confirm the appointment date and time. Once this is done, complete the **Book** fields, manually click the **Confirmed** checkbox, and click the **Save** button. This will ensure the eReferral moves to the **Booked Confirmed** side tab.

To close out the eReferral see step five, for additional options for managing received eReferrals see page six+.

The sidebar contains the Ocean logo and a list of filters and status counts:

- Filter: [Search]
- All - Centre for Specialist Car: 4
- New: 2
- Deletion Warnings: 0
- All Received
- For Me: 0
- Needs Review: 5
- Outstanding: 9
- Pending Contact: 11** (highlighted with a red box)
- Booked Unconfirmed: 0
- Booked Confirmed: 0
- Awaiting Reply
- Processed: [Dropdown]
- Forwarded
- Sent: 0
- Actions: [Dropdown]
- Support

The main interface shows a navigation bar with 'Patients', 'eRequests', 'Studies', 'Tablets', 'eForms', and 'Admin'. Below is a table of eRequests:

Patient	MRN	DOB	Description	Date Sent	Source	Site	Protocol	Priority
John Doe	55-	07-20	Lower Limb Services, Chiroprody, or Podlatry	Feb 7, 2017 10:16 am	Dr. Primary Doc	CEPHealth Family Medicine		

The detailed view for John Doe shows the following information:

- Patient Information:** Height (cm): 160, Weight (kgs): 70, BMI: 27.3, Allergies: KNA, Language Spoken: En
- Referral:** Diabetes Assessment: Symptomatic, Diabetes Diagnosis: Established (>1yr), Previous Diabetes Education: Yes, Diabetes Type: Type 2 Diabetes
- Reason for Referral:** Foot Care Education; Foot Care Treatment
- Current Therapy and Medical History:** Current Therapy and Medical History Attached
- Lab Results:** Lab Results Provided: Attached
- Consult:** Chiroprodist Consult
- Comments:** [Text area]

At the bottom of the window, there are fields for 'Book:' (with a red box around it), 'time...', 'Wait Time:', 'Confirmed', 'Seen', 'Comments for Referrer and Patient:', 'Choose Files', 'Send Message to Referrer...', and 'Needs review:'. The 'Save' button is highlighted with a red box.

## — Step 5 —

To close out the eReferral once the patient has been seen, click the **Book Confirmed** side tab and re-select the eReferral from the list.

In the eReferral window, click the **Seen** checkbox, then click the **Save** button.

The eReferral sender will be sent an email to notify them that you have seen the patient.

The eReferral will be moved to the **Seen** side tab, available from the **Processed** drop-down menu.

**You have now successfully received and processed an eReferral!**

For additional options for managing received eReferrals, see page six+

The screenshot displays the Ocean eReferral Network interface. On the left is a sidebar with a filter search bar and a list of status categories: New (2), Deletion Warnings (0), All Received, For Me (0), Needs Review (5), Outstanding (8), Pending Contact (10), Booked Unconfirmed (0), **Booked Confirmed (1)**, Awaiting Reply, Processed (dropdown), Forwarded, and Sent (0). The main area shows a table of eReferrals with columns: Patient, MRN, DOB, Description, Booked, Date Sent, Source, Site, Protocol, and Priority. The first row is for John Doe, booked on Mar 23, 2017 at 2:30 pm, sent on Feb 7, 2017 at 10:16 am, from Dr. Primary at CEPHealth Family Medicine. A detailed view for John Doe is open, showing patient information (DOB: Jul 20, 1955, age 61), referral note (Diabetes Assessment: Symptomatic, Diagnosis: Established (> 1yr), Type: Type 2 Diabetes), and reason for referral (Foot Care Education; Foot Care Treatment). At the bottom of the view, there are checkboxes for 'Confirmed' (checked) and 'Seen' (unchecked), a 'Save' button, and a 'Decline' button.

## Additional Ways to Manage eReferrals

**A** To request additional and/or missing information (e.g. lab results, diagnostic imaging, eReferral form field value) or to ask for clarification from the eReferral sender, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click *Send Message to Referrer* [a1] and enter your request and/or comment in the textbox that appears. Once text is entered, click *Send*.

Next click the *Action* drop-down menu and select *Await Reply* [a2].

The eReferral sender will be sent an email to notify them of your request and/or comment and that you are awaiting their reply.

The eReferral will be moved to the *Awaiting Reply* side tab, until the eReferral sender addresses your request and/or comment.

Once the eReferral sender addresses your request and/or comment, you will receive an email notifying you of this (if you have set your email address as the *Referral Notification Email*. To set this up, see *Setting up your Ocean Account [eReferral Receivers]* reference guide for instructions).

Navigate to the eReferral in the *Awaiting Reply* side tab from the Ocean portal and in the eReferral window, click the *Accept Reply* button if upon review, the additional information and/or attachment is adequate.

The eReferral will be moved out of the *Awaiting Reply* side tab, and back into the *Pending Contact*, *Booked Unconfirmed* or *Booked Confirmed* side tab, based on where you are at in processing the eReferral.

### NOTE

For eReferrals forwarded by Waterloo Wellington Orthopedic Central Intake, check the *Local Note* section of the eReferral to determine whether the *Referral sender will follow up to provide additional/missing information* checkbox is checked. If checked, Central Intake has already followed-up with the eReferral sender regarding the additional and/or missing information and therefore the eReferral sender will provide you with the information directly once available.

The screenshot shows the Ocean eReferral portal interface. On the left is a sidebar with a filter and various status tabs: New (2), Deletion Warnings (0), All Received, For Me (0), Needs Review (5), Outstanding (9), Pending Contact (11), Booked Unconfirmed (0), Booked Confirmed (0), Awaiting Reply, Processed, Forwarded, and Sent (0). The main area displays a table of eReferrals for John Doe. The detailed view for John Doe shows a request sent by Dr. Primary Doc on Feb 7, 2017. The 'Action' menu is open, with 'Await Reply' highlighted. The 'Send Message to Referrer...' button is also highlighted. The detailed view includes sections for Patient Information, Referral Note, Patient's Note, Local Note, Referral, Reason for Referral, Current Therapy and Medical History, Lab Results, and Consult.

## Additional Ways to Manage eReferrals

**B** To send the eReferral to a colleague (within your Ocean site) for review, navigate to the eReferral window from the Ocean portal.

In the eReferral window, enter and select the physician's name from the *Needs* review field [b].

To add another user to your site, see the *Setting up your Ocean Account (eReferral Receivers – Multi-User)* reference guide for instructions.

**C** To forward the eReferral onto a different eReferral receiver or send a related eReferral, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *Action* drop-down menu and select either *Forward* [c1] or *Send Related Referral* [c2], based on whether you would like to forward that same eReferral or generate a new related eReferral for the patient.

Both selections will open the *Forward Referral* window, which will prompt you to enter the name/title of the health service you are referring for, preferred language and maximum wait time. Once entered, click the *Search* button and select the preferred eReferral receiver from the list provided.

To complete the eReferral, click the *Forward Referral* or *Create Related Referral* button.

### NOTE

Only eReferral receivers who provide the health service you are referring your patient for will appear in the search results.

The screenshot displays the Ocean eReferral portal interface. On the left is a navigation sidebar with filters and status counts. The main area shows a table of eReferrals for 'John Doe' and a detailed view of a specific referral. The 'Action' menu is open, highlighting 'Forward...' (C1) and 'Send Related Referral...' (C2). A 'Needs review' field is highlighted with a red box and labeled 'B'. The referral details include patient information, referral notes, and a list of potential receivers.

Patient	MRN	DOB	Description	Date Sent	Source	Site	Protocol	Priority
John Doe		55-07-20	Lower Limb Services, Chiroprody, or Podiatry	Feb 7, 2017 10:16 am	Dr. Primary Doc	CEPHealth Family Medicine		

**John Doe**  
Lower Limb Services, Chiroprody, or Podiatry

Request sent by Dr. Primary Doc via Directory on Feb 7, 2017 10:16 am (received Feb 7, 2017 10:22 am)

Sent by: Dr. Primary Doc  
Billing #: 12345  
CPSO #: 54321

John Doe  
dob: Jul 20, 1955 age 61  
john.doe@gmail.com  
647-260-7777 (M)

MRN: [ ]

4161234567  
4161234567

**Referral Note**  
**Patient Information**  
Height (cm): 160  
Weight (kgs): 70  
BMI: 27.3  
Allergies: KNA

Language Spoken: En

**Referral**  
Diabetes Assessment: Symptomatic  
Diabetes Diagnosis: Established (>1yr)  
Previous Diabetes Education: Yes  
Diabetes Type: Type 2 Diabetes

Reason for Referral: **Foot Care Education; Foot Care Treatment**

**Current Therapy and Medical History**  
Current Therapy and Medical History Attached

**Lab Results**  
Lab Results Provided: Attached

**Consult**  
Chiroprodist Consult

Comments: [ ]

Book: [ ] time... Wait Time: [ ] [ ] Confirmed [ ] Seen

Comments for Referrer and Patient: [ ]

Choose Files No file chosen [ ] Send Message to Referrer...

Needs review: [ ] [B]

[ ] Decline [ ] Close [ ] Save [ ] Split

## Additional Ways to Manage eReferrals

**D** To communicate with the eReferral sender, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click *Send Message to Referrer* [d1], enter your message and click Send.

### NOTE

You can send a joint message to the eReferral sender and patient by typing a message in the *Comments for Referrer and Patient* textbox [d2/e2] and clicking the *Save* button.

**E** To communicate with the patient, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *Action* drop-down menu and select *Email Patient* [e1].

This will open the *Send Email to Patient* window, which will prompt you to enter the email subject and body. Once entered, click the *Send* button.

### NOTE

You can send a joint message to the eReferral sender and patient by typing a message in the *Comments for Referrer and Patient* textbox [d2/e2] and clicking the *Save* button.



All - Centre for Specialist Car

- New 2
- Deletion Warnings 0
- All Received
- For Me 0
- Needs Review 5
- Outstanding 9
- Pending Contact 11
- Booked Unconfirmed 0
- Booked Confirmed 0
- Awaiting Reply
- Processed -
- Forwarded
- Sent 0

Actions

Support

Centre for Specialist Care Dr. Doc

Patients
eRequests
Studies
Tablets
eForms
Admin

Patient	MRN	DOB	Description	Date Sent	Source	Site	Protocol	Priority
John Doe		55-07-20	Lower Limb Services, Chiropody, or Podiatry	Feb 7, 2017 10:16 am	Dr. Primary Doc	CEPHealth Family Medicine		

John Doe
✕

**John Doe** Lower Limb Services, Chiropody, or Podiatry

Request sent by Dr. Primary Doc via Directory on Feb 7, 2017 10:16 am (received Feb 7, 2017 10:22 am)

Sent by: **Dr. Primary Doc**      John Doe ♂  
 Billing #: 12345      dob: Jul 20, 1955 age 61  
 CPSO #: 54321      john.doe@gmail.com  
 416-260-7777 (M)

MRN:

📞 4161234567      📠 4161234567

**Referral Note**

**Patient Information**  
 Height (cm): 160  
 Weight (kgs): 70  
 BMI: 27.3  
 Allergies: KNA

Language Spoken: En

**Referral**  
 Diabetes Assessment: Symptomatic  
 Diabetes Diagnosis: Established (> 1yr)  
 Previous Diabetes Education: Yes  
 Diabetes Type: Type 2 Diabetes

Reason for Referral: **Foot Care Education; Foot Care Treatment**

**Current Therapy and Medical History**  
 Current Therapy and Medical History Attached

**Lab Results**  
 Lab Results Provided: Attached

**Consult**  
 Chiropodist Consult  
 Comments:

**Patient's Note**

**Local Note**

Book:  time... D2 E2 Wait Time:   Confirmed  Seen

No file chosen

Needs review:

Action

- Print
- Download
- Export
- Forward...
- Send Related Referral...
- Await Reply
- Email Patient... E1
- View Event Log
- Delete Request
- Cancel Request

## Additional Ways to Manage eReferrals

**F** To add a note to the eReferral, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *review* button [f1].

This will open the *Review* window, which will prompt you to enter the eReferral priority and/or comments. Once entered, click the *OK* button.

Alternatively, if Central Intake has already added a Local Note, use the *Comments* box [f2] to avoid overriding Central Intake's note.

**G** To split an eReferral that containing multiple health services that you would like to process seperately, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *Split* button [g]. The eReferral will be split into individual eReferrals based on health service.

Individual eReferrals will be accesible from the *Pending Contact* side tab, and the original master eReferral will be accessible from the *Outstanding* side tab.

**NOTE**  
If automatic splitting of eReferrals is preferred, this can be selected in the *Admin* tab under the *Directory Listing* side tab. If selected, all eReferrals will be autmatically split in the *New* tab and cannot be viewed as a single master record in the *Outstanding* tab.

The screenshot shows the Ocean Portal interface. At the top right, there are tabs for 'Centre for Specialist Care' and 'Dr. Doc'. Below this is a navigation bar with 'Patients', 'eRequests', 'Studies', 'Tablets', 'eForms', and 'Admin'. The main area displays a table of eReferrals with columns for Patient, MRN, DOB, Description, Date Sent, Source, Site, Protocol, and Priority. A detailed view for 'John Doe' is shown, including patient information, referral notes, and a 'Local Note' section with a 'review...' button (F1). At the bottom of the detailed view, there is a 'Comments' box (F2) and a 'Split' button (G). A sidebar on the left contains filter options like 'New', 'Deletion Warnings', 'All Received', 'For Me', 'Needs Review', 'Outstanding', 'Pending Contact', 'Booked Unconfirmed', 'Booked Confirmed', 'Awaiting Reply', 'Processed', 'Forwarded', and 'Sent'.

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