



Sending an eReferral via Ocean Portal

WHAT YOU WILL LEARN: This reference guide will walk you through the steps to send an eReferral via the Ocean portal. Steps for managing sent eReferrals are contained on page eight+.

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

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

TIME: These steps will take approximately seven 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.

Sending an eReferral via Ocean Portal

— Step 1 —

As a first step, **open an internet browser and go to <https://ocean.cognisantmd.com/>**

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 \(eReferral Senders\)](#) 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 —

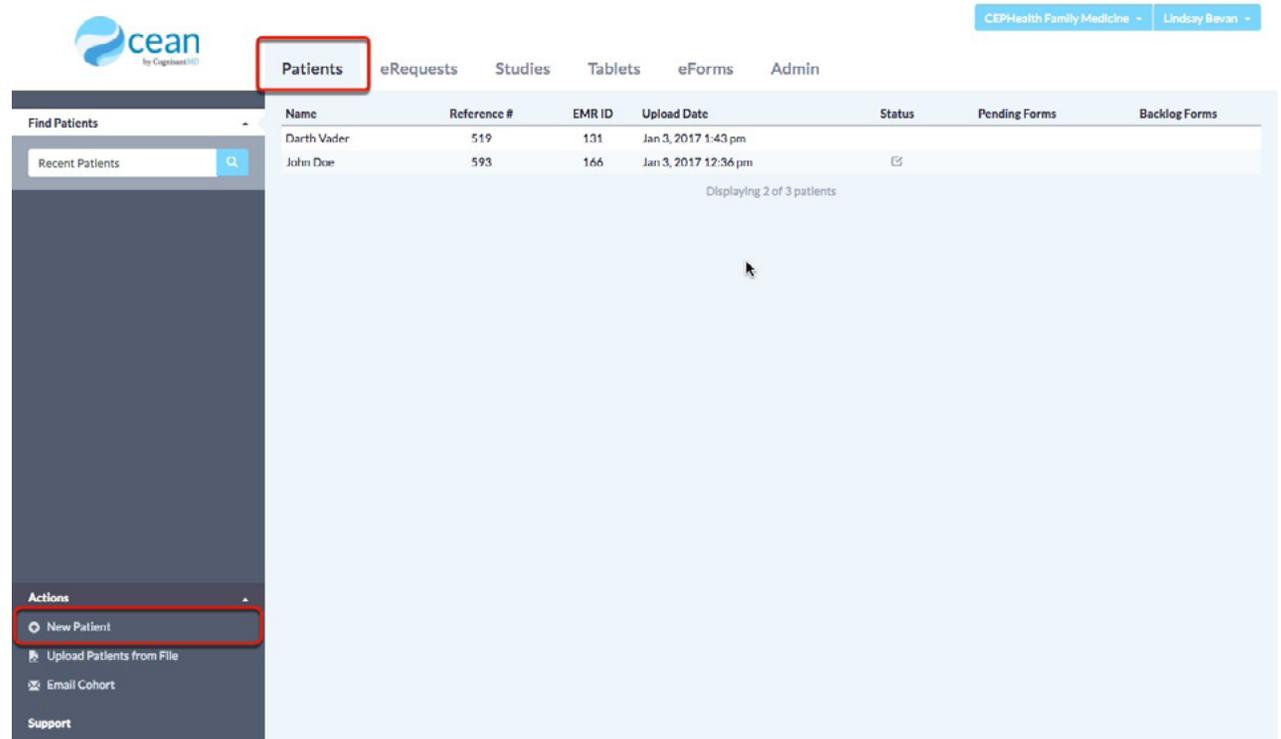
Once login is successful, you should see the Ocean portal, complete with a set of tabs as shown here.

To add a patient you wish to send for an eReferral, **click on the *Patients* tab, then click the *New Patient* button.**

This will open the *New Patient* window.

! NOTE

To avoid duplicate entries, conduct a search by entering the patient's name into the search field, prior to adding a new patient to your Ocean account.



The screenshot shows the Ocean portal dashboard. At the top right, there are user details: "CEPHealth Family Medicine" and "Lindsay Bevan". The main navigation bar includes "Patients", "eRequests", "Studies", "Tablets", "eForms", and "Admin". The "Patients" tab is highlighted with a red box. Below the navigation bar is a table with columns: Name, Reference #, EMR ID, Upload Date, Status, Pending Forms, and Backlog Forms. The table contains two entries: "Darth Vader" (Reference # 519, EMR ID 131, Upload Date Jan 3, 2017 1:43 pm) and "John Doe" (Reference # 593, EMR ID 166, Upload Date Jan 3, 2017 12:36 pm). Below the table, it says "Displaying 2 of 3 patients". On the left sidebar, under the "Actions" section, the "New Patient" button is highlighted with a red box. Other actions include "Upload Patients from File", "Email Cohort", and "Support".

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— Step 3 —

In the *New Patient* window, **complete the Surname, First Name, Sex, Birth Date and Email fields**. The *Add Favourite* field does not need to be completed at this time.

Once all fields are complete, **click the Create button**.

NOTE

The warning regarding form memory is a reminder that your Ocean account will store inputted eReferral form field answers for subsequent eReferrals, without compromising patient privacy. For more information go to: <https://cognisantmd.zendesk.com/hc/en-us/articles/221096788-Form-Memory-Storing-Form-Values-for-Patients-in-Ocean>

The patient will now appear in the list available from the *Patients* tab.

— Step 4 —

Once the patient has been added, **select the patient from the list**, which will open a window titled with the patient's name.

From this window, **click Find Health Service**.

This will open the Ocean health service directory.

Name	Reference #	EMR ID	Upload Date	Status	Pending Forms	Backlog Forms
Jane Doe	981	N/A	Jan 16, 2017 2:37 pm			
John Doc	901	N/A	Dec 22, 2016 4:38 pm			

Displaying 2 of 2 patients

Jane Doe

Jane Doc age 29
 Aug 12, 1987
 jane.doc@gmail.com

There is no note available for this patient.

- + Add eForm...
- ✉ Email Patient...
- 🔍 Find Health Service...
- Remove Patient (scheduled in 7 days)
- ⚙ Advanced...

— Step 5 —

Once the Ocean health service directory is open, **search for your preferred eReferral receiver by either:**

Typing the health service, provider/clinic/ program name or central intake site in the *Find* field;

Clicking the ***Browse Directory*** button and selecting a health service from the list;



Selecting one of your favourite eReferral receivers from the favourites page, available from the *Favourites* button. To save eReferral receivers in your favourites, open an eReferral receiver's listing page and click the *Add to Favourites* button.

Type the patient's address in the address field if available, to ensure you are searching for services close to the patient's home.

NOTE

To refer to central intake, either select *Waterloo Wellington Orthopedic Central Intake* or *Waterloo Wellington Diabetes Central Intake* from the favourites page, available from the Favourites button, or search in the Ocean health service portal for the Central Intake site.

— Step 6 —

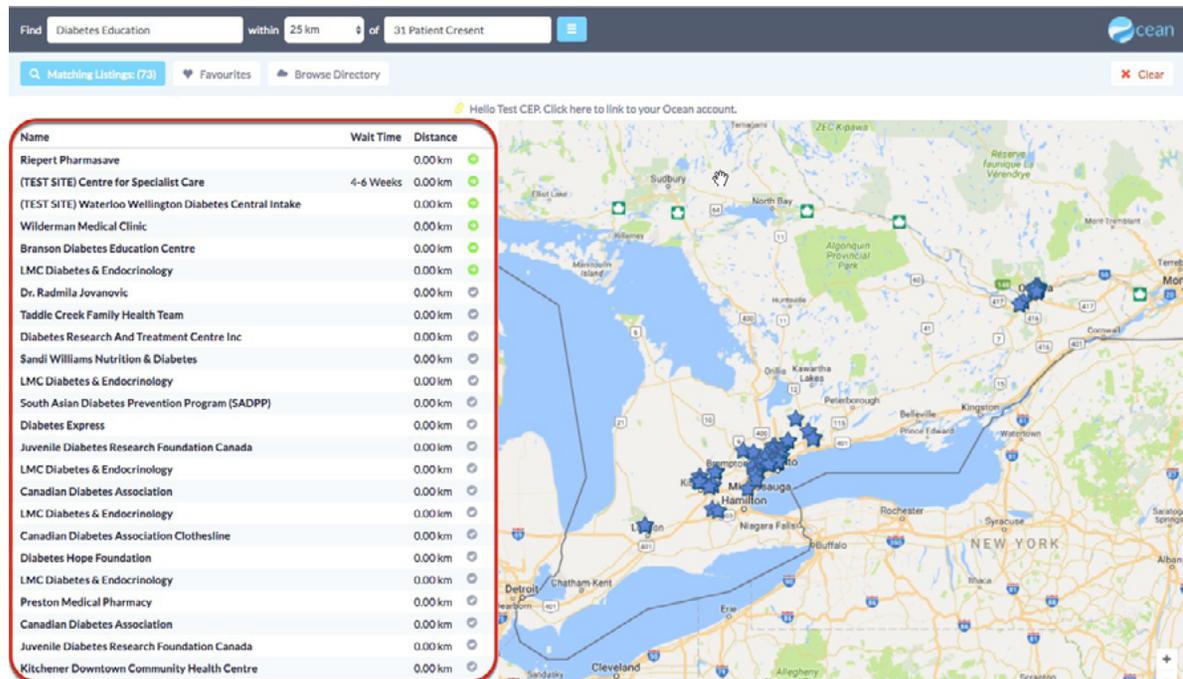
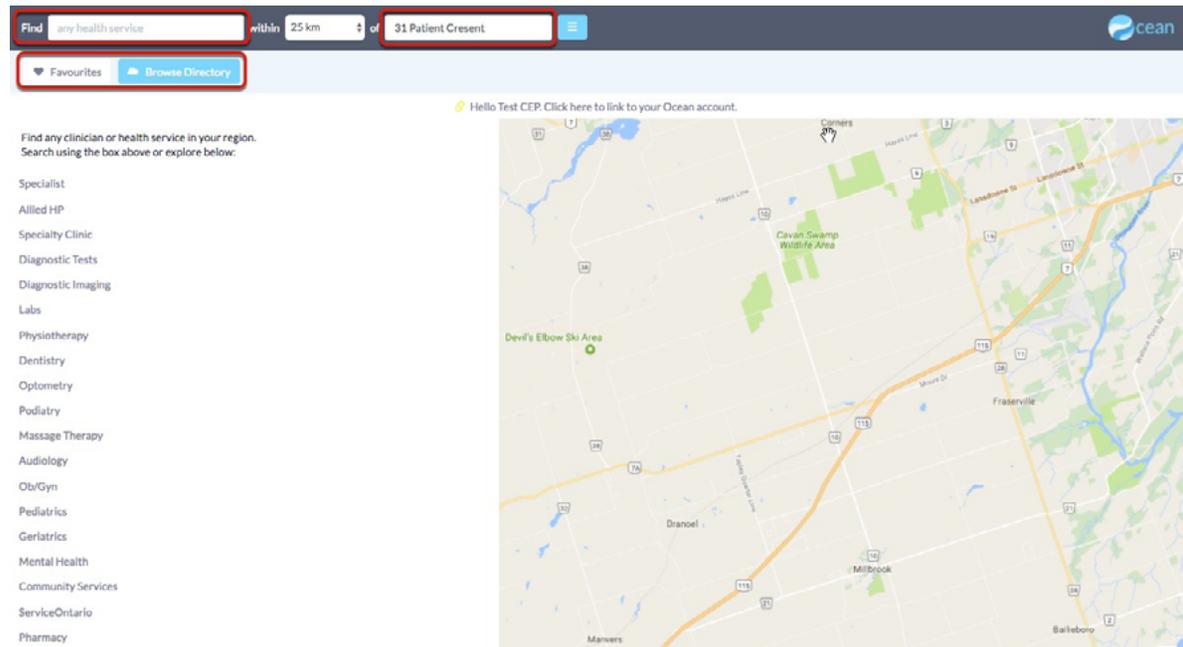
Select your preferred eReferral receiver by clicking an option from the list.

Green arrows next to listed health services indicate that the referral receiver is accepting eReferrals. For referral receivers not accepting eReferrals, see step five.

This will open the selected eReferral receiver's listing page.

NOTE

If you searched for a specific provider/clinic/program or central intake site you will be sent directly to their listing page.



— Step 7 —

The eReferral receiver's listing page contains location and contact information as well as the health services offered by the receiver.

NOTE
You can save eReferral receivers in your favourites by clicking the *Add to Favourites* button, available from the eReferral receiver's listing page. Then click the *Favourites* button, available from the Ocean health service directory toolbar, to access them subsequently.

Once the eReferral receiver's listing page is open, **click the Send eReferral button**. This will open an eReferral form.

If an eReferral button is not available, this means that the chosen referral receiver does not yet accept eReferrals. For referral receivers not accepting eReferrals, click the *Print Referral* button, complete the referral manually and fax it to the referral receiver.

Find Diabetes Education within 25 km of 31 Patient Cresent

Matching Listings: (73) Favourites Browse Directory Clear

Hello Test CEP. Click here to link to your Ocean account.

Centre for Specialist Care
(TEST SITE)
203 College Street
Suite 402 Toronto, Ontario
M5T 1P9
Info@effectivepractice.org Phone: 647-260-7880
www.effectivepractice.org
Diabetes and Orthopedic Specialists

Services Offered:
Orthopedics Diabetes Education Diabetes Specialist Management

Add To Favourites

Distance from 0.00 km

Print Referral **Send eReferral**

Centre for Specialist Care
203 College Street
Suite 402
Toronto, Ontario
M5T 1P9
info@effectivepractice.org
647-260-7880

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— Step 8 —

Once the eReferral form is open, **select the preferred health service in the Service field, and ensure the correct eReferral form is selected** (e.g. *Waterloo Wellington Diabetes Referral*, *Waterloo Wellington Orthopedic Referral* or *Waterloo Wellington Self-Management Program Referral*).

The patient information fields will auto-populate with available information from the patient record within your Ocean account.

To attach a file to the eReferral form, **click the *Choose File* button from the *Attach File* field**, and select the file(s) from your computer you wish to attach. You can select multiple files at once.

Once the form is complete, click either the:

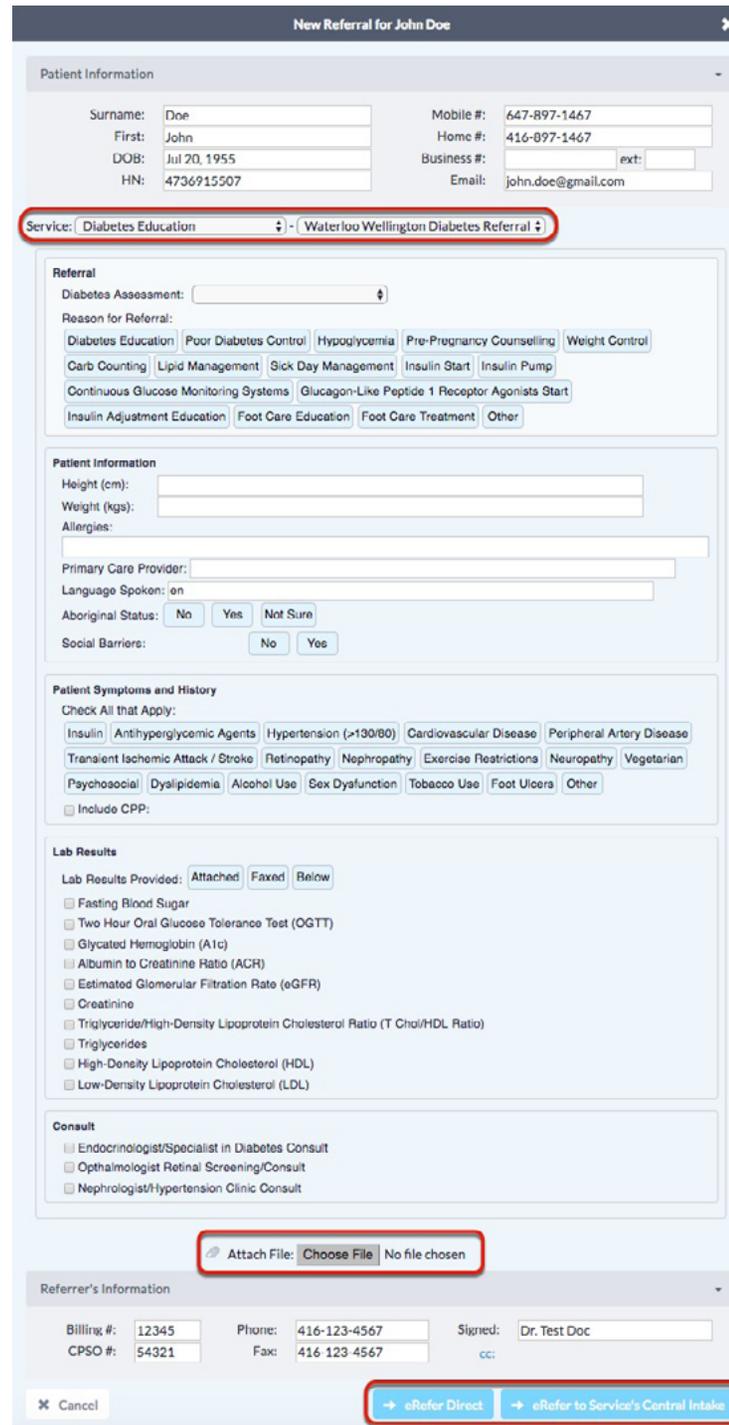
eRefer Direct button to send the eReferral directly to the selected eReferral receiver;



eRefer to Service's Central Intake button to send the eReferral to the relevant central intake office (if available).

! NOTE

If the *eRefer to Service's Central Intake* button is not available and you would like to refer to central intake, return to the Ocean health service directory and search for either *Waterloo Wellington Diabetes Central Intake* or *Waterloo Wellington Orthopedic Central Intake*. Then redo steps six to eight.



New Referral for John Doe

Patient Information

Surname: Doe | Mobile #: 647-897-1467
 First: John | Home #: 416-897-1467
 DOB: Jul 20, 1955 | Business #: | ext: |
 HN: 4736915507 | Email: john.doe@gmail.com

Service: Diabetes Education | Waterloo Wellington Diabetes Referral

Referral

Diabetes Assessment: |
 Reason for Referral:
 Diabetes Education | Poor Diabetes Control | Hypoglycemia | Pre-Pregnancy Counselling | Weight Control
 Carb Counting | Lipid Management | Sick Day Management | Insulin Start | Insulin Pump
 Continuous Glucose Monitoring Systems | Glucagon-Like Peptide 1 Receptor Agonists Start
 Insulin Adjustment Education | Foot Care Education | Foot Care Treatment | Other

Patient Information

Height (cm): |
 Weight (kgs): |
 Allergies: |
 Primary Care Provider: |
 Language Spoken: en
 Aboriginal Status: No | Yes | Not Sure
 Social Barriers: No | Yes

Patient Symptoms and History

Check All that Apply:
 Insulin | Antihyperglycemic Agents | Hypertension (>130/80) | Cardiovascular Disease | Peripheral Artery Disease
 Transient Ischemic Attack / Stroke | Retinopathy | Nephropathy | Exercise Restrictions | Neuropathy | Vegetarian
 Psychosocial | Dyslipidemia | Alcohol Use | Sex Dysfunction | Tobacco Use | Foot Ulcers | Other
 Include CPP:

Lab Results

Lab Results Provided: Attached | Failed | Below
 Fasting Blood Sugar
 Two Hour Oral Glucose Tolerance Test (OGTT)
 Glycated Hemoglobin (A1c)
 Albumin to Creatinine Ratio (ACR)
 Estimated Glomerular Filtration Rate (eGFR)
 Creatinine
 Triglyceride/High-Density Lipoprotein Cholesterol Ratio (T Chol/HDL Ratio)
 Triglycerides
 High-Density Lipoprotein Cholesterol (HDL)
 Low-Density Lipoprotein Cholesterol (LDL)

Consult

 Endocrinologist/Specialist in Diabetes Consult
 Ophthalmologist Retinal Screening/Consult
 Nephrologist/Hypertension Clinic Consult

Attach File: Choose File | No file chosen

Referrer's Information

Billing #: 12345 | Phone: 416-123-4567 | Signed: Dr. Test Doc
 CPSO #: 54321 | Fax: 416 123 4567 | cc:

Cancel | eRefer Direct | eRefer to Service's Central Intake

Sending an eReferral via Ocean Portal

— Step 9 —

Prior to completing the eReferral, the Obtain Patient's Email Consent window will appear.

Click either the:

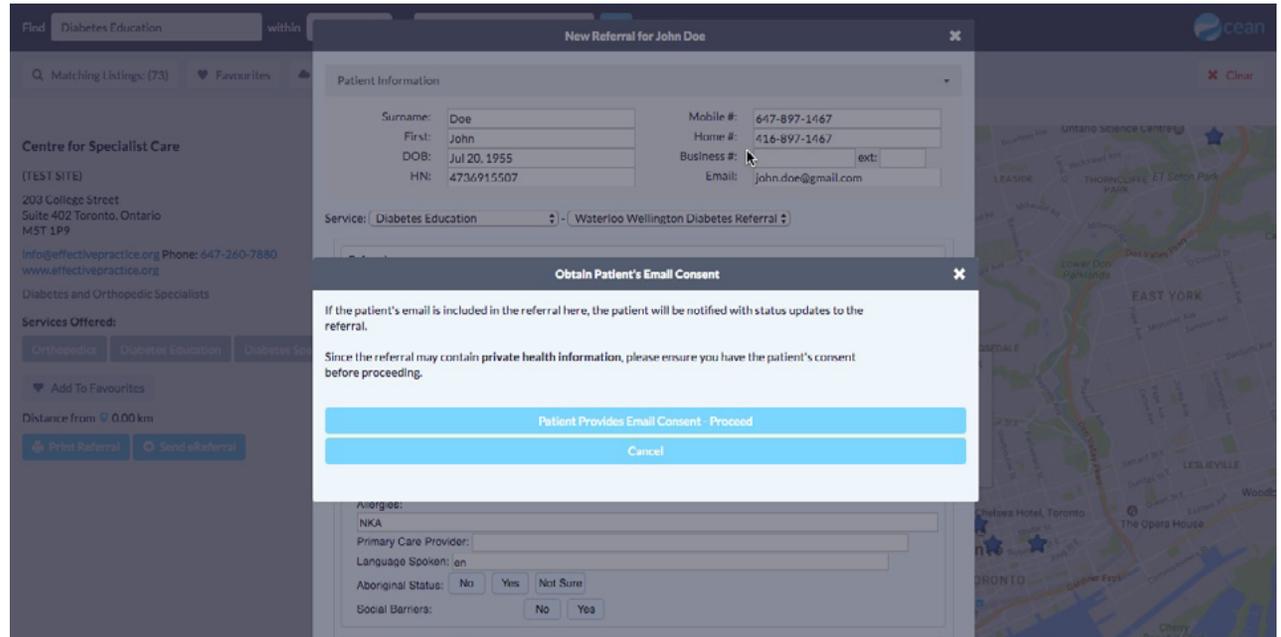
Patient Provides Email Consent – Proceed button if you have obtained verbal consent from your patient to share their email address with the eReferral receiver;



Cancel button if you have not obtained verbal consent from your patient to share their email address with the eReferral receiver, remove the email address from the eReferral form and resubmit.

NOTE

The Obtain Patient's Email Consent window will not appear if the patient's email address was not included in the eReferral form.



— Step 10 —

A Referral Complete window will appear containing confirmation that your eReferral was sent, and a summary of the eReferral information.

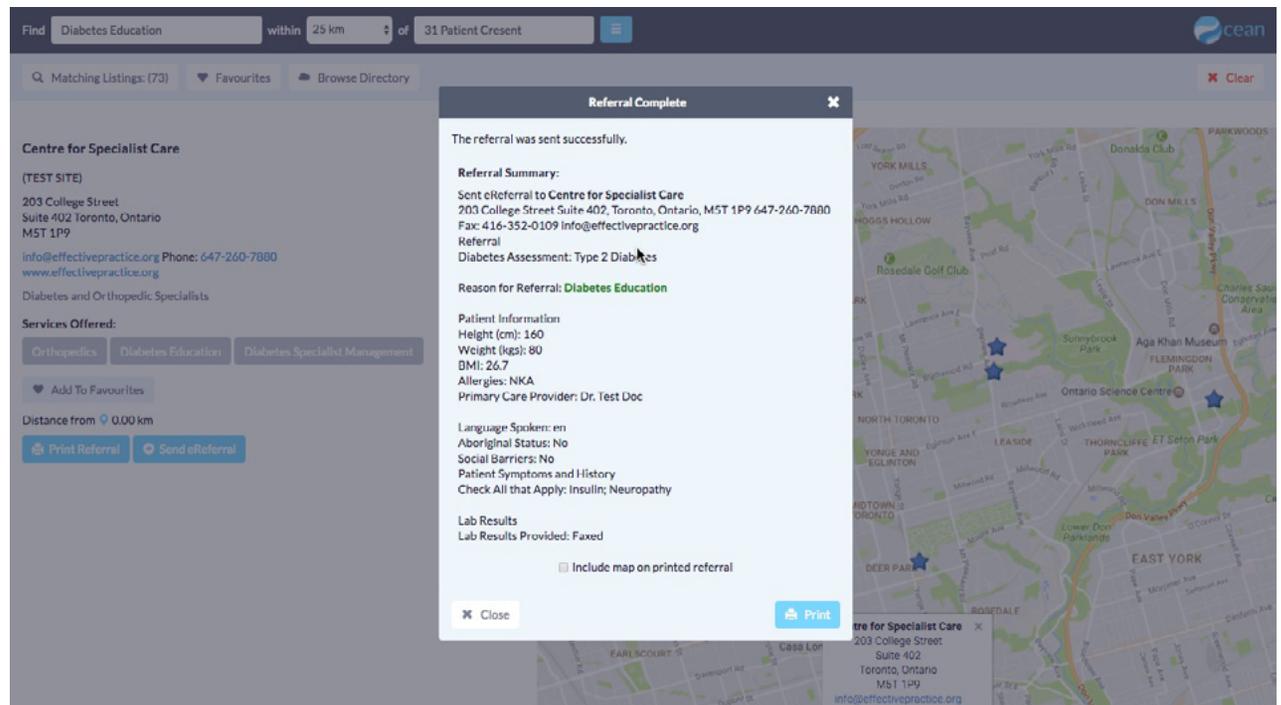
NOTE

Note: you can click the *Print* button to print a copy of the eReferral information summary for your patient.

You have now successfully sent an eReferral!

Your patient will receive an email informing them of the eReferral you made on their behalf. You and your patient (if you provided consent for the eReferral receiver to contact your patient via email) will be notified when the eReferral receiver responds to the eReferral.

For steps on managing sent eReferrals, see page eight+.



Additional Ways to Manage eReferrals

To access a sent eReferral, open the Ocean portal, click the *eRequests* tab and select the *Sent* side tab. Select the eReferral from the list of sent eReferrals.

- A** To view the status of the eReferral, navigate to the eReferral window in the Ocean portal.

The status of the sent eReferral can be seen from the second column on the *Sent* page [a1] of the *eRequests* tab, and from the eReferral window [a2].

- B** To cancel an eReferral, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *Action* drop-down menu and select *Cancel Request* [b].

- C** To communicate with the eReferral receiver, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click *Send Message to Service Provider* [c], enter your message and click *Send*.

- D** To communicate with the patient, navigate to the eReferral window in the Ocean portal.

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

The screenshot displays the Ocean Portal interface. At the top, there are navigation tabs: Patients, **eRequests**, Studies, Tablets, eForms, and Admin. The **eRequests** tab is active, showing a table of referrals. The table has columns for Patient, Status, Service, Referral Date, Recipient, Clinician, and Messages. The status column is highlighted with a red box and labeled 'A1'. Below the table, a sidebar lists various filters and categories, with 'Sent' selected and highlighted with a red box. The main content area shows a detailed view of a referral for 'John Doe'. The referral status is 'Awaiting Reply'. The 'Action' menu is open, showing options like 'Print', 'Download', 'Export', 'Send Related Referral...', 'Email Patient...' (highlighted with a red box and labeled 'D'), 'View Event Log', 'Referral History', and 'Cancel Request' (highlighted with a red box and labeled 'B'). The 'Referral Note' section contains patient information, referral details, and a note stating 'No appointment yet recorded. This referral is awaiting a reply from the referrer.' At the bottom, there is a text input field for a message to the service provider, with a 'Send Message to Service Provider...' button highlighted with a red box and labeled 'C'. A 'Save' button is also visible.

Additional Ways to Manage eReferrals

E If the eReferral receiver is requesting more and/or missing information, you will be notified via email. The status of this eReferral will also change to *Awaiting Reply*, which can be seen from the *Sent* side tab within the *eRequests* tab of the Ocean portal [e1] and from the eReferral window [e2]. The message from the eReferral receiver will also appear on the eReferral window [e3].

To add the requested information, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click either:

The *edit* button [e4] to add general information to the eReferral form. Then click the *OK* button;

The *edit* symbol [e5] next to the patient information to add demographic information to the eReferral form. Then click the *OK* button;



The *Choose Files* button [e6] to add an attachment (e.g. lab results, diagnostic imaging) from your computer. You can select multiple files.

Click the *Save* button.

Alternatively, if the information is not relevant to any of the eReferral form fields, you can click *Send Message to Service Provider* [e7], enter the information and click the *Save* button. This information will be sent to the eReferral receiver.

The screenshot shows the Ocean Portal interface. At the top, there are navigation tabs: Patients, **eRequests**, Studies, Tablets, eForms, and Admin. Below the tabs is a table of eRequests with columns for Patient, Status, Service, Referral Date, Recipient, and Clinician. The 'eRequests' tab is highlighted with a red box and callout E1. The table shows several entries, with 'Awaiting Reply' status highlighted in red for John Doe. Below the table is a sidebar with a search filter and a list of status categories, with 'Sent' highlighted in red and callout E1. The main content area shows a detailed view of an eReferral for John Doe. The 'edit' button is highlighted with a red box and callout E4. The patient information section has an edit icon highlighted with a red box and callout E5. A message from the receiver is shown with a callout E2. The 'Choose File' button is highlighted with a red box and callout E6. The 'Send Message to Service Provider...' button is highlighted with a red box and callout E7. A 'Save' button is visible at the bottom right. A callout F3 points to the 'Action' menu on the right side of the window.

Additional Ways to Manage eReferrals

F If an eReferral is declined by the eReferral receiver, you will be notified via email of the decline and the reason for decline. The status of this eReferral will also change to *Declined*, which can be seen from the *Sent* side tab within the *eRequests* tab of the Ocean portal [f1] and from the eReferral window [f2].

To send the eReferral to a different eReferral receiver, navigate to the eReferral window from the Ocean portal.

In the eReferral window, click the *Action* drop-down menu and select *Send Related Referral* [f3].

This 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* button.

NOTE

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

The screenshot shows the Ocean Portal interface. On the left is a sidebar with a search filter and a list of eReferral statuses: New, Deletion Warnings, All Received, For Me, Needs Review, Outstanding, Pending Contact, Booked Unconfirmed, Booked Confirmed, Awaiting Reply, Processed, Forwarded, and Sent (highlighted with a red box and labeled F1). The main area displays a table of eReferrals with columns for Patient, Status, Service, Referral Date, Recipient, Clinician, and Messages. One entry for John Doe has a status of 'Declined' (highlighted with a red box and labeled F1). Below the table is a detailed view of the declined referral for John Doe. The 'Action' menu (highlighted with a red box and labeled F3) includes options like Print, Download, Export, and 'Send Related Referral...'. A message at the bottom of the window states 'No appointment yet recorded. This referral is awaiting a reply from the referrer.' (highlighted with a red box and labeled F2). The 'Referral Note' section includes patient information, lab results, and a note about the referral: 'Diabetes Assessment: New' and 'Reason for Referral: Diabetes Education; Poor Diabetes Control'.

This reference guide has been developed by the Centre for Effective Practice under the leadership of the System Coordinated Access program, which is hosted by the eHealth Centre of Excellence. This reference guide was developed in partnership with CognisantMD and Think Research.

