



Sending an eReferral via Ocean and OSCAR

WHAT YOU WILL LEARN: This reference guide will walk you through the steps to send an eReferral via Ocean and OSCAR Electronic Medical Record (EMR). Steps for managing sent eReferrals are contained on page seven+.

TARGET AUDIENCE: The reference guide is intended for eReferral senders currently using OSCAR EMR.

PREREQUISITE: Prior to sending an eReferral via OSCAR EMR, please ensure to set up your Ocean account (see *Setting up your Ocean Account [Referral Senders]* reference guide for instructions) and configure your EMR and Ocean account (see *Configuring your EMR and Ocean Account [for OSCAR]* reference guide for instructions).

TIME: These steps will take approximately seven minutes to complete.

! NOTE

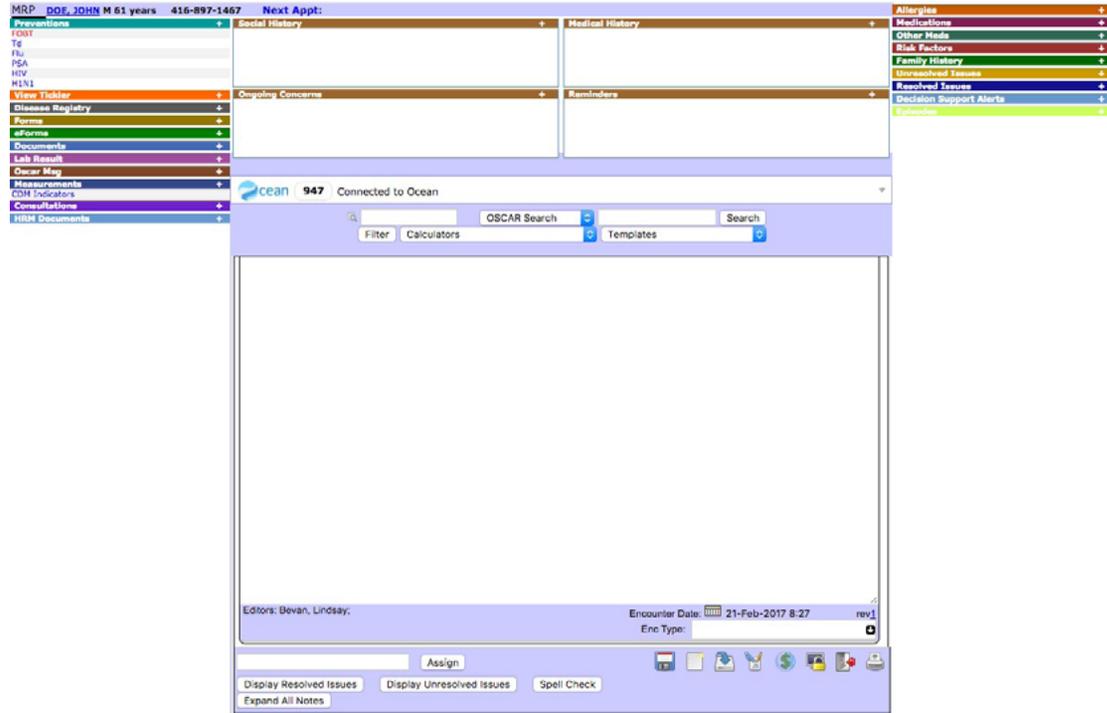
Ocean portal layout may appear slightly different from your current view in reference guide screenshots, however general steps remain applicable. Reference guide content is subject to change.

Sending an eReferral via Ocean and OSCAR

— Step 1 —

As a first step, open your OSCAR EMR.

Open the encounter window for the patient you wish to send an eReferral for.

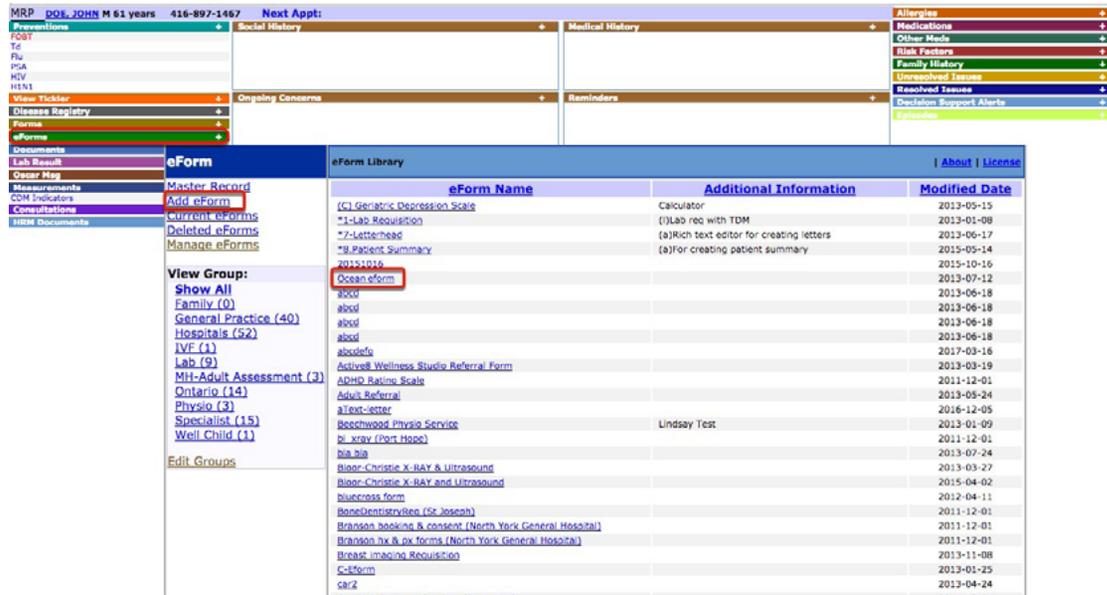


— Step 2 —

Click eForms to open the ShowMyForm window.

In the ShowMyForm window, click **Add eForm** and select the **Ocean eForm** from the list. You may need to select *Show All* first to display all available forms.

This will open the Ocean eForm window.



Sending an eReferral via Ocean and OSCAR

— Step 3 —

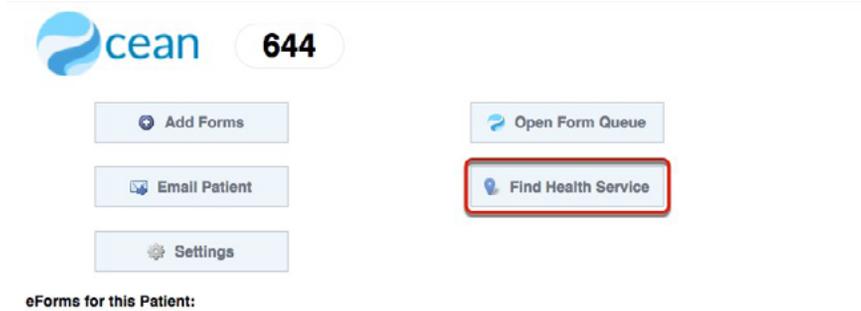
In the Ocean eForm window, **click the Find Health Service button.**

If you have not yet configured your OSCAR EMR and Ocean Account, see the *Configuring your EMR and Ocean Account (for OSCAR)* reference guide for instructions.

This will open the Ocean health service directory in an internet browser window.

! NOTE

You can also send an eReferral from the appointment booking window using the Ocean shortcut.



— Step 4 —

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;

OR

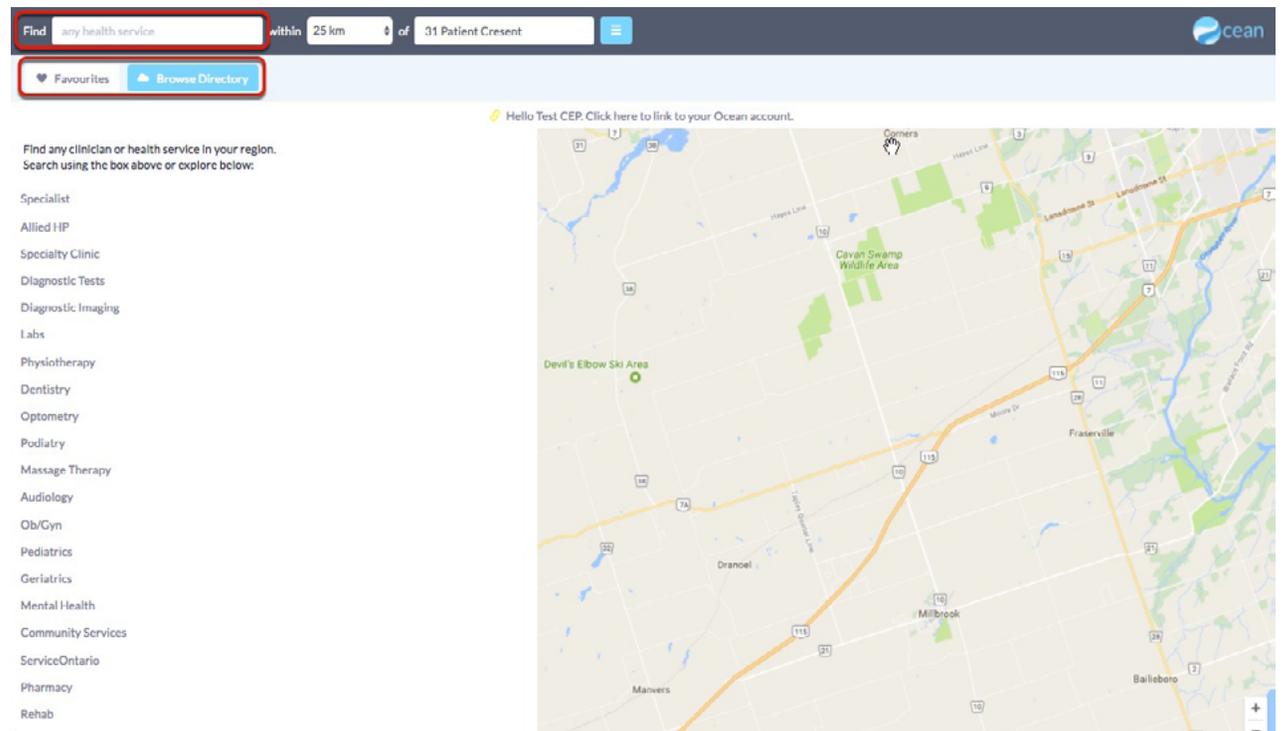
Selecting one of your favourite eReferral receivers from the favourites page, available from the *Favourites* button. To save eReferral receivers in your favourites, open an eReferral receiver's listing page and click the *Add to Favourites* button.

! 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.

! NOTE

The default address in the location field is the patient's address, if available from the patient's record in your EMR. This makes it easy to search for an eReferral receiver close to the patient's home.



— Step 5 —

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 six.

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.

Name	Wait Time	Distance
Riepert Pharmasave		0.00 km
(TEST SITE) Centre for Specialist Care	4-6 Weeks	0.00 km
(TEST SITE) Waterloo Wellington Diabetes Central Intake		0.00 km
Wilderman Medical Clinic		0.00 km
Branson Diabetes Education Centre		0.00 km
LMC Diabetes & Endocrinology		0.00 km
Dr. Radmila Jovanovic		0.00 km
Taddle Creek Family Health Team		0.00 km
Diabetes Research And Treatment Centre Inc		0.00 km
Sandi Williams Nutrition & Diabetes		0.00 km
LMC Diabetes & Endocrinology		0.00 km
South Asian Diabetes Prevention Program (SADPP)		0.00 km
Diabetes Express		0.00 km
Juvenile Diabetes Research Foundation Canada		0.00 km
LMC Diabetes & Endocrinology		0.00 km
Canadian Diabetes Association		0.00 km
LMC Diabetes & Endocrinology		0.00 km
Canadian Diabetes Association Clothesline		0.00 km
Diabetes Hope Foundation		0.00 km
LMC Diabetes & Endocrinology		0.00 km
Preston Medical Pharmacy		0.00 km
Canadian Diabetes Association		0.00 km
Juvenile Diabetes Research Foundation Canada		0.00 km
Kitchener Downtown Community Health Centre		0.00 km

— Step 6 —

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.

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

Distance from 0.00 km

Buttons: Print Referral, **Send eReferral**

Once on the eReferral receiver's listing page, 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.

Sending an eReferral via Ocean and OSCAR

— Step 7 —

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*).

Fields will auto-populate with information from your EMR whenever possible.

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.

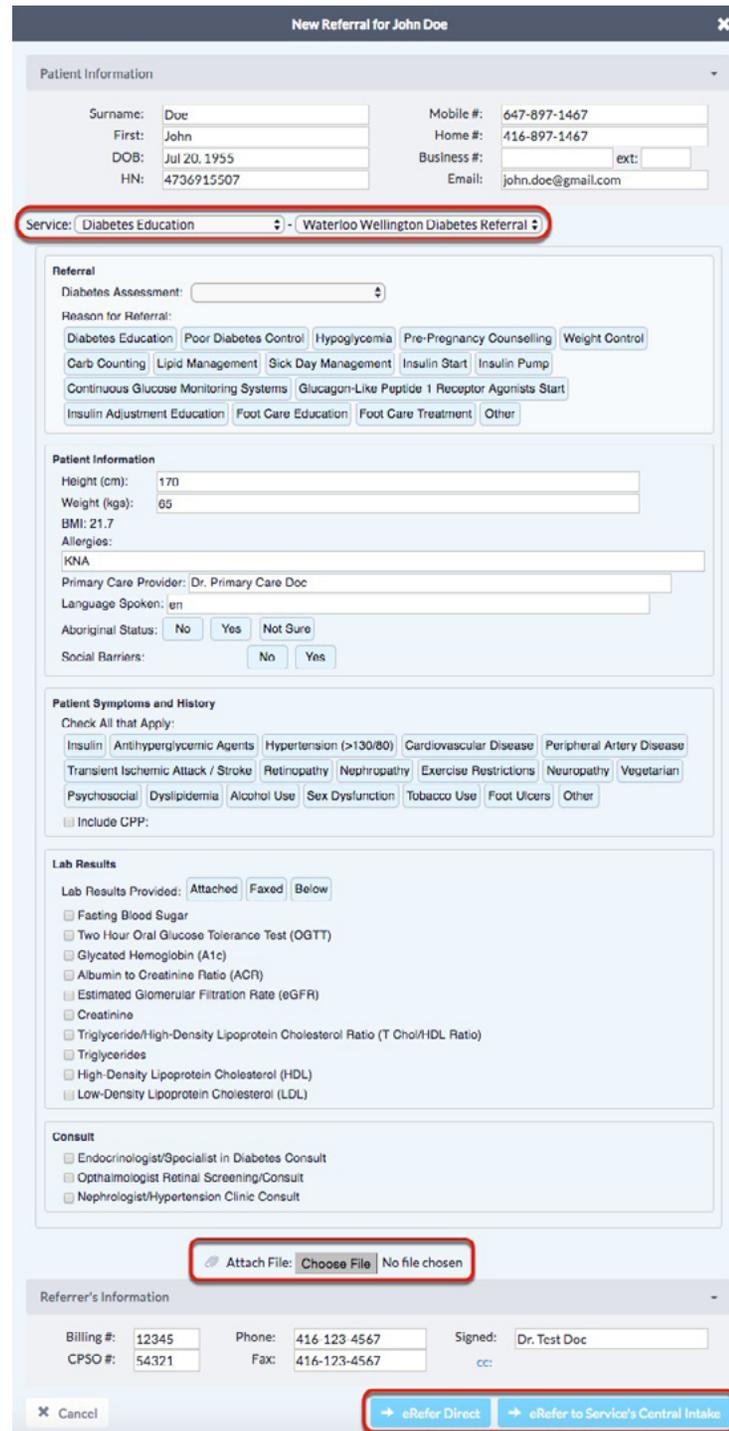
Once the form is complete, **click either the:**

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 five to seven.



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: [Dropdown]
 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): 170
 Weight (kgs): 65
 BMI: 21.7
 Allergies: KNA
 Primary Care Provider: Dr. Primary Care Doc
 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 | Faxed | 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

— Step 8 —

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

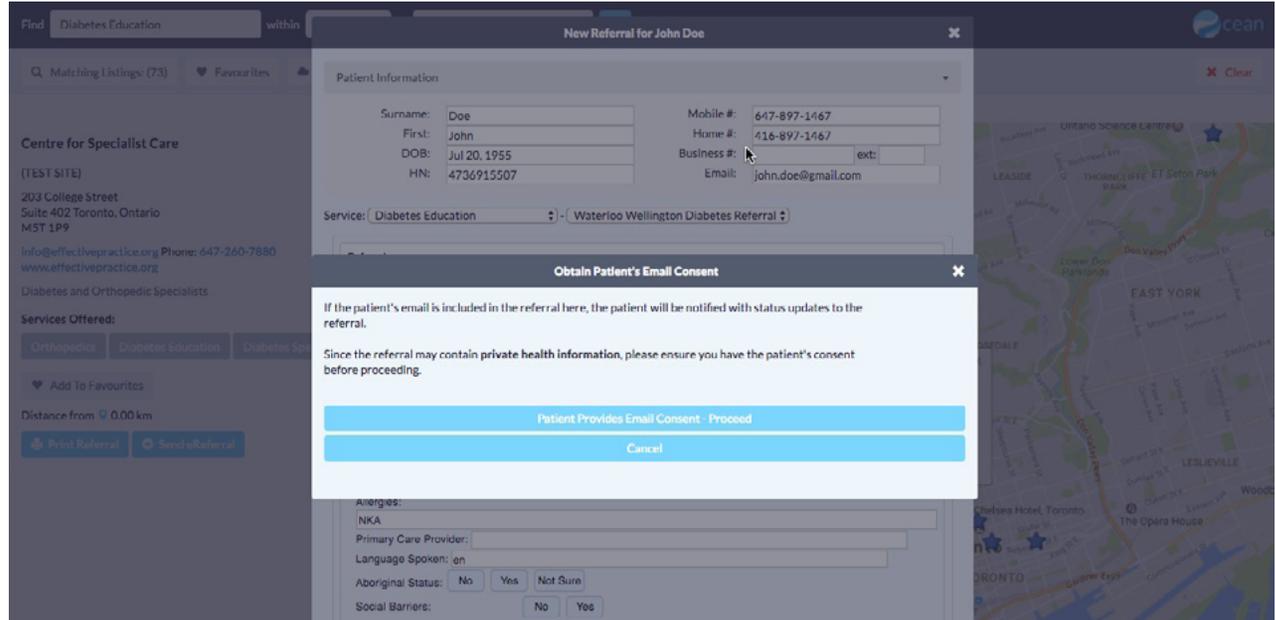
Click either the:

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 9 —

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

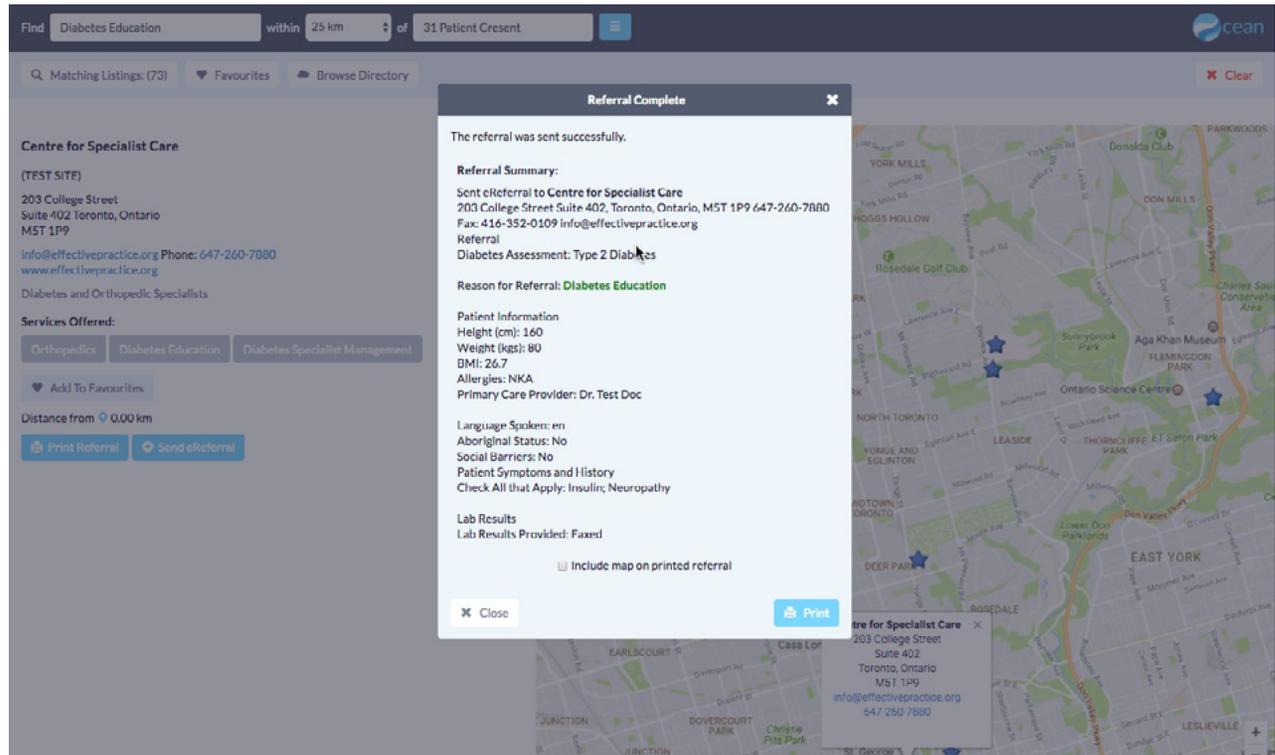
NOTE
You can click the *Print* button to print a copy of the eReferral information summary for your patient.

You have now successfully sent an eReferral!

Your patient will receive an email informing them of the eReferral you made on their behalf. The patient's information will also now be added to the *Patients* tab within the Ocean portal. The sent eReferral information will be added to the notes section of your patient's encounter window in your EMR.

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 seven+.



Additional Ways to Manage eReferrals

To access a sent eReferral from your EMR, **open the patient's encounter window**, and **click the 1 eReferrals** button available from the Ocean toolbar, which will open the *Active Referrals* internet browser window, then **click the View button**.

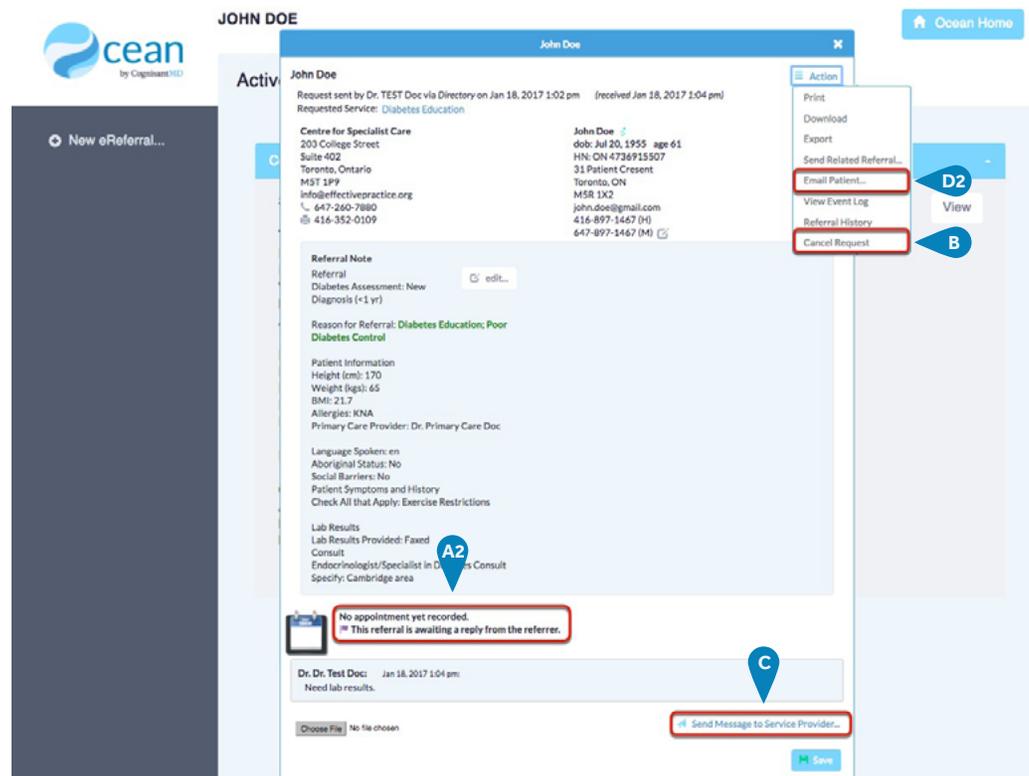
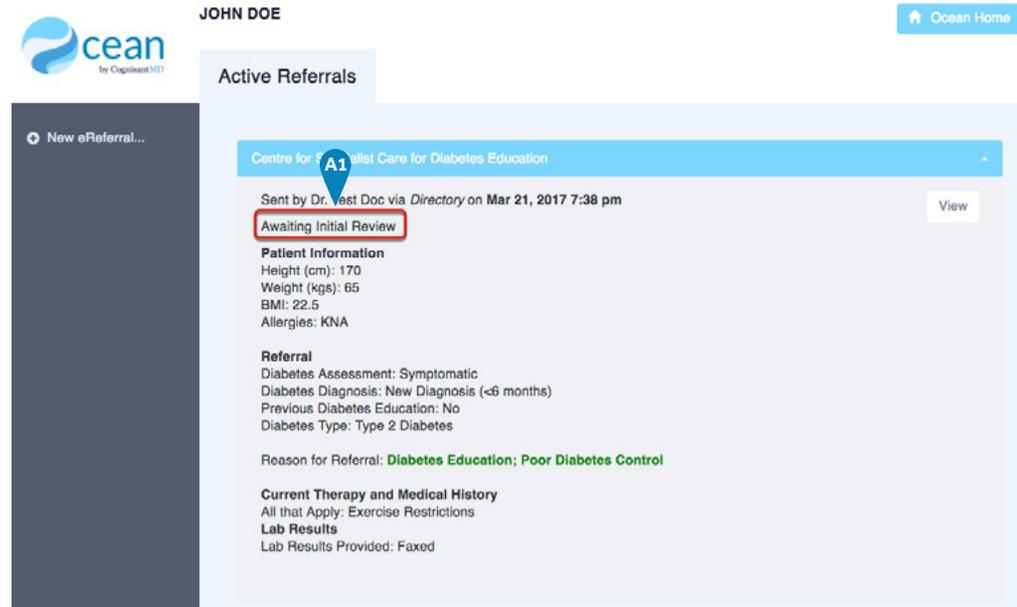
Also, click the **Download** button from the Ocean toolbar, which will populate the eReferral information in the progress notes section of the patient's encounter window.

NOTE
You can also access a sent eReferral from your Ocean account. To do this, open the Ocean portal, click the *eRequests* tab, select the *Sent* side tab and then select the eReferral from the list of sent eReferrals.

The screenshot displays an EMR interface for a patient named MRP DOB, JOHN M 61 years, with phone number 416-897-1467. The interface includes a sidebar with various medical categories like Preventions, Social History, and Medical History. A toolbar at the top features buttons for 'Download', '1 eReferrals', 'Add Form', 'Open', 'Email', 'Import', 'Refer', and 'Settings'. The '1 eReferrals' button is highlighted with a red box. Below the toolbar, there is a search bar for OSCAR and a list of filters. The main content area shows a consultation note for an Endocrinologist/Specialist in Diabetes Consult (Cambridge area) on 21-Feb-2017. The note includes patient information (Height: 170 cm, Weight: 65 kg, BMI: 22.5), referral details (Diabetes Diagnosis: New Diagnosis, Type 2 Diabetes), and current therapy (Exercise Restrictions). At the bottom, there are buttons for 'Assign', 'Display Resolved Issues', 'Display Unresolved Issues', and 'Spell Check'.

Additional Ways to Manage eReferrals

- A** To view the status of the eReferral, navigate to the eReferral window through your EMR.
The status of the sent eReferral can be seen from the *Active Referrals* internet browser window [a1], and from the eReferral window [a2].
- B** To cancel an eReferral, navigate to the eReferral window through your EMR.
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 through your EMR.
In the eReferral window, click *Send Message to Service Provider* [c], enter your message and click *Send*.



Additional Ways to Manage eReferrals

D To communicate with the patient, navigate to the patient's encounter window in your EMR, and click the *Email* button [d1] available from the Ocean toolbar.

Alternatively, navigate to the eReferral window through your EMR. In the eReferral window, click the *Action* drop-down menu and select *Email Patient* [d2] (See Previous Page).

The screenshot shows the EMR interface for patient **DOE, JOHN M 61 years**. The top toolbar includes buttons for **Add Form**, **Open**, **Email** (highlighted with a red box and callout **D1**), **Import**, **Refer**, and **Settings**. A notification above the toolbar states: "Download Patient's notes are finished and ready for download + 1 eReferrals".

The eReferral window displays the following information:

- Consult:** Endocrinologist/Specialist in Diabetes Consult; (Cambridge area)
- Editors:** Bevan, Lindsay
- Encounter Date:** 21-Feb-2017 8:27
- Enc Type:** [icon]

The **Ocean Note** contains:

- Sent eReferral to Centre for Specialist Care
203 College Street Suite 402, Toronto, Ontario, M5T 1P9 647-260-7880 Fax: 416-352-0109 info@effectivepractice.org
- Patient Information:** Height (cm): 170, Weight (kgs): 65, BMI: 22.5, Allergies: KNA
- Referral:** Diabetes Diagnosis: New Diagnosis (&t;6 months), Diabetes Type: Type 2 Diabetes
- Reason for Referral:** Diabetes Education
- Current Therapy and Medical History:** All that Apply: Exercise Restrictions, Lab Results, Lab Results Provided: Faxed

At the bottom of the window, there are buttons for **Assign**, **Display Resolved Issues**, **Display Unresolved Issues**, **Spell Check**, and **Expand All Notes**.

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 *Active Referrals* internet browser window [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 to the sent eReferral, navigate to the eReferral window through your EMR.

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.

JOHN DOE Ocean Home

Active Referrals

New eReferral...

Centre for Specialist Care for Diabetes Education

Sent by Dr. Test Doc via Directory on Mar 21, 2017 7:38 pm

Awaiting Initial Review

Patient Information
 Height (cm): 170
 Weight (kgs): 65
 BMI: 22.5
 Allergies: KNA

Referral
 Diabetes Assessment: Symptomatic
 Diabetes Diagnosis: New Diagnosis (<6 months)
 Previous Diabetes Education: No
 Diabetes Type: Type 2 Diabetes

Reason for Referral: **Diabetes Education; Poor Diabetes Control**

Current Therapy and Medical History
 All that Apply: Exercise Restrictions

Lab Results
 Lab Results Provided: Faxed

John Doe Diabetes Education Action

Request sent by Dr. Test Doc via Directory on Mar 22, 2017 9:42 am (received Mar 22, 2017 9:43 am)

Centre for Specialist Care
 203 College Street
 Suite 402
 Toronto, Ontario
 M5T 1P9
 info@effectivepractice.org
 647-260-7880
 416-352-0109

John Doe
 dob: Jul 20, 1955 age 61
 HN: ON 4736915507
 31 Patient Crescent
 Toronto, ON
 M5R 1X2
 john.doe@gmail.com
 416-897-1467 (H)
 647-897-1467 (M)

Referral Note
Patient Information
 Height (cm): 170
 Weight (kgs): 65
 BMI: 22.5
 Allergies: KNA

Referral
 Diabetes Assessment: Symptomatic
 Diabetes Diagnosis: Established (>6 months)
 Previous Diabetes Education: No
 Diabetes Type: Type 2 Diabetes

Reason for Referral: **Diabetes Education; Poor Diabetes Control**

Lab Results
 Lab Results Provided: Faxed

No appointment yet recorded.
 This referral is awaiting a reply from the referrer.

Comments for Referrer
 Need lab results

Choose Files No file chosen

Send Message to Service Provider...

Save

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 *Active Referrals* internet browser window [f1], and from the eReferral window [f2].

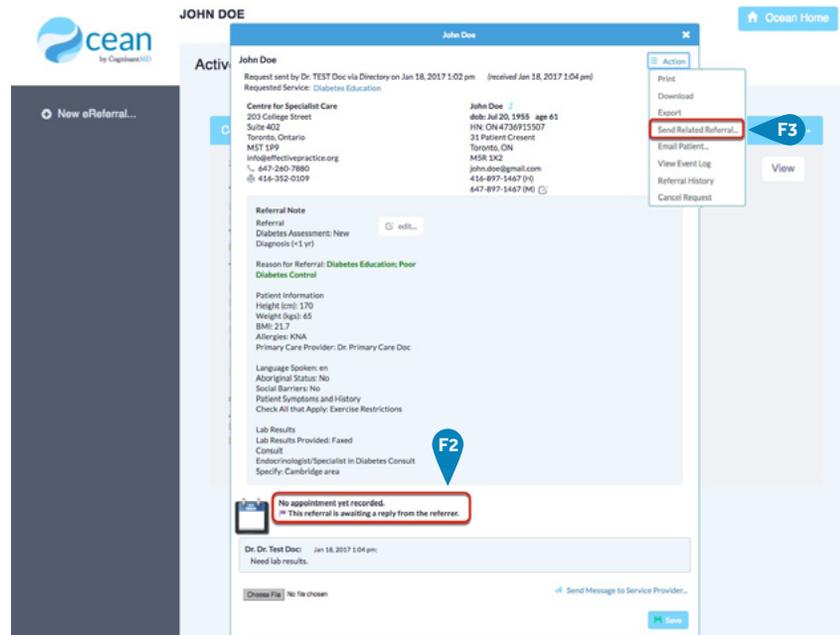
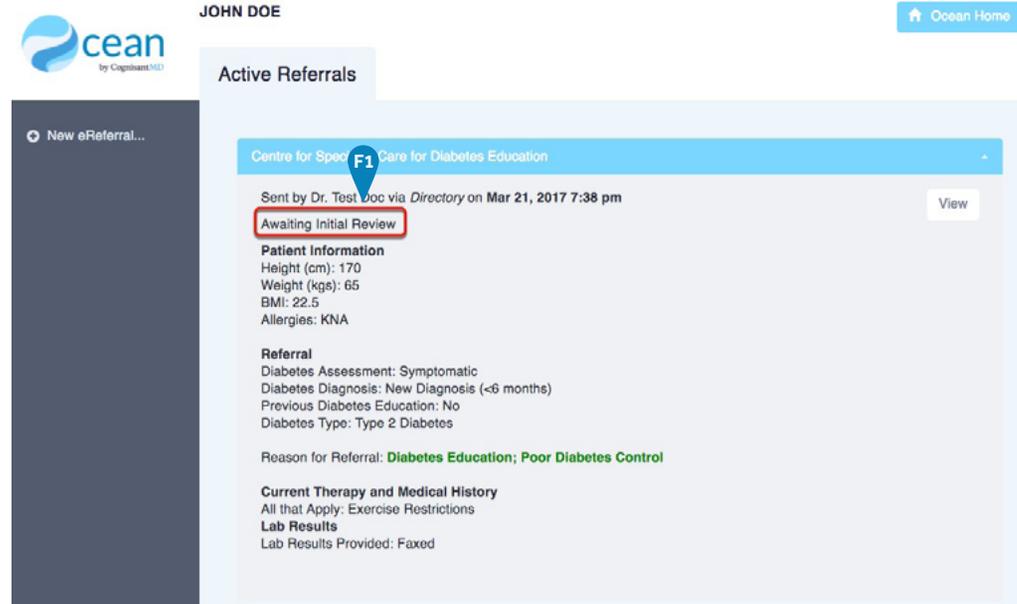
To send the eReferral to a different eReferral receiver, navigate to the eReferral window through your EMR.

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 alternative 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.



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.