Understanding the eReferrals & eConsults View

The eReferrals & eConsults view is used for viewing, tracking, and managing all of your eReferrals in one central area. Learning the basic functionalities of this area will allow you to confidently navigate Ocean and handle your referrals with ease.

eReferrals & eConsults View

The diagram below outlines the key areas	and functionalities in the eReferrals & eConsults view.
	an 🛄 🛛 eReferrals & eConsults
Film -	TracEduras
Aut - Ar & Johenawits Neords Review	Palent MBN DDB Description Data Set V Stars Provider Provider Provider Notad Avait Yet 90.09-20 General Surgery Not 21,2022-00-pm Ontribuler Linitik Desc Sile XV2 Specificitis
For Me Recently Viewed	Op/Dub Op/Op/Dub O
Received New	Cristi dati Terri Martini Terri Mar
Pending Booking Bookind Unconfirmed	Maturalszizzerowani 09/010 General Steps Aki2 (2021) Offension With Steps VZ (Speciality VZ (Spec
Booked Confirmed Anathray Sydy	Orivi Tat 0%02 00 General Surgary Anit 3.0221697 an Outworkshift AlE-Matical VX2 Socialists Moleo Mose 960+02 General Surgary Anit 3.0221697 an Outworkshift AlE-Matical VX2 Socialists
Walk-Ins AB Bacahad	On Data Synthetic General Surgery Just. 2022 12 gan Ontongere Earlisk AEC Medical VXZ Specialitie P3 22:05:00.22 gan Ba Just Schin 90-96-20 General Surgery Just. 2022 12 gan Ontongere Earlisk AEC Medical VXZ Specialitie P3 22:05:00.22 gan Ba Just Schin 90-96-20 General Surgery Just. 2022 12 gan Ontoingere Earlisk AEC Medical VXZ Specialitie P3 22:05:00.22 gan Ba Just Schin 90-96-20 General Surgery Just. 2022 12 gan Ontoingere Earlisk AEC Medical VXZ Specialitie P3 22:05:00.21 gan Ba Just Schin 90-96-20 General Surgery Just. 2022 12 gan Anite XXZ Specialitie P3 22:05:00.21 dagin B1 Just. 2004 20 gan General Surgery Just. 2004 20 gan G B1 Zust. 2004 24 gan G
Completed Towardsd (Mill	Avalytics Test2 90-01-01 Orthoppedics Dec7.20212:11 pm Mila Smithies Dr. Mila Smithies XVZ Specialists @
Destined Corrolled	Diploment Soft Stread Ann
Sent	
Dekton Wannes Actiona	
 New Heburd Referral View Directory 	
Liefer Requisition ₿ Depent	
 Update Wait Times Or Paleret Habay 	
Support	
1. Filtering	To find a specific referral, type into the search bar. You can search by patient surname, or the names of
1.1 ///////	the related healthcare providers.
	the related healthcare providers.
	If your Ocean Site owns multiple Directory Listings, you can filter by listing using the dropdown menu.
2. General Folders	The general folders are used to flag referrals that need to be reviewed, referrals that have been flagged
	for your specific attention, and referrals you have recently viewed.
3. Status Folders	The 'Received' and 'Sent' folders contain individual status folders which are used to organize referrals as
	they progress through their lifecycle. The specific purpose of each status folder is defined in this support
	article.
4. Actions Menu	Used for quick access and advanced functionalities, including creating manual inbound requests,
	launching the Ocean Healthmap, claiming a printed Ocean requisition, exporting your referrals, bulk
	updating your wait times, and viewing a patient's referral history.
5. Patient Referral List	Shows basic information about the patient referrals that match your currently selected folder and
	applied filter.
6. Status Icons	Used for quickly indicating relevant statuses and characteristics for each referral. A full legend for all
	icons is found in this support article.
7. Settings Button	Used for accessing the configuration options available for eReferrals & eConsults at your Ocean Site.

Opening an eReferral

A referral can be opened by simply clicking on it from the patient referral list. The diagram below outlines the key areas and functionalities within a referral.

Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import Import <
Image: Section of the sec
A Constraint of gene
Image: Section of the sec
Interaction of the control Report Control Report Control
Interaction of the control Report Control Report Control
Bayento Canantia Marine Canantia Marine Canantia Bayento Canantia Marine Canantia Bayento Canantia Marine Canatia Mari
Are formed Grade and the formed of the fo
Windowski
Line for the formation of the formation
Madrine Nordation
Sensitive 🕖 -
Apertent two lines Nades Chrome SSSSSEARE or pretrained for the printer of the strengtheres of the strengt
Health Service Offering The patient's name, health service offering that they were referred for, and MRN number are displayed
at the top of the referral.
Action Menu Used to action and manage the referral from directly within. Each action menu item is described in detail
in this support article.
General Contains basic information regarding the patient, the referrer, the date of the referral, and any
additional stakeholders copied on the referral.
additional statements copied on the referral.
Notes Used for general and/or private note-taking regarding the referral, as well as advanced functionalities
such as the review/triage form, and specifying dates affecting readiness to consult/treat.
Messaging Used for communicating with other referral stakeholders. Common use cases include requesting
additional information prior to accepting/declining a referral (e.g., lab values, imaging results).
Referral Form Summary Contains a note summarizing the referrer's responses to the referral form questions/criteria during the
referral sending process.
Patient's Note If the patient recently completed an Ocean eForm(s), the resultant note will be displayed.
Providers with an Ocean Patient Messages license can use the envelope icon to send a secure message
and/or additional digital questionnaires to the patient.
Scheduling Used for scheduling appointment dates or estimating wait times, specifying the appointment medium,
and including comments or attachments for the patient and referrer.
Needs ReviewUsed to assign a referral to be reviewed by another user on your Ocean site.
) Anting Dutting
D. Action ButtonsUsed to accept or decline the referral.

Accepting & Declining eReferrals

1. Receive an email notification and access the eReferral

- will receive an email notification ral A. When you receive a new eRefe based on your notification co
- B. Log in to the Ocean Portal, an 'eReferrals & eConsults' area

 A. When you receive a new eReferral, you will receive an email notification based on your notification configuration. B. Log in to the Ocean Portal, and use the menu to navigate to the 	New eReferral for XYZ Specialists							
'eReferrals & eConsults' area.	Your site has one new eReferral.							
	Recipient Type Description Count							
	XYZ Specialists eReferral General Surgery 1							
	Please sign in to the Ocean Portal to view your inbox. Warm Regards, The CognisantMD Team							
C. Locate the eReferral under the ' Received ' tab and within the ' New ' statu folder. Click on the referral to open it and view more details.	S Transition Control State Sta							
Tip: Certain columns can be used to sort your referrals into ascending/descending order. Simply click the column header.	A management of the second sec							

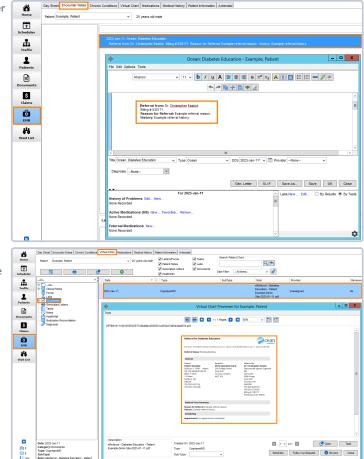
2. Review and accept or decline the eReferral

Α.	After opening the eReferral, review it's contents to gain a more detailed	Cay Montag		Utraound		MRG = AC	
		General			Notes		
	understanding of the referral and ensure it contains all of the information you require.	Fer: XV2.5pecialitats Sent by Christopher Eardox ela elidentel de Dec 15, 2022 2:36 pm Patient Gan Montag d ² G elat: Oce 15, 1593 1: Mage 69 HN: ON 177777777777	Referred by: Christopher Lastick ARC Medical 3000 Yronge Toronthi (2N		Nen Mar.		
		Suthers, ON P35665 testilicemiantmd.com	Teorino, ON MONINI Billing # 12345 C. 705-555-6666	CP90 # 67090	Messelfer To: Referer (Dr. Christopher Eastick / ABC Medical) Activities Activities	•	
		Referral Form Summary				et Send	
	Tip: If necessary, you can assign the referral to be reviewed by another user on your Ocean site for a secondary review.	Or Inquest for Constitution Theory operation of these pains. Pharty Cases on "Londing for Adjaments" Constrained Unstanced Uns					
		Allegies No allegies Medicators No medicators					
		Padent's Note					
		Scheduling					4
		Appointment omding time. Nedium in Person at 2404 Los	ng Laike Rid	Anticipated Time to Appointment	V Confirmed	+	
		Comments for Referrer and Patient:					
		Add Attachmenta					
		Needs review			S Decine S Accept	0	J
B.	Use the ' Decline ' or ' Accept ' button at the bottom of the referral to indicate your decision.		8	Decline	O Accept		

Accepting

When you accept a new eReferral, the referral note will be **automatically** imported into the patient's chart in Accuro with the matching healthcard number.

Depending on your Cloud Connect configuration, the referral note will either appear as an **Encounter Note** or a **Document**.

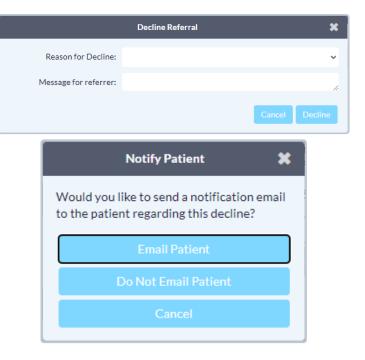


If no chart with a matching healthcard number is found, Ocean will automatically generate a new chart and import the referral notes into it. The patient's demographic fields will also automatically update in the patient's chart.

In Ocean, the referral will be automatically moved to the 'Pending Booking' status folder.

Declining

- A. If declining an eReferral, you will be prompted to enter a reason for the declination, with the option to provide an additional message for the declination email notifications.
- **B.** If the patient consented to email notifications, you can additionally choose whether or not the patient should also receive the declination email notification.



C. The referral will be automatically moved to the 'Declined' status folder.

Messaging within an eReferral

When processing and managing incoming eReferrals, it can be necessary to communicate with the other referral stakeholders to gain additional or missing information. This is achieved using the 'Messaging' area within an eReferral.

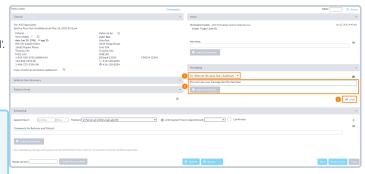
Optional Step

Note: This is an optional step in the Guide to Receiving eReferrals, since it may not always be relevant or necessary to communicate with other referral stakeholders.

How do I send a message?

- A. Within the 'Messaging' area, simply select the appropriate message recipient (if multiple parties are involved in the referral), type your message into the text box, optionally add an attachment, and press 'Send'.
- **B.** The message recipient will receive an **email notification** that you have sent them a message.

Tip: For increased efficiency, you can also create canned responses for your Ocean Site that are easily selectable using the speech bubble icon.



Additional Message Functionalities

Once a message has been sent, additional functionalities can be accessed by clicking clicking on the **message header**.

Note: The '**Amend**' and '**Delete**' options are only available to the user who sent the message.

	Minnie Mouse		Geo	eral Surgery		NEN	E Actio	
	General			*	Notes		*	*
	For:XYZ Specialists See by Christopher Eastick-Va eByterration Jun 16, 2022 10:00 am Patient Minnik Morpe © © debu Jun 1, Jones F Japa 37 Hith: CN 1777777777 XD 123 Main	Incolved Jun 16, 2022 10:01 cml Referred by: S Christopher Eastlick ABC Medical 3080 Yenge Terrotics, ON			Not Hels Add Allexbrown.		-	
	Subbury: ON NEXNIN: 705-555-559 (M) Copy of referral and status updates to:	M4N3N1 Billing # 12345 C. 705-555-6789 @ 705-555-1224	CP50 # 67890		Messaging Re-Alex-Apple - 392 Specifiers In Hermon Extended Add Medical Developed Address Little Reg Hydrogethers,	wi 14, 2022 12:31 prij _{jan}	- mended 0	l
	Referrat Form Summary Beasen for Referral: The patient needs surgery.			*	Arrend k/ABCMedical)			l
J	Patient's Note				Add Attudymenta_		Sent	l
				8				I
	Scheduling Appointment: ponding pine Medium (https://www.scheduling Comments for Reference and Patient:	n at 2404 Long Lake Rd	▼ ⊕ kt6	lipated Time t	s/qqointment.		-	
	Acts Anteriorenees. Any scheduling changes will send an email notification to the referrer.	The patient must be notified separatel						
	Nauda review				Declase O Accept		0.00	1

Download Addendum Letter

Downloads a PDF document containing basic eReferral information and the selected message.

Amend

Delete

Copies the selected message into the new message text field, to allow for additional information to be added.

Deletes the message.

Scheduling the Referral Appointment

Appointment information can be added, edited, or removed by referral recipients at any point in an eReferral's lifecycle. This allows for patient and referring providers to stay up to date with the latest appointment dates, times, mediums, and other scheduling details.

Configure the Send Appointment Notification CDS Link

Note: Configuring the CDS link is a one-time step for each EMR user.

For instructions on setting up the 'Send Appointment Notification' CDS link, refer to this support article.

Schedule the Appointment and Update the eReferral

A. Select the relevant patient in Accuro.

Patient Test	t, Chris	\$	
Chris Test	:		
	8:30am		
	8:45am		
	9:00am	Test, Chris	
	9:15am		
	9:30am		

C. Select the Send Appointment Notification CDS link or the equivalent user-friendly button.

B. Book the patient's appointment in the Accuro schedule.

- D. The Patient Dashboard will launch in a new window, and you will be prompted to select the relevant referral to update.
- E. The details from the appointment booked in the EMR will automatically be available for selection within the 'Scheduling' area. Select the appointment date to add it to the referral.

Alternatively, if an appointment cannot be scheduled right away you can communicate an anticipated wait time to the referrer by using the 'Anticipated Time to Appointment' function.

6 Home				Providering, 1) (Fri) Testing		
-tests				1			
7 heduler	8:00am						
-	8:15em 8:30em						
Traffic	8.45am						
	9.00am						
Latients	9:15am 9:30am						
	9.45am						
	10:00am 🔽	st, Chris					
File		Management (My NCBI)			^		
Schedu	iler	0 - Ocean Staging - Cardiolog					
Cla Tools		0 - Ocean Staging - OCI Refer	rral				
Reports	•	0 - Ocean Staging - Refer 0 - Ocean Staging - Send App	contract Natification		-		
EF Billing		0 - Ocean Staging - View Pat			_		
Users		1 - Ocean Prod - Ocean Porta					
Help		10 - Ocean Prod - eRefer For 11 - Ocean Prod - SADE For					
CDS		2 - Ocean Prod - Send Online					
Configu	iration	3 - Ocean Prod - Add PHQ9 F					
\$		4 - Ocean Prod - Find Health 3					
~		5 - Ocean Prod - View Patient	t Dashboard (Global)				
		C. David David Cond America					
E		6 - Ocean Prod - Send Appoin 7 - Ocean Prod - eRefer to Ps	ntment Notification Jeudo Central Intake				
	CURC EMF Logout			eConsult E		1W2 1m2 4 Eend Apt Notif AEFI Report	SADIE Form
- АС Ф-	EMF Logout	9 - Ocean Localhost GT	e Load PHQ-9 Refe		Dashboard Central Intal	A Ø	-
Choose ctive R	EMF Logout	9 - Ocean Localhost GT	e Load PHQ-9 Refe		Dashboard Central Intal	A Ø	-
Choose ctive R eceived Date Ser	EMF Logout	P - Ocean Locators of T P - Ocean Locators of T Ocean Decision of T Ocean Pointal Send Resease om the following list to upda Description	e Load PHQ-9 Refe	nis patient's EMR appo	Dashbaard Central Intal	a Send Apt Ristr AETI Report	SADIE Form
Choose ctive R eceived Date Ser Date Ser	EMF Logout a referral fr seferrals d t 2022 11:46 0 deReferral	P - Ocean Locators of T P - Ocean Locators of T Ocean Decision of T Ocean Pointal Send Resease om the following list to upda Description	e Lead PHQ-9 Refe te its information with th	his patient's EMR appo Source Site	Dashkeard Central Intal	a Send Apt Ristr AETI Report	SADIE Form
Choose ctive R eceivec Date Sere Date Sere Forms	EMF Logout a referral fr seferrals d t 2022 11:46 0 deReferral	P - Ocean Locators of T P - Ocean Locators of T Ocean Decision of T Ocean Pointal Send Resease om the following list to upda Description	e Lead PHQ-9 Refe te its information with th	his patient's EMR appo Source Site	Dashkeard Central Intal	a Send Apt Ristr AETI Report	SADIE Form
Choose Choose	EMF Legent a referral fr seferrals d nt 2022 11:46 d eReferral eForm	P - Ocean Locators of T P - Ocean Locators of T Ocean Decision of T Ocean Pointal Send Resease om the following list to upda Description	e Lead PHQ-9 Refe te its information with th	his patient's EMR appo Source Site	Dashkeard Central Intal	a Send Apt Ristr AETI Report	SADIE Form
Choose ctive R eceivec Date Ser Dec 20, 2 Sence Forms Add	EMF Legent e a referral fr seferrals d tot 2022 11:46 d eForm_ ton below to u	• Costa Loaded CT • Costa Loaded CT	e Lead PHQ-9 Refe te its information with th	Source Site	Dashkeard Central Intal	a End Aye Root Status Pending Booking	SADIE Form

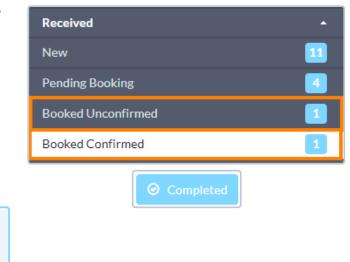
F.	Optionally, update the ' Appointment Label ', the ' Medium ', and the ' Confirmed ' checkbox if the date and time were confirmed by the patient at the time of booking.	Scheduling Appointment: (m 20, 2023 (950.2M) Medium [in Person at 2000 Yonge 51 Comments for Referrer and Patient: Any scheduling charges will send an email rectification to the referrer and the patient.
	Tip: You can customize your Appointment Labels and the set a default Medium in your Directory Listing settings.	
G.	To add more than one appointment, press the '+' button on the right hand side. To cancel or remove an appointment, select the '-' button.	Schwaling Appointment: Im 20, 2023 1600 AM Medium: In: Person at 5000 Yonge 51 Image: Appointment: Image: Commonts for Reference and Patient: Commonts for Reference and Patient: Image: Appointment: Image: Appointment: Image: Appointment: Image: Appointment: Image: Appointment: Image: Appointm
H.	Type any comments for the referrer and patient into the text box, and press ' Add Attachments ' to include any file attachments.	Scheduling Appointment: Im 20, 2023 (HOAM) Medium (In Person at 3000) Yonge 55 Appointment: Im 20, 2023 (HOAM) Medium (In Person at 3000) Yonge 55 Comments for Referrer and Patient:
	Tip: You can create canned booking comments to increase efficiency.	Any scheduling changes will send an email notification to the referrer and the patient.
I.	Select either 'Save' or 'Save & Close'.	

The referral will automatically move to the either 'Booked Unconfirmed' or 'Booked Confirmed' folder depending on the confirmation status, and an email notification will be sent to the referrer and/or patient containing the details of the scheduled appointment, the comments and attachments, and the ability to confirm the appointment (if applicable). Save Save & Close

Completing the Referral

Once the scheduled appointment date for the referral has passed, you are able to mark the referral as completed.

A. Locate the referral within its current status folder. This is typically either the 'Booked Unconfirmed' or 'Booked Confirmed' folder.



B. Open the referral, and press the 'Completed' button at the bottom.

Note: If you are using **Accuro** or **OSCAR Pro**, a final copy of the referral record will be automatically downloaded into the patient's chart in your EMR.

For **other EMRs**, you can manually download a final copy of the referral record.

C. The referral will be automatically be moved to the 'Completed' status folder.

С						
	n	m	n	മ	ТΘ	п
-	-		P			-

4

How long will the referral stay in the 'Completed' folder?

Referrals will always remain in the 'Completed' folder for a minimum of at least 30 days until they are removed from Ocean.

If you would like to see the specific date that a referral is scheduled to be removed from Ocean, you can click on the "Action" menu within the referral, and choose "View Event Log". The specific removal date will be displayed at the bottom of the event log.

Event Log									
Referral Reference: 595048a3-4bad-4af1-86c1-b5e6fa5a7100									
Туре	Date	User	User Location	Tag	Referral Location	Site	Previous Provider	Forwarded To	Actions
Sent	Oct 2, 2019 5:25 pm	Hope Burrows	Demo Site		Galt Hospital Imaging	1234			Details
Automatic email sent to patient	Oct 2, 2019 5:25 pm	Hope Burrows	Demo Site		Galt Hospital Imaging	1234			Details
This referral will purge from Ocean on: Dec 1, 2019									
				_					

Optional Step

Note: While this guide provides an overview of the main steps to receiving and handling an eReferral, optional information on advanced features and best practices is also available below.

- Viewing a Patient's Referral History If you ever need to inquire about any Ocean eReferral(s) that have been received and processed for a certain patient in the past, you can easily look this up in the patient's eReferral history in Ocean.
- Adding Notes to an eReferral The 'Notes' area within an eReferral can be used for general documentation regarding the request.
- Downloading the Referral Record You are able to download a complete copy of the entire referral record at any point in time.
- Creating Inbound Requests If your Ocean site receives referrals by phone or fax, you can convert these into Ocean eReferrals by creating a New Inbound Referral.
- Backing Up Your eReferrals It's a good idea to keep a backup of all your Ocean eReferrals, as they are purged from the Ocean Portal over time.
- Accessing eReferral Analytics Ocean sites receiving eReferrals can access analytic data about eReferrals received over time.
- Batch Printing Received eReferrals If your Ocean site receives referrals and would like to print or download a PDF copy to maintain with your patient records, this can be done using Ocean's batch print function.
- Automatically Marking your Referrals as Complete If you're managing your referrals in another external system, you can automatically mark your referrals as 'Complete' in Ocean

Tip: You can review the full eReferrals FAQ section for additional information on even more topics.