

eReferral Specialist Receivers

Ocean eReferral User Guide

THIS GUIDE GIVES OCEAN USERS THE STEPS TO RECEIVE AND MANAGE OCEAN EREFERRALS.

Step 1: Understanding the eReferrals View

- Learn how to [navigate Ocean's eReferrals area](#) for viewing, tracking, and managing your eReferrals. Review the eReferral sections and folders.

Step 2: Accepting & Declining Referrals

- All referrals will be sent to your Ocean site by Central Intake (CI).
- Learn how to [accept and decline your Ocean eReferrals](#).
- If you decline a referral, it will be sent back to CI to gather more info, etc. Please ensure you provide details on the reason you're declining the eReferral (what information is missing, etc.).
- Ocean has built-in functionality to allow you [to easily assign an eReferral](#) for review by another user on your Ocean site.
- If applicable, you can [Add Notes to the eReferral](#). This could include adding a priority/triage indicator, or any other relevant information.

Step 3: Messaging within an eReferral

- You can use [the Messaging functionality](#) as a way to communicate with other referral stakeholders and gather any additional information.
- You can use the [Action Menu](#) to move the referral to the "Awaiting Reply" status folder, until you receive the information you need.

Step 4: Scheduling the Referral Appointment

- [Add appointment details](#) to the eReferral, this will update both the referring provider and the patient (if an email and consent was provided).

Step 5: Completing the Referral

- Once the scheduled appointment date for the referral has passed, you are able to [mark the referral as completed](#).

Step 6: Advanced Features (Optional)

- Explore [advanced features](#) for managing your referrals, along with additional best practices.
- These advanced features are completely optional and include topics such as accessing eReferral Analytics and Viewing Referral History.
- You can review the full [eReferrals FAQ](#) section for additional information on even more topics.