

# Initiate Your Ocean eReferral

With an Ocean account, you can initiate an Ocean eReferral at any time directly from the [Ocean Healthmap](#).

## Initiate your eReferral (without an attachment)

In a web browser, navigate directly to the [Ocean Healthmap](#).

## Initiate your eReferral (with an attachment)

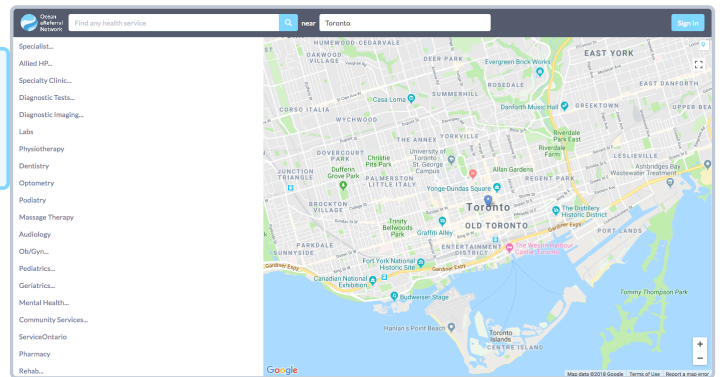
- A. Use your clinic's **pre-existing process** for creating documents for fax or mail in your EMR (e.g., consults, referrals).
- B. Rather than printing your document to paper, **save your document as a PDF file** to your computer.

**Note:** After sending the referral, ensure that you **delete** any attachments saved to your computer to ensure any personal health information is appropriately cleansed.

- C. In a web browser, navigate directly to the [Ocean Healthmap](#).

The actions above will take you directly to the [Ocean Healthmap](#).

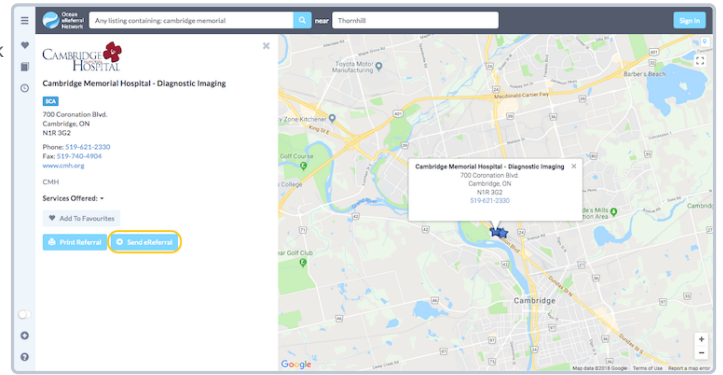
**Note:** Log in to the Ocean Healthmap with your Ocean user credentials if your user name does not appear in the top right so that your provider details are autopopulated in the eReferral.



## Select an eReferral Site

Choose a service and/or search for a specific site in the [Ocean Healthmap](#).

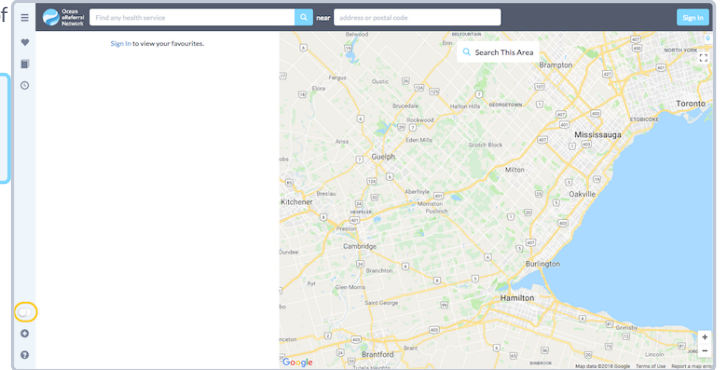
Once you find the service and/or site that you're looking for, select it and click "Send eReferral".



If you are looking to send a test referral, use the **toggle** on the left hand side of the screen to access **test mode**.

**Note:** A green arrow icon indicates if a listing accepts eReferrals in search results.

If the "Send eReferral" button doesn't appear on a listing, the site you've chosen does not accept eReferrals.



# Send Your eReferral

- A. Complete the eReferral form, as required. If you initiated the referral from an integrated EMR, patient contact information and other required details will be automatically pre-populated. Complete the remaining fields as required.

- B. If you are sending an eReferral as a **delegate**, you will need to select the appropriate provider that you are referring on behalf of (from the dropdown menu at the top of the "Referrer Information" panel).
- C. Click the **"Send Referral"** button to send your eReferral.

**Note:** If the referral listing you are sending to is under a Regional Authority, you must accept the agreement located beside the **"Send Referral"** button the first time an eReferral is being submitted.

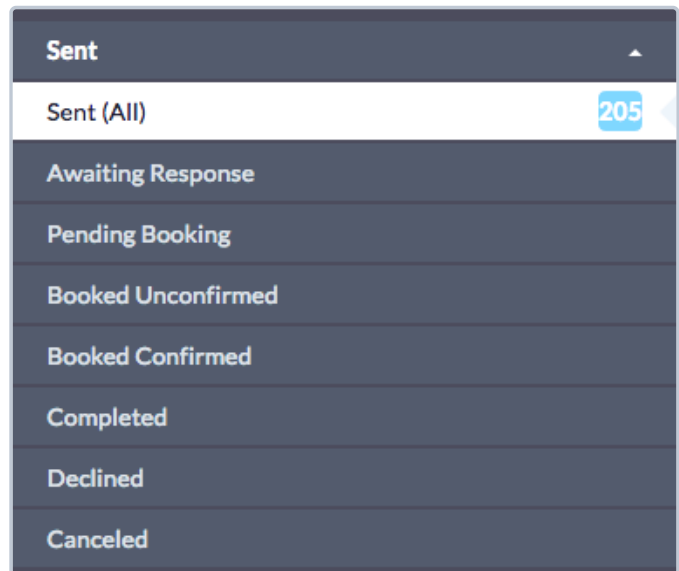
- D. Once sent, you will see a **confirmation window** with the option to print a copy of the referral for the patient.

- E. If you are using a non-integrated EMR, you can copy and paste the information from the confirmation window directly into your patient's chart in your EMR.

# View & Track Your eReferral

## 1. View your eReferral.

You can view your eReferrals in the [eReferrals & eConsults area](#) of the Ocean Portal. To view the eReferrals that you've sent select the "Sent (All)" option in the left sidebar.



## 2. Check the status of your eReferral.

If you are using a non-integrated EMR, you can view and check the status of your eReferral in the [eReferrals & eConsults area](#) of the Ocean Portal.

If you've linked your referral to your own Ocean account, you will also automatically receive **email updates** when the status of your eReferral changes (i.e. if it's booked, cancelled, or changed). More details about these email updates can be found in the article "[Where do eConsult and/or eReferral notification emails get sent to?](#)".

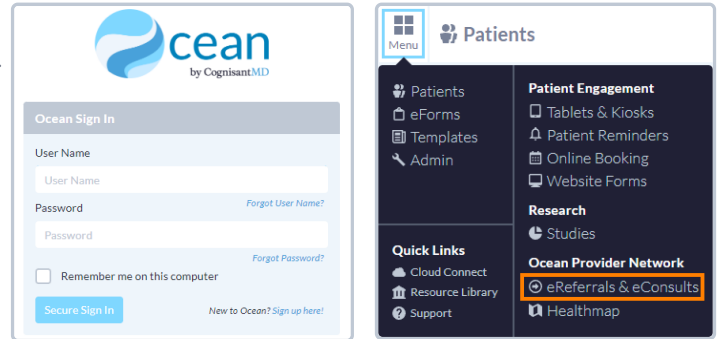
# Manage All Your eReferrals in the Ocean Portal

After your eReferral has been sent, it can be viewed and managed from the [eConsults & eReferrals area](#) of the Ocean Portal. The portal allows you to see all of your referrals in one place, clearly organized into folders according to their current status.

This article walks through the different features and options available in the portal, from searching for referrals to understanding the triggers that update a referral's status.

## Login to the Ocean Portal

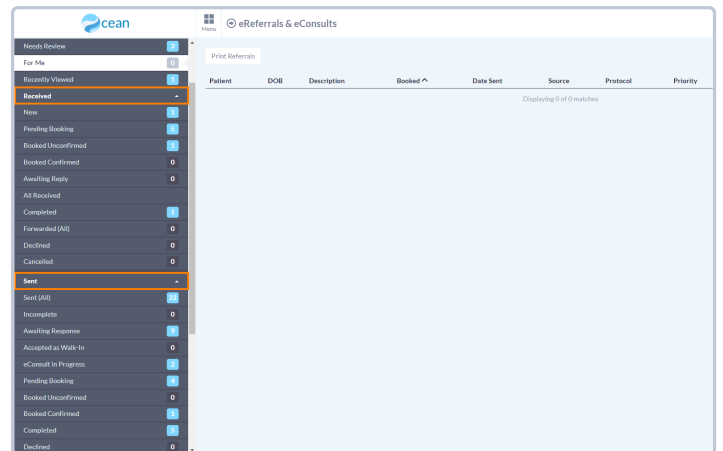
- A. Log in to the [Ocean Portal](#) with your Ocean username and password.
- B. Open the **Menu** in the top left corner, and select 'eReferrals & eConsults'.



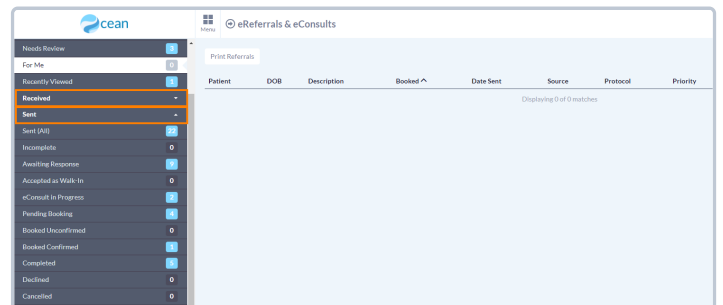
## Configure your Sent and Received Folders

The eReferral & eConsult View in the Ocean Portal has two main folders: a **Sent Folder** and a **Received Folder**.

Within these folders, you can access all of your referrals, organized by their current status.



If you are **only sending eReferrals** it is recommended that you **collapse** the 'Received Folder' by clicking on it.

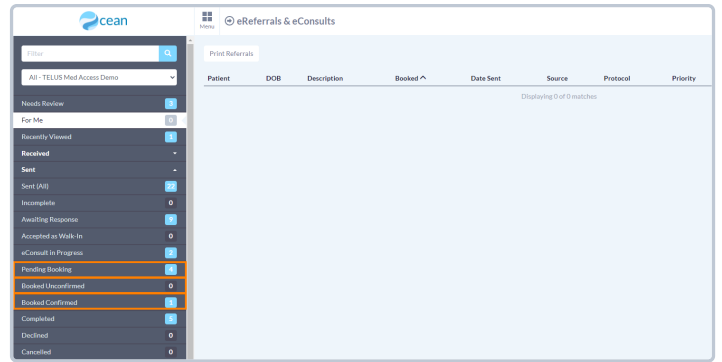


## Status Folders

**Status Folders** categorize your referrals based on their current status. As a referral's status changes throughout its lifecycle, it will be **automatically moved** to the appropriate folder.

For example, a referral in the '**Pending Booking**' folder will automatically move to the '**Booked Unconfirmed**' folder when the referral recipient books an appointment for the patient and updates that information in the referral.

Once the appointment date and time are confirmed, the referral will then be automatically moved to the '**Booked Confirmed**' folder for both parties.



This functionality ensures that the status of the referral is always up to date throughout its lifecycle for all relevant parties.

## Searching and Filtering

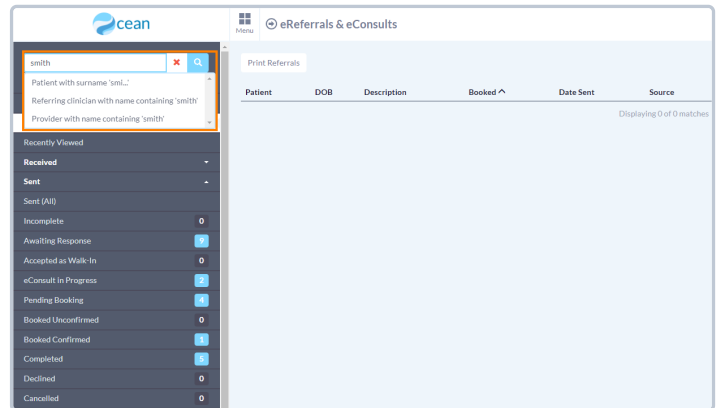
### Search Bar

To quickly locate a specific or group of referrals, you can take advantage of the **search bar** in the top left corner.

Selecting '**Patient with surname**' filters all your referrals to only include patients with the matching surname.

Selecting '**Referring clinician with the name containing**' filters all your referrals to only include referrals sent by a specific clinician.

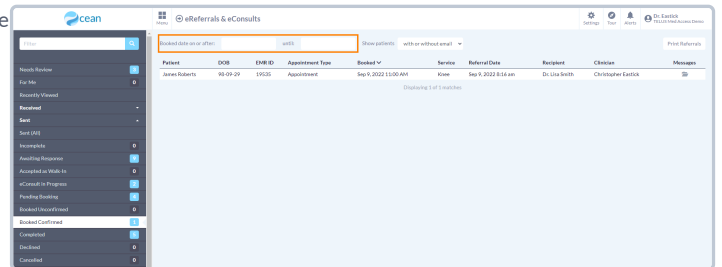
Selecting '**Provider with name containing**' filters all your referrals to only include referrals sent to the Directory Listing with the chosen search term included in it's name.



### Appointment Date Filtering

The '**Booked Unconfirmed**' and '**Booked Confirmed**' status folders can also be filtered to show appointments within a certain time frame.

The '**Booked date on or after: \_\_\_\_ until \_\_\_\_**' filter allows you to select a specific date range. Referrals with an appointment booked in that date range will be shown.



### Column Filtering

Certain columns within each Status Folder can be used to order the matching referrals in **ascending** or **descending** order.

Simply **click** on the column header to sort the referrals based on that column.

