Accuro: Complete Guide to Sending eReferrals

Step 1: Initiate Your Ocean eReferral

With an Ocean account, you can initiate an Ocean eReferral at any time directly from the Ocean Healthmap.

You can also initiate an eReferral at at time directly from your Accuro EMR by following the steps below.

(Optional) Select your Attachments

> **Note:** If you are **not including an attachment** in your referral, simply **skip to Step H**.

A. Select the patient in Accuro that you wish to generate an attachment in Ocean for.

B. In the '**Encounter Notes**' section, create a new note by clicking the **green plus icon**.

> **Tip:** You can use the Ctrl+F11 keyboard shortcut to create a new note from any section of Accuro, as long as you have the patient selected first.

C. Specify a filename for your attachment by using the '**Title**' field in the bottom left, and then click **Generate Letter**.
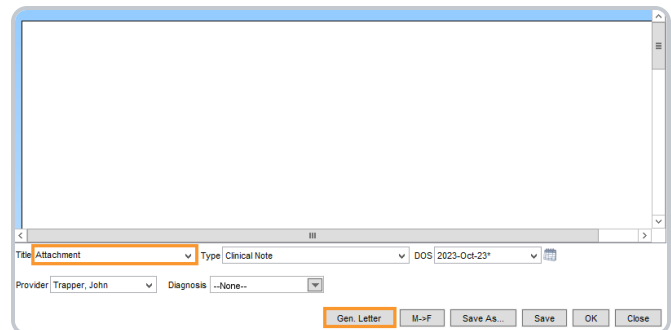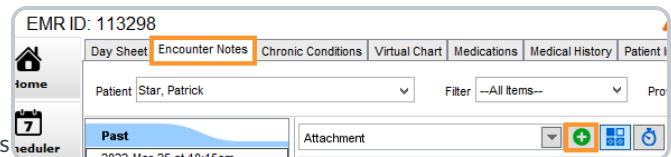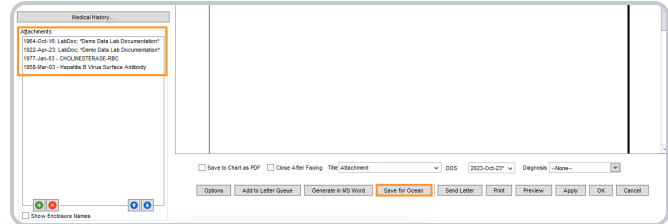
D. Ensure you have the correct '**From:**' Provider selected in the top left, then go to the **Attachments** pane and click the green plus icon to add an attachment.
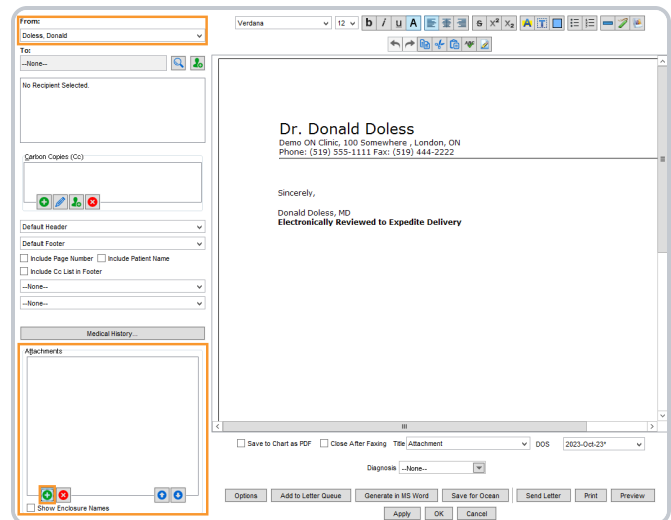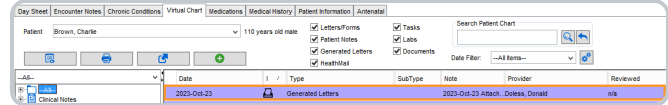
E. In the **Select Attachments** window, choose the items from the patient chart that you would like included, and then select **OK**.
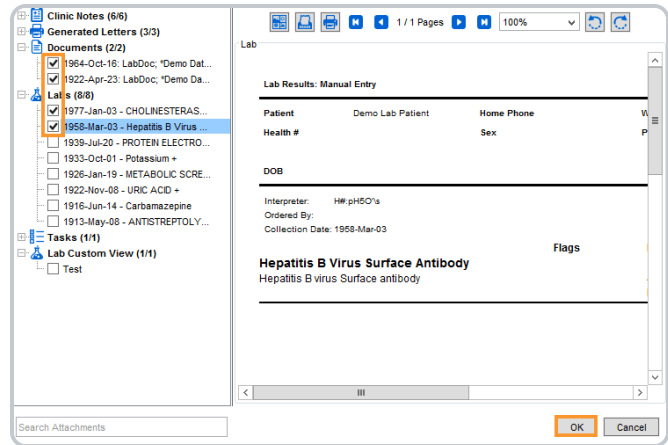
F. The list of selected attachments will appear on the left. Click the '**Save for Ocean**' button.
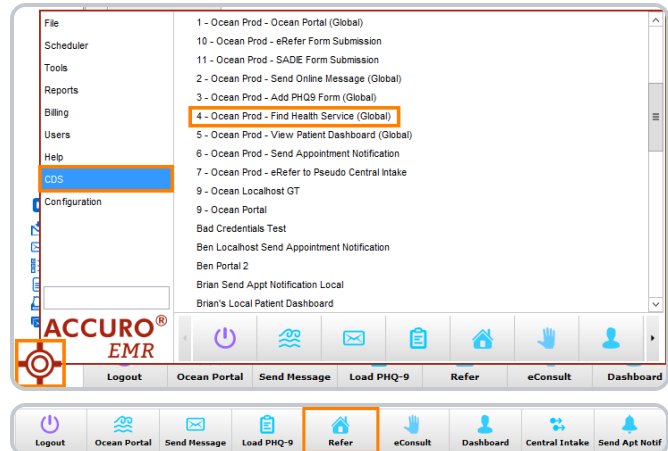

G. A Generated Letter will be created in the patient chart.


Initiate your eReferral

H. With the relevant patient in context in Accuro, click the "**Find Health Service**" global CDS link.

I. Alternatively, you can use the equivalent "**Refer**" CDS button on the action bar if you have configured it.

J. You will be taken 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.
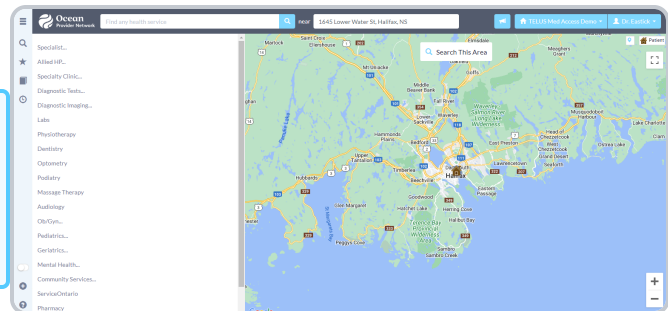
Step 2: Select an eReferral Site

Choose a service and/or search for a specific provider in the Ocean Healthmap. Once you find the service and/or provider that you're looking for, select it and click '**Send eReferral**'.

> **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 have selected is not currently accepting eReferrals.
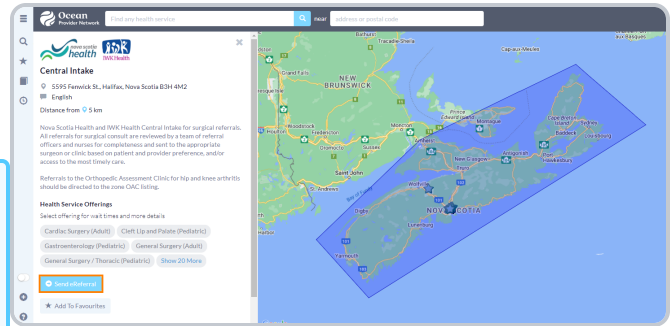
Step 3: Send Your eReferral

A. Complete the eReferral form as required.

Patient contact information and other details will be automatically pre-populated using information from the EMR.

Any attachments you prepared in Accuro during Step 1 will be automatically included at the bottom of the referral form.

You can preview your attachment by clicking on the purple "**eye**" icon, or remove it by clicking on the "**X**" icon.

B. If you remove an attachment and would like to add it to the consult and/or referral again, select the **Add Attachments** button at the bottom of the consult or referral.

A list of any attachments uploaded to Ocean for that patient will appear for you to choose from.

C. 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).

D. 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.

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

F. A copy of the referral will be automatically documented in the patient's chart in Accuro.

Depending on the configuration of your Cloud Connect settings, the eReferral information summary will automatically populate either as an Encounter Note, or as a PDF file in the Documents area of the patient's chart.

Step 4: View & Track your eReferral

View the status of the referral by using the '**View Patient Summary**' global CDS link.
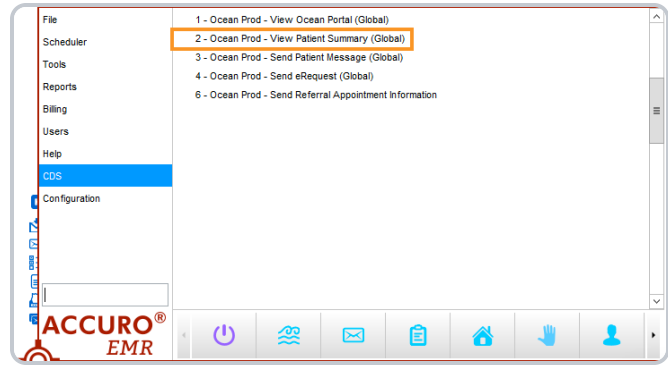
Alternatively, you can use the '**Summary**' button on the action bar.

This opens the Ocean Patient Summary where you can view the status of the any active eReferrals.

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?".
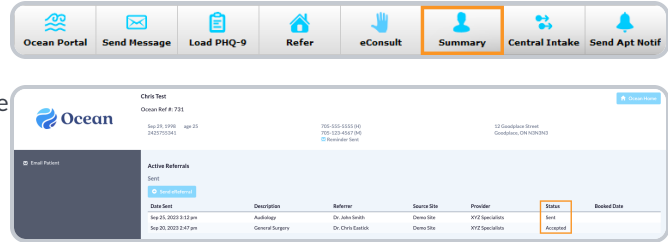
Step 5: Manage All Your eReferrals in the Ocean Portal

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.

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**'.
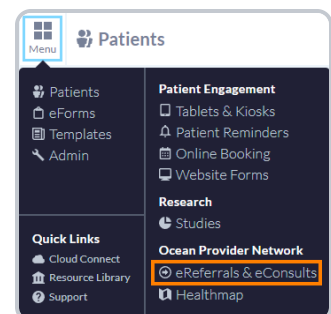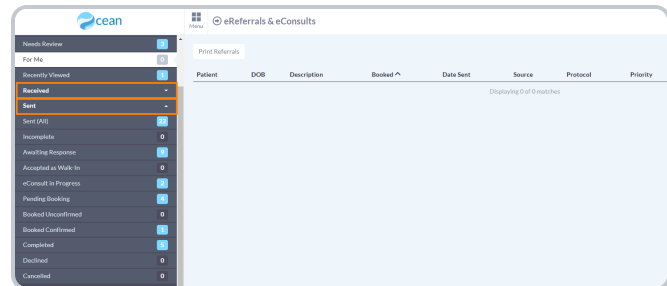
Configure your Sent and Received Folders

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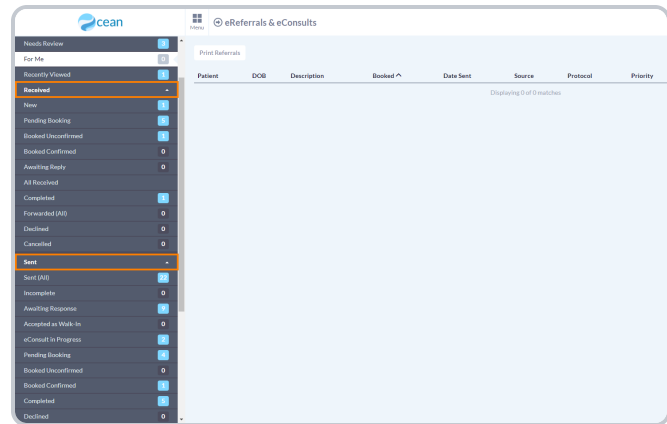
If you are **only sending eReferrals** it is recommended that you **collapse** the 'Received Folder' by clicking on it.


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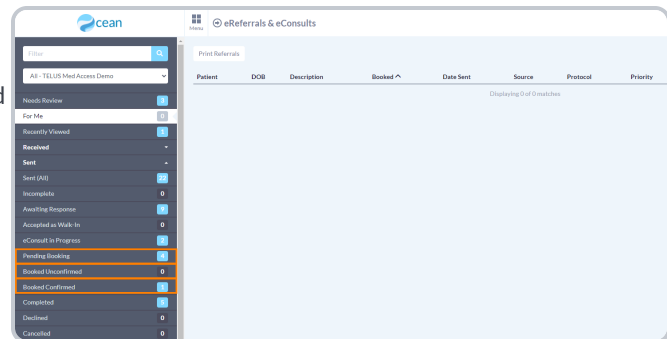
This functionality ensures that the status of the referral is always up to date throughout its lifecycle for all relevant parties.

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.
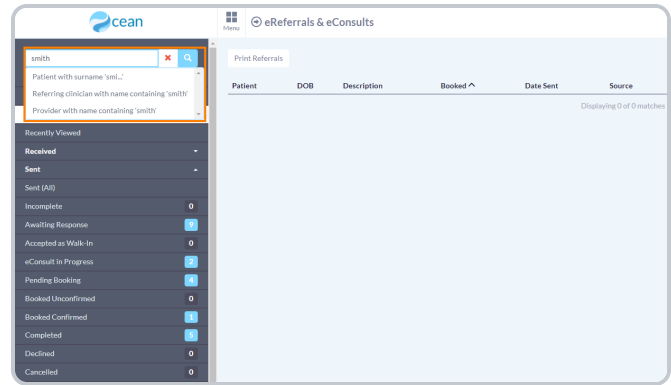
Appointment Date Filtering

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.
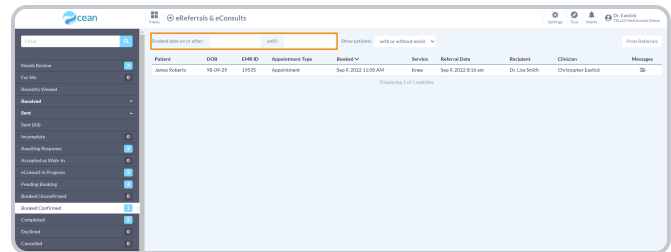
Column Filtering

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.