Med Access: 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. Using Med Access, you can also initiate an eReferral at at time by following the steps below.

> **Note:** The steps outlined in this guide assume that you have already installed the Ocean-MA Extension for Google Chrome and Microsoft Edge.

(Optional) Select your Attachments

A. From within a Chart Summary, use the checkboxes on the left to select the parts of the patient chart you would like to include as an attachment, and then select the '**Print**' button in the top right corner to generate a PDF of your selection.

   Select the '**Chart Summary**' option to simply capture the information shown in the Chart Summary window.

   Select the '**Chart Summary (with Attachments)**' option to capture the information shown in the Chart Summary window along with any files that are already attached to the selected chart items.

B. A new window will automatically open containing a generated PDF version of your selection. Select the **Ocean icon** in the top right corner.

C. Enter a name for your file attachment and then select '**OK**' to queue the attachment for use in Ocean.
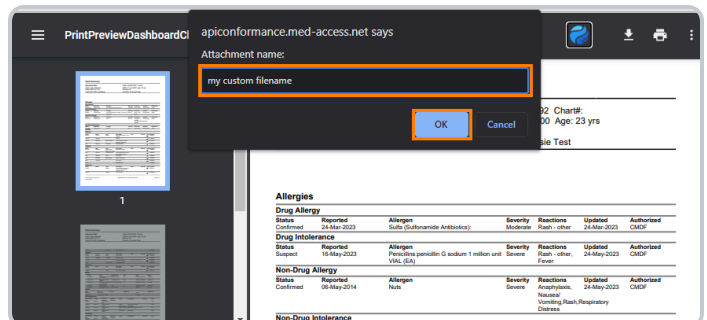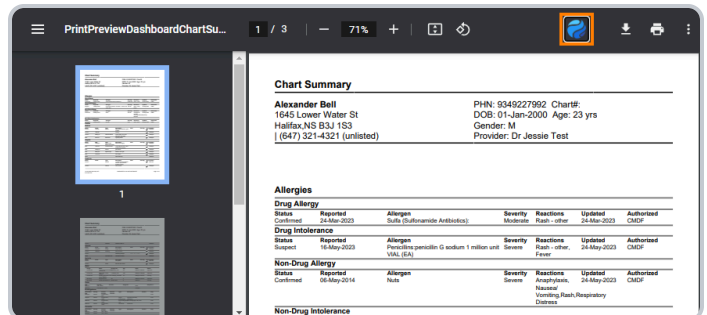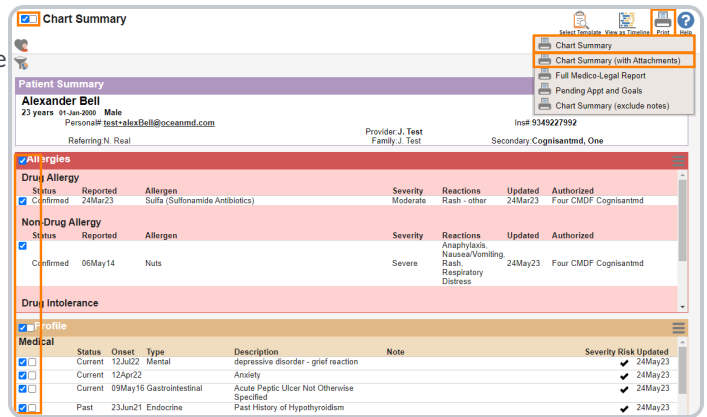

Attachments From Other Areas

The Ocean-MA Extension icon may appear in PDF viewing windows that are accessible through other areas of Med Access. Users may prefer to incorporate other workflows that take advantage of this feature. For more detailed information, please refer to the Ocean-MA Extension FAQ.
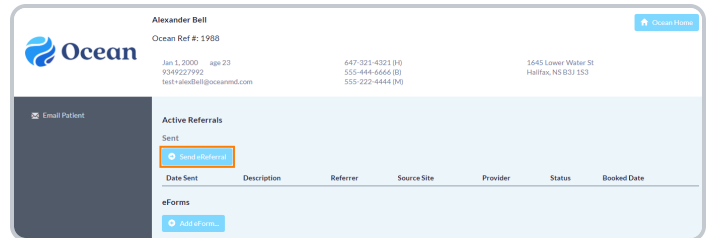
Initiate your eReferral

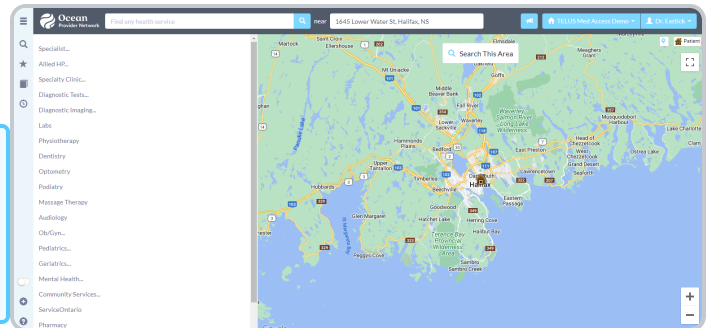**A.** Select the "**Launch**" icon from within the patient's chart.
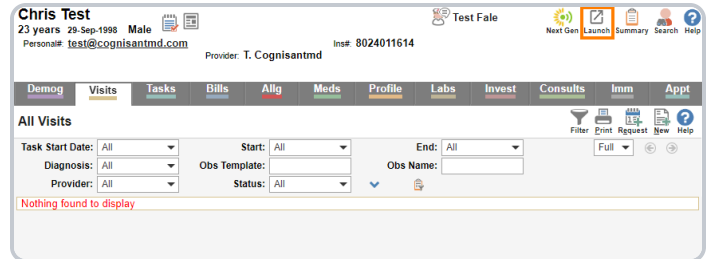
B. Locate the "**Ocean**" extension, and select "**View Patient**".
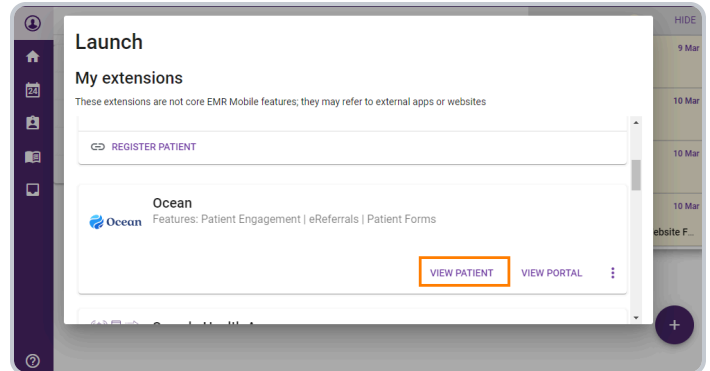
C. Select the "**Send eReferral**" button from within the patient's dashboard.

**D.** 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.

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**'.
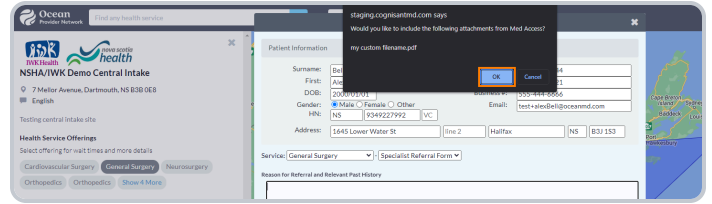

> **Note:** A green arrow icon indicates if a listing accepts eReferrals in search results.
>
> If the '**Send eReferral**' button doesn't appear on a listing, the site you have selected is not currently accepting eReferrals.
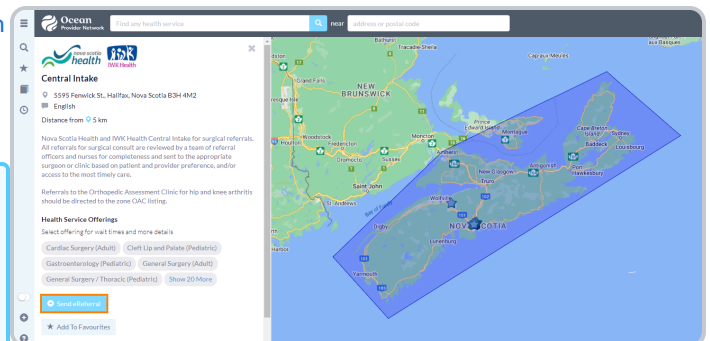
Step 3: Send Your eReferral

A. The referral form will open, and you will be automatically prompted to include the attachments you selected earlier. Select 'OK' to confirm you would like to include the attachment(s).

B. Complete the eReferral form as required. Patient contact information and other required details will be automatically pre-populated using information from the EMR.

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.
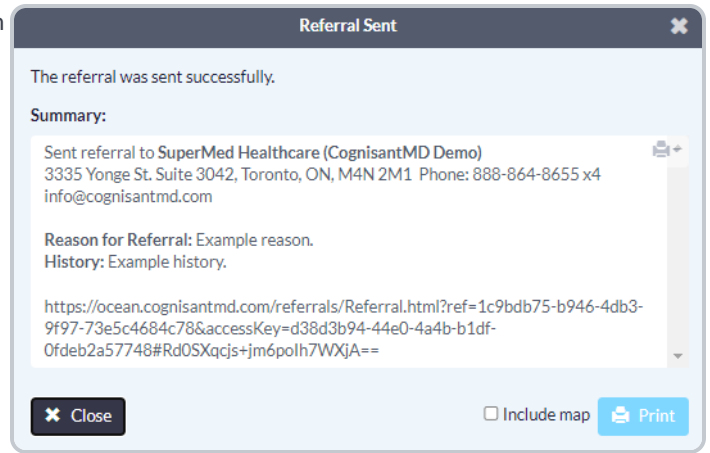
Step 4: View & Track Your eReferral

1. View your eReferral.

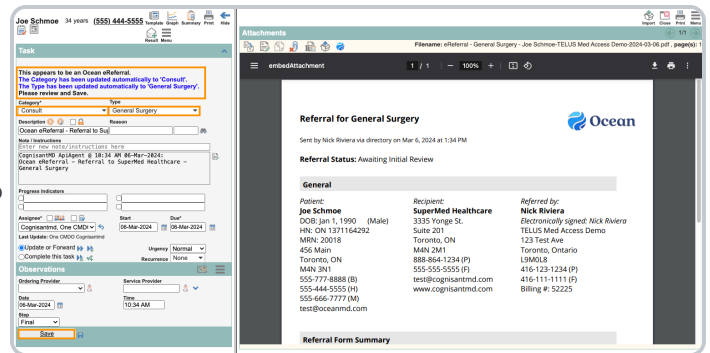You can view the referral information summary as a Task with an attachment in the patient's chart.

The **Ocean-MA Extension** will automatically recognize upon opening the Task that it is related to an Ocean eReferral.

It will automatically adjust the Task '**Category**' and '**Type**' values to correspond with the Ocean eReferral.
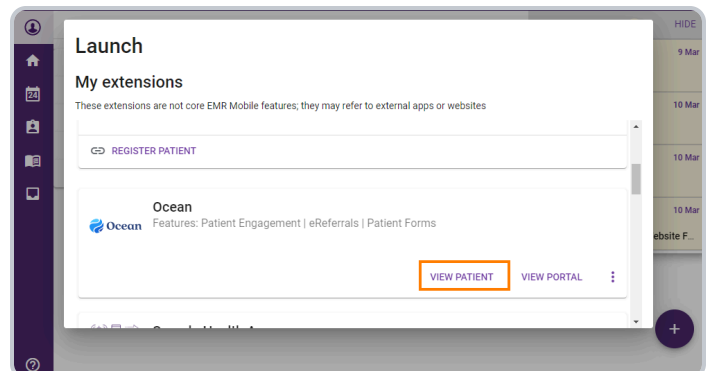
2. Check the status of your eReferral.

A. View the status of the referral by selecting the "**Launch**" icon from within the patient's chart.
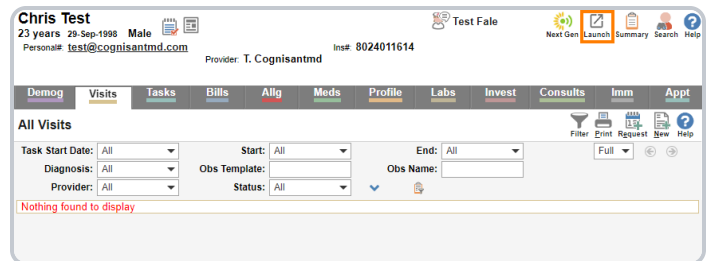
B. Locate the "**Ocean**"" extension, and select "**View Patient**".

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

D. 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).

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.

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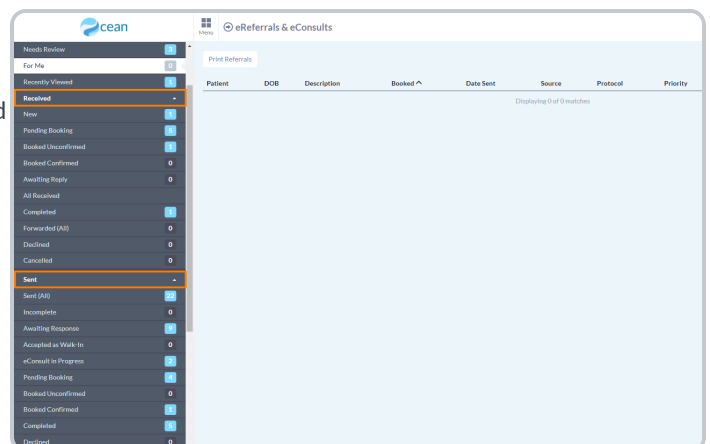
If you are **only sending eReferrals** it is recommended that you **collapse** the 'Received Folder' by clicking on it.
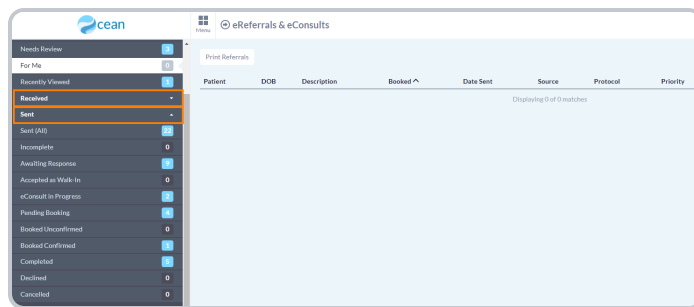

Status Folders

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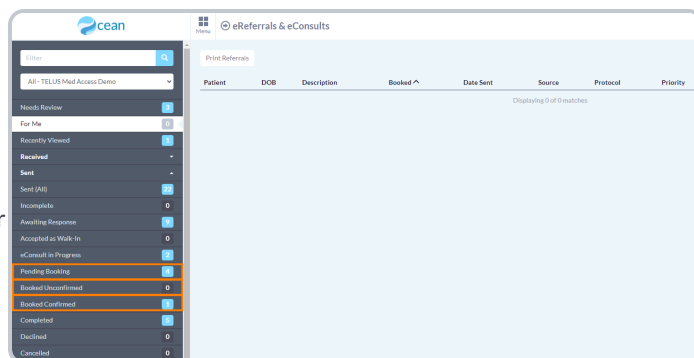
This functionality ensures that the status of the referral is always up to date throughout its lifecycle for all relevant parties.

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.
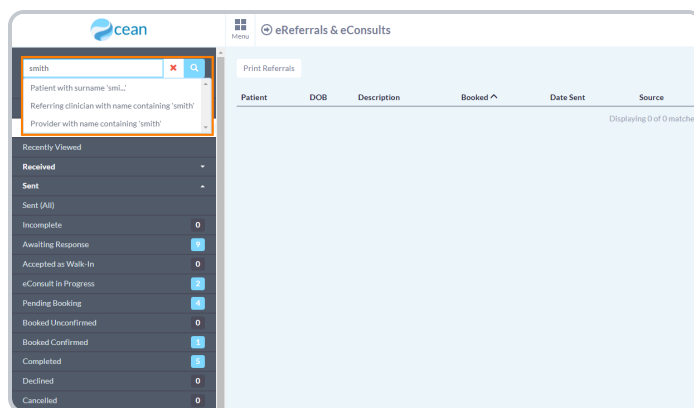
Appointment Date Filtering

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.
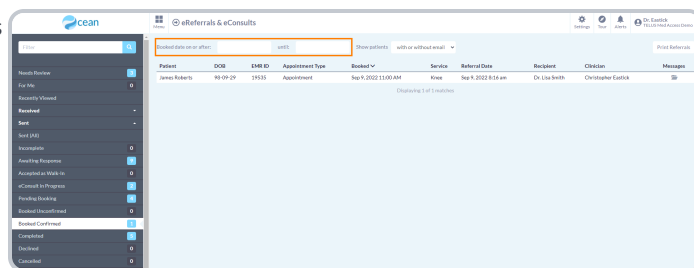
Column Filtering

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.