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

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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.

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	Ø Moltzviere.
	Vend miker Construction (Inc. 1997)
1. 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.
2. Action Menu	Used to action and manage the referral from directly within. Each action menu item is described in detail
	in this support article.
2 Conoral	Contains basis information regarding the nations, the referrer, the date of the referral and any
5. General	contains basic mornation regarding the patient, the referrer, the date of the referral, and any
	additional stakeholders copied on the referral.
4. 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.
5. 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).
6. Referral Form Summary	Contains a note summarizing the referrer's responses to the referral form questions/criteria during the
	referral sending process.
	If the metion to constitute of the Ocean of Fermile's the metal through the disclosed
7. 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.
8. Scheduling	Used for scheduling appointment dates or estimating wait times, specifying the appointment medium,
	and including comments or attachments for the patient and referrer.
0 No ode Deuterra	
7. Needs Kevlew	Used to assign a referral to be reviewed by another user on your Ocean site.
10. Action Buttons	Used to accept or decline the referral.

Accepting & Declining eReferrals

1. Receive an email notification and access the eReferral

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

~ .	based on your notification configuration.	New eRef	erral	for >	۲ZS	Special	ists								
B.	Log in to the Ocean Portal, and use the menu to navigate to the eReferrals & eConsults' area.														
		Your site has one new eReferral.													
		Recipient		Ту	pe	C	escription			Count					
		XYZ Specialis	ts	eF	Referra		ieneral Surg	gery		1					
		Please sign in t	o the C		ortal to	view you	r inbox.								
		Warm Regards	S,												
		The Cognisant	MD lea	am											
C .	Locate the eReferral under the ' Received ' tab and within the ' New ' status	Fiter Q	Print Referrals												
1	folder. Click on the referral to open it and view more details.	Al-XXX Specialists	Patient Guy Montag	MRN DOB 53-10-19	Description 9 Utrasound	Date Sent V Dec 15, 2022 3.36 pm	Source in Christapher Eadlick Displaying 15 of 15 matches	Site ABC Medical	Provider XYZ Specialists	Protocol	Priority Noted				
	Tip: Certain columns can be used to sort your referrals into ascending/descending order. Simply click the column header.	New 3 Pendrad Dodra 2 Benedi Narofi med 2 Benedi California 2 Avezital Rody 0 Waki kis 3 Al Dockned 3													

2. Review and accept or decline the eReferral

A. After opening the eReferral, review it's contents to gain a more detailed understanding of the referral and ensure it contains all of the informatio you require.

Tip: If necessary, you can assign the referral to be reviewed by another user on your Ocean site for a secondary review.

Cancel of the set of the se	Comer algebra	Image: Control of Control o			
over ver Contraction	Guy Montag		Ultrasound		MRN
Note: Section: Sect	General			Notes	
Sintegring Sintegring Sintegring <td>For: XYZ Specialists Sent by Christopher Eastick via eReferral on Dec 15, 2022 2:36 pm Deleter</td> <td>Referred by</td> <td></td> <td>New Nate:</td> <td></td>	For: XYZ Specialists Sent by Christopher Eastick via eReferral on Dec 15, 2022 2:36 pm Deleter	Referred by		New Nate:	
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Seale	Dem Republic Ultrasound Ultrasound Munculosisistat Koee Right Procedures Ultrasound guided paracentesis - Diagnostic Land of Menity Roodine				
Name Image: Contract of	Chical Information Allergies: No allergies Medications: No medications.				
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⊗ Decline					

B. Use the 'Decline' or 'Accept' button at the bottom of the referral to indicate your decision.

Accepting

When you accept a new eReferral, the referral information will be **automatically** imported as a new **Active Task** in the patient's chart with the matching healthcard number and date of birth in your Med Access EMR.

The Ocean-MA Extension will automatically recognize upon opening the Task that it is related to an Ocean eReferral and automatically adjust the Task '**Category**' and '**Type**' values to correspond with the Ocean eReferral.

Jes Schmon M years (555) 644-5555 🔐 kan kan year at the second s	Attachments D D D D D D D D D D D D D D D D D D D	C
Description Description Construct Reading Vector Description Reading Vector Description Reading Reading Description Reading Reading Reading	Referral for General Surgery Set by Nick Rivers via directory on Mar 6, 2024 et 134 PM Referral Status: Awaiting Initial Review	🥏 Ocean
Negret Molecular Control of the State of the	Allenet Acceptent Superfield Isabitive Jes Schmitt Wei Superfield Isabitive Dec On 1217164229 Schwitz 2019 MRE-20218 Control Schwitz 2019 MRE-20218 MRE-20218 MRE-20218 MRE-20218 MRE-	Informed by: Reside Notice agreed Note Notice Notice (Notice Control (Notice Notice)) Tax Set And (Notice Notice) Tax Set And (Notice Notice) Tax Notice (Notice) Advised Notice (Notice) MULL Set Notice) Tax Notice (Notice) MULL Set Notice) Billing # - 2225
Sant A	Referral Form Summary	

After reviewing the changes and making any other necessary adjustments to the Task, click '**Save**'. The Task will be automatically categorized into the '**Active Requests**' section of the corresponding '**Consults** ' or '**Investigations**' area of the patient chart.

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

If no chart with a matching healthcard number and date of birth 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.

Note: The '**Patient Status**' field in new charts generated by Ocean will be set by default to '**Unconfirmed**'. Ensure that you update the status to '**Active**' (or your preferred status) after accepting the referral.

If Ocean automatically generated a new patient chart and the name of the referring provider already exists in your Med Access address book, the '**Referring Provider**' chart field will also be updated with the referrer's name.

Care Assignment & Not	es
Rostered? OYes No	
Primary Provider	Secondary Provider
Referring Provider 💥	Family Provider 💥
Eastick, Christopher 🛛 👶	⁰
First Appt	Last Appt
04-Jan-2023	03-May-2023

Note: Ocean matches the referring provider's information with the Med Access address book using First Name and Last Name.

If more than one provider exists in the Med Access address book with the same first and last name, Ocean uses the referrer's fax number to match with the correct provider.

If multiple providers have the same first name, last name, and fax number, Ocean will not update 'Referring Provider' field.

If multiple providers have the same first name, last name, but no matching fax number is found, Ocean will not update '**Referring Provider**' field.

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.

	Decline Referral		×
Reason for Decline:			*
Message for referrer:			
		Cancel	Decline

B. If the patient consented to email notifications, you can additionally choose whether or not the patient should also receive the declination email notification.

Notify Patient

x

Would you like to send a notification email to the patient regarding this decline?

Email Patient

Do Not Email Patient

Cancel

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.

	Planie Mouse		6	eneral Surgery		MEN	E Actio	
	General			*	Notes		*	*
	For:XYZ Specialists Seet by Orkitopher Eastick via objevnice Jun 16, 2022 10:00 am Polient Minisk Menne () () debt. Jun 1; 1005 F. Ega 37 Hit: ON 777777777 ND 123 Main	(received Jun 16, 2022 10:01 on) Referred by: (5) Christopher Eastlick ABC Middial 3080 Yange Tarroto, ON			NorMati]	
	Sudovs: ON NSNSN3 205-555-6589 (M) Copy of referral and status updates to:	M4N3N1 Billing # 12345 C. 705-555-6789 @ 705-555-1234	CP50 # 67890		Messaging Ce Ade Apple VP Sponsition Trainteen if University and Add Medical Developed Addeduct Letter performation.	2wi 14, 2022 12:33 pm(pm	- tendect O	
	Referral Form Summary Reason for Referral: The patient needs surgery.				Arrend Delete X/ABC Medical)		-	l
J	Patient's Note				Add Attachments.	4	Secul	l
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	Scheduling						-	
	Appointment: conding (time., Medium (in Person	nat 2404 Long Lake Rd	× 04	vticipated Time t	#Appointment) Confirmed		-	
	Any scheduling changes will send an email softlication to the referrer.	The patient must be notified separately						ļ
	Needs review: Enable Review Mode				Declas SAccept		0.00	9

Download Addendum Letter

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

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

Amend

Delete

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.

Schedule the Appointment

A. Book the patient's appointment into the Med Access schedule.

08:30		
08:45		
09:00	Chris Test 29-Oct-1998 (24) M	7114338275
09:15		
09:30		

Update the Referral

- A. Open the patient's chart in the EMR, and press the 'Launch' button.
- **B.** Locate the '**Ocean**' extension module, press the **three dots** on the right, and then select '**Send Appointment Notification**'.

- **C.** A new tab will open showing the Patient's Dashboard and their relevant referrals. Select the appropriate referral by clicking on it.
- D. 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.

E. 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.

Tip: You can customize your Appointment Labels and the set a default Medium in your Directory Listing settings.



- F. To add more than one appointment, press the '+' button on the right hand side. To cancel or remove an appointment, select the '-' button.
- **G.** Type any **comments** for the referrer and patient into the text box, and press '**Add Attachments**' to include any file attachments.

Tip: You can create canned booking comments to increase efficiency.

H. 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).





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.

Received		
New		11
Pending Booking	ş	4
Booked Unconfi	rmed	1
Booked Confirm	ed	1
	Completed	

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

copy of the referral record will be automatically downloaded into the patient's chart in your EMR.

Note: If you are using Med Access, Accuro or OSCAR Pro, a final

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.

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Are referrals deleted after they are moved into the 'Completed' status folder?

Moving a referral into the 'Completed' status folder has no impact on how long the referral is stored in Ocean. Referrals are always kept for 365 days from the date the referral was sent OR for 30 days after the last appointment date (in the case of an appointment being that is scheduled after the 365-day default). For more details on Ocean's deletion rules, please see the article here.

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.