# 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

The diagram below outlines the key areas and functionalities in the eReferrals & eConsults view.
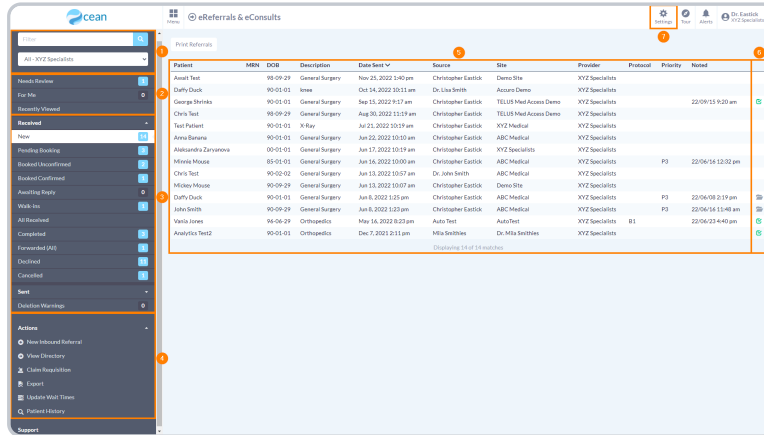


| | |
|---|---|
| **1. Filtering** | To find a specific referral, type into the search bar. You can search by patient surname, or the names of the related healthcare providers. |
| | If your Ocean Site owns multiple Directory Listings, you can filter by listing using the dropdown menu. |
| **2. General Folders** | The general folders are used to flag referrals that need to be reviewed, referrals that have been flagged for your specific attention, and referrals you have recently viewed. |
| **3. Status Folders** | The 'Received' and 'Sent' folders contain individual status folders which are used to organize referrals as they progress through their lifecycle. The specific purpose of each status folder is defined in this support article. |
| **4. Actions Menu** | Used for quick access and advanced functionalities, including creating manual inbound requests, launching the Ocean Healthmap, claiming a printed Ocean requisition, exporting your referrals, bulk updating your wait times, and viewing a patient's referral history. |
| **5. Patient Referral List** | Shows basic information about the patient referrals that match your currently selected folder and applied filter. |
| **6. Status Icons** | Used for quickly indicating relevant statuses and characteristics for each referral. A full legend for all icons is found in this support article. |
| **7. Settings Button** | Used for accessing the configuration options available for eReferrals & eConsults at your Ocean Site. |

## 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.
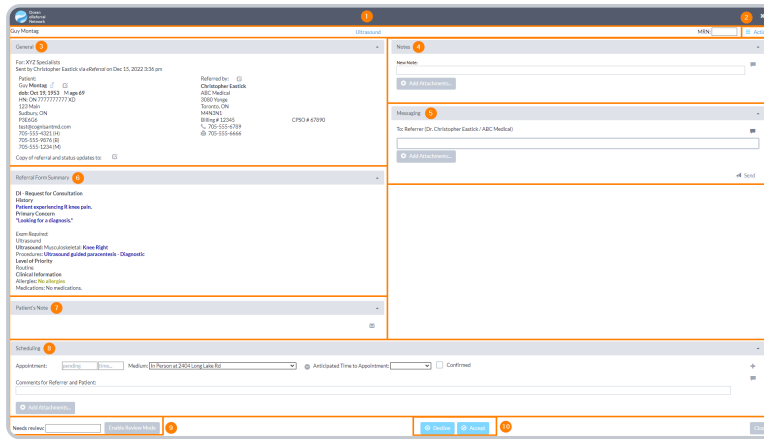
**1. Health Service Offering**
The patient's name, health service offering that they were referred for, and MRN number are displayed at the top of the referral.

**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.

**3. General**
Contains basic information 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.

**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.

**9. Needs Review**
Used to assign a referral to be reviewed by another user on your Ocean site.
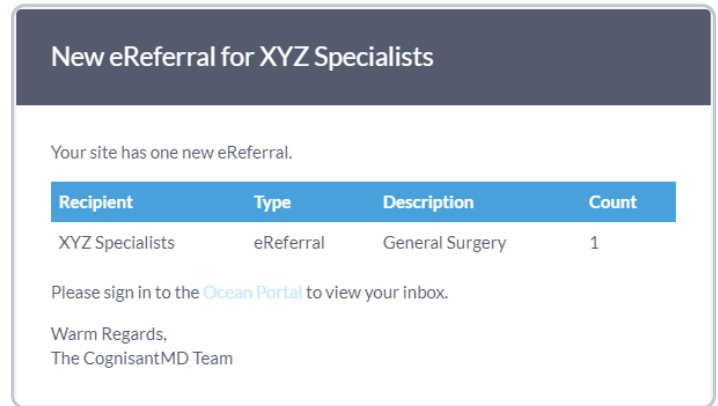
**10. Action Buttons**
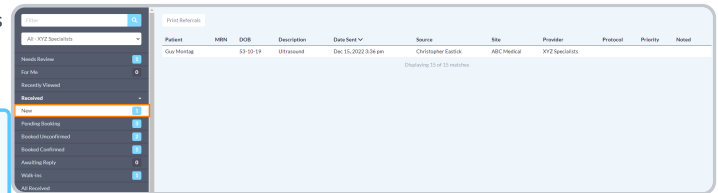Used to accept or decline the referral.

# 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 configuration.

**B.** Log in to the Ocean Portal, and use the menu to navigate to the 'eReferrals & eConsults' area.



**C.** Locate the eReferral under the '**Received**' tab and within the '**New**' status folder. Click on the referral to open it and view more details.

> **Tip:** Certain columns can be used to sort your referrals into ascending/descending order. Simply click the column header.



## 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 information you require.

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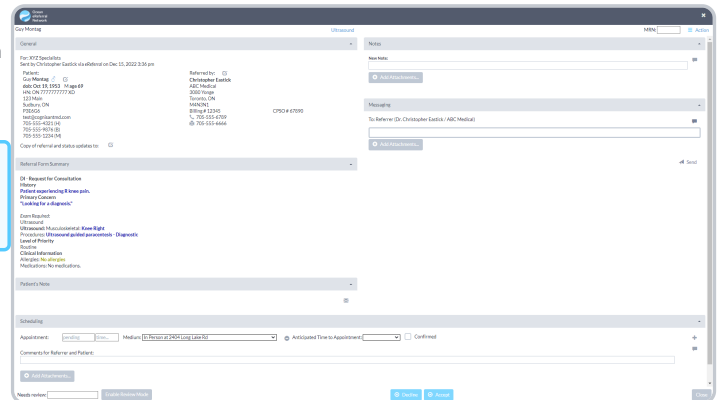


**B.** Use the '**Decline**' or '**Accept**' button at the bottom of the referral to indicate your decision.

# 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.
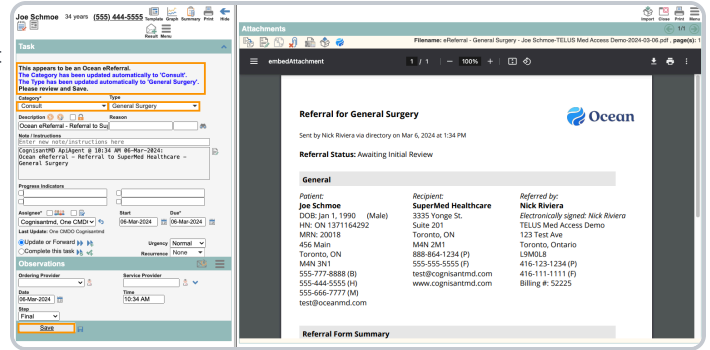


After reviewing the changes and making any other necessary adjustments to the Task, click '**Save**'. The Task will be automatically categorized into the '**Active Requests**' section of the corresponding '**Consults** ' or '**Investigations**' area of the patient chart.

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.
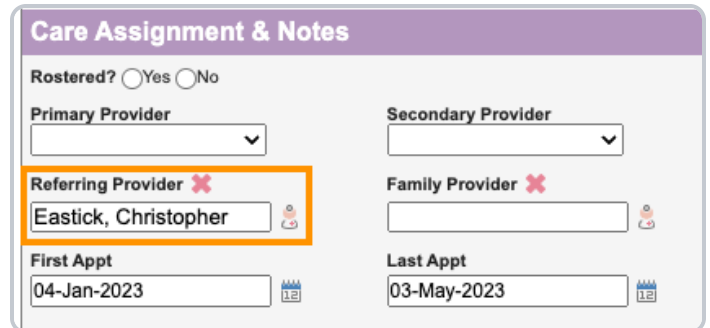


> **Note:** Ocean matches the referring provider's information with the Med Access address book using First Name and Last Name.
>
> If more than one provider exists in the Med Access address book with the same first and last name, Ocean uses the referrer's fax number to match with the correct provider.
>
> If multiple providers have the same first name, last name, and fax number, Ocean will not update '**Referring Provider**' field.
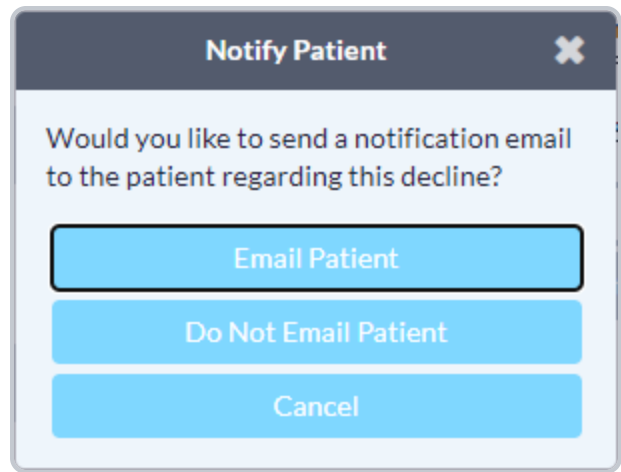>
> If multiple providers have the same first name, last name, but no matching fax number is found, Ocean will not update '**Referring Provider**' field.

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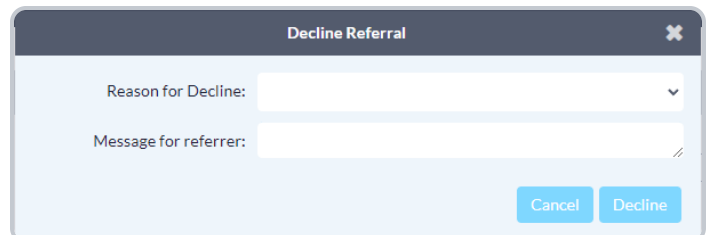
**B.** If the patient consented to email notifications, you can additionally choose whether or not the patient should also receive the declination email notification.

**Notify Patient** ✖

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.

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## 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.

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## 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.
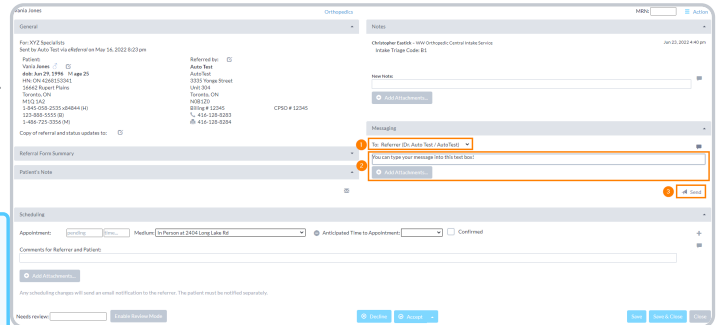
## Additional Message Functionalities

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.
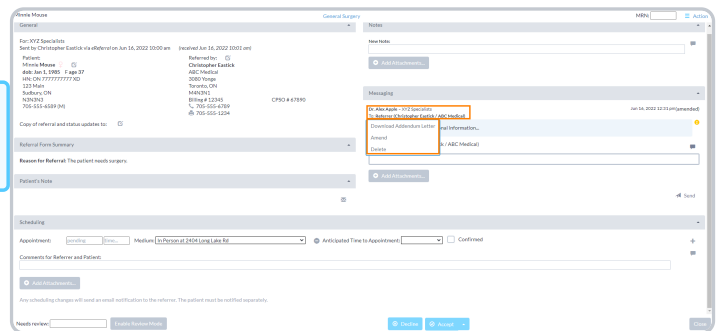
| | |
|---|---|
| **Download Addendum Letter** | Downloads a PDF document containing basic eReferral information and the selected message. |
| **Amend** | Copies the selected message into the new message text field, to allow for additional information to be added. |
| **Delete** | Deletes the message. |

# 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.
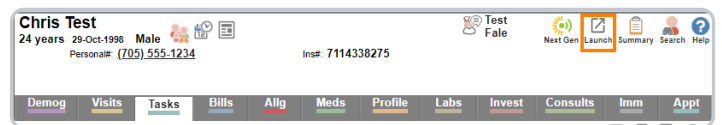
## Schedule the Appointment

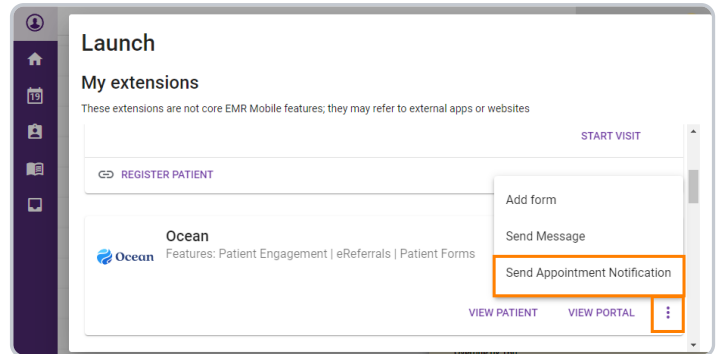**A.** Book the patient's appointment into the Med Access schedule.



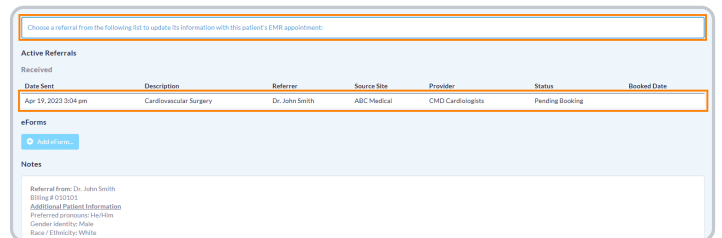## Update the Referral

**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.
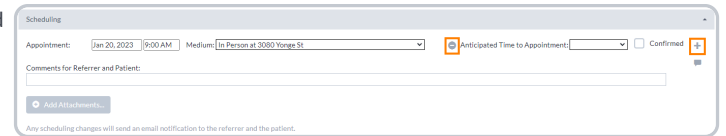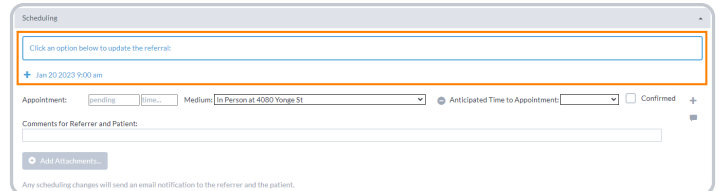


**E.** Optionally, update the '**Appointment Label**', the '**Medium**', and the '**Confirmed**' checkbox if the date and time were confirmed by the patient at the time of booking.
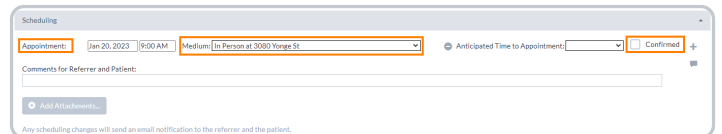


> **Tip:** You can customize your Appointment Labels and the set a default Medium in your Directory Listing settings.

**F.** To add more than one appointment, press the '**+**' button on the right hand side. To cancel or remove an appointment, select the '**-**' button.
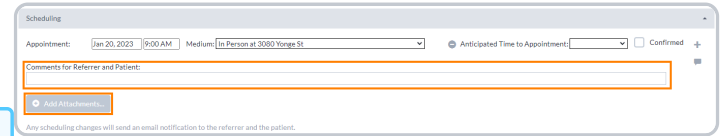


**G.** Type any **comments** for the referrer and patient into the text box, and press '**Add Attachments**' to include any file attachments.



> **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).
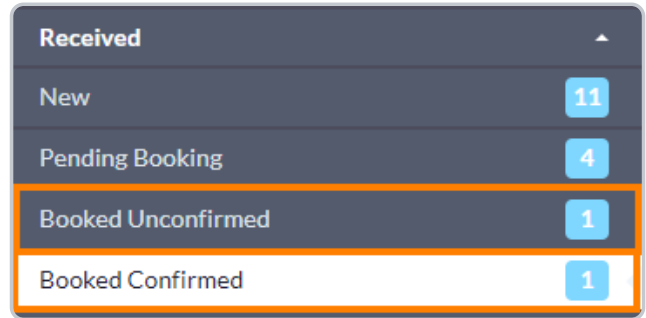
# Completing the Referral

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.



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



> **Note:** If you are using **Med Access**, **Accuro** or **OSCAR Pro**, a final copy of the referral record will be automatically downloaded into the patient's chart in your EMR.
>
> 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.
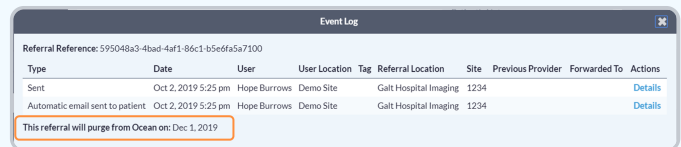
# Advanced Features and Best Practices

> **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.