Guide to Receiving eReferrals (for PS Suite Users)

1. Importing eReferral Requests into Your EMR	Learn how to import notes from eReferral requisition forms from the eRequests tab of the Ocean Portal into the patient's chart in your EMR.
2. Managing Incoming eReferrals	Learn about where eReferrals appear and move within the eRequests tab of the Ocean Portal, as well as how incoming eReferrals can be managed.
3. 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.
4. Creating Inbound Requests	If your Ocean site receives referrals by phone or fax, you can convert these into Ocean eReferrals by creating an inbound Website form requests.
5. Managing eReferral Wait Times	Learn how Ocean automatically calculates wait times for health services and how you can specify your own instead.
6. 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.
7. Accessing eReferral Analytics	Ocean sites receiving eReferrals can access analytics data about eReferrals received over time by downloading a report from the Admin tab of the Ocean Portal. Since referral analytics do NOT contain any patient health information, they are always maintained within Ocean, which means that analytics data can be accessed and downloaded at any time.

Importing eReferral Requests into Your EMR

After you've accepted an eReferral, an "**Import**" window will appear.
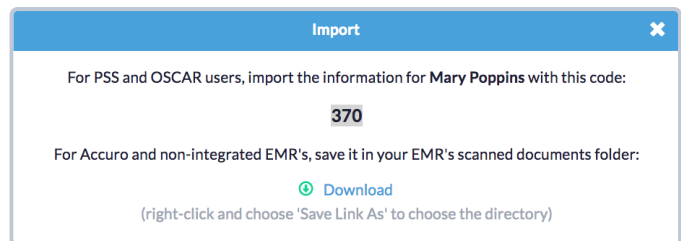
If you are an **PS Suite** or **OSCAR** user, and you have a patient chart with matching demographic data, you should have a quick "**Import**" link on the Ocean toolbar in your EMR, which will allow you to import a patient's eReferral using the reference number provided.
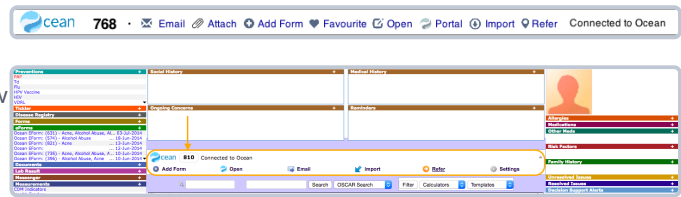
The patient demographic fields will automatically update in the patient's chart when you import their eReferral data.

For more detailed instructions on how to import patient notes from the eRequests tab into a patient's chart in your EMR, please refer to "Importing Website Form Submissions from the Ocean Portal to an EMR".

Managing Incoming eReferrals

You can view and manage all of your received eReferrals from the eRequests tab of the Ocean Portal.

Simply click on the patient to manage its next steps, including triaging the referral, accepting the referral, booking an appointment for the referral, sending a message to the referrer, etc.

A. Once you receive a **new eReferral** or if there is a **status change** in any of your eReferrals, your clinic's indicated referral notification email address will be sent a **notification email**. Please refer to the "eReferral Notification Email Rules" article to learn more about who, when, and why Ocean eReferral notification are sent.

B. The **referred patient** will also be sent email updates about their eReferral, provided that an email address was included in the original referral and the referral indicates that patient consented to be contacted via email.

C. All incoming eReferrals will appear in under the eRequests tab in the Ocean Portal.

> **Note:** Please review "What do the Different eReferral Inboxes Mean?" to learn more about the different inboxes that are used to manage eReferrals.
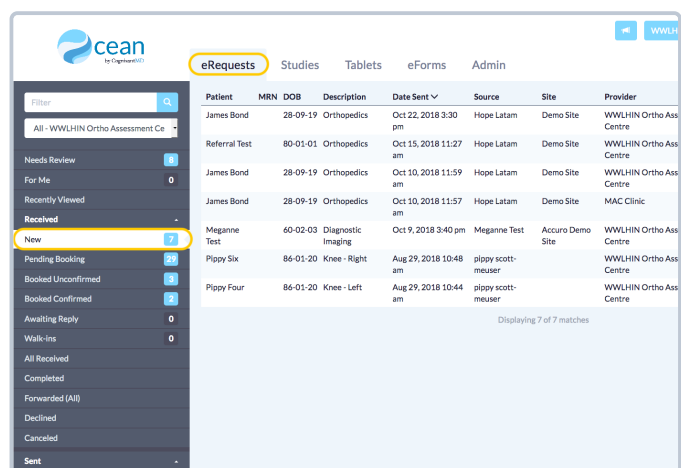
D. There are several features available to help isolate specific referral(s). The "**Filter**" search box allows you to search by patient surname, referring clinician name, or provider name. The listing dropdown menu allows you to choose referrals for a specific listing or health service offering within that listing. You may also sort referrals by the "**Description**", "**Date Sent**", "**Source**", "**Site**", "**Provider**", "**Protocol**", "**Priority**", or "**Noted**" columns. Click the column description once to sort the referrals in ascending values, and click it again to sort them in descending values.

E. Click anywhere on the line of your selected referral to open it.

> **Note:** To learn more about the various icons and buttons you will see when managing incoming eReferrals, please review "What do the Icons and Buttons in eReferrals Mean?"

F. If the patient demographic information requires correction, click the icon beside their name to update these fields. Use the "**Accept**" or "**Decline**" buttons to accept or decline the referral.

> **Note:** This will move the referral to your **Pending Booking** or **Declined** inbox depending on which option is selected.

G. If the referral requires review by another user at your site, use this button to select the individual and notify them.
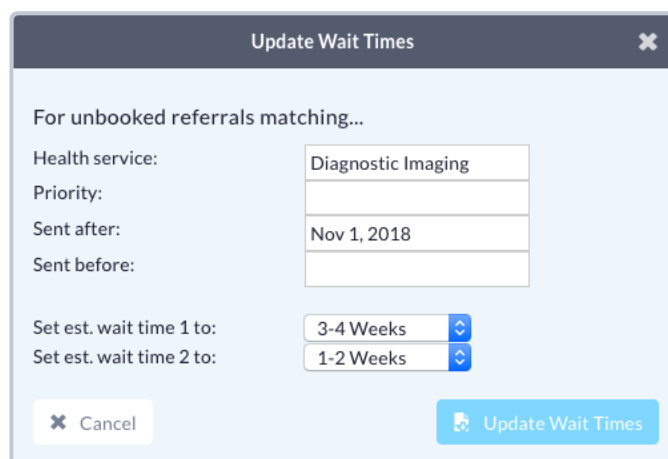
> **Note:** This action will move the eReferral to your **Needs Review** inbox.

H. Use the scheduling pane to enter the patient's appointment information and any relevant booking notes. If the appointment has already been confirmed with the patient, select the checkbox.

> **Note:** This will trigger a message to the patient and referrer including the appointment date and time as well as any additional messaging included in the text box or attachments that have been indicated. If the appointment has not been confirmed, the patient will have the option of confirming the appointment electronically.

I. If an appointment can not be scheduled right away, you can communicate an estimated wait time to the referring provider by selecting it from the "**Estm. Wait:**" drop down menu in the scheduling pane. This action will update the status of the referral for the referring provider but will not trigger an email notification unless booking comments are added.

J. To update wait times for multiple referrals at once, select "**Update Wait Times**" from the "**Actions**" menu in the eRequests tab. Enter the health service you would like to update along with the updated wait times. You may optionally specify the priority or dates to limit the update to apply only to specific referrals.
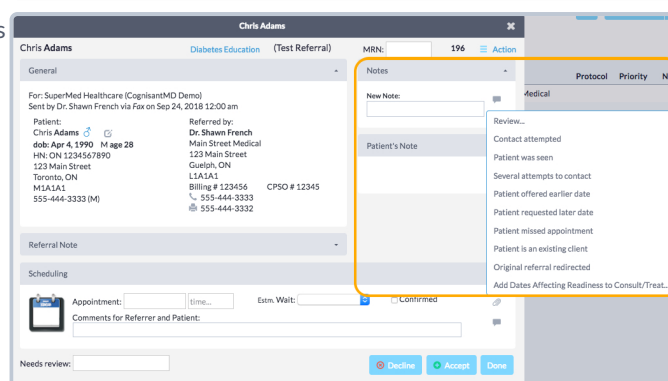
K. Use this action menu to access additional functions available to you, such as printing, downloading, or exporting the referral. You may also forward, cancel, or delete the referral from this menu. If the referral has been forwarded incorrectly, you may also revoke the forwarded referral here. Other options include adding a related (child) referral, viewing past referrals for this patient, moving the referral to your **Awaiting Reply** inbox, or marking/ unmarking it as a test referral. You may also view the referral event log that indicates any action that has been completed on the referral from this menu.

L. Add a note to the referral using free text or one of the options from the drop-down menu here. You may also triage the referral using the "**Review...**" option.

M. You may exchange information securely with the referrer using the Messaging pane of the referral. Enter any text, canned responses, or attachments you would like to send and then press the "**Send**" button. The recipient will then be notified of your message by email and may log in to the Ocean portal to view it securely.

Viewing a Patient's Referral History

For sites **receiving** eReferrals, it may be valuable to know if the patient has been referred to your site before, and some details of the previous referral(s). Fortunately, you can view a patient's "**Referral History**" directly from the eRequests tab of the Ocean Portal.

> **Note:** A health card number and birth date **must** be included in the referral, in order for Ocean to identify the patient's referral history. This is because these two values are used to generate a unique patient identifier that is stored in Ocean with the referral.

The "**Referral History**" captures the following referral information: **Description**, **Status**, **Referring Site**, **Booked Date**, **Referral Date**, **Referrer**, **Provider**, **Protocol**, and **Priority**.

Similar to referral analytics, because this referral history contains no patient health information (PHI), this data is **not** purged from Ocean over time. This means that if you were to receive a referral for a patient today, their referral history can still be viewed ten years from now.

If a previous referral is still in Ocean at the time that it's viewed, this referral **can be selected** from the "Referral History" window. This will open the referral, allowing you to view further details about this referral.

There are **three methods** to view a patient's previous referral(s) (i.e. "Referral History"), as outlined below.

"Open File" Icon

When viewing referrals under the eRequests tab of the Ocean Portal, there may be an "**Open File**" icon displayed on the far right hand side of the referral.

This is a **quick flag** to indicate that there was at least one previous referral for the patient at your site. Simply **click this icon** to open and view the patient's referral history.

Action Menu

If you already have a specific patient's referral open, the referral history can be accessed from the **Action menu** at the top right corner of the referral.

Simply open this **Action menu** and then select "**Referral History**" to see if there were any previous referrals at your site for that patient.
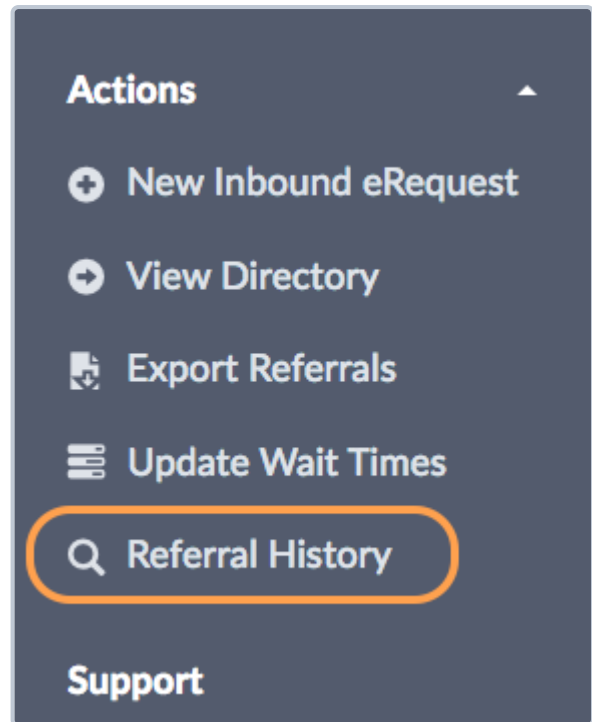

Referral History Search

If there is **no referral** for a specific patient currently sitting in the eRequests tab of your Ocean Portal, you can still **search** for that specific patient's referral history.

This is useful if you have received a referral via fax and would like to see if there are records of any previous referrals for this patient in Ocean, for example.

To search for a patient's referral history, go into the eRequests tab of the Ocean Portal. From the **Actions menu** at the bottom left, select "**Referral History**".

Actions ▲

⊕ New Inbound eRequest

⊙ View Directory

📄 Export Referrals

▤ Update Wait Times

🔍 **Referral History**

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Enter the patient's **birth date** and **health card number**, then select "Search".

Referral History Search ✕

Birth Date:
Health Number (numbers only)

✕ Cancel   🔍 Search

If **no previous referrals** are found, you will see a pop-up window, informing you as such.

No Matching Referrals ✖

No referrals matched this patient information.

OK

Otherwise, the "**Referral History**" window will appear.

Referral History for Max Rockatansky ✕

Description	Status	Referring Site	Booked Date	Referral Date	Referrer	Provider	Protocol	Priority
MRI Brain	- Appointment: Jul 31, 2017 at 2:30 PM - The referral was marked by its recipient as complete.	Demo Site	Jul 31, 2017 2:30 pm	Jul 31, 2017 9:29 pm	Dr. Douglas Gordon Kavanagh	Galt Hospital Imaging		
X-Ray / Radiography	Awaiting Initial Review	Demo Site		Apr 18, 2018 2:29 pm	Douglas2 Gordon Kavanagh B.S.E., M.D., C.C.F.P.	Galt Hospital Imaging		
Bone Mineral Density; X-Ray / Radiography	Awaiting Initial Review	Demo Site		Apr 18, 2018 2:54 pm	Douglas2 Gordon Kavanagh B.S.E., M.D., C.C.F.P.	Galt Hospital Imaging		
MRI Head and Neck	Booked - Appointment: Aug 24, 2017 at 3:30 PM - Archived	Demo Site	Aug 24, 2017 3:30	Aug 14, 2017 9:52	Dr. Douglas Gordon Kavanagh	Galt Hospital		☀

Creating Inbound Requests

If your Ocean site receives referrals by **phone or fax**, you can convert these into Ocean eReferrals by creating an **Inbound Website Form Request** by following the steps outlined below.

A. Log in to the Ocean Portal and navigate to the **eRequests tab**.

B. Expand the "**Actions**" menu at the bottom left and select "**New Inbound Referral**".

C. Select the **source** for the new referral.

D. If there are **multiple listings** tied to your site, you will be prompted to select which listing the referral was directed to.

E. Complete the patient information and all relevant fields on the referral form, including the date the referral was sent if it differs from the current date.

F. Enter the referrer's information or click "**Import…**" to auto-populate the information from the referrer's directory listing.

Referrer's Information	Import…

Site Name:
Address: line 1 / line 2
City:
Province:
Postal Code:

Phone:
Fax:
Billing #:
Professional ID:
Referrer: *title and name*
Clinician Type:
cc:

G. To import the referrer, type their name into the text box and choose their listing from the list of results.

> **Note:** If any information requires updating, update these fields in the "**Referrer's Information**" pane of the eReferral and it will be saved for next time.

Import Referrer Information From Listing

Referrer: Dr.

Name	Address	Wait Time	Distance
Dr.J.Scott Peaker	14 Elm St		
Dr.Khurrum Ashraf	55 Northfield Drive East		
Dr.Stan Waese Orthodontics	4800 Leslie St #204		
Dr. Abdullah Alobaid	399 Bathurst Street UHN Toronto Western Hospital - Division of Neurosurgery		
Women's College Reserach Institute	790 Bay Street		

Matching Listings (10)

Cancel

H. When all of the information for the referral has been entered, click the "**eRefer**" button in the bottom right corner of the window.

I. The eReferral will now appear in the "**New**" inbox in the eRequests tab of your Ocean Portal. These inbound eReferrals can be managed in the same way as any other Ocean eReferral, with the exception that **NO** referral notifications will be sent to the referrer through Ocean.

Ocean by CognisantMD

WW Diabetes Central Intake Service — Ingrid Cheung

eRequests | Studies | Tablets | eForms | Admin

Filter
All - WW Diabetes Ce

	New	5
	Deletion Warnings	
	Outstanding	18
	Needs Review	2
	For Me	0
	Forwarded (New)	2
	Pending Booking	17

Patient	DOB	Description	Date Sent ⌄	Source	Provider	Priority	Noted
Inbound Test	96-06-07	Diabetes Education	Mar 6, 2018 4:17 pm	Dr. Smoke Test			
Smoke Test	90-05-04	Diabetes Education	Feb 12, 2018 3:33 pm	Hope Latam			
Decimals Test	01-01-01	Diabetes Education	Feb 12, 2018 11:13 am	Hope Latam			
Hope Latam-Test	91-08-19	Diabetes Education	Nov 6, 2017 10:52 am	Hope Latam	WW Diabetes Central Intake Service		17/11/06 10:53 am
ReportAnalytics TestSiteName	00-01-01	Diabetes Education	Oct 11, 2017 10:43 am	Test Doc	WW Diabetes Central Intake Service		

Managing eReferral Wait Times

Ocean automatically calculates wait times on a nightly basis for each health service offering in your listings. Ocean uses **eligible eReferrals** sent over the past six months for the calculations.

> **Note:** Some eReferrals are excluded from wait times if there are notes entered in the referral that indicate the appointment was delayed by patient availability. If there are any dates affecting readiness to consult and treat entered, those periods will be removed from the wait times as well.

To view the wait times for your directory listing(s), navigate to that listing in the Ocean Portal and complete the steps below.

A. Select the **directory listing** and **health service offer** that you would like to view the wait times for.

B. In the **offer details**, click the wait time next to Wait Time 1 or Wait Time 2 depending on which wait time you would like to view.

C. From this window, you can view Ocean's calculated wait times and the details about how they were calculated.

D. If you would like to specify a different wait time than the one that was calculated automatically, use the drop down menu beside **Claimed Wait Time** to choose the appropriate option.

> The Ocean Healthmap will display wait times in a new feature coming soon!

> **Note:** You can also view individual wait times using your eReferral Analytics.

Backing Up Your eReferrals

As Ocean eReferrals are purged from the Ocean Portal over time, it is recommended that you **keep a backup** of the referrals received at your site. This can be done on a weekly basis, by following the steps below:

A. Log in to the Ocean Portal and navigate to the eRequests tab.

B. Expand the **Actions** menu at the bottom left. Then select "**Export Referrals**".

Actions ▲

⊕ New Inbound eRequest

➔ View Directory

🖪 Export Referrals

☰ Update Wait Times

🔍 Referral History

Support
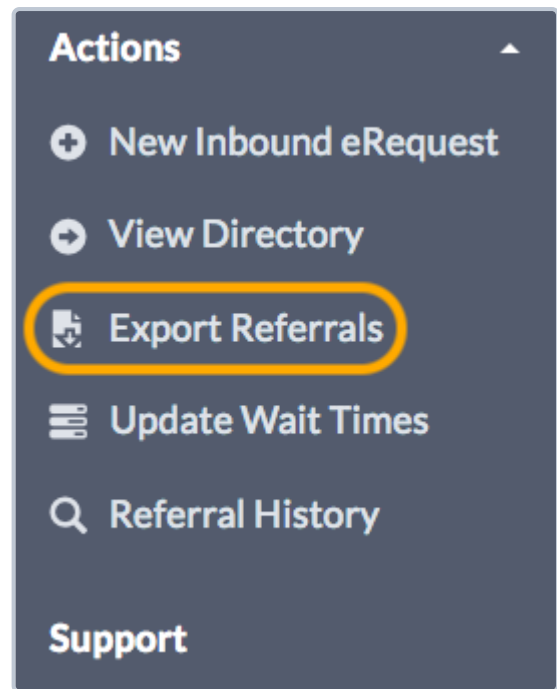
C. Select your **start and end date** for your export. You can either download data within a specific date range, view all data since you started receiving referrals to a specific date (select just an end date), all data from a specific date onwards (select just a start date), or all data since you started receiving referrals (leave both dates blank).

Referrals Export ✖

From: [   ]
To: [   ]

☑ Export unexported referrals only
☑ Mark referrals exported

✖ Cancel   🖪 Export

D. Select "**Export unexported referrals only**" if you would only like to export referrals that have not been previously backed up. If you want to export all referrals in the Ocean Portal, uncheck this box.

E. Select "**Mark referrals exported**" to mark the referrals as backed up, once you've completed the export. This will add a green checkbox icon beside the referral in the Ocean portal, once the export is completed.

18/04/17 1:17 pm ☑

Note: If this box is left unchecked, the next time the export is done, the previously exported referrals will be pulled once again.

F. Finally, click **"Export"**. This will export your data in a **.csv file** that can be opened using Microsoft Excel.

Final Comments:

The referral export will contain patient health information and should be stored somewhere securely at your site.

Referral information pulled in the export includes; referral reference, patient name, description, status, referral date, booked date (if present), referring site, recipient site, clinician, professional ID, patient phone number, patient email, internal comments, referrer comments, and the entire contents of the referral note.

The API also provides access to this referral information. For more details, please refer to: "Ocean Open API".

Accessing eReferral Analytics

Ocean sites receiving eReferrals can access their Referral Analytic Data at any time, from the Ocean Portal under the Admin tab. Note that referral analytics do not contain any patient health information and are maintained within Ocean. So even though the Ocean eReferral itself will be purged from Ocean over time, you will always be able to access the referral analytic.

To access these analytics, follow the steps outlined below:

A. Log in to the Ocean Portal and navigate to the Admin tab.

B. Select the "**Reports**" section from the menu along the left.

C. Under the "**Export Referral Analytic Data**" section, select the date range for referrals. You can either download data within a specific date range, view all data since you started receiving referrals to a specific date (select just an end date), all data from a specific date onwards (select just a start date), or all data since you started receiving referrals (leave both dates blank).

D. Then select the desired file type. **"All"** will pull all referrals received by your site, including master, test, and deleted referrals. A **"Clean"** file type will remove these referrals, giving you a clean data set to work with.

E. Finally, select the "**Export**" button. This will export your data in a **.csv file** that can be opened using Microsoft Excel. For more information about each analytic field, please refer to: "Supporting Analytics in eReferral eForms".

Note: Referral analytics can also be accessed through our Ocean API. For more details, please refer to: "Ocean Open API".