

# Send, Track & Manage eReferrals from OSCAR

The Ocean eReferral Network makes it easy to find a healthcare provider, send secure patient referrals electronically, and track the status of a referral, all from your EMR.

With eReferrals, you can eliminate paper and faxes, while reducing errors and rejected requisitions to help provide better access to care for your patients.

## When sending eReferrals with Ocean, you get:

- Intelligent eReferral forms that automatically incorporate best evidence to improve referral appropriateness and reduce rejected referrals;
- Secure messages between the referring provider and the referral recipient;
- Automatic referral status updates in the patient chart;
- A web-based, searchable directory of all healthcare professionals and health care service delivery locations based on the Ontario Provincial Provider Registry with wait time data;
- Automated patient alerts to keep patients informed about the status of their referrals.

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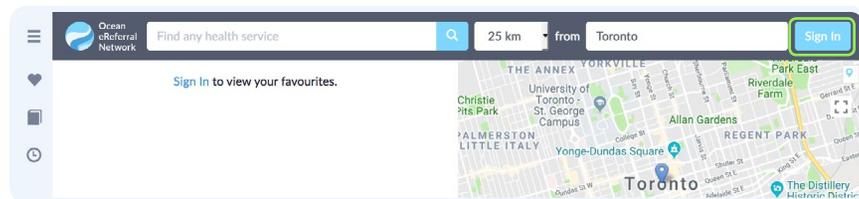
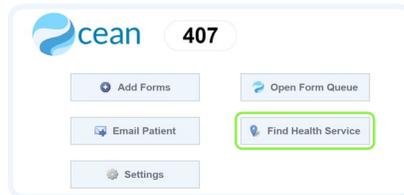
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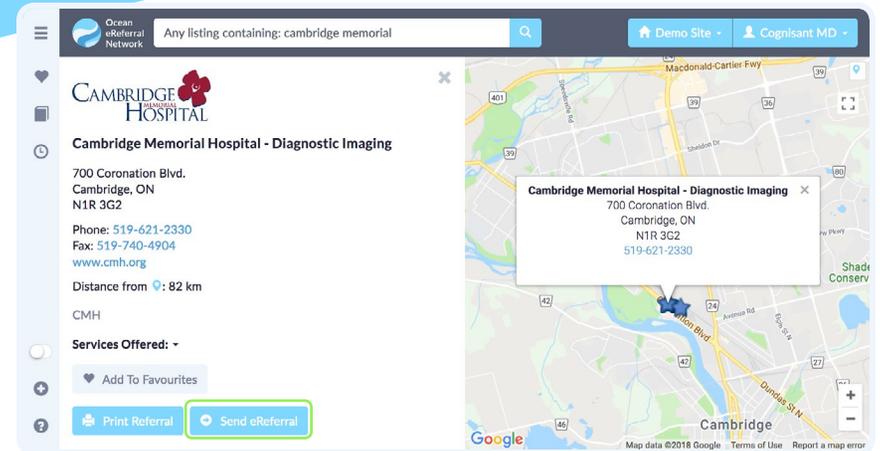
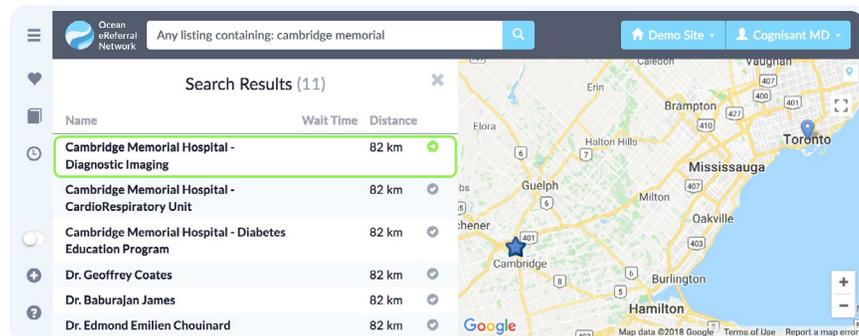
# Sending an Ocean eReferral from OSCAR

Please confirm that your EMR is fully integrated with Ocean and that you have your Ocean user name and password ready before sending your first Ocean eReferral.

- 1 Open the “Encounter” window for the patient you wish to send an eReferral and launch the “Ocean eForm”.
- 2 Within this eForm, click the “Find Health Service” button.
- 3 A web browser window will open to display the Ocean Healthmap directory.
- 4 Log in with your Ocean user credentials if your user name does not appear in the top right.



- 5 Find the appropriate service or provider using the search bar, directory, or favourites menu.
- 6 Click on the provider name to open the directory listing details page. Listings accepting eReferrals are indicated with a green arrow icon.



- 7 Click “Send eReferral” from the directory listing details page to launch the referral form.
- 8 Patient contact information and other required details will be automatically pre-populated. Complete the remaining fields.
- 9 Click “eRefer” to send the referral. If required details are missing, the form will alert you before allowing you to complete the process.
- 10 You will be asked to confirm or deny whether your patient has consented to receive alerts via email to provide updates about referral status including booking.
- 11 A referral summary window will appear with the option to print a copy of the referral for the patient.
- 12 Back in OSCAR, click the “Download” button from the Ocean Toolbar, which will populate the eReferral information into the progress notes section of the patient’s Encounter window.
- 13 When the status of the eReferral changes, the Ocean eReferral will automatically be updated in the Ocean Portal and can be viewed directly from the Ocean Toolbar in the patient’s Encounter chart.



# Managing eReferrals

With Ocean eReferrals, you can access a shared view of the referral in real time, allowing you to update the referral, add notes and send or receive messages to and from referral recipients.

To access the eReferral window, open the “Encounter” window for the patient. Click the “eReferrals” link **1** on the Ocean toolbar to open the patient’s Ocean dashboard. Next select “View” **2** beside the referral you wish to open.

## Cancel or resubmit a referral

Using the “Action” drop-down menu **3**, you can cancel an existing referral or resubmit a referral that was previously declined or cancelled.

## Edit or update referral details

In the “Referral Note” **4** section you will find an “Edit...” button **5** allowing you to adjust or add details to the existing fields. If an eReferral receiver requests more details, this is where you will need to update that information.

## Communicate with referral recipients

In the “Messaging” **6** section of the eReferral window, type a message and click “Send” **7**. If the referral has been forwarded (eg. central intake referrals), you can select the appropriate recipient from the drop-down menu. Any messages from the referral recipient can also be viewed here. In the case of a new message, you will also be notified via email.

The screenshot displays the Ocean eReferrals interface. At the top, a toolbar shows the Ocean logo, the number 407, and a notification: "Available notes have been downloaded" with a plus icon and "1 eReferrals". A green circle with the number 1 points to the "eReferrals" link.

Below the toolbar, the patient's profile is shown for "Jesse Andrews" (Ocean Ref #: 407). The profile includes the Ocean logo, birth date (Mar 12, 1990), age (28), phone number (222-343-6767 (M)), and address (Yonge St, Toronto, ON M4N 3N1). A green circle with the number 2 points to the "View" button next to the referral.

The "Active Referrals" section shows a referral to "Cambridge Memorial Hospital for X-Ray". A green circle with the number 3 points to the "Action" dropdown menu.

The "Referral Note" section (4) contains patient information and referral details. A green circle with the number 5 points to the "edit..." button. The patient information includes: Patient: Andrews Jesse (male), dob: Mar 12, 1990, M age 28, Yonge St, Toronto, ON M4N 3N1, 222-343-6767 (M). Referral resides with: Cambridge Memorial Hospital, 700 Coronation Blvd., Cambridge, ON N1R 3G2, 519-621-NNNN, 519-740-NNNN.

The "Scheduling" section (6) shows an appointment initially scheduled for Jul 10, 2018 11:00 am. A green circle with the number 7 points to the "Send" button in the messaging section.

The "Messaging" section (6) shows a message to "Cambridge Memorial Hospital" with a "Send" button.

## Frequently Asked Questions

### How do I know which providers in the directory are accepting eReferrals?

Providers in the Ocean eReferral Network directory that accept eReferrals will appear at the top of your search and will be displayed with a green arrow icon next to them.

### What if a patient doesn't receive an eReferral confirmation email?

When completing an eReferral, ensure you select **"Patient has consented to receive email notifications."** If this option was selected during the referral and the patient is still not receiving any messages, verify the confirmation email has not been accidentally sent to their spam folder.

### Can I see which patients have confirmed their appointment times?

Yes. You can log into the Ocean Portal by clicking on the **"Portal"** option on the Ocean Toolbar or clicking on the Ocean eReferral Logo in an eReferral window. On the **"eRequests"** tab, you see the status of your eReferrals, grouped in folders. You can search any of the folders, including **"Booked Confirmed"** and **"Booked Unconfirmed"** to confirm a patient's current status.

### How long are referrals stored in Ocean?

- 60 days after the creation date for all referrals left in the **"New"** tab
- 6 months after the creation date for all **"Accepted"** referrals
- **"Accepted"** referrals with a booked appointment are stored for 6 months after the creation date or 30 days after the scheduled appointment (the longer period applies)

For more information, visit [ocean.tips/eref-storage](https://ocean.tips/eref-storage)

### What actions trigger email notifications for the sender and the patient?

- Appointment date is booked, removed, or changed
- Booking comments are added or changed
- The referral is forwarded, canceled, or declined.
- A secure message is sent to the referrer (patients do not receive this message)

For more information, visit [ocean.tips/eref-notify](https://ocean.tips/eref-notify)

# Troubleshooting & Resources

Need help or more details  
concerning eReferrals?

Ocean eReferral Network Resources  
[ocean.tips/eref-send](https://ocean.tips/eref-send)

eReferrals FAQ  
[ocean.tips/eref-faq](https://ocean.tips/eref-faq)

Ocean eReferrals Support  
[ocean.tips/eref-support](https://ocean.tips/eref-support)

## **Want to learn more about the Ocean Platform?**

Visit the CognisantMD website  
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