Ocean
eReferral
Network

Send, Track & Manage eReferrals from Telus PS Suite

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.

Sending an Ocean eReferral from Telus PS Suite

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** Click on the "**Refer**" button on the Ocean Toolbar in the patient record.

2 A web browser window will open to display the Ocean Healthmap directory.
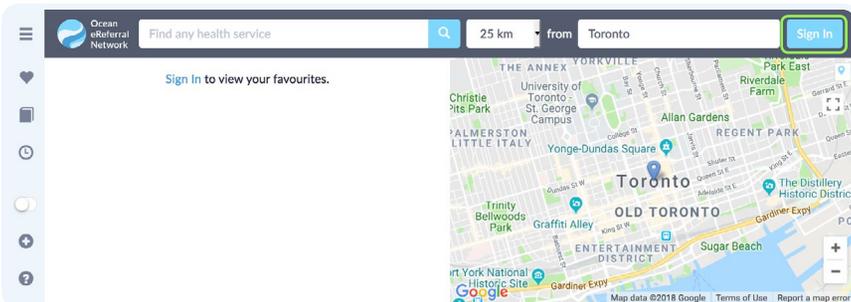
3 Log in with your Ocean user credentials if your user name does not appear in the top right.

4 Find the appropriate service or provider using the search bar, directory, or favourites menu.

5 Click on the provider name to open the directory listing details page. A green arrow icon indicates the listing accepts eReferrals.
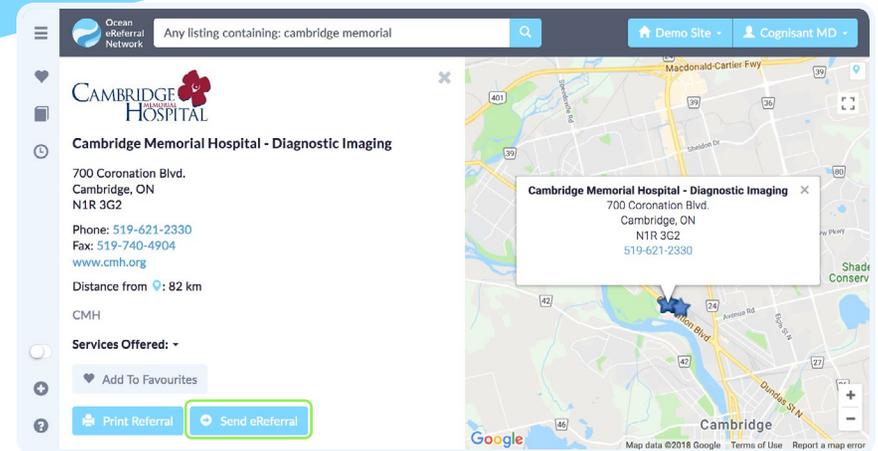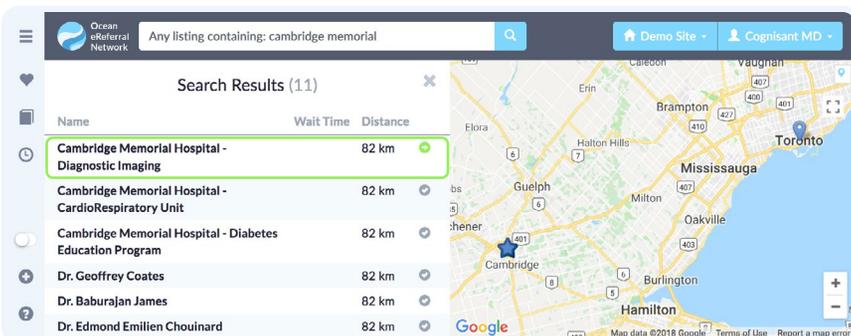
6 Click "**Send eReferral**" from the directory listing details page to launch the referral form.

7 Patient contact information and other required details will be automatically pre-populated. Complete the remaining fields. If required, notes or attachments from the patient chart can be attached using Ocean's "**greenbar attach**" feature in PS Suite (see **Managing eReferrals** for more details).

8 Click "**eRefer**" to send the referral. If required details are missing, the form will alert you before allowing you to complete the process.

9 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.

10 A referral summary window will appear with the option to print a copy of the referral for the patient.

11 The referral note and Ocean eReferral form are automatically downloaded into the patient chart. An internal PS message can also be triggered to the PS user/group of your choice, so they can follow up on the referral, in the specified number of days.

12 When the status of the eReferral changes, the Ocean eReferral form in the patient chart will automatically be updated. You can access and review the status at any time from the patient 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, click the "**Open**" ① button on the referral patient note in your EMR.

Cancel or resubmit a referral

Using the "**Action**" drop-down menu ②, 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**" ③ section you will find an "**Edit...**" button ④ 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**" ⑤ 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.

Add chart notes or attachments to a referral

To add notes or attachments from the patient chart, you can use Ocean's "**greenbar attach**" feature from PS Suite by clicking the checkbox next to the patient's note sections you wish to attach in the patient record. Click the paperclip icon on the Ocean toolbar. This will save a temporary PDF file on your computer desktop, which you can then attach to the eReferral form. This can be done from the "**Messaging**" ⑤ section of the eReferral window by clicking on "**Choose Files**/**Browse**" ⑥.

Advanced eReferral Features in Telus PS Suite

Saving Referrals for Future Completion

A referrer may choose to save the initial information entered for referral prior to the submission of the referral. The referral may be accessed directly from the patient's chart later on.
Learn more here: ocean.tips/eref-save

Using the Messaging Module in PS Suite

Ocean can send a message to clerical staff to ensure that the referral is successfully followed up and booked appropriately.
Learn more here: ocean.tips/eref-followup

Using the Pending Consult Module

Ocean can create a pending consult note within the chart to facilitate the tracking of the referral. The use of pending consults allows participating clinics to take advantage of a unified workflow for safely managing both faxed and electronic referrals.
Learn more here: ocean.tips/eref-consults

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

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

Troubleshooting & Resources

**Need help or more details
concerning eReferrals?**

Ocean eReferral Network Resources
ocean.tips/eref-send

eReferrals FAQ
ocean.tips/eref-faq

Ocean eReferrals Support
ocean.tips/eref-support

Want to learn more about the Ocean Platform?

Visit the CognisantMD website
www.cognisantmd.com

Sign up for our newsletter
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Stay up to date on new features and
product updates by following the
Ocean product release notes here:
ocean.tips/updates

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