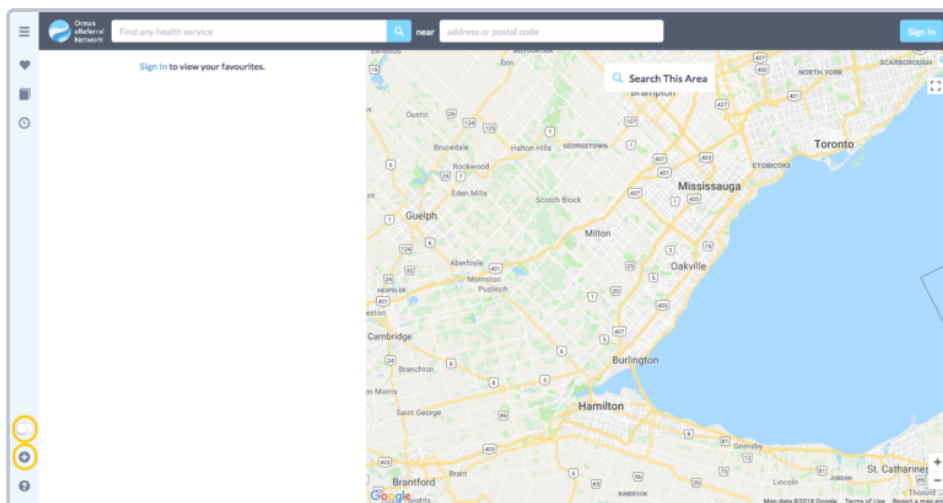


Set Up Your Site to Receive eReferrals

1. Find or Add Your Site to the Ocean eReferral Network	If your site isn't already listed on the Ocean Healthmap , you will need to create it so that eReferral senders can find your site.
2. Claim Your Site	<p>Once your site has been created on the Ocean Healthmap, you will need to claim it so that it is linked with your Ocean site.</p> <p>Once you've claimed your site, please let us know at ocean.tips/support so that we can validate your site as a legitimate clinic for accepting patient data.</p>
3. Confirm Your eReferral Site Settings	<p>Once we have validated your site, log in to your Ocean Portal and navigate to the Admin tab to ensure that your directory listing is correct and that you are ready to accept eReferrals.</p> <p>You can now start receiving eReferrals immediately.</p>
4. Set Up eReferral Notification Email(s) (for Receivers)	Configure which email addresses receive email notifications for new or updated eReferrals and/or eRequests.
5. Creating Canned Responses for eReferral Bookings and Messages*	You can optionally choose to set up canned messages that can be sent to the patient in advance of their appointment and/or that can be sent to the referrer.
6. Supporting Analytics in eReferral eForms*	The Ocean eReferral platform provides some analytics automatically to help provide an understanding of referral patterns, decline rates, wait times, etc. If you would like to set up your referral form to set additional analytics values now is a good time to do so.
7. Set Up eReferrals on Your Website*	Once you're set up to receive eReferrals, you can optionally choose to set up Website Forms on your website to accept Ocean eReferrals from both your website and the Ocean Healthmap .
8. Set Up Your Site to Receive Walk-Ins*	If you are a receiving site that accepts walk-in patients, you will want to enable the "Accept Walk-In" feature in your site.

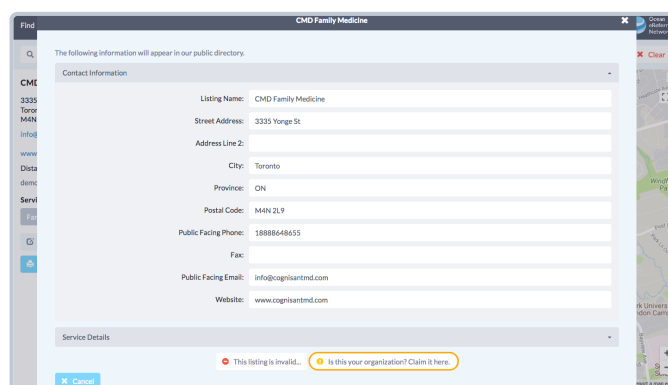
[Find or Add Your Site to the Ocean eReferral Network](#)

- 1 Visit the [Ocean Healthmap](#) and search for your site.
- 2 If your site doesn't exist already, select the **plus sign** icon at the bottom left of the screen, enter your information, and save the listing.
- 3 If you would like to find a demo or test listing, click on the **toggle** at the bottom left of the screen and continue your search.



Claim Your Site

- A. Search for your site in the [Ocean Healthmap](#) again and select **"Update listing..."**. If necessary, update your listing information.
- B. Then, click **"Is this your organization? Claim it here."** and save your listing.
- C. Once you've claimed your site, let us know at [ocean.tips/support](mailto:info@ocean.tips/support) so that we can validate your site as a legitimate clinic for accepting patient data.



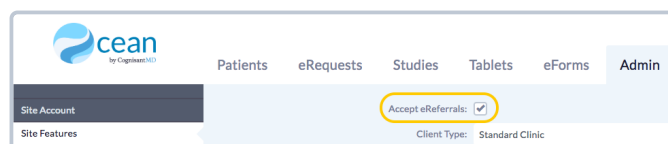
Confirm Your eReferral Site Settings

1. Confirm your listing has been validated

Once your listing has been [validated](#) by CognisantMD, log in to the Ocean Portal and navigate to your site's [Admin](#) tab.

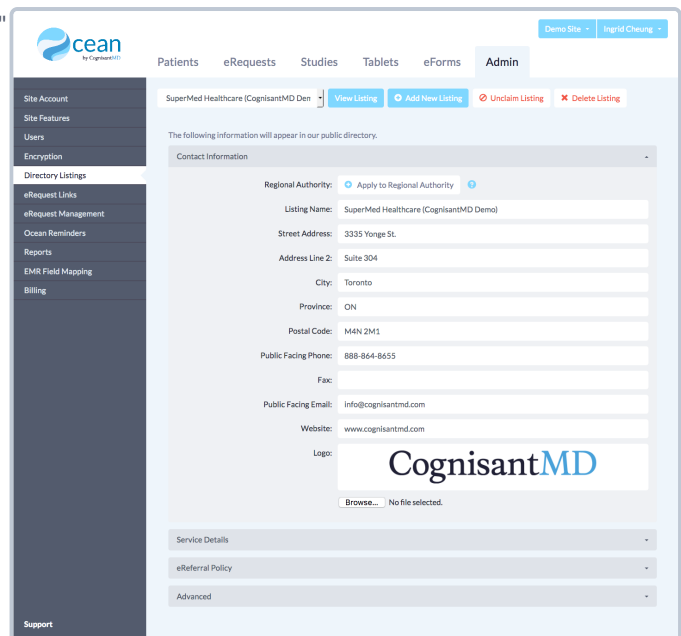
2. Start accepting eReferrals

Check off **"Accept eReferrals"** in the **"Site Features"** section.



3. Confirm your contact information

Under the Directory Listings menu, in the "**Contact Information**" panel, this information can be updated and will be displayed on the [Ocean Healthmap](#).



4. Add your "Appointment Labels"

The appointment labels in the "**Service Details**" panel will impact the different appointment types that appear in the scheduling pane of incoming referrals. Labels include: **Appointment 1**, **Appointment 2**, **Appointment 3**, **Appointment 4**, **Appointment 5**, **Initial Visit Date**, **Follow-Up Date**, **Consultation Date**, **Surgical Date**, and **Procedure Date**.

The appointment label determines which appointment(s) on the referral are used in [wait time calculations](#). The following appointment labels are associated with a **Wait 1**, and will map to the **scheduledAppointment** field in your site's referral [analytics](#):

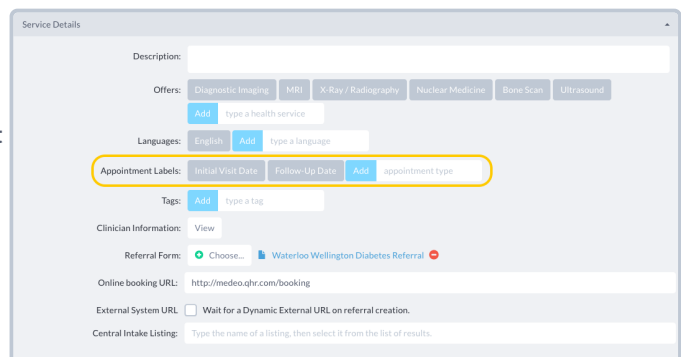
- Appointment
- Appointment 1
- Initial Visit Date
- Consultation Date

These appointment labels are associated with a **Wait 2**, and will map to the **scheduledAppointment2** field in the analytics:

- Surgery Date
- Procedure Date

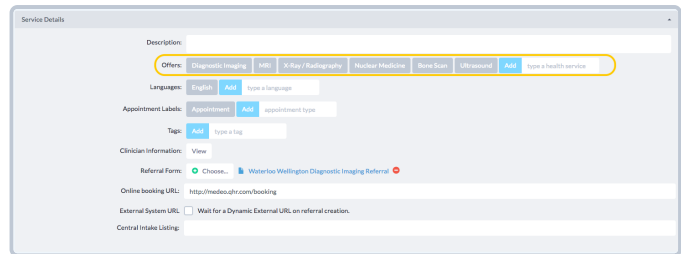
You can only have **one** appointment label associated with **Wait 1**, and only **one** associated with a **Wait 2**, on a single referral, otherwise Ocean will default to using the first appropriate label listed on the referral.

Example: A surgical office could use the **Consultation Date** label for their **Wait 1**, and the **Surgical Date** label for their **Wait 2**.



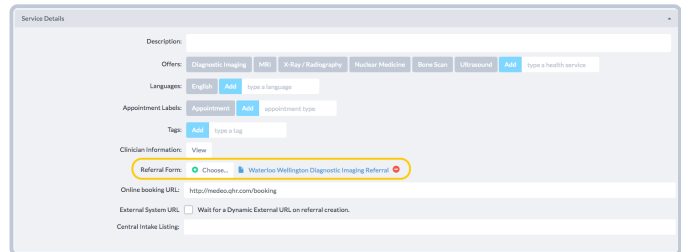
5. Add your listed "Offers"

Offers allow Healthmap users to search for your location based on the services you provide. Your listing's offers are updated in the **"Service Details"** panel.



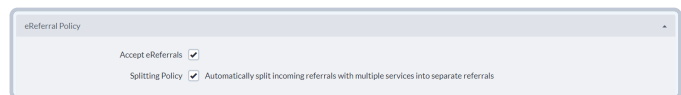
6. Choose your "Referral Form"

Use the forms available in the [Ocean Library](#) or [create your own](#) then choose your form in the **"Service Details"** panel.



7. Set your "eReferral Policies"

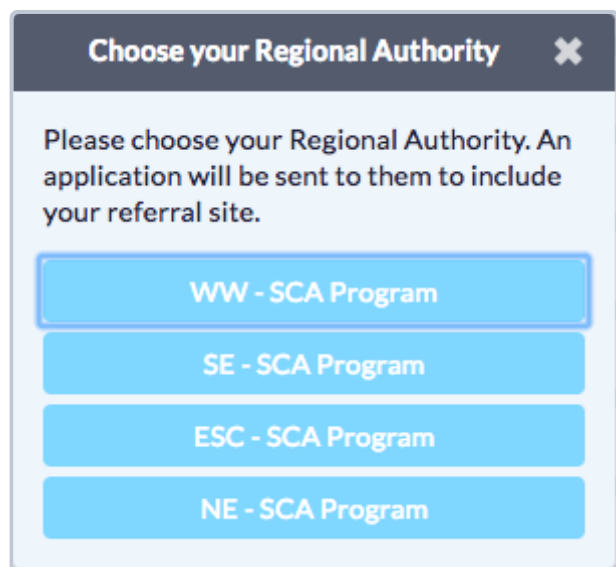
- A. Ensure your listing is set to Accept eReferrals (automatically checked when Step 2 above is completed)
- B. Choose whether you would like to split incoming referrals with multiple services into separate referrals.



If your site falls under the System Coordinated Access program, there are several additional steps to configure your listing.

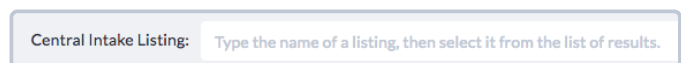
1. Apply to Regional Authority

The System Coordinated Access program offers Ocean eReferral licenses to eligible sites in participating LHINs. You can apply for one in your region by clicking **"Apply to Regional Authority"** in the **"Contact Information"** panel and accepting the license agreement



2. Add your central intake listing (if applicable)

Central intakes accept and triage eReferrals based on region and pathway. By adding a central intake to your listing in the **"Service Details"** panel, referrals sent to your site will be routed through the central intake.



3. You may also accept direct referrals outside of central intakes (Optional)

Some sites that receive eReferrals through a central intake may also want to receive direct eReferrals for other services. If you would like to configure direct eReferrals for specific health offerings, select the offer(s) in the "**Service Details**" panel and add your custom referral form within that listing.

MRI

Program Name:

Reference:

MRI

Regional Favourite: [Clear](#) [Set](#)

Details:

Accepting Referrals:

☒ Unknown ☐ Yes ☐ No

Accepting Self Referrals:

☒ Unknown ☐ Yes ☐ No

Accepting eConsults:

☒ Unknown ☐ Yes ☐ No

Wait Time 1:

Walk-In

Wait Time 2:

Unspecified

Custom Referral Form:

Choose...

MRI Requisition

Requisition File:

Choose File

No file chosen

Patient Handout:

Choose File

No file chosen

Remove Service

Cancel

OK

Set Up eReferral Notification Email(s) (for Receivers)

This article describes locations where you can configure your email addresses for eReferral notifications when receiving eReferrals. To learn more about the rules/logic that Ocean uses to determine which email address to send the eReferral notifications to, please refer to "[Where do eReferral notification emails get sent to?](#)".

Site-Wide Emails: Site Account

Several email address can be configured in the **"Site Account"** section within the [Admin tab](#) of the Ocean Portal. These will be the email addresses of eReferral **recipients** not associated with a specific Ocean user, that get notified about a set if referrals, a patient eRequest, or a site-wide notification.

You can access this section by signing in to the [Ocean Portal](#), navigating to the **Admin tab**, and selecting **"Site Account"** from the menu on the left.

From there, you can set which email address receives various site-wide Ocean notifications.

Clinical Administrator Email This email address will receive any miscellaneous Ocean system messages, including pending eReferral requests, study export alerts, Ocean reminder-related messages, etc.

Referral Notification Email This email address will get notified of new eRequests (including submissions to an eRequest link, as well as new eReferral requests), as well as status changes to received requests.

Again, ensure that you **save your changes** before leaving this page.

Listing Specific Emails: Directory Listings

An email address can be configured in the **"Directory Listings"** section within the [Admin tab](#) of the Ocean Portal. The Referral Notification Email can be set under the **Advanced** section of the listing. Any notifications regarding referrals sent to this specific listing, will be directed to this email, overriding the notification email set at the Site Account level.

You can choose to use the Site Default here, by clicking the "Use Site Default" button to the right of the field. In this case, if the site referral notification email is updated at a later date, the listing email will automatically update to match.

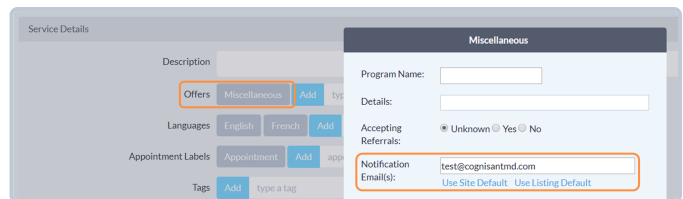
Again, ensure that you **save your changes** before leaving this page.

Offering Specific Emails: Directory Listings

An email address can be configured within the Offerings tagged on the listing, in the "**Directory Listings**" section within the **Admin tab** of the Ocean Portal. The Notification Email can be set under the **Offers** in the **Service Details** section of the listing. Any notifications regarding referrals sent to this specific listing, for this specific health service offering, will be directed to this email, overriding the notification email set at both the Listing level and the Site Account level.

You can use either the Site Default or Listing Default here, by clicking the "Use Site Default" or "Use Listing Default" buttons below the field. Then, if either the site or listing email is updated at a later date, the offering email will automatically update to match.

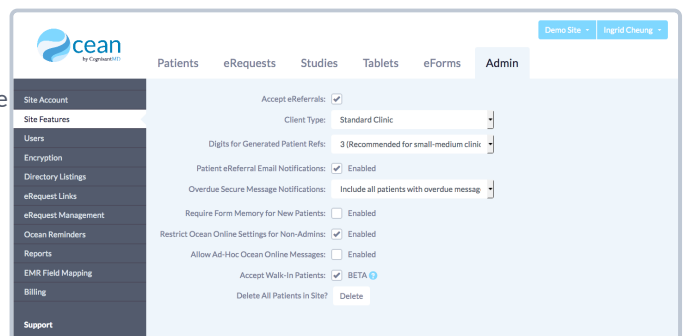
Again, ensure that you **save your changes** before leaving this page.



The screenshot shows the 'Service Details' form. The 'Offers' tab is active, and the 'Miscellaneous' section is highlighted. The 'Notification Email(s)' field is set to 'test@cognisantmd.com'. Below the field are two buttons: 'Use Site Default' and 'Use Listing Default'.

eReferral Notifications: Site Features

If you would like to disable automatic notifications to patients, you can do so by going into the **Admin tab** of the Ocean Portal, within the "**Site Features**" section (selected from the menu on the left) and unchecking the "**Patient eReferral Email Notifications**" checkbox.



The screenshot shows the 'Admin' tab in the Ocean Portal. The 'Site Features' section is selected in the left sidebar. The 'Patient eReferral Email Notifications' checkbox is checked. Other settings visible include 'Accept eReferrals' (checked), 'Client Type' (Standard Clinic), 'Digits for Generated Patient Refs' (3), 'Overdue Secure Message Notifications' (Include all patients with overdue message), 'Require Form Memory for New Patients' (Enabled), 'Restrict Ocean Online Settings for Non-Admins' (Enabled), 'Allow Ad-Hoc Ocean Online Messages' (Enabled), 'Accept Walk-In Patients' (BETA), and 'Delete All Patients in Site?' (Delete).

Creating Canned Responses for eReferral Bookings and Messages*

This is an **optional** part of setting up eReferrals.

On the receiving end of an eReferral, when booking appointments for patients using the Ocean eReferral Network, you have the ability to add canned messages that can be sent to the patient in advance of their appointment and/or canned messages that can be sent to the referrer.

Canned Booking Comments

- Log in to the [Ocean Portal](#).
- Navigate to the [Admin](#) tab and select **Canned Responses** (from the menu along the left).
- From the Canned Responses screen, select the "**New Canned Response**" button under the "Canned Responses for Booking Comments" section
- Give your response a **title** and add the **text** into the text field.
- Click the "**Save**" button to save your canned comments.
- Now, next time you are processing a referral, you can select one of your canned responses using the **dialogue bubble** in the "**Scheduling**" section of the referral.

Note: Canned booking comments are selected from the speech bubble icon in the "Scheduling" section, **NOT** the "Notes" or "Messaging" sections. Notes recorded in the "Notes" section in the top right corner of an eReferral are internal notes that indicate the status of the referral request.

Canned Messages to Referrer

- A. Log in to the [Ocean Portal](#).
- B. Navigate to the [Admin tab](#) and select **Canned Responses** (from the menu along the left).
- C. From the Canned Responses screen, select the "**New Canned Response**" button under the "Canned Responses for Messages" section
- D. Give your response a **title** and add the **text** into the text field.
- E. Click the "**Save**" button to save your canned comments.
- F. Now, next time you are processing a referral, you can select one of your canned responses using the **dialogue bubble** in the "**Messaging**" section of the referral.

The first screenshot shows the Ocean Portal Admin interface. The left sidebar contains a menu with options: Site Account, Site Features, Users, Encryption, Directory Listings, eRequest Links, **Canned Responses** (highlighted), Ocean Reminders, Reports, and EMR Field Mapping. The main content area shows the 'Canned Responses' section with a 'New Canned Response' button. Below this, there are two sections: 'Canned Responses for Booking Comments' and 'Canned Responses for Messages'. The 'Canned Responses for Messages' section has a 'Test' button and a 'Body' text field containing 'test message'. A 'New Canned Response' button is also present.

The second screenshot shows the 'Add a title here' dialog box. It has a 'Body' text field with the placeholder 'Enter text here' and a checkbox labeled 'Prompt for an appointment date and details'. There are 'Delete', 'Cancel', and 'Save' buttons.

The third screenshot shows the 'Messaging' section of a referral. It has a 'To: Referrer (a)' field, a 'Browse...' button, and a 'Send' button. A 'Test' button is also visible.

Note: Canned responses to referrers are selected from the speech bubble icon in the "Messaging" section, **NOT** the "Notes" or "Scheduling" section. Notes recorded in the "Notes" section in the top right corner of an eReferral are internal notes that indicate the status of the referral request.

Supporting Analytics in eReferral eForms*

This is an **optional** part of setting up eReferrals.

The Ocean eReferral platform **de-identifies data automatically** to provide you with an understanding of referral patterns, decline rates, wait times, etc. You can **export** this data at anytime from the "**Reports**" section of the [Admin tab](#) in the Ocean Portal. For more details on exporting eReferral analytics, please refer to "[Accessing eReferral Analytics](#)".

Core Analytics

The **core set** of analytics captured in the de-identified record are in the table below.

Column Header	Description
referralRef	The unique reference number for the referral in Ocean.
referralCreationDate	The date the referral was sent OR resubmitted by the referring provider (in ISO 8601 format). This could be the back-dated referral date entered on an inbound referral.
referralInitialCreationDate	Invariant field representing the original sent date that is set during referral creation (in ISO 8601 format).

Column Header	Description
oceanCreationDate	The date/time the referral was created in Ocean (in ISO 8601 format). It could be the date it was sent in Ocean through the healthmap or a website form, or the date it was transcribed as an inbound referral.
modificationDate	The date/time the referral was most recently updated (in ISO 8601 format).
masterReferral	A true/false flag that indicates if the referral was split into multiple "child" referrals, based on the number of health service offerings assigned.
patientId	A one-way hashed value representing the patient identity. This is used to track the patient's referral history in Ocean. It will be blank if a health number was omitted from the referral.
siteNum	The Ocean site number that the referral belongs to.
regionalAuthoritySiteNum	The Ocean site number for the Regional Authority (RA) that the referral is captured under (if it's sent to a listing under RA).
initialHealthService	The health service on the referral at time of sending.
currentHealthService	The health service on the referral currently.
claimedWaitTimeDaysLow	The lower end of the range of wait times claimed in the health service listing when the referral was sent (e.g. 7, if 1-2 weeks). This will be wait 1 for health services with multiple health services.
claimedWaitTimeDaysHigh	The higher end of the range of wait times claimed in the health service listing when the referral was sent (e.g. 14, if 1-2 weeks). This will be wait 1 for health services with multiple health services.
claimedWaitTime2DaysLow	The lower end of the range of wait 2 times claimed in the health service listing when the referral was sent (e.g. 7, if 1-2 weeks).
claimedWaitTime2DaysHigh	The higher end of the range of wait 2 times claimed in the health service listing when the referral was sent (e.g. 14, if 1-2 weeks).
wait1Days	The number of days calculated between the date the referral was created to the first appointment date.
wait1aDays	<p>The number of days calculated between the date the referral was created and the initial assessment date.</p> <p>Note: The darcWait1aDays is subtracted from this calculation.</p>
wait1bDays	<p>The number of days calculated between the initial assessment date and the initial consult date (scheduled appointment). If there is a "ax_decisionToConsult" date, Ocean will use this value for the Wait1b calculation instead of the initial consult date.</p> <p>Note: The darcWait1bDays is subtracted from this calculation.</p>
Wait2Days	The actual wait time, as calculated between the date the referral was created to the second appointment date.
darcWait1aDays	Number of days affecting readiness to consult for patient reasons between the date the referral was created and the initial assessment date.
darcWait1bDays	Number of days affecting readiness to consult for patient reasons between the initial assessment date and the initial consult date (scheduled appointment).


Column Header	Description
dartWait2Days	Number of days affecting readiness to treat for patient reasons between the date the referral was created to the second appointment date.
srcSiteNum	The number of the source referral site.
srcSiteName	The name of the source referral site.
referredByUserName	The Ocean username representing the user who sent the eReferral (which may represent a delegated administrative user, as opposed to being the same person as the referrer).
referredByUserFullName	The full name of the Ocean user who sent the eReferral (which may represent a delegated administrative user, as opposed to being the same person as the referrer)
delegateClinicianType	The clinician type of the delegate user, who sent the referral on behalf of the provider (ex. Physician Assistant). Will be blank if the referral was NOT sent by a delegate.
referredByAnonymousEmrUser	A flag that indicates a referrer user is signed into their EMR but not signed into their Ocean user account: TRUE values indicate that the referral was sent from the EMR, by a user who did NOT have a linked Ocean account. FALSE values indicate that the referral was sent from the EMR, by a user with a linked Ocean account, OR the referral was not sent from an EMR at all.
referrerUserName	The Ocean user name representing the referring clinician, if available.
referrerName	The name of the referrer (i.e. clinician).
referrerClinicianType	The referrer clinician type. One of the following: " Allied Health Professional ", " Family Physician ", " Medical Student ", " MOA / Secretary ", " Nurse ", " Nurse Practitioner ", " Resident ", " Specialist " or " Other ".
referrerUrgency	The urgency of the referral, as taken from the referral form item with the EMRField mapping of " referralUrgency ".
initialRecipientName	The name of the original referral target on the referral.
initialReferralTargetRef	The unique listing reference of the original referral target on the referral.
initialOrganizationName	The name of the organization the referral was initially sent to, IF an organization has been applied to the listing.
recipientName	The name of the current referral target on the referral (this can change if the referral is forwarded from central intake to a specialist, for example.)
referralTargetRef	The unique listing reference of the current referral target on the referral.
recipientOrganizationName	The name of the organization tied to the listing that the referral is directed to, IF an organization has been applied to the listing.
recipientCity	The city of the recipient.
recipientProvince	The province of the recipient.
recipientPostalCode	The postal code of the recipient.
recipientPriority	The priority as indicated by the recipient via the review form (specifically the item with reference " priority "). Limited to P1 , P2 , P3 , P4 , P4F , P5 .
recipientLatitude	The latitude of the recipient.

Column Header	Description
recipientLongitude	The longitude of the recipient.
eConsultOutcome	The status/outcome of the eConsult. Can be one of the following values: E_REFERRAL (case where the referral was responded to as an eConsult, but then continued with as a referral), PENDING (represents an eConsult in progress) and COMPLETED (represents a referral that is marked completed as an eConsult).
eConsultOutcomeDate	The date of the eConsult outcome.
eConsultAcceptanceDate	The date/time the referral is accepted as an eConsult. This may happen at the time of the first eConsult message being sent on the referral, or when an admin/delegate clicks to accept the referral as an eConsult, to allow for the specialist/provider respond to it at a later time.
eConsultFirstMessageDate	The date/time of the first eConsult message on a referral.
eConsultMessageCount	The number of messages flagged as "eConsult" on the referral.
eConsultProceedToEReferralReason	The reason the referring provider chooses to "Proceed as eReferral" after receiving an eConsult message. Can be one of three standard reasons: PROVIDER_PREFERENCE , PATIENT_PREFERENCE , or OTHER .
sentToTestListing	Flag to indicate if the referral was sent to a test listing, or manually labeled as a test referral using the Action menu. Used to exclude the referral from analytics.
patientAge	Patient age in years, rounded down.
patientGender	The gender of the patient.
patientCity	The patient's home city.
patientProvince	The patient's home province.
patientPostalFirst3Chars	The first 3 characters of the patient's postal code.
patientDistanceKm	The distance, in km, between the patient's home and the referral target.
referralState	The status of the referral. One of: INITIAL , ACCEPTED , DECLINED , BOOKED , CANCELED , or COMPLETE .
scheduledAppointment	The date/time set for the first appointment.
scheduledAppointment2	The date/time set for the second appointment.
initialForwardDate	The date/time the referral is initially forwarded.
initialAssessmentDate	The date/time of the initial assessment if the referral is booked at an assessment centre.
initialAssessmentSite	The name of the initial assessment site listing.
initialAssessmentSiteRef	The unique listing reference id of the initial assessment site.
forwardDateFromAssessmentSite	The date the referral is forwarded from a listing of type Rapid Access Clinic.
forwardDate	The date/time that the referral was last forwarded.
completedDate	The date the referral is marked "Completed" (can be done in the booking tab once the appointment date has passed).
booked	Whether the referral appointment has been booked.

Column Header	Description
seen	Whether the patient has been seen (i.e. in the clinic for a consult).
completed	Whether the referral has been marked completed (i.e. generally means referral has been completed and consult letter, if appropriate, will be forthcoming.)
reasonForDecline	The reason for a declined referral. One of: UNABLE_TO_CONTACT , MISSING_INFORMATION , ADDITIONAL_WORKUP_REQUIRED , INAPPROPRIATE_INDICATION , SENT_TO_WRONG_PROVIDER , RECOMMEND_OTHER_PROVIDER , SERVICE_NOT_AVAILABLE , PRECLUDED_DUE_TO_PATIENT_ISSUE , CANNOT_BE_SEEN_QUICKLY_ENOUGH , UNLIKELY_TO_BENEFIT , NOT_YET_DUE , OTHER

Additional Available Analytics

In addition, you can **map fields** in your referral form and Review form to set analytics values for your referral exports. Keep in mind that the semantics behind each is arbitrary and you can "co-opt" them for the purposes of a particular pathway as long as the consumers of the analytical data understand the data values. To do add these analytics values, simply open your form in the **eForm Editor** and set the item reference to one of the following values.

Item Reference
ax_preciseAge
ax_pcpName
ax_reasonForReferral
ax_preferredClinician
ax_preferredCity
ax_preferredWasChosen
ax_secondOpinion
ax_cause
ax_severity1
ax_severity2
ax_diagnosis
ax_diagnosisAcuity
 e.g. undiagnosed high risk; newly diagnosed; established)
ax_aboriginalStatus
ax_gestationalAge
ax_languageBarrier
ax_language
ax_comorbidities
ax_imagingStatus

Item Reference

ax_socialDeterminants

ax_lab_hb

ax_lab_a1c

ax_lab_fbs

ax_lab_glucoseT1Hr

ax_lab_glucoseT2Hr

ax_lab_chol

ax_lab_cholHdlRatio

ax_lab_hdl

ax_lab_ldl

ax_lab_tg

ax_lab_egfr

ax_lab_cr

ax_v_bp

ax_v_ht

ax_v_wt

ax_v_bmi

ax_cm_arthritis

ax_cm_asthma

ax_cm_chf

ax_cm_cvd

ax_cm_dm

ax_cm_obesity

ax_cm_osteoporosis

ax_cm_copd

ax_cm_pad

ax_cm_tiaStroke

ax_cm_retinopathy

ax_cm_nephropathy

ax_cm_footUlcer

ax_cm_mentalHealth

ax_cm_htn

Item Reference

ax_alcohol_dpw

ax_tobacco_cigsPerDay

ax_tobacco_everSmoked

ax_drugUse_mj

ax_request_preConceptionCounseling

ax_request_footCareEducation

ax_request_additionalEducation

ax_request_renalCriteria

ax_request_mentalHealth

ax_examType

ax_surgicalCandidate

ax_assessmentOutcome

ax_assessmentOutcomeMedicalSpecialist

ax_assessmentOutcomeCommunityProgram

ax_assessmentOutcomeSelfManagement

ax_patientPreference

ax_consultOutcome

ax_decisionToTreat

ax_decisionToConsult

ax_bodySite

Set Up eReferrals on Your Website*

This step is an **optional** part of setting up your site to receive eReferrals.

Ocean lets you accept eReferrals, not only from the [Ocean Healthmap](#), but also from a secure page on your clinic's website, called **Website Forms**.

For example, Cambridge Memorial Hospital accepts Ocean eReferrals for diagnostic imaging and MRI on the "[DI and MRI Request for Consultation](#)" page of their website.

All referrals submitted through Website Forms will go into your central [eRequests Inbox](#) in the Ocean Portal.

The top screenshot shows the Cambridge Memorial Hospital website. The header includes the hospital logo, navigation links (PATIENTS & VISITORS, PROGRAMS & SERVICES, ACCOUNTABILITY, ABOUT, CONTACT), and buttons for 'SEND AN eCARD' and 'Donate!'. The main content area is titled 'DI AND MRI REQUEST FOR CONSULTATION' and states: 'Cambridge Memorial Hospital now accepts physician eReferrals directly from our website:'. It provides links for 'Diagnostic Imaging eReferral Form' (for x-rays, mammogram, bone densitometry, CT, ultrasound and nuclear medicine) and 'MRI eReferral Form'. A note mentions that users can also send an eReferral via the local health service directory [OceanHealthLinks.ca](#). A footer note says 'For Telus Practice Solutions EMR users:'.

The bottom screenshot shows the Ocean Portal interface. The 'eRequests' tab is selected, displaying a table of referrals. The left sidebar shows a filter menu with 'New' highlighted. The table columns are Patient, MRN, DOB, Description, Date Sent, Source, Site, and Provider.

Patient	MRN	DOB	Description	Date Sent	Source	Site	Provider
James Bond	28-09-19		Orthopedics	Oct 22, 2018 3:30 pm	Hope Latam	Demo Site	WWLHIN Ortho Ass Centre
Referral Test	80-01-01		Orthopedics	Oct 15, 2018 11:27 am	Hope Latam	Demo Site	WWLHIN Ortho Ass Centre
James Bond	28-09-19		Orthopedics	Oct 10, 2018 11:59 am	Hope Latam	Demo Site	WWLHIN Ortho Ass Centre
James Bond	28-09-19		Orthopedics	Oct 10, 2018 11:57 am	Hope Latam	Demo Site	MAC Clinic
Meganne Test	60-02-03		Diagnostic Imaging	Oct 9, 2018 3:40 pm	Meganne Test	Accuro Demo Site	WWLHIN Ortho Ass Centre
Pippy Six	86-01-20		Knee - Right	Aug 29, 2018 10:48 am	pippy scott-meuser		WWLHIN Ortho Ass Centre
Pippy Four	86-01-20		Knee - Left	Aug 29, 2018 10:44 am	pippy scott-meuser		WWLHIN Ortho Ass Centre

Displaying 7 of 7 matches

To learn how to set up an eReferral submission page on your website, check out our [Website Forms Creation Guide](#).

Set Up Your Site to Receive Walk-Ins*

This is an **optional** part of setting up eReferrals.

If you are a **receiving** site that accepts **walk-in patients** (i.e. patients who can come in whenever they're available, without necessarily having a pre-booked appointment).

Follow the steps outlined below to enable this walk-in setup.

- A. Log in to the [Ocean Portal](#).
- B. Navigate to the [Admin](#) tab and enter the "Directory Listings" section (selected from the menu along the left).

The screenshot shows the Ocean Portal Admin interface. The left sidebar has 'Directory Listings' selected. The main area shows contact information for 'SuperMed Healthcare (CognisantMD Den)'. The 'Service Details' panel is collapsed.

- C. In the "Service Details" panel, click on the health service offering for your listing that accepts walk-in patients.

The screenshot shows the Ocean Portal Admin interface with the 'Service Details' panel expanded. The 'Service Details' panel shows a description field and a list of services. 'X-Ray / Radiography' is selected and highlighted with a red circle. The 'Languages' section shows 'English' selected.

- D. In the pop-up window, click on the blue text beside the "Wait Time 1" field to access the "Wait Time Information" dialog box.

The screenshot shows the 'X-Ray / Radiography' pop-up window. The 'Wait Time 1' field is highlighted with a red circle, and the 'NaN days' text is highlighted with a red circle. The 'Wait Time 2' field is 'Unspecified'. The 'Custom Referral Form' field is 'Choose...'. The 'Requisition File' and 'Patient Handout' fields are 'Browse...' with 'No file selected.'

- E. For the "Reported Wait Time" field, select "Walk-In".
- F. Be sure to **save** your changes.

Wait Time Information ✕

This wait time is "Wait 1", the time until the initial consult.

Reported Wait Time:

Walk-In
⌵

[Set Automatically](#)

Last Updated:

May 31, 2018 5:09 pm

Calculated Average Wait Time:
 90% Within:
 95% Confidence Interval:
 Sample Standard Deviation:
 Sample Size:
 Exclusion Count:
 Last Calculated:

Wait times are generally calculated on a nightly basis.

Cancel
OK

- G. Now when you accept any new incoming eReferrals for this specific health service offering, the "Accept" option at the bottom of the referral will default to "Accept Walk-In".

Walk-In Patient ✕

Walk-In Patient

X-Ray / Radiography

(Test Referral)

MRN: 199 Action

General

For: SuperMed Healthcare (CognisantMD Demo)
Sent by CognisantMD via Fax on May 31, 2018 5:18 pm

Patient:
 Walk-In Patient
 dob: Feb 2, 2002 F age 16
 HN: ON 1234567890 VC
 123 Main Street
 Toronto, ON
 M4N3N1
 416-999-8888 (M)

Referred by:
 CognisantMD
 Demo Site
 3080 Yonge Street
 Toronto, ON
 M4N3N1
 Billing # 123
 416-777-8888
 416-666-5555

CPSO # 123

Notes

New Note:

Patient's Note ✕

Referral Note

DI - Request for Consultation
CLINICAL HISTORY test
X-RAY
Lumbar Spine

edit...

Scheduling

Booking 1:

time...

Booking 2:

time...

Estm. Wait 1:

Walk-In
⌵

☐ Confirmed

Estm. Wait 2:

Walk-In
⌵

Comments for Referrer and Patient:

Needs review:

Decline
Accept Walk-In
Done

- H. As usual, the "Import" window will appear, where you can obtain the patient's Ocean reference number. Accepting the eReferral will also move the patient directly into the "Walk-In" folder.

Patients eRequests Studies Tablets eForms Admin

Patient	MRN	DOB	Description	Date Sent	Source	Site	Protocol	Priority	Noted
Walk-In Patient	02-02-02		X-Ray / Radiography	May 31, 2018 5:18 pm	CognisantMD	Demo Site			18/05/31 5:18 pm
Test Test	00-01-01		X-Ray / Radiography	May 31, 2018 4:47 pm	Test				18/05/31 4:47 pm

Displaying 2 of 2 matches

Filter

All - Demo Site

Needs Review 18

For Me 0

Recently Viewed

Received

New 18

Outstanding 18

Pending Booking 27

Booked Unconfirmed 0

Booked Confirmed 0

Awaiting Reply 0

Walk-ins 2

All Received

- I. From there, whenever the patient comes in to the office, you can simply search for them in this **"Walk-In Folder"** and then mark the referral as **"Completed"**.

Walk-In Patient

Walk-In PatientX-Ray / Radiography (Test Referral)MRN: 199Action

General

For: SuperMed Healthcare (CognisantMD Demo)
Sent by CognisantMD via Fax on May 31, 2018 5:18 pm (received May 31, 2018 5:18 pm)

Patient:
Walk-In Patient ♀
dob: Feb 2, 2002 F age 16
HN: ON 1234567890 VC
123 Main Street
Toronto, ON
M4N3N1
416-999-8888 (M)

Referred by:
CognisantMD
Demo Site
3080 Yonge Street
Toronto, ON
M4N3N1
Billing # 123 CPSO # 123
416-777-8888
416-666-5555

Referral Note

DI - Request for Consultation
CLINICAL HISTORY test
X-RAY
Lumbar Spine

Scheduling

Booking 1: time...
Booking 2: time...

Estm. Wait 1: Walk-In
Estm. Wait 2:
☐ Confirmed

Comments for Referrer and Patient:

Notes

New Note:

Patient's Note

Needs review:

DeclineCompletedDone