

Set Up Your Site to Send eReferrals

1. Link User EMR Accounts to Ocean User Accounts

Each person who will be sending Ocean eReferrals will need to link their EMR and Ocean user accounts.

This is especially important for auditing and tracking purposes.

2. Set Up eReferral User Email Notifications (for Senders)

Configure which email addresses receive email notifications when eReferrals that you've sent are changed or updated.

3. Set a Delegate User for Your Ocean Account*

If you work with an MOA, receptionist, nurse, resident, or student who will be sending eReferrals or Patient Messaging on your behalf, you will want to invite them to create an Ocean user account and set them as your clinical delegate.

4. Add & Manage Favourites on the Ocean Health Map*

If your clinic most often sends eReferrals to a specific destination clinic or group of clinics, you may want to save these sites as Favourites. This will allow for easy and efficient sending of Ocean eReferrals to your preferred clinics.

Link User EMR Accounts to Ocean User Accounts

Each Ocean eReferral sender **must link** their EMR user account to their Ocean user account by following the steps below.

This will allow individual users to send eReferrals to **enable alerts and track activity**.

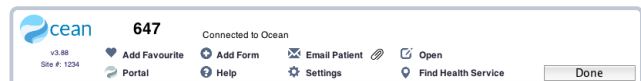
1. Initiate your eReferral.

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Select "**Find Health Service**" on the Ocean custom form or "**Refer**" on the Ocean toolbar.



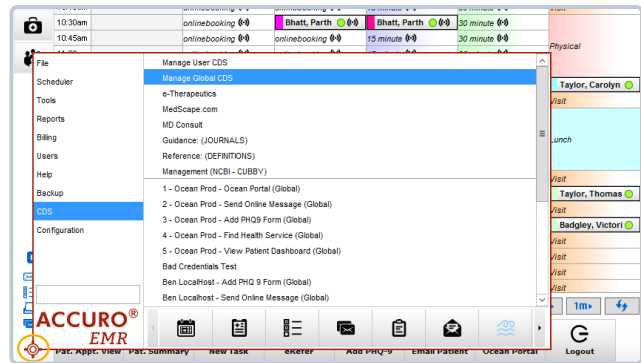
cean 768 · Email Attach Add Form Favourite Open Portal Import Refer Connected to Ocean



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v3.88
Site # 1234
Add Favourite Add Form Email Patient Open
Portal Help Settings Find Health Service Done

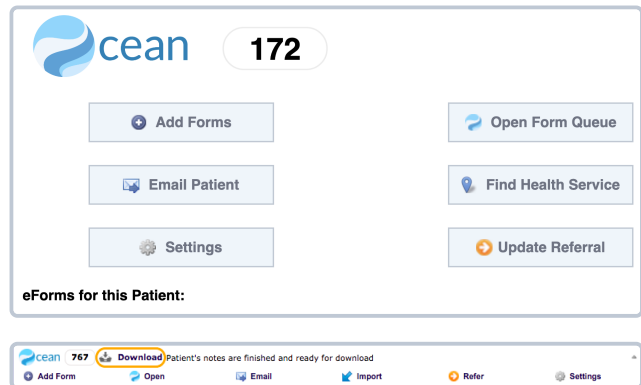
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Select the **CDS link** to the Ocean Portal or the direct **"Refer/Find Health Service"** CDS link.



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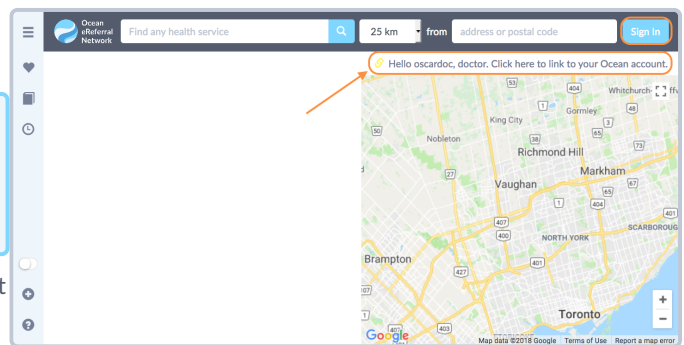
Select **"Find Health Service"** on the Ocean eForm or **"Refer"** on the Ocean toolbar.



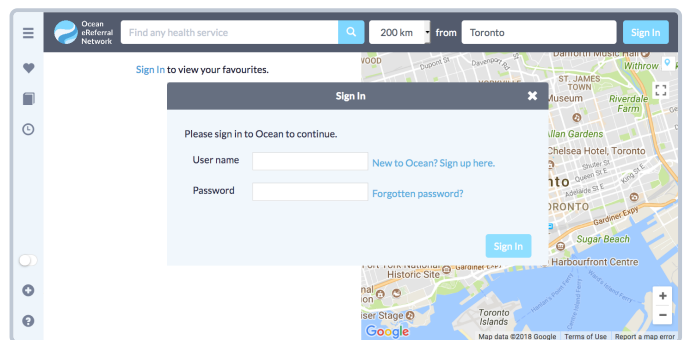
2. Log in to Ocean to link your EMR and Ocean accounts.

- A. Initiating a referral will open the **Ocean Healthmap** in an internet browser.

Note: If your default internet browser is Internet Explorer, the Ocean Health Map requires **at least Internet Explorer 11** to run properly.

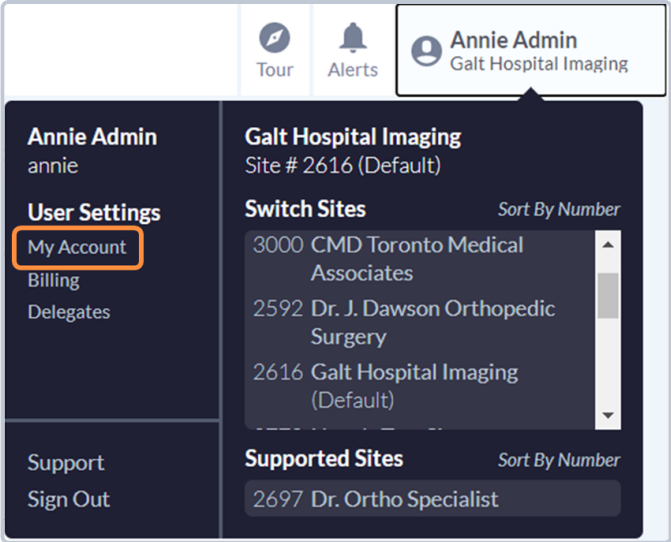


- B. At the top of the Ocean health map, you will see a banner that says: **"Hello [your EMR username]. Click here to link to your Ocean account."**
- C. Click this banner (or the "Sign In" button" above it) to **sign in to Ocean** with your Ocean username and password.
- D. Your EMR username will now be **linked** to your Ocean user account (an accompanying unlimited Ocean online user license, if applicable).



3. Confirm that your EMR and Ocean accounts have been successfully linked.

A. Log in to the [Ocean Portal](#) and click on your name in the top right corner, and choose the My Account button in the Account Menu [here](#).



B. Verify that your the "EMR Username" field is populated with the exact same name as your EMR username.

Set Up eReferral User Email Notifications (for Senders)

This article describes locations where you can configure your email addresses for **eReferral notifications** when sending 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?](#)".

Several email address can be configured in the "[View My Account](#)" section of the Ocean Portal. These will be the email addresses of eReferral **senders** that get notified about changes in specific referrals that they have sent (e.g. booking updates).

You can access this section by signing in to the [Ocean Portal](#), clicking on your name at the top right-hand corner of the screen and selecting "**View My Account**" from the dropdown menu that appears.

From there, you can set which email address receives specific Ocean notifications.

Email Address	This is the personal email address associated with each user with an Ocean account.
Clinical Delegate Email	This is the email address that generally receives clinical notifications, such secure message notifications (patient responses, eForm completions, etc.).
Referral Notification Email	This is the email address of the referrer that will be sent referral notifications, such as eReferral booking updates.

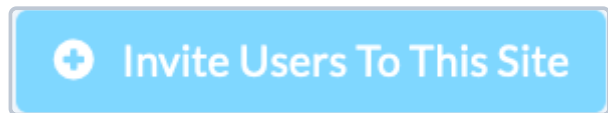
If you make any changes, ensure that you **save your changes** before leaving this page.

Set a Delegate User for Your Ocean Account*

This step is an **optional** part of setting up an Ocean eReferral / Patient Messaging user who will be sending online messages or eReferrals on your behalf.

1. Invite your delegate(s) to create an account on your Ocean site.

- A. Login to the [Ocean Portal](#). Click the "Menu" button in the top left corner and select "Admin".
- B. Enter the **Users** section (selected from the menu along the left.)
- C. Click the "Invite Users To This Site" button (on the left hand side of the page.)



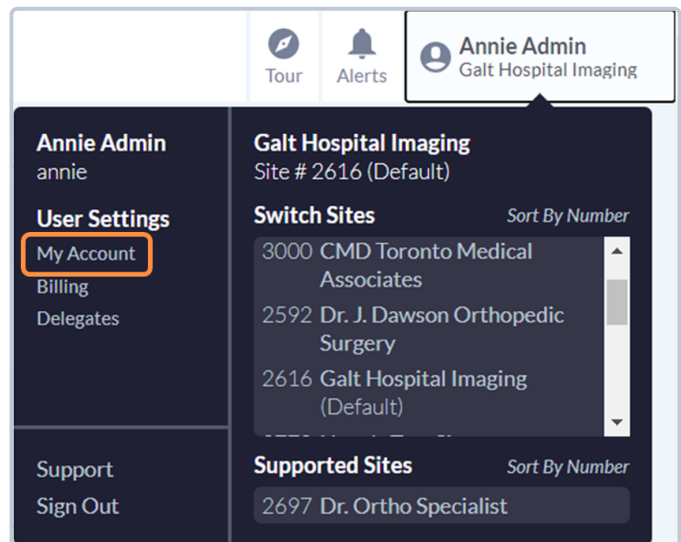
- D. If your colleague already has an Ocean user account, enter their username. They will be added to your Ocean site directly.

If your colleague hasn't created an Ocean user account yet, you can enter their email address. Ocean will send them an email invitation to instruct them to create an Ocean user account.

When you are finished, select "OK".

2. Add your delegate(s) as delegate user(s) on your account

- A. Log into the [Ocean Portal](#).
- B. Click your **name** in the top right hand corner and select **My Account** from the menu. From the **User Settings** page of your account, select the "Edit Delegates" button.



- C. On the Delegates page, click the "Add Delegate" button and select the **username(s)** of the user that you want to add as your clinical delegate(s). You can add **any number** of delegates to be associated with your Ocean user account.

3. Set a Primary Delegate (optional)

- A. You can select one of your delegates to be your **primary delegate**. Only this primary delegate will be covered under your own Patient Messaging subscription (if applicable.)

Note: The delegate user must be assigned one of the following clinician types: **MOA, receptionist, nurse, resident, student, or physician assistant.**

- B. Under the "Actions" column, click the blue text labelled "Make Primary Delegate."

Clinical Delegates			
You may add any number of delegates. You may also select one primary delegate, who must be an MOA, receptionist, nurse, resident, student or physician assistant. The primary delegate is covered under your Ocean Online subscription.			
Name	Username	User Type	Actions
Annie Admin	annie	MOA / Secretary	✓ Make Primary Delegate ✗ Remove Delegate

- C. Once set, the "Actions" column will read "Primary Delegate." This confirms the chosen delegate is now associated with your Patient Messaging subscription.

Clinical Delegates			
You may add any number of delegates. You may also select one primary delegate, who must be an MOA, receptionist, nurse, resident, student or physician assistant. The primary delegate is covered under your Ocean Online subscription.			
Name	Username	User Type	Actions
Annie Admin	annie	MOA / Secretary	Primary Delegate ✗ Remove Delegate

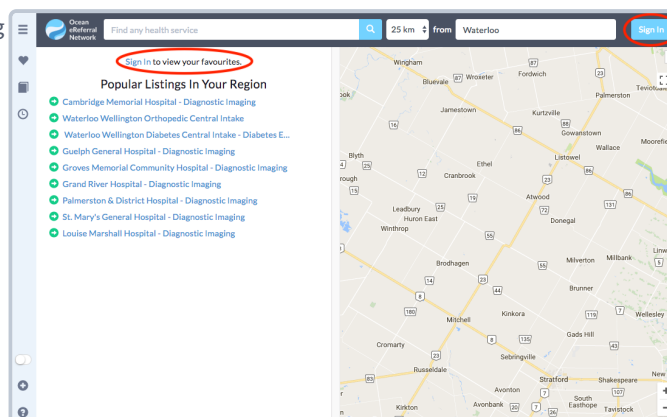
Note: An Ocean Administrative user can see and edit delegates for all users at their site in the Admin view. Refer to this article: [Edit Delegates Page](#).

Add & Manage Favourites on the Ocean Health Map*

This step is an **optional** part of setting your site up to easily and efficiently send Ocean eReferrals to preferred destination clinics.

To begin, navigate to the [Ocean Healthmap](#).

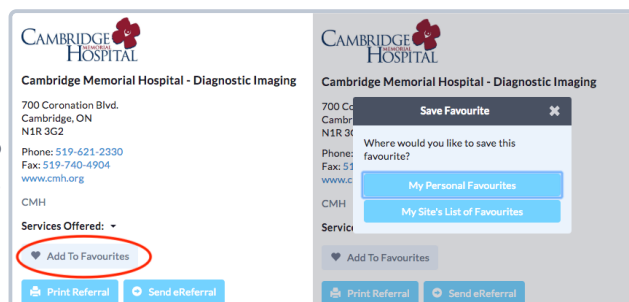
If you aren't already signed into your Ocean account, do so using the blue "Sign In" button located at the top right corner of the screen or by clicking the "Sign In to view your favourites" link located in the left-hand column of the screen.



Note: You will not be able to add or manage favourite listings if you are not logged into your Ocean account.

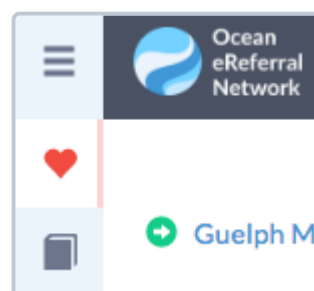
Adding a Favourite

- A. **Search for and select** the listing in the Ocean Health Directory that you want to add as a favourite.
- B. You'll then be presented with an **overview screen** displaying such details as the listing's contact information, distance, and services offered.
- C. Note the light blue **"Add to Favourites"** button. Clicking this button will open a dialogue window that will ask you where you would like to save the selected listing.
- D. Choosing **"My Personal Favourites"** will save the listing to your individual Ocean account's Favourites. Other users belonging to your Ocean Site will not be able to view any of these Favourites.
- E. Choosing **"My Site's List of Favourites"** will make the selection available to all the other users attached to your Ocean Site.



Viewing Favourites

At any time, you can view all the listings you or your team have favourited by clicking the **star icon** on the sidebar along the left. This will open the **Favourites panel** for you to review.



You will be presented with the following three headings on your Favourites page:

Your Favourites	Any listings you have favourited when selecting "My Personal Favourites" from a listing's summary page. These are only viewable by you and you alone.
Your Site's Favourites	Any listing favourited by yourself or other users on your site when selecting "My Site's List of Favourites" from a listing's summary page. If other Ocean Site members have favourited any listings, they will be visible to you in this area.
Popular Listings in Your Region	A suggested set of popular listings based upon your location.

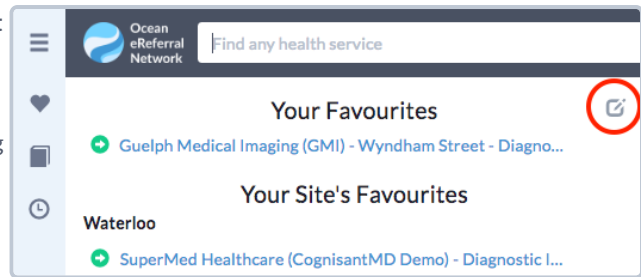
Managing Favourites

Favourites in any category (**"Your Favourites"** or **"Your Site's Favourites"**) can be reordered, grouped, or deleted by selecting the **"Edit"** (pencil and paper) icon located in the top right corner of the Favourites panel.

Edit Mode

Clicking this “Edit” button will change the panel state into **edit mode**, allowing you to manage both your personal and site-wide Favourites.

While in this edit state, you’ll be able to perform the following options:



Remove a Favourite

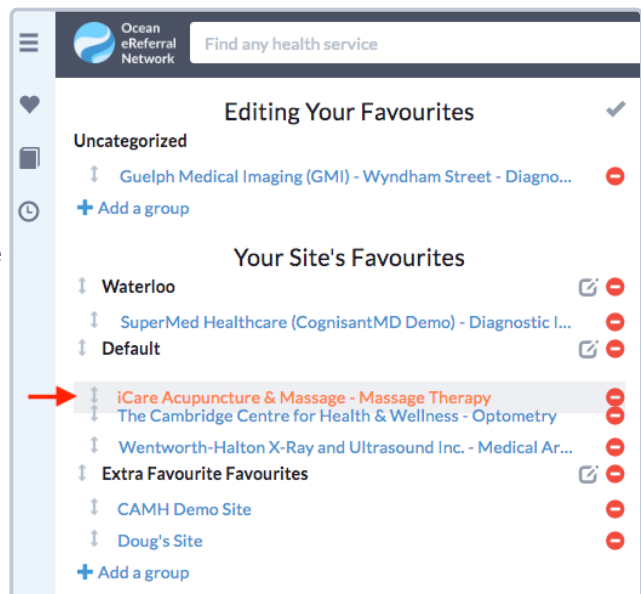
Click the circular red “**Remove Favourite**” icon to the right of any Favourite entry to remove it from your list.

Note: Favourites will be removed immediately with no prompt to confirm. If you remove a favourite by mistake, you will need for search for it again in the directory and re-add it to your Favourites.

Change Favourites Order

To change the listed order of Favourites, **click and hold** the grey up-and-down arrow icon located on the left of each Favourite. While continuing to hold the mouse button, **drag** the favourite to the desired position in the list then let go.

Note: You cannot drag Favourites between “Your Favourites” and “Your Site’s Favourites.” If you wish for a specific listing to show up in one list versus the other, you will have to first remove it totally from your Favourites, search for the listing in the main directory, and click the “Add Favourite” button



Favourites Groups

Creating a New Favourites Group

By default, Favourites will be grouped under an “**Uncategorized**” heading.

- A. Click the “+ Add a group” link under either “Your Favourites” or “Your Site’s Favourites” section to begin setup of a new Favourites category.
- B. A **popup dialogue** will appear asking you to name your group. Type in a name for your new category and then click the “+ Add Group” button to save your changes.
- C. Using the “**Managing Favourites**” instructions for changing the order of your Favourites, you can now drag Favourites under your newly-created Favourites category.
- D. Categories or groups are helpful for **organizing** favourites by location or health services provided, but you are free to make any groupings that make sense for your organizational needs. Just like individual Favourites, groups can be deleted and moved around, as you see fit.

Note: you cannot delete a group if there are any favourites nested within it. Drag your Favourites to another group before attempting to delete a grouping.

Renaming a Favourites Group

If you wish to rename a group heading, simply click the “**Rename group**” (pencil) icon located to the right of the group title.

When you are finished making changes to your Favourites, click the “**Finish editing**” checkmark icon located in the top right of the “Editing Your Favourites” panel. You will then return to the default view state of the Favourites panel.

