

Create or update a Directory Listing for Receiving sites

This guide explains how to create or update an Ocean Directory Listing (or "listing").

Listings provide public information about a healthcare site and the services it offers. **At least one directory listing is required to use eReferrals.**

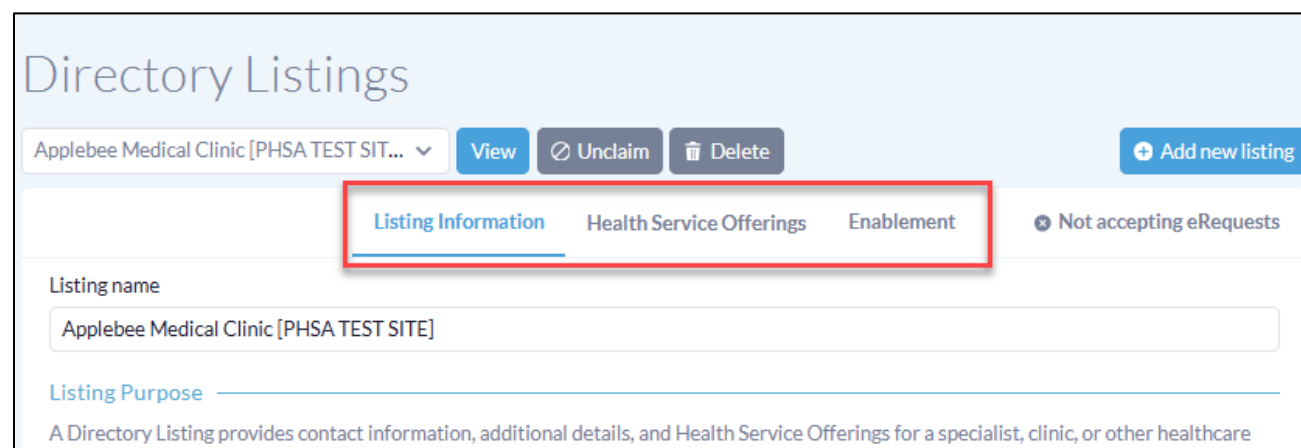
Follow the instructions carefully to ensure your listing meets all mandatory program and technical requirements for successful eReferral use.

Fields not specifically identified in the instructions can remain at their default settings. These will not affect basic eReferrals functionality.

Each listing contains **three tabs** that must be completed and configured:

1. **Listing Information**
2. **Health Service Offerings**
3. **Enablement**

Note: Only an Ocean Site Admin can make these changes.



The screenshot displays the 'Directory Listings' management interface. At the top, there's a header with the title 'Directory Listings'. Below it, a dropdown menu shows 'Applebee Medical Clinic [PHSA TEST SIT...' with buttons for 'View', 'Unclaim', and 'Delete'. A blue button 'Add new listing' is on the right. A red box highlights the three tabs: 'Listing Information' (selected), 'Health Service Offerings', and 'Enablement'. Below the tabs, the 'Listing name' field contains 'Applebee Medical Clinic [PHSA TEST SITE]'. The 'Listing Purpose' field is empty. At the bottom, a note states: 'A Directory Listing provides contact information, additional details, and Health Service Offerings for a specialist, clinic, or other healthcare'.

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Step 1: Add PHSA-developed referral form(s) to site

Referral forms are required for all sites that receive referrals. To support consistent referral processes and clinical decision-making, use only [PHSA-developed referral forms](#).

This step adds one or more referral forms to your site. The forms will be assigned in a later step.

If your site offers multiple health services, you can add more than one referral form. Forms can be assigned to the following spaces:

1. Directory Listing (default referral form)

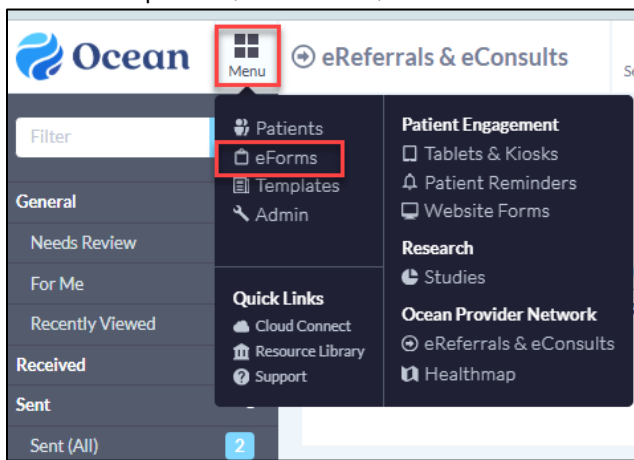
- A default referral form is assigned to the Directory Listing.
- This form is used for all health service offerings unless a different form is assigned.
- To change the default referral form, see ***Step 4: Update Details in the Listing Information tab (Default Request Form section).***

2. Health Service Offering (service-specific referral form)

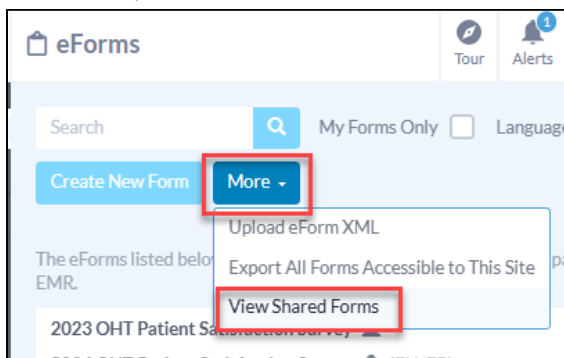
- A specific referral form can be assigned to an individual health service offering.
- This form overrides the default referral form for that offering.
- To assign or change a service-specific referral form, see ***Step 5: Update Details in the Health Service Offerings tab (Offering Request Form section).***

A list of available PHSA-developed forms is available [here](#).

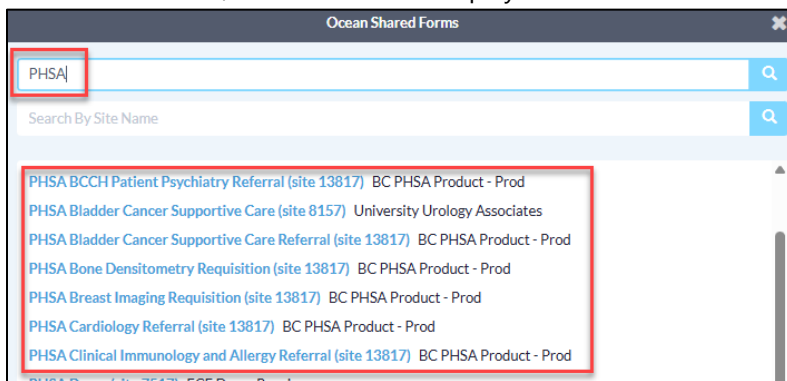
1. Sign in to [Ocean](#).
2. From the top menu, click **Menu**, then select **eForms**.



3. Click **More**, then select **View Shared Forms**.



4. In the **Search** field, enter "**PHSA**" to display all available PHSA-developed forms.



Notes:

- It may take a few moments for the forms to load.
 - A list of available PHSA-developed forms is available [here](#).
5. Select the desired form and click **Import** to add it to your Ocean site or click **Preview** to review the form before importing it.

PHSA Bone Densitometry Requisition (site 13817) BC PHSA Product - Prod

Preview Import

6. When the pop-up appears, click **Proceed**. A confirmation message will appear once the form has been successfully added.

Importing Form ✕

When you import an eForm from another site, you assume complete responsibility for its suitability for use within your site. Neither the site from which you are importing this form nor OceanMD offer any warranty whatsoever.

Please review the form and the license terms carefully before use. Do you agree and want to proceed?

Proceed

Cancel

Message ✕

The eForm was imported successfully. You may now proceed to edit your local copy of the form.

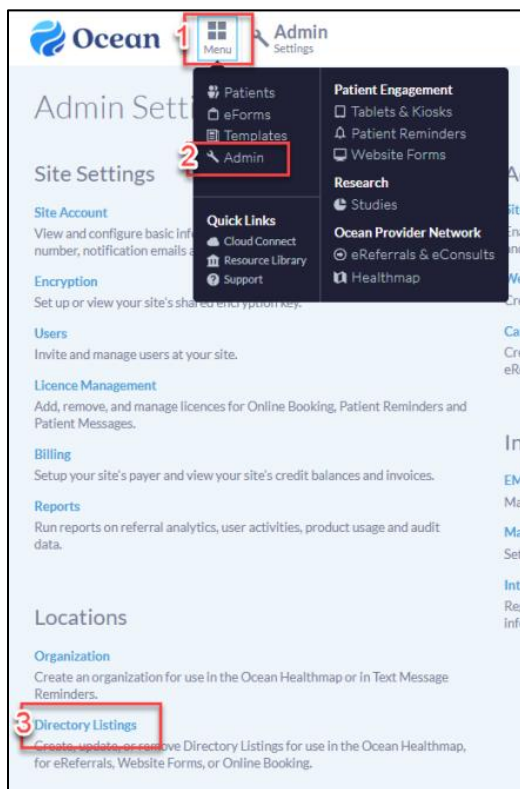
OK

7. If your site provides services that require different forms, repeat these steps to select and import all required forms.
8. The forms you import will be added to your **Directory Listing** in Step 4 and/or **specific Health Service Offerings** in Step 5.

Step 2: Access Directory Listings section

The **Directory Listings** section in your Ocean site manages key details about your healthcare site and its services. This information appears on the public-facing Healthmap.

1. Access the **Directory Listings** section.
 - a) Sign in to [Ocean](#).
 - b) From the top menu, click **Menu > Admin**, then select **Directory Listings**.

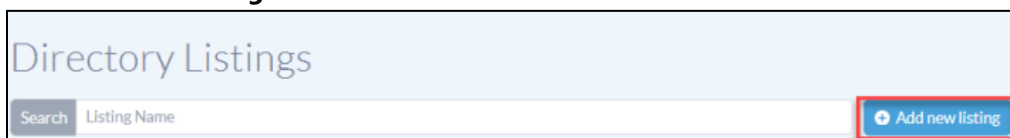


Step 3: Create, review or update a directory listing

To use eReferrals, your site must have **at least one directory listing**. This page shows you how to **create**, **view**, and **update** listings as needed.

OPTION 1: Create a new listing

1. Access the **Directory Listings** section.
2. Click **Add new listing**.



3. Continue to **Step 4: Update details in the Listing Information tab**.

OPTION 2: View or update an existing listing.

1. Access the **Directory Listings** section.
2. Once a listing has been created and saved, it will appear on this page.
 - If your site has multiple listings, they will all be displayed on this page.
3. Use the **View** or **Edit** buttons.

Directory Listings

Search Listing Name

Applebee Medical Clinic [PHSA TEST SITE]
Family Medicine

Add new listing

View Edit

- **View:** Opens your listing on the Healthmap. This is the exact information users see about your site in Ocean.
- **Edit:** Update your listing details. Changes made here will be visible to users on the Healthmap.

4. Continue to **Step 4: Update details in the Listing Information tab**.

Step 4: Update details in the Listing Information tab

The **Listing Information** tab is used to set up the basic details and purpose of your directory listing. This information is displayed on the Healthmap.

1. Access the **Listing Information** tab.
 - a) After completing Steps 1 and 2 and clicking **Edit**, the **Listing Information** tab should open.
 - b) The tab name appears underlined in blue when selected.
 - c) If it is not selected, click on the tab.

Directory Listings

Applebee Medical Clinic [PHSA TEST SIT...]

View Unclaim Delete

Add new listing

Listing Information Health Service Offerings Enablement Not accepting eRequests

2. Enter a **Listing name**.

This is the name that will appear on the public-facing Healthmap. Use an accurate and descriptive name to help users identify your site.

Listing Information Health Service Offerings Enablement Not accepting eRequests

Listing name

Applebee Medical Clinic [PHSA TEST SITE]

Listing Purpose

- a) In most cases, the listing name should match your site's business name.
- b) If a provider's name is used, include a descriptor such as an area of specialty or organization to help identify your site.
- c) Examples:
 - i. Business name: **Applebee Medical Clinic.**
 - ii. Business name and specific provider: **Applebee Medical Clinic – Dr Steve Smith.**
 - iii. Part of a larger organization: **Applebee Medical Clinic – Vancouver Medical Center.**

- iv. Provider name: **Dr Steve Smith - Family Medicine.**
- 3. Enter **Listing Purpose** details.

Use this section to describe the purpose of your listing.

Listing Purpose

A Directory Listing provides contact information, additional details, and Health Service Offerings for a specialist, clinic, or other healthcare provider on the Ocean Healthmap. They also indicate if that physician/program/provider is accepting eRequests.

Will this listing accept eRequests?
Yes, eReferrals and/or eConsults

eReferral button label
Send eReferral

eRequest notification email(s)
john.smith@applebeemedical.com; steve.smith@applebeemedical.c

Switch to site default

Patient contact email for eRequests
christopher.lee1@phsa.ca

Multiple emails must be separated by commas or semicolons.

Provided to patients in eRequest notification emails.

Complete the following fields.

a) Will this listing accept eRequests?

Indicates whether the listing will receive eReferrals.

- i. Select **Yes, eReferrals and/or eConsults.**

b) eReferral button label.

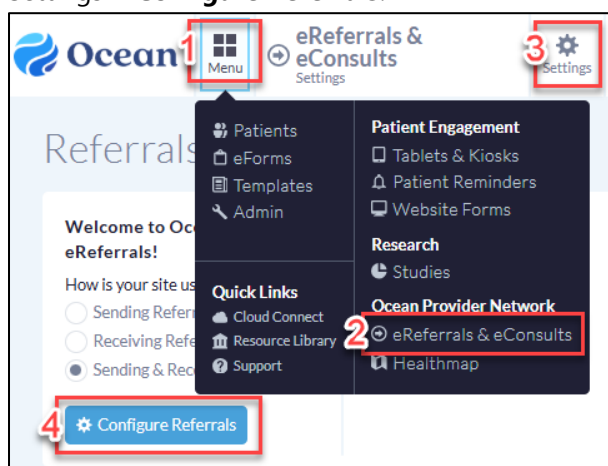
Controls whether the 'Send eReferral' button appears on your listing in the Healthmap.

- i. Select **Send eReferral.**

c) eRequest notification email(s).

Enter the email address(es) that will receive eReferral notifications (e.g., appointment confirmations, status updates). Separate multiple email addresses with commas or semicolons.

- i. By default, this field uses the site-wide email address from your **Referrals Configuration** settings.
- ii. To view or change this default email, go to: Menu > eReferrals & eConsults > Settings > **Configure Referrals.**



iii. To change or add additional email addresses: Click **Switch to manual entry**.

iv. To revert to the default email: Click **Switch to site default**.

4. Enter **Contact Information** details.

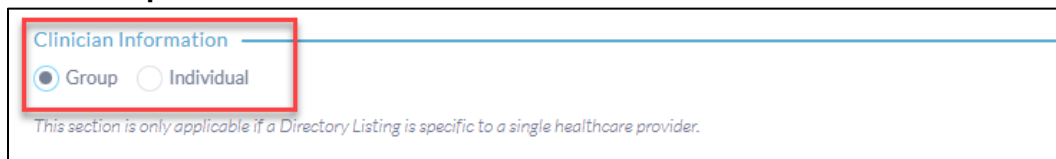
Use this section to set the public contact details shown on the Healthmap.

The use of general site contact information, rather than personal details, is recommended.

Complete the following fields:

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- a) **Address line 1 (REQUIRED).**
 - b) Address line 2 (Optional if applicable).
 - c) **City (REQUIRED).**
 - d) **Province (REQUIRED).**
 - e) **Postal code (REQUIRED).**
 - f) **Public-facing phone (REQUIRED).**
 - g) Fax (Optional but recommended).
 - h) Public-facing email (Optional).
 - i) Website (Optional).
 - j) Logo (Optional but recommended).
 - k) Organization: **(REQUIRED if your site is part of a larger organization).**
5. Enter **Clinician Information** details.
- a) Select **Group**.



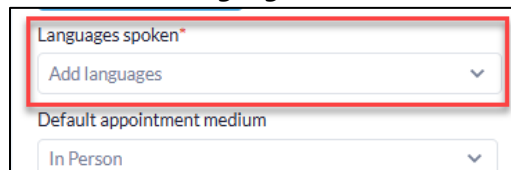
6. Enter **Service Details**.

a) Languages spoken.

Lists the language(s) that your site provides services in. At least one language is required.

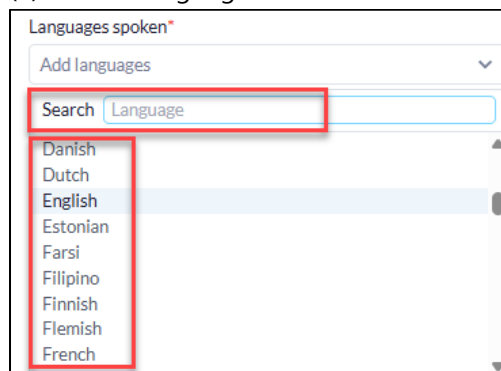
i. Add a language.

- (1) Click **Add languages**.

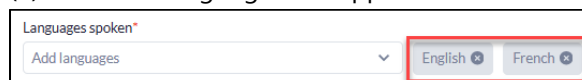


- (2) Select from the list or use the **Search** field to find a language.

- (3) Click a language to add it.



- (4) Selected languages will appear next to the **Add languages** field.



ii. Remove a language:

- (1) Click the language name next to the **Add languages** field



A screenshot of a form field labeled 'Languages spoken*'. Below the label is a dropdown menu with the text 'Add languages' and a downward arrow. To the right of the dropdown is a button labeled 'English' with a small globe icon. The 'English' button is highlighted with a red rectangular box.

b) Default request form.

*Sets the default referral form for all health service offerings within this listing unless a different form is assigned to a specific offering. To assign a form to a specific offering, see **Step 5: Update Details in the Health Service Offerings tab.***

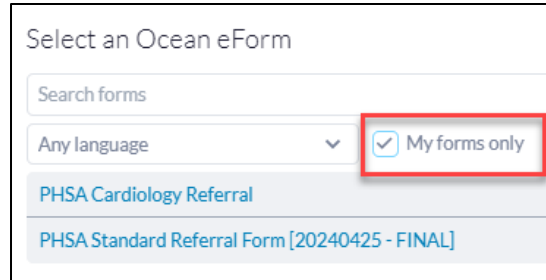
- i. A PHSA-developed request form must be used and should already be added to your Ocean site. If the correct form does not appear in the next step, return to **Step 1: Add PHSA-developed referral form(s) to site** before continuing.

- ii. Click **Select eForm**.



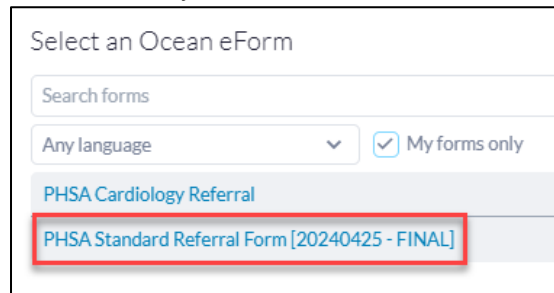
A screenshot of a form section titled 'Default request form'. Below the title is a subtitle: 'Select an Ocean eForm to use as the default request form for this listing's Health Service Offerings.' Below the subtitle is a blue button with a white plus icon and the text 'Select eForm'. The button is highlighted with a red rectangular box.

- iii. In the pop-up window, check **My forms only**.



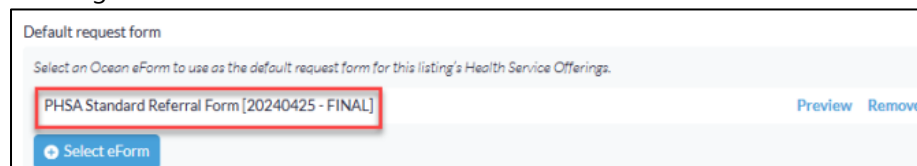
A screenshot of a pop-up window titled 'Select an Ocean eForm'. It contains a search bar labeled 'Search forms', a dropdown menu labeled 'Any language', and a checkbox labeled 'My forms only' which is checked. Below these are two form names: 'PHSA Cardiology Referral' and 'PHSA Standard Referral Form [20240425 - FINAL]'. The 'My forms only' checkbox is highlighted with a red rectangular box.

- iv. Click the form you want to use.



A screenshot of the same 'Select an Ocean eForm' pop-up window. The 'PHSA Standard Referral Form [20240425 - FINAL]' form name is highlighted with a red rectangular box.

- v. The selected form will appear under the **Default request form** section. This form will be used for all services, unless a different form is assigned at the Health Service Offering level.



A screenshot of the 'Default request form' section. It shows the subtitle 'Select an Ocean eForm to use as the default request form for this listing's Health Service Offerings.' Below this is a table with one row containing the form name 'PHSA Standard Referral Form [20240425 - FINAL]'. To the right of the form name are two links: 'Preview' and 'Remove'. Below the table is a blue button with a white plus icon and the text 'Select eForm'. The form name is highlighted with a red rectangular box.

- vi. Use the buttons beside the form name to **Preview** or **Remove** the form.

c) Description.

Displays information about your site on the Healthmap. Use the **Directory Listing Description Template** to create a clear, properly formatted description that meets program requirements.

- i. Download: [Directory Listing Description Template \(Receiving Sites\)](#).
- ii. Follow the instructions in the guide.
- iii. Copy and paste the completed content into the **Description** field.
- iv. Save the completed template for future updates.

7. Save changes.

- a) When all fields are complete, click **Save** in the **lower-left corner** of the screen.

Step 5: Update details in the Health Service Offerings tab

Each Directory Listing must include at least one Health Service Offering ("offering") to use eReferrals.

Offerings describe the services your site provides, and help sending sites select the appropriate destination for their referrals. Each offering is added and updated individually.

A different referral form can be assigned to a specific offering.

1. Access the **Health Service Offerings** tab.
 - a) Click the **Health Service Offerings** tab at the top of the page.
 - b) The tab name appears underlined in blue when selected.
 - c) If it is not selected, click on the tab.

2. Add a Health Service Offering.

a) **Notes:**

- i) **Do not use the “Miscellaneous” option.**
- ii) If you cannot find a Health Service Category that clearly describes the service, select the closest matching category. You may rename it to better reflect the service.
- iii) This approach helps improve search results in Healthmap and supports better analytics.
- iv) Only include credentialed specialties (e.g., psychiatry, dermatology, cardiology) if your physician is licensed in that specialty.

b) Click **Add Health Service Categories**.

The screenshot shows the 'Health Service Offerings' tab selected. Below the header, there is a text input field labeled 'Add Health Service Categories' which is highlighted with a red rectangular box. Above this field, there is a link that says 'Add services that your listing will support. You can further customize the display and func'.

c) Scroll through the list or use the **Search** bar to find the name of the service.

The first screenshot shows the 'Health Service Offerings' section with a scrollable list of service categories. A red box highlights the list, which includes: ADHD Services, Abnormal Pregnancy Screening Support, Acquired Brain Injury, Acupuncture, Addictions Assessment & Referral, Adolescent Medicine, Adoption Support, Adult Day Program, Adult Intensive Services, and Advice Event Following Immunization.

The second screenshot shows the same section with the search bar filled with the word 'family'. A dropdown list of results is shown, with 'Family Medicine' highlighted by a red box. Other visible results include 'Family Planning' and 'Family Services'.

d) Click on an offering from the drop down to add it. Added offerings will appear in boxes under **Health Services Offerings**.

The screenshot shows the 'Health Service Offerings' section. Below the 'Add Health Service Categories' input field, there is a blue button labeled 'Family Medicine' which is highlighted with a red box. This indicates that the service has been successfully added to the list.

- e) Some specialties, such as Cardiology, may automatically add multiple related offerings. You can remove any that are not needed.

Health Service Offerings

Add services that your listing will support. You can further customize the display and function of any selected offering in the sections below.

Add Health Service Categories

Cardiology Cardiology Services Cardiac Stress Testing ECG Echocardiogram Ambulatory Blood Pressure Monitoring Ambulatory ECG Monitoring

3. Remove a Health Service Offering.

- a) Click the offer you want to remove. It will be highlighted in blue.
- b) Click **Remove offering**.

Health Service Offerings

Add services that your listing will support. You can further customize the display and function of any selected offering in the sections below.

Add Health Service Categories

Cardiology Family Medicine Cardiology Services Cardiac Stress Testing ECG Echocardiogram Ambulatory Blood Pressure Monitoring Ambulatory ECG Monitoring

Offering name Remove offering

- c) In the pop-up, click **Yes - Remove**.
- i) **Note:** Removing an offering permanently deletes its details. If you add it again, all information must be re-entered.

Remove health service

Are you sure you want to remove this health service and its associated information?

Yes - Remove Cancel

4. Select a Health Service Offering.

- a) Each offering must be updated separately. Changes apply only to the selected offering.
- b) Click an offering to select it. The selected offering will be highlighted in blue.

Health Service Offerings

Add services that your listing will support. You can further customize the display and function of any selected offering in the sections below.

Add Health Service Categories

Dermatology Family Medicine

5. Update the following **Health Service Offerings** details:

Listing Information **Health Service Offerings**

Health Service Offerings

Add services that your listing will support. You can further customize the display and sections below.

Add Health Service Categories

Family Medicine

Offering name

Family Medicine

Health Service Category: Family Medicine

Accept eReferrals

☒ Yes ☐ No

Accept eConsults

☐ Yes ☒ No

a) Offering name.

Can be used to customize the name to better reflect the service shown on the Healthmap.

General Medicine (Family Medicine)

Offering name

General Medicine

Health Service Category: Family Medicine

- i) You can keep the default name or enter a custom one. The original name will still appear beside your custom name to note the general area of specialty.

b) Accept eReferrals.

This setting determines whether your site can receive eReferrals.

Health Service Category: Family Medicine

Accept eReferrals

☒ Yes ☐ No

- i) Select **Yes**.

6. Edit Offering Wait Time Management details.

Wait time information helps referring providers make clinical decisions. Ocean calculates wait times automatically each night, but you can also enter them manually.

Listing Information Health Service Offerings Ena

☐ Yes ☒ No

Offering Wait Time Management

Wait 1 Wait 2

For surgical pathways: Wait 1 is the time until the initial consult. Wait 2 is the time until surgery or intervention.
For non-surgical and diagnostic pathways: Wait 1 is the wait time.

Self-reported wait time Calculated wait time

Unspecified Unknown

Self-reported wait times are prioritized over calculated wait times in the Healthmap search results for 6 months.

Healthmap search results

☐ Use self-reported wait time ☒ Use calculated wait time

Public comment

Optional field for providing context to your wait time

a) Update the following settings to choose whether wait times are self-reported or automatically calculated.

i) Wait 1/Wait 2.

Offering Wait Time Management

Wait 1 Wait 2

For surgical pathways: Wait 1 is the time until the initial consult. Wait 2 is the time until surgery or intervention.

(1) **For surgical pathways:** Wait 1 is the time until the initial consult. Wait 2 is the time until surgery or intervention.

(2) **For non-surgical and diagnostic pathways:** Wait 1 is the wait time.

ii) Self-reported wait time.

Self-reported wait time

Unspecified

Unspecified

Walk-In

1 Day

2 Days

3 Days

4 Days

5 Days

6-10 Days

10-14 Days

1-2 Weeks

(1) From the drop-down, select an option to manually set a wait time.

iii) Healthmap search results.

Wait 1 Wait 2

For surgical pathways: Wait 1 is the time until the initial consult. Wait 2 is the time until the surgical procedure.
For non-surgical and diagnostic pathways: Wait 1 is the wait time.

Self-reported wait time: Unspecified Calculate

Self-reported wait times are prioritized over calculated wait times in the Healthmap search results for 6 months.

Healthmap search results
☐ Use self-reported wait time ☒ Use calculated wait time

- (1) **Use self-reported wait time:** Select this option if you want to manually enter the wait time.
- (2) **Use calculated wait time:** Select this option if you want to use Ocean-calculated wait times.
 - (i) Note 1: Selecting this option will ignore the values entered above.
 - (ii) Note 2: At least six referrals with scheduled appointment dates are required before wait times can be generated. For more information, [click here](#).

7. Edit **Offering Configurations** details.

These optional settings allow you to customize details for a specific offering. This section is also where you can assign a referral form that is unique to the offering.

Offering Configurations (Optional)

Offering description

Specify offering catchment area

Offering notification email(s) Switch to manual entry

Automatically updates to match this listing's eRequest notification email(s).

Offering public-facing email Offering website

Offering languages spoken
Add languages

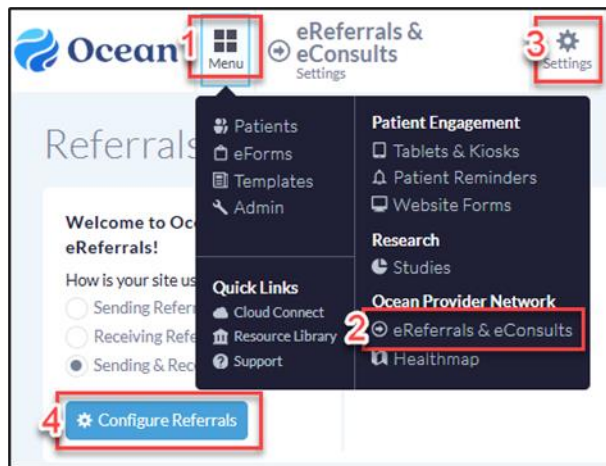
Offering request form
Select an Ocean eForm to use as this offering's request form. This form will be shown instead of the default eRequest form (if one is set).

Select eForm

a) **Offering notification email(s).**

Optional: Enter the email address(es) that should receive notifications for this offering if they differ from those listed under **Default Incoming Referral Notification Emails**.

- i) Go to Menu > eReferrals & eConsults > Configure > **Default Incoming Referral Notification Emails**, then review the email address currently entered.



- ii) If the email entered is correct, no further action is required. Notifications for this offering will be sent to that email address.
- iii) To change or add email addresses that will receive notifications for this offering, return to the **Offering Notification Email(s)** section.
- iv) Click **Switch to manual entry**.

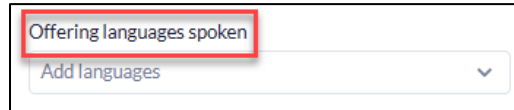
- v) Enter the preferred email address(es).
 - Separate multiple email addresses using commas or semicolons.
 - The addresses entered in this section will replace those in the **Offering notification email(s)** section.
 - If you still want the original addresses to receive notifications, you must re-enter them here.

b) Offering languages spoken.

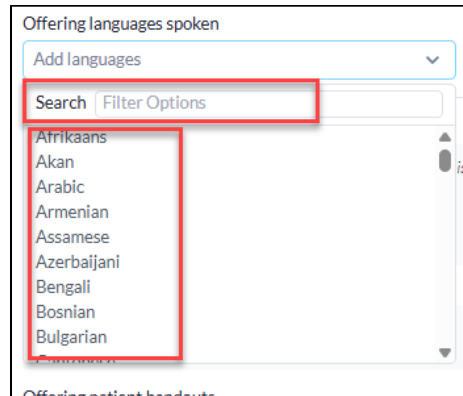
Optional: Used to list the language(s) the offering's services are provided in.

- i) **Add a language:**

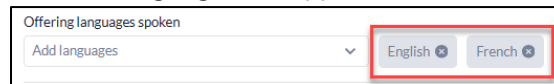
(1) Click **Offering languages spoken.**

A screenshot of a web form showing a dropdown menu labeled 'Offering languages spoken'. The dropdown is open, showing a search bar and a list of languages. The text 'Offering languages spoken' is highlighted with a red box.

(2) Select one or more languages from the list or use the search field to find them.

A screenshot of the 'Offering languages spoken' dropdown menu. The dropdown is open, showing a search bar and a list of languages. The text 'Offering languages spoken' is highlighted with a red box. The list of languages includes Afrikaans, Akan, Arabic, Armenian, Assamese, Azerbaijani, Bengali, Bosnian, and Bulgarian.

(3) Selected languages will appear next to the **Add languages** field.

A screenshot of the 'Offering languages spoken' dropdown menu. The dropdown is closed, and the selected languages 'English' and 'French' are displayed next to the 'Add languages' field. The text 'Offering languages spoken' is highlighted with a red box.

ii) **Remove a language:**

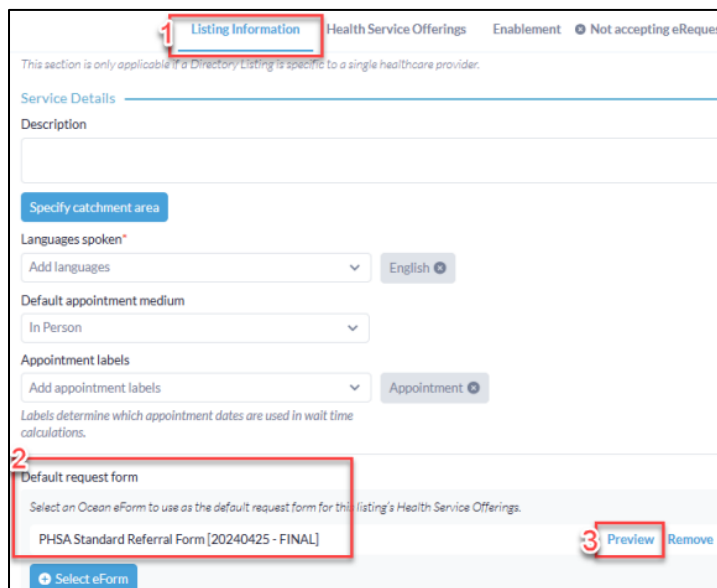
(1) Click the language next to the **Add languages** field.

A screenshot of the 'Offering languages spoken' dropdown menu. The dropdown is closed, and the selected languages 'English' and 'French' are displayed next to the 'Add languages' field. The 'French' button is highlighted with a red box.

c) **Offering request form**

Assign a referral form that is specific to this offering if it differs from the default referral form.

i) Review the default referral form.

A screenshot of the 'Listing Information' tab in the 'Health Service Offerings' section. The tab is highlighted with a red box and labeled '1'. The 'Default request form' section is highlighted with a red box and labeled '2'. The 'Default request form' section shows a dropdown menu with 'PHSA Standard Referral Form [20240425 - FINAL]' selected. The 'Preview' button is highlighted with a red box and labeled '3'. The text 'This section is only applicable if a Directory Listing is specific to a single healthcare provider.' is visible at the top.

(1) Go to the **Listing Information** tab.

- (2) Scroll to the **Default request form** section.
- (3) Click **Preview** to review the default form.
- ii) Are changes required:
 - (1) If **No**: No further action is required. The default form is used for all offerings, unless another form is assigned.
 - (2) If **Yes**: Return to the **Offering request form** section.

- (a) Click **Select eForm**.

- (b) In the **Select an Ocean eForm** pop-up, check **My forms only** to display your site's uploaded forms. Select the form you want to use from the list.

- (c) If the required form is not listed, see **Step 1: Add PHSA-developed referral form(s) to site** to add the required form, then repeat these steps.
- (d) Click **Preview** to review or **Remove** to delete the form.

8. Save changes.

- a) Click **Save** in the lower-left corner of the screen.

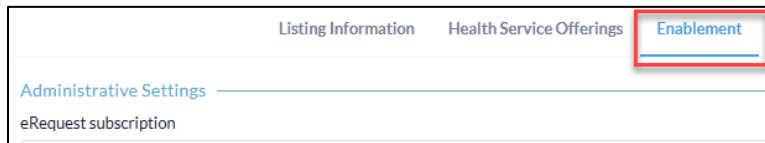
Step 6: Update details in the Enablement tab

The **Enablement** tab contains the activation and configuration settings for your directory listing.

This section also allows you to apply to Regional Authority, which is required to qualify for eReferrals program funding and support.

1. Access the **Enablement** tab.

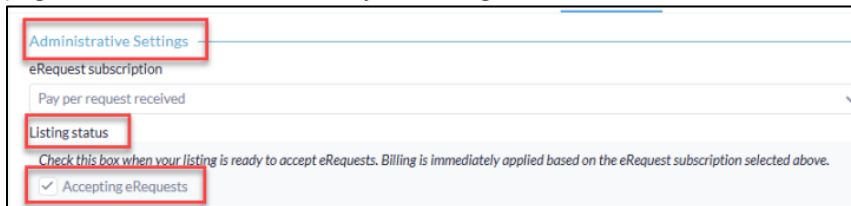
- Click the **Enablement** tab at the top of the page.
- The tab name appears underlined in blue when selected.
- If it is not selected, click on the tab.



The screenshot shows a navigation bar with three tabs: 'Listing Information', 'Health Service Offerings', and 'Enablement'. The 'Enablement' tab is highlighted with a blue underline. Below the tabs, the text 'Administrative Settings' and 'eRequest subscription' are visible.

2. Update **Listing status**.

*This setting is located under the **Listing status** heading in the **Administrative Settings** section of this page and determines whether your listing can receive eReferrals.*

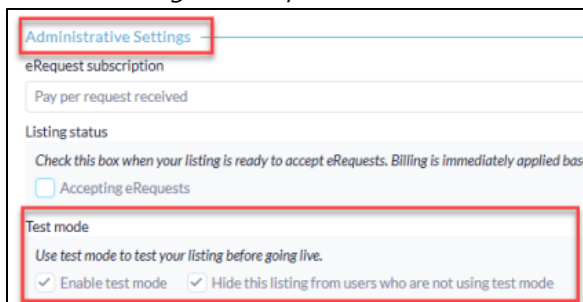


The screenshot shows the 'Administrative Settings' section. The 'Listing status' heading is highlighted. Below it, the 'Accepting eRequests' checkbox is checked. A note states: 'Check this box when your listing is ready to accept eRequests. Billing is immediately applied based on the eRequest subscription selected above.'

- Select **Accepting eRequests**.

3. Activate **Test mode**.

Use this mode to train in Ocean without affecting live operations. When enabled, your site is hidden from live listings, which prevents accidental referrals to or from live sites.

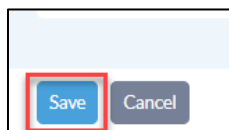


The screenshot shows the 'Administrative Settings' section. The 'Test mode' heading is highlighted. Below it, both the 'Enable test mode' and 'Hide this listing from users who are not using test mode' checkboxes are checked. A note states: 'Use test mode to test your listing before going live.'

- Go to the **Administrative Settings** section.
- Under **Test mode**, select both checkboxes:
 - Enable test mode**.
 - Hide this listing from users who are not using test mode**.

4. Save changes.

- Click **Save** in the lower-left corner of the screen.



The screenshot shows the bottom of the screen with two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red border.

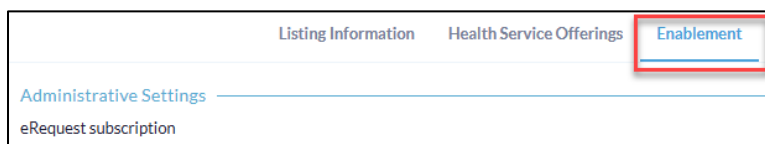
Step 7: Apply to Regional Authority

Applying to the Regional Authority is required to enable eReferrals and qualify for program funding and support.

This process includes accepting the [Health User Participation Agreement](#). A staff member with legal signing authority (the signatory) must accept the agreement on behalf of all users at their site using their own Ocean user account.

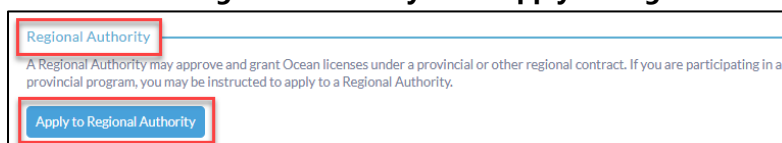
This step may be deferred but must be completed before a site goes live and enables eReferrals. **Enabling eReferrals without completing this step may result in system charges.**

1. Confirm legal signing authority.
 - a) **Only a staff member with legal signing authority for the site can complete this step using their own Ocean User Account.**
 - i) If you have legal signing authority: Continue to the next step.
 - ii) If you are not the signatory: Notify an authorized staff member. To complete this step, the signatory must:
 - (1) Be invited to the Ocean Site;
 - (2) Have an Ocean User Account; and
 - (3) Have Ocean Site Admin privileges.
2. Review and accept the **Health User Participation Agreement**.
 - a) The signatory should review the [Health User Participation Agreement](#) before accepting it.
3. Apply to Regional Authority.
 - a) Access the **Directory Listings** section (see Steps 1 and 2).
 - b) Click the **Enablement** tab.



The screenshot shows a web interface with three tabs: 'Listing Information', 'Health Service Offerings', and 'Enablement'. The 'Enablement' tab is highlighted with a red box. Below the tabs, there is a section titled 'Administrative Settings' with a sub-item 'eRequest subscription'.

- c) Scroll down to **Regional Authority**. Click **Apply to Regional Authority**.



The screenshot shows a section titled 'Regional Authority' with a red box around the title. Below the title is a paragraph: 'A Regional Authority may approve and grant Ocean licenses under a provincial or other regional contract. If you are participating in a provincial program, you may be instructed to apply to a Regional Authority.' At the bottom of the section is a button labeled 'Apply to Regional Authority', which is also highlighted with a red box.

4. Provide site details in the **Apply to Regional Authority** popup.

Apply to Regional Authority **Receiving or Sending & Receiving site details**

Enter the number of clinicians authorized

- Authorized clinicians don't need to have an Ocean user account.
- Only include clinicians who receive eRequests at this directory listing and nowhere else.
- Don't include administrative staff.

If the total number of clinicians is 0, you must include a comment explaining the rationale. See this [support article](#) for further details on determining the appropriate number of clinicians for your listing.

Number of clinicians*	Comment
2	Additional Details

Note: This number must be reviewed and updated annually to assist Regional Authorities in capturing an accurate number of eRequest targets available in their region via the Ocean Healthmap.

Cancel Choose Regional Authority

- Number of clinicians:** Enter the number of providers at your site who receive referrals.
- Comment:** Leave blank.

5. Choose a Regional Authority.

- Click **Choose Regional Authority**.

Note: This number must be reviewed and updated annually to assist Regional Authorities in capturing an accurate number of eRequest targets available in their region via the Ocean Healthmap.

Cancel Choose Regional Authority

- In the pop-up window, click **Regional Authority** to open the drop-down menu.
- Select **British Columbia Regional Authority**.

Choose Your Regional Authority

An application to include your site will be sent to the chosen Regional Authority.

Regional Authority

British Columbia Regional Authority

Search | Filter Options

- Central East - Amplify Care Network
- Toronto Central - Amplify Care Network
- North Simcoe Muskoka - Amplify Care Network
- Central - Amplify Care Network
- Central West - Amplify Care Network
- Mississauga Halton - Amplify Care Network
- Provincial - Amplify Care Network
- Nova Scotia Health & IWK Health
- British Columbia Regional Authority
- Ontario Health eReferral Program

- Click **Review License Agreement** to open the **Health User Participation Agreement**.

Choose Your Regional Authority

An application to include your site will be sent to the chosen Regional Authority.

Regional Authority

British Columbia Regional Authority

Cancel Review Licence Agreement

- e) Check **I agree**, then click **Send application**.

British Columbia Regional Authority - Licence Agreement

DIGITAL REFERRALS AND ORDERS SYSTEM (OCEAN) HEALTH USER PARTICIPATION AGREEMENT

This Participation Agreement ("Agreement") is between the PROVINCIAL HEALTH SERVICES AUTHORITY ("PHSA") and you as a user (the "User") of the Digital Referrals and Orders System ("DRO System"). As a user of the DRO System you may be a provider of health care services (e.g. a registered professional or health care body) ("Provider") or an individual who has been authorized by a Provider to use their DRO System account to access and use the DRO System ("Delegated User"). This Agreement takes effect on the date that the User digitally accepts the Agreement.

BACKGROUND

The DRO System is a cloud-based tool made available by PHSA to Providers and Delegated Users in British Columbia through an arrangement with a third party service-provider, OceanMD Inc. ("OceanMD").

Under this Agreement, the User is granted access to an online platform hosted by OceanMD through which users can access online patient services, such as, as available, health care referrals and consultations, medical imaging and laboratory ordering and other services ("eServices").

Acceptance of the terms and conditions set out in this Agreement is a condition of all user access to the DRO System, including by users that are Providers or Delegated Users.

TERMS AND CONDITIONS

In consideration of the rights and privileges granted to the User under this Agreement, the User accepts and agrees to the following terms and conditions.

1. INTERPRETATION

When used in this Agreement, the following capitalized terms have the following meanings: (a) "Applicable Privacy Laws" means, as applicable, the *Freedom of Information and Protection of Privacy Act* (British Columbia), the *Personal Information Protection Act* (British Columbia), and any other laws applicable to the collection, use, disclosure or processing of Personal Information through the DRO System; (b) "Patient" means a patient receiving health services from a Provider in British Columbia; (c) "Patient Data" means a Patient's Personal Information that a Provider or Delegated User inputs or views in the DRO System; (c) "Personal Information" means recorded information about an identifiable individual and includes all information that comprises "personal information" under Applicable Privacy Laws.

Version 005927.043/7152276.1

Your Ocean user email address "christopher.lee1@phsa.ca" will be provided to the regional authority "British Columbia Regional Authority" so that the regional authority can contact you regarding your application.

☒ I agree

- f) The PHSA Digital Referrals & Orders team will review your application and contact your site if additional information is required.
6. Save changes.
- a) Click **Save** in the lower-left corner of the screen.

Questions?

If you have questions or require assistance with creating your Directory Listing, please contact the Digital Referrals and Orders team: dro.program@phsa.ca.