

Create or update a Directory Listing for Sending 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.**

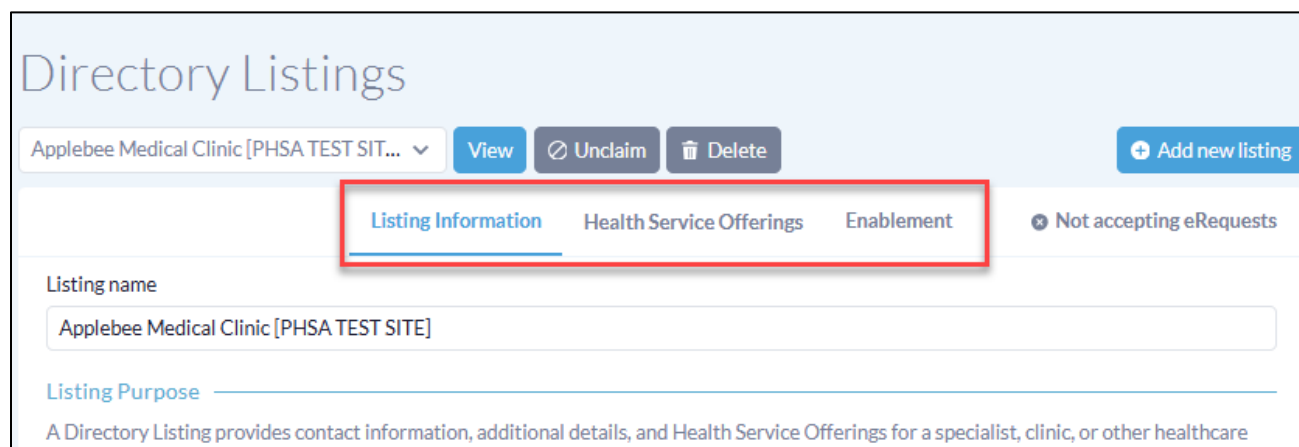
Follow the instructions carefully to ensure your listing meets all mandatory program and technical requirements for successful eReferral use.

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 a downward arrow. To the right of the dropdown are three buttons: 'View', 'Unclaim', and 'Delete'. Further right is a blue button labeled 'Add new listing'. Below these elements is a tabbed interface with three tabs: 'Listing Information' (which is highlighted with a red box and an underline), 'Health Service Offerings', and 'Enablement'. To the right of the tabs is a status indicator 'Not accepting eRequests' with a crossed-out circle icon. Under the 'Listing Information' tab, there is a 'Listing name' label followed by a text input field containing 'Applebee Medical Clinic [PHSA TEST SITE]'. Below this is a 'Listing Purpose' label followed by a horizontal line. At the bottom, a descriptive text states: 'A Directory Listing provides contact information, additional details, and Health Service Offerings for a specialist, clinic, or other healthcare'.

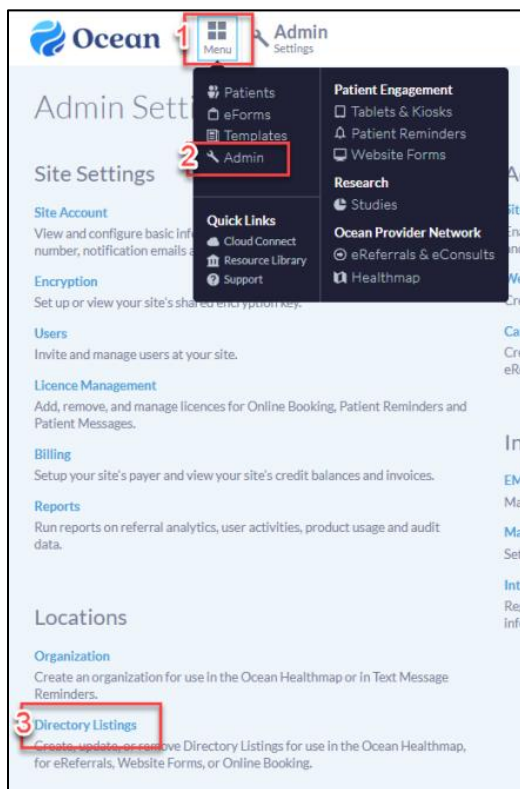
Contents

Step 1: Access Directory Listings section	2
Step 2: Create, review or update a directory listing	3
OPTION 1: Create a new listing	3
OPTION 2: View or update an existing listing	3
Step 3: Update details in the Listing Information tab	3
Step 4: Update details in the Health Service Offerings tab	8
Step 5: Update details in the Enablement tab	11
Step 6: Apply to Regional Authority	12
Questions?	15

Step 1: 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**.

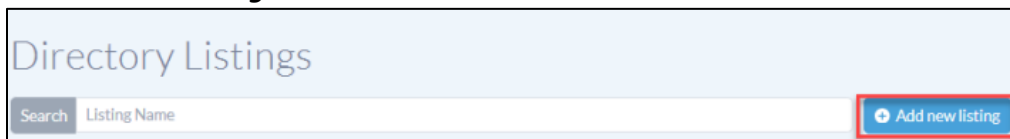


Step 2: Create, review or update a directory listing

To use eReferrals, your site must have **at least one directory listing**. This page allows you 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 3: 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

Add new listing

Applebee Medical Clinic [PHSA TEST SITE]
Family Medicine

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 3: Update details in the Listing Information tab**.

Step 3: 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

Modifies the send button and notification text for this listing.

eRequest notification email(s)

john.smith@applebeemedical.com; steve.smith@applebeemedical.c

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.

[Contact Information](#)

Complete the following fields.

a) Will this listing accept eRequests?

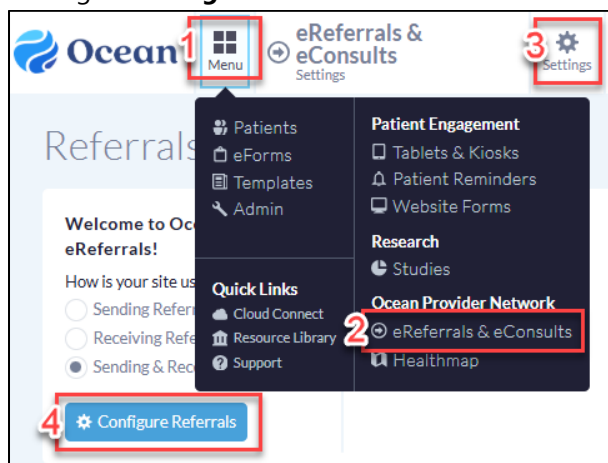
Indicates whether the listing will receive eReferrals.

- i. Select **No**.

b) 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**.

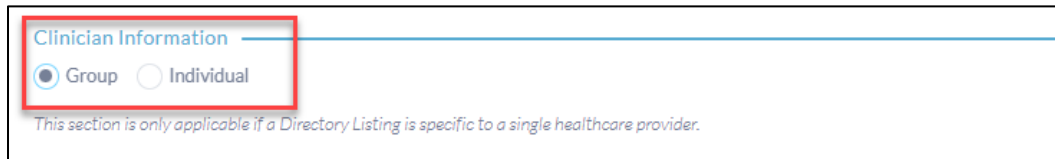
4. Enter **Contact Information** details.

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:

- 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**.



Clinician Information

☒ Group ☐ Individual

This section is only applicable if a Directory Listing is specific to a single healthcare provider.

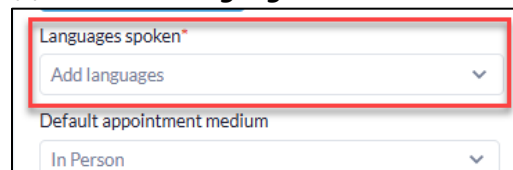
6. Enter **Service Details**.

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**.



Languages spoken*

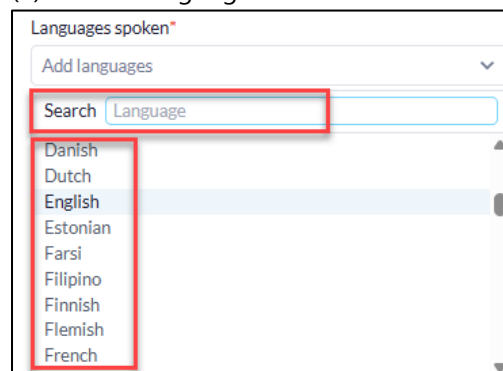
Add languages

Default appointment medium

In Person

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

(3) Click a language to add it.



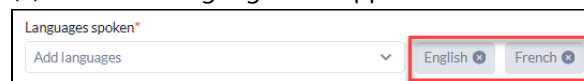
Languages spoken*

Add languages

Search Language

- Danish
- Dutch
- English
- Estonian
- Farsi
- Filipino
- Finnish
- Flemish
- French

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



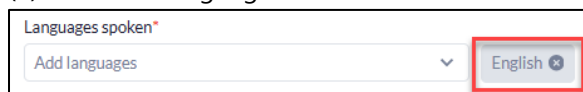
Languages spoken*

Add languages

English French

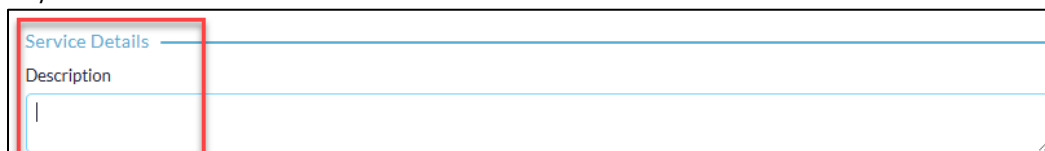
- ii. Remove a language:

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



b) Description.

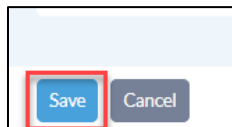
*Displays information about your site on the Healthmap. Use the **Directory Listing Description Template** to create a clear, properly formatted description that meets program requirements.*



- i. Download the [Directory Listing Description Template \(Sending Sites\)](#).
- 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.



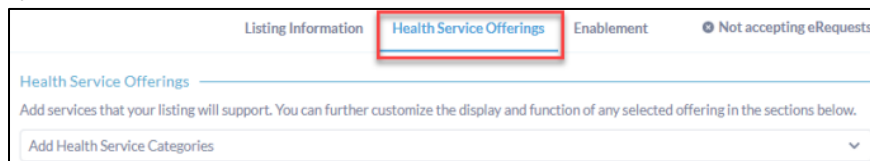
Step 4: Update details in the Health Service Offerings tab

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

Offerings describe the services your site provides and help receiving sites understand the nature of a referral.

Sending sites must add at least one offering, however additional offerings may be added at the site's discretion. Each offering is added and updated individually.

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.

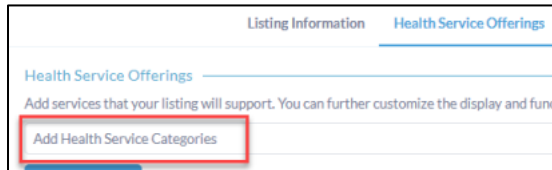


2. Add a Health Service Offering.

a) **Notes:**

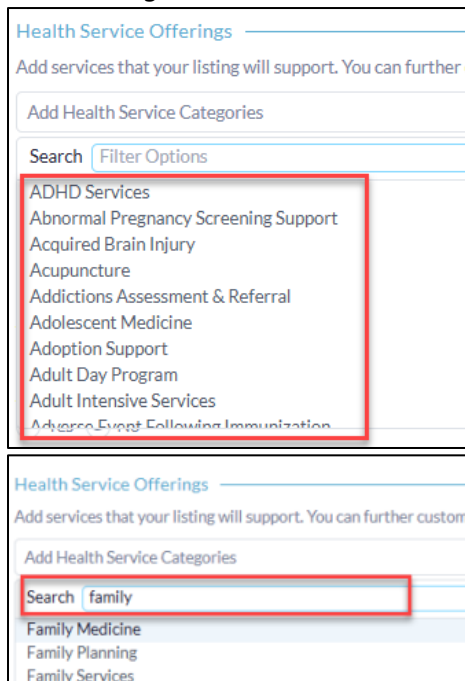
- i) **Do not use the “Miscellaneous” option.**
- ii) If you cannot find a Health Service Category that clearly describes the service, select the closest matching category. You may rename it to better reflect the service.
- iii) This approach helps improve search results in Healthmap and supports better 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 in a web application. Below the tab name, there is a text prompt: 'Add services that your listing will support. You can further customize the display and func'. Below this prompt, a button labeled 'Add Health Service Categories' is highlighted with a red rectangular box.

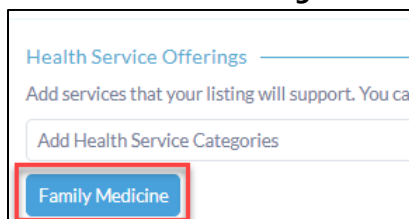
c) Scroll through the list or use the **Search** bar to find the name of the service.



The first screenshot shows the 'Health Service Offerings' tab with a search bar and a list of categories. The search bar has 'Filter Options' next to it. The list of categories 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 'ADHD Services' item is highlighted with a red box.

The second screenshot shows the same tab with the search bar containing the text 'family'. The search results list 'Family Medicine', 'Family Planning', and 'Family Services'. 'Family Medicine' is highlighted with a red box.

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' tab. Below the 'Add Health Service Categories' button, a blue button labeled 'Family Medicine' is highlighted with a red rectangular box, indicating it has been added to the list of offerings.

- 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:

a) Offering name.

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

- 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.

- i) Select **No**.

6) Save changes.

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

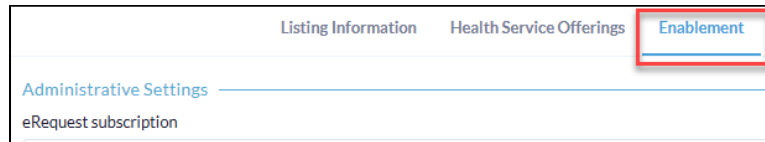
Step 5: Update details in the Enablement tab

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.

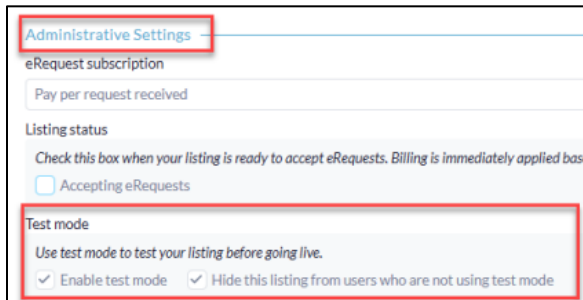
- 1. Access the **Enablement** tab.

- a) Click the **Enablement** 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.

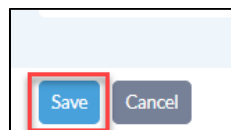


2. Activate **Test mode**.

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.



- a) Go to the **Administrative Settings** section.
 - b) Under **Test mode**, select both checkboxes:
 - i) **Enable test mode**.
 - ii) **Hide this listing from users who are not using test mode**.
3. Save changes.
- a) Click **Save** in the lower-left corner of the screen.



Step 6: 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.

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

4. Provide site details in the **Apply to Regional Authority** popup.
 - a) **Number of clinicians:** Enter '0' (zero).
 - b) **Comment:** Enter 'sender.'

5. Choose a Regional Authority.

- a) Click **Choose Regional Authority**.

- b) In the pop-up window, click **Regional Authority** to open the drop-down menu.
- c) 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

- d) 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.

Cancel

☒ I agree

Send application

- 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.

Save

Cancel

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.