Directory listing description template for Sending sites

This guide explains how to format a directory listing description to meet program requirements for sites that **Send** referrals.

The description is a key part of the eReferrals system. It provides essential site details in a clear and consistent way to support clinical decision-making.

The information appears on the public Healthmap and supports the eReferral process. Formatting codes are used to ensure clarity, consistency, and proper function.

Note: Only a Site Admin can make these changes.

Step 1: Review the required information

The following fields are required for Sending sites:

- **Note:** Unless otherwise stated, list each item in point form on separate lines.

Mandatory fields are highlighted in green.

Required information:	Information details:	Examples:
Provider name and area(s) of specialty (REQUIRED)	List the name of all providers at your site and include their area(s) of specialty.	**Point form only:** Dr. Steve Smith, Cardiology Dr. Jack Johnson, Family Medicine, Dermatology
Patient population served (REQUIRED)	Specify the patient population served by your site. The details can be displayed in point or sentence form.	**Point form:** Adults 18+ Children under 16 Cancer patients **Sentence form:** Residents of Vancouver and the Lower Mainland, including Coquitlam, Port Coquitlam and Port Moody.
Special Notes (Optional if applicable or desired)	This section is used if you want to include your clinic hours, or	**Point form only:**

This section can be kept blank if there are no special notes.	information such as upcoming changes, limited availability, etc. This section can also include details such as the appointment format or access options (walk-ins, virtual visits, etc.).	Clinic hours: Monday to Friday: 8AM - 4PM Not accepting new patients. We do not offer walk-in appointments. Serving the community for over 40 years. Located at Gordon Professional Centre.

Step 2: Complete description template

1. Copy and paste the highlighted **Description Template** content into a document on your computer.
2. Update the template with your site details.
3. **For text highlighted in yellow:** Do not edit, delete or change this text. These are formatting codes that ensure your description is in the right format and meets program requirements.
4. **For text highlighted in blue:** Replace this text with your site's information. If you don't have any details to add, delete the placeholder examples but keep the heading.

Description Template:

Provider(s):
Dr. First Example, Family Medicine (*placeholder example)*
Dr. Last Example, Family Medicine (*placeholder example)*

Patient Population Served:
Adults 18+, children under 16, cancer patients *(placeholder example)*

Special Notes:
Clinic hours: Monday to Friday: 8AM – 4PM *(placeholder example)*
Not accepting new patients *(placeholder example)*
We do not offer walk-in appointments *(placeholder example)*

Step 3: Copy and paste the template content to the *description* field of your directory listing

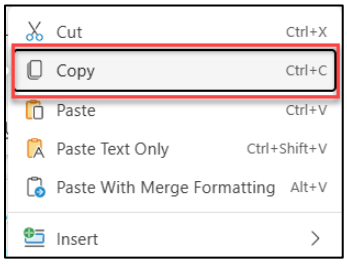
1) **Ensure that you remove the *placeholder example* information from the template above before copying and pasting it into your directory listing's description. Your description should only include information that applies to your site.**
2) Copy all the content in the **Description Template** box above.
    a) Highlight all the content with your cursor.

Provider(s):
Dr. First Example, Cardiology *(placeholder example)*
Dr. Last Example, Cardiology *(placeholder example)*

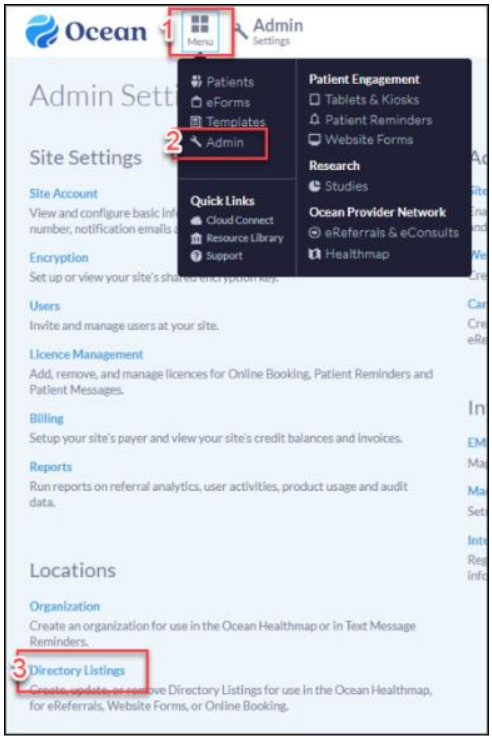
Patient Population Served:
Adults 18+, children under 16, cancer patients *(placeholder example)*

Special Notes:
Clinic hours: Monday to Friday: 8AM – 4PM *(placeholder example)*
Not accepting new patients *(placeholder example)*
We do not offer walk-in appointments *(placeholder example)*

    b) Right-click and select **Copy.**

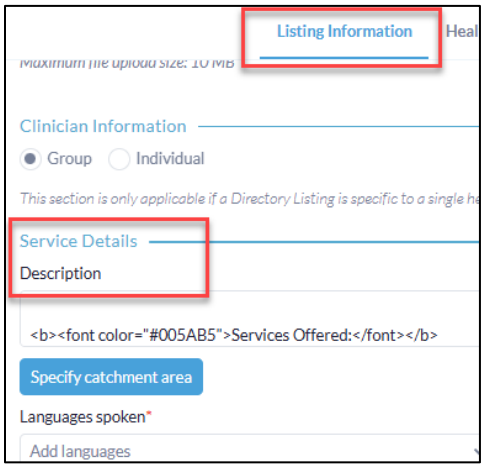


3) Login to your Ocean site.
    a) Go to: **Menu** > **Admin** > **Directory Listings**



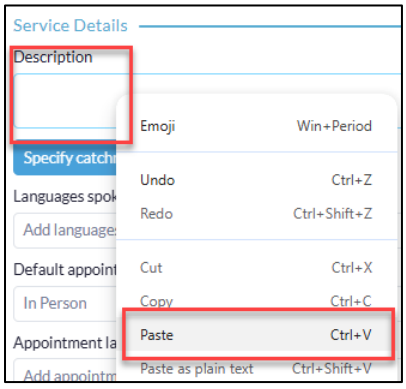
4) Select your directory listing from the list by clicking on the **Edit** button next to the listing.

5) Click the **Listing Information** tab and scroll down to the **Service Details** section.

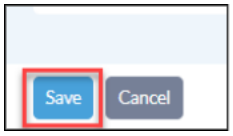


6) Paste the content you copied above into the **Description** field.
   a) Click the **Description** field. Right-click and select **Paste**.

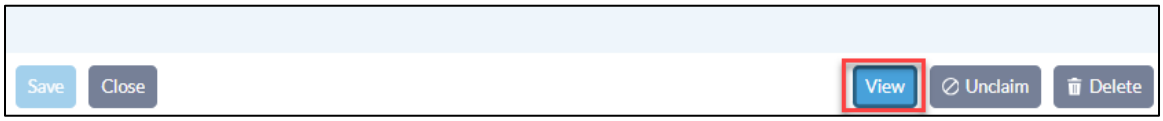
b)



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



8) View listing.
   a) Click **View** in the lower-right corner of the screen to see how the directory listing will appear in the Healthmap.



9) If edits are required, make changes to the description template section above.
   a) Delete the content from the **Description** field.
   b) Follow the steps above to copy and paste the content from the description template section to the **Description** field in the Directory Listing section of the Ocean site.
   c) Save changes in the Ocean site.

Step 4: Save your description document for future use

We recommend saving a copy of the description document and updating it whenever your site information changes (e.g., if a new provider or service is added). Doing so will make updates easier while preserving the required formatting requirements.

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.