

eReferrals General User Training Manual for Senders

Introduction

Your Ocean site administrator, the person responsible for setting up and managing your Ocean site, has invited you to join your team's Ocean site. This site is used by your team to send eReferrals.

You will receive an invitation by email. If you do not see it in your inbox, check your spam or junk folder. If you still cannot find the invitation, contact your Ocean site administrator for help.

Important: Download and save a copy of this guide so you can track your progress and return to where you left off.

Who is This Guide For?

This guide is for all team members who will work directly with eReferrals and patient information. It walks you through the onboarding steps you need to complete to use the Ocean site. This guide can be used while your team's Ocean site admin is onboarding or after they have finished. Either way, you will need to wait until the site admin invites you to join.

How to Join the Ocean Site

- a) **Create a user account and log into Ocean**
 - When you accept the invitation from your Ocean site admin, you will be prompted to:
 - Create a new Ocean user account if you do not already have one.
 - Sign in using your existing Ocean user account if you already have one.
- b) **Set your personal user settings**
- c) **Complete the training**

How This Guide is Organized

Each step follows the same structure:

- **Before you begin** – lists what you need before starting.
- **Complete the steps** – numbered instructions to follow in order.
- **Resources for you and your team** – videos and guides for reference.

Training and Compensation

Training differs depending on when you join the Ocean site. It can occur during the site's initial onboarding to Ocean or after the site has gone live.

Important: If you receive training while the site is being onboarded, you can use the test environment to practice. If you receive training after Go-Live, you will not be eligible for compensation.

Technology Requirements

These requirements apply to all sections of the guide:

- Use a computer with stable internet (minimum 10Mbps).
- Viewing on a mobile phone is not recommended.

Recommended browsers ([Ocean browser recommendations](#)):

- Mozilla Firefox: Latest standard or extended service release.
- Google Chrome or Microsoft Edge: Latest stable or extended stable release.
- Apple Safari: Any version running on a supported edition of MacOS, iOS, or iPadOS.

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Step 1: Create a user account & log into Ocean

Create one user account per person, even if you work at multiple locations or for different providers.

Important: If you already have an Ocean user account, skip to [Step 2: Set your personal user settings](#)

Before you begin

Pre-requisite:

- Completed intake form
- Do not yet have an Ocean user account.

Difficulty:

- Easy - comparable to creating an email account

Time to complete:

- 5 minutes

Technology needed:

- The requirements are the same for all sections.
- For full details, see [Ocean browser recommendations](#)

When you are done you will be able to:

- Create a user account
- Log in to Ocean

Complete the steps

1. Create a user account

- Go to <https://ocean.cognisantmd.com> in your web browser.
- Click the **Sign up here!** button in the bottom right corner of the sign-in box.

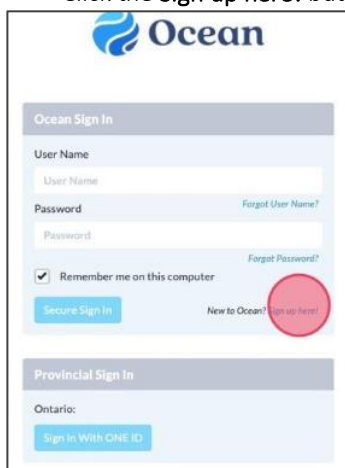


Figure 1: Sign up screen

2. Fill out the user registration form

- Complete the required fields in the form and select **I want to create a new Ocean site.**
-

Important: Your Ocean username cannot be changed once set. Choose carefully.

Figure 2: [User registration form](#)

- Select Sign Up for Ocean.

Figure 3: Sign up for Ocean button

3. Accept the End User License Agreement (EULA)

- Click Sign In and enter your username and password.



Figure 4: Sign In

- Read the EULA, then click **I Agree** in the bottom right corner.

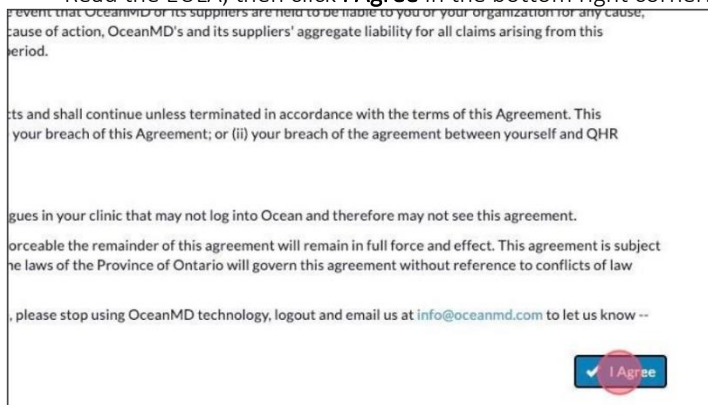


Figure 5: End User Legal Agreement (EULA)

4. Access the Ocean Portal

- Select **Go to the Ocean Portal** to start using Ocean.

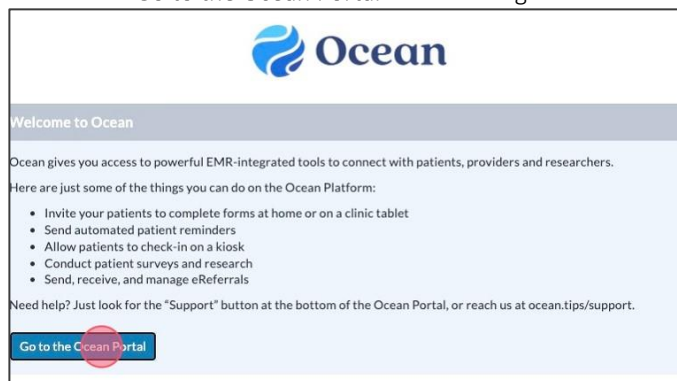


Figure 6: Welcome to Ocean screen

5. Check your email for the verification message

- Ocean will send a verification email to the address you used. Verify your account before signing in.

Resources for you and your team

- Video
 - [Get Started with Ocean](#)
- PDF
 - [Create an Ocean user account in the Ocean Portal](#)

Step 2: Set your personal user settings

In this section you will set your preferred landing page, add your clinical information, and assign any clinical delegates.

Before you begin

Pre-requisites:

- *Ocean user account*
- *Ocean site*

Difficulty:

- *Easy (comparable to creating an email)*
- Time to complete:
- *15 minutes*

Technology needed:

- *Technology requirements are the same for all sections.*
- *For full details, see [Ocean browser recommendations](#)*

When you are done you will be able to:

- *Set your landing page*
- *Complete clinical information (for medical practitioners)*
- *Set clinic location*
- *Add clinical delegates*

Review the information

To get an overview of the concepts in this section:

- First watch the video: [Configure your Ocean User Account](#)
- Next, follow the step-by-step instructions in the *Complete the steps* section.

Complete the steps

1. Set your preferred landing page

- Select your **name** at the top right corner in Ocean and select **My Account**.
- Under Account Information click **Set Default Home Page** and choose **eReferrals**.
- Click **Save**.

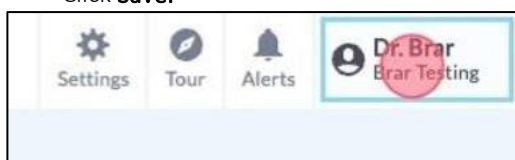


Figure 7: Select name

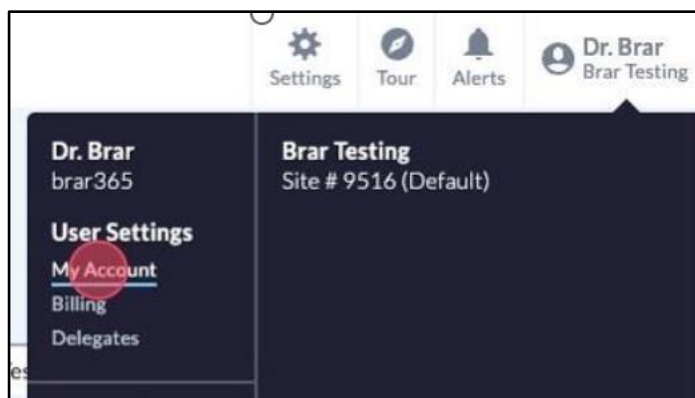


Figure 8: Select My Account

Account Information	
User Name:	daniyal
Password:	••••••••
Two Factor Authentication:	Enabled
Email Address:	daniyal.naumani@phsa.ca
First Name:	Daniyal
Surname:	Naumani
User Role:	Family Physician
Province:	Ontario
Clinical Delegate Emails:	
Referral Notification Email:	
Referral Email Language:	English only
ONE ID User ID:	
Subscriptions:	☐ Weekly usage report
Default Home Page:	eReferrals
Autofill templates:	Disabled
TReC Application:	Submit Application to Regional Authority

Figure 9 : Account information > Select Default Home page

For Medical Professionals only

2. Edit your Clinical Contact Information

- Select your **name** at the top right corner in the Ocean portal. (see Figure. 7 above)
- From the pop-up menu, select **My account**. (see Figure. 8 above)
- Select **Edit Clinical Contact Information**.

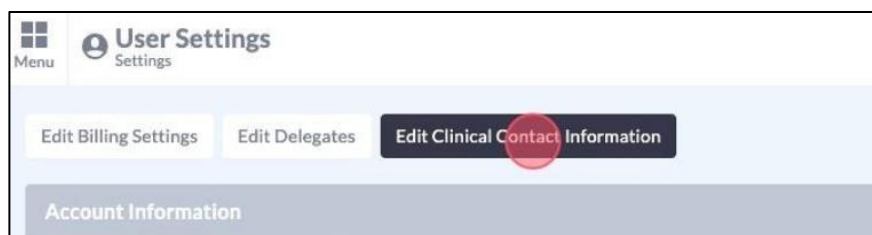


Figure 10: User settings > Edit Clinical Contact Information

3. Enter your:

- **Billing #** (MSP number)
- **Professional ID** (College of Physicians and Surgeons license number)
- **Signature**

Note: Professional ID is your College of Physicians and Surgeons of BC license number.

Figure 11: Clinical Contact Information

- Click **Save**.

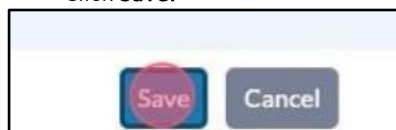


Figure 12: Clinical Contact Information > Save

4. Add a clinical delegate in Ocean

- Delegates can send eReferrals on behalf of a physician.
- Delegates can be assigned by the site admin for the physician or physicians can assign their own delegates.

Menu > select Admin > Site Settings > Users

Option A: Admin assigns delegates for a physician

Admin can assign as many delegates as needed. These delegates will be able to send eReferrals on behalf of the physician or healthcare provider.

- a) Select the **Menu** icon in the top left corner.

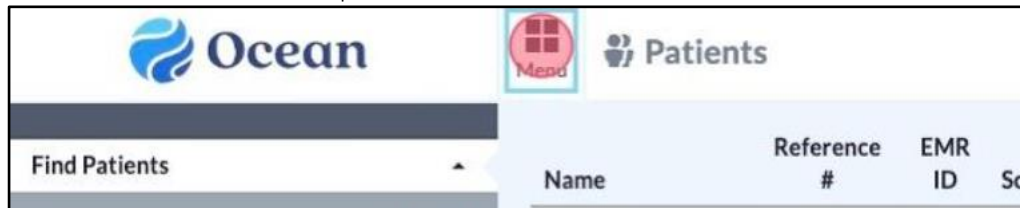


Figure 13: Menu button

- b) Add clinical delegates

- i. From the User screen, find the physician you want to assign delegates for from the list and select **Edit Delegates**.

awynden	Andy Wynden	Family Physician	☐	Edit Delegates
azharnsupport	Naved Azhar	Specialist	☐	Edit Delegates
beeakin	Bee Akinboye	Family Physician	☐	Edit Delegates
belindahardy	Belinda Hardy	Specialist	☒	Edit Delegates
brar365	Amitoz Brar	Family Physician	☐	Edit Delegates
chrisl	Chris Lee	Family Physician	☐	Edit Delegates
daniyal	Daniyal Naumani	Family Physician	☐	Edit Delegates

Figure 14: Users> Edit Delegates

- c) Select **Add Clinical Delegate**.

- i. Search or scroll to find the delegate user, then **select their name**. Changes save automatically.

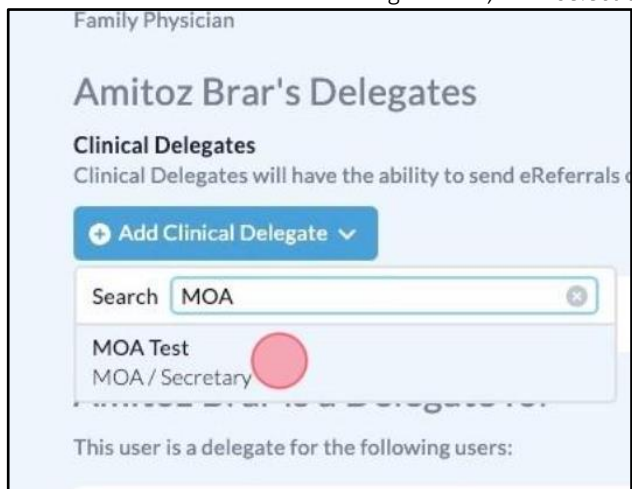


Figure 15: Edit Delegate > Add Clinical Delegate

Option B: Physicians assign their own delegates

The physician can assign multiple delegates. These delegates will be able to send eReferrals on behalf of the physician or healthcare provider.

- a) Navigate to your delegate settings

b) Select **your name** in the top right corner and select **Delegates**.

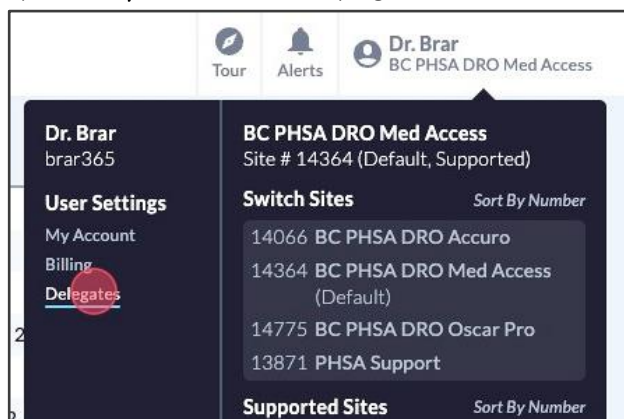


Figure 16: User settings > Delegates

c) Select **Add Clinical Delegate**

i. Search or scroll to find the delegate user, then **select their name**. Changes save automatically.

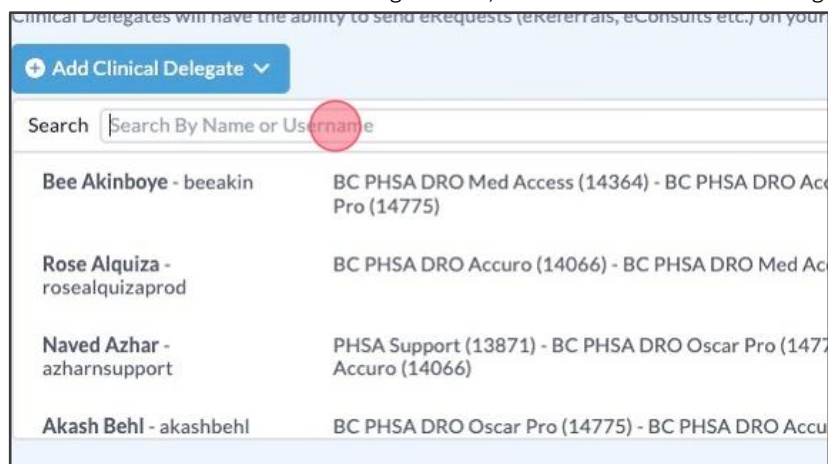


Figure 17: Add Clinical Delegate

Resources for you and your team

- PDF
 - [Add a clinical delegate in Ocean](#)
 - [How to update your clinical contact information for your Ocean user account \(Physicians\)](#)

Step 3: Training

Congratulations, you have progressed to the final stretch of onboarding: Training and Go-live. This step covers the sending workflow – from finding a specialist to submitting your eReferral and tracking it.

Important: Complete training before Go-live

It is strongly recommended that all team members complete training before Go-live. Individuals who receive training after Go-live will not be eligible for compensation.

The steps below follow a workflow that many sending sites use.

- 3.1 Initiate a Referral
- 3.2 Navigate the Healthmap
- 3.3 Submit the eReferral
- 3.4 Track, view and manage your sent eReferrals

Important: To be eligible for the final step, Go-Live, complete all tasks, including sending training referrals.

Need help? Contact us DRO.Program@phsa.ca

3.1 Initiate an eReferral

Before you begin

Pre-requisites:

- Completed a Site Review session with DRO team
- Access to test patient information
- If using an integrated EMR, EMR integration must be completed

Difficulty:

- Intermediate (comparable to creating or updating a patient chart)

Time to complete:

- Approximately 60 minutes

Technology needed:

- Technology requirements are the same for all sections.
- For full details, see [Ocean browser recommendations](#)

When you are done you will be able to:

- Initiate an eReferral
- EMR users by launching Ocean from their EMR
- Ocean portal users through the portal

Review the information

This section provides a video overview of the concepts in this section. Watch the workflow video that matches your integrated EMR or the Ocean Portal.

Note: The videos for the EMR users have an attachment included in the workflow. You do not have to practice with an attachment. In the *Complete the steps* section, we have provided guides for both sending with or without attachments.

For EMR users

QHR Accuro: [Send an eReferral in Accuro with an attachment](#)

Med Access: [Send an eReferral in Med Access with an attachment](#)

OSCAR Pro: [Send an eReferral in Oscar PRO with an attachment](#)

Ocean Portal users

Ocean Portal: [Send an eReferral in the Ocean web portal](#)

Complete the steps

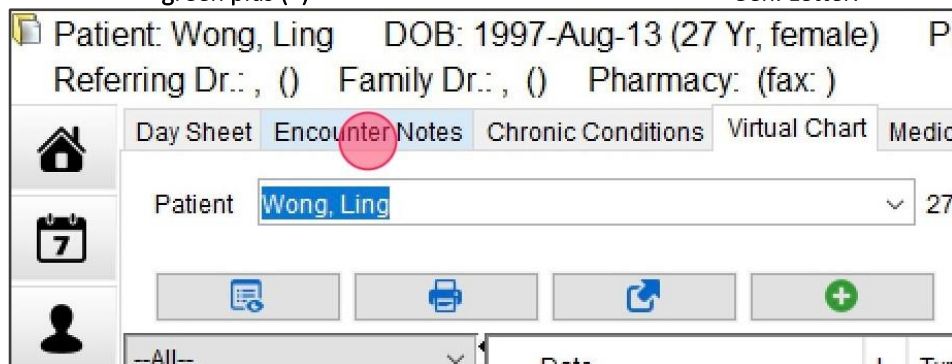
Jump to your EMR section to complete the training steps:

[QHR Accuro](#) | [Med Access](#) | [Oscar PRO](#) | [Ocean Portal](#)

QHR Accuro: Send with attachment

1. Prepare the attachment in QHR Accuro

- **Sign in** to QHR Accuro
- Search for the patient and open their chart.
- Open the **Encounter Notes**.
- Click the note template dropdown and select a cover note template.
- Click the **green plus (+)** button to create a new note then click **Gen. Letter**.



Patient: Wong, Ling DOB: 1997-Aug-13 (27 Yr, female) PI
Referring Dr.: , () Family Dr.: , () Pharmacy: (fax:)

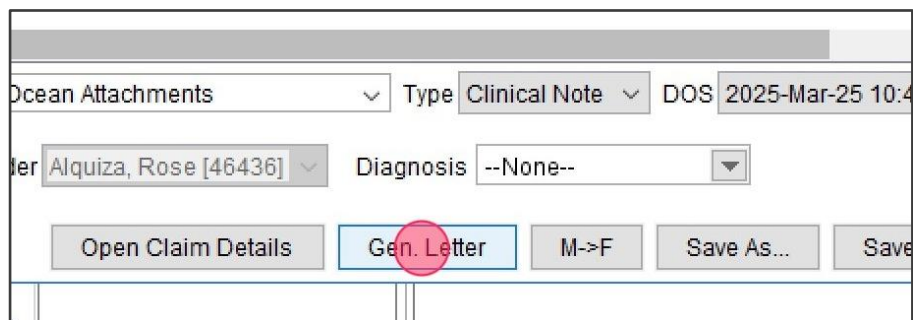
Day Sheet **Encounter Notes** Chronic Conditions Virtual Chart Medic

Patient Wong, Ling 27

Buttons: [Icon], [Icon], [Icon], [Green Plus (+)]

--All--

Figure 18: QHR Accuro Patient's Encounter note



Ocean Attachments Type Clinical Note DOS 2025-Mar-25 10:4

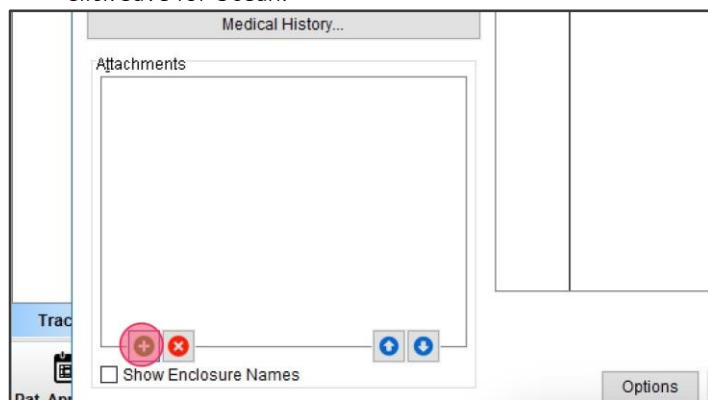
Alquiza, Rose [46436] Diagnosis --None--

Buttons: Open Claim Details **Gen. Letter** M->F Save As... Save

Figure 19: QHR Accuro Generate letter (Gen. Letter)

2. Attach the file and save

- In the bottom-left Attachments pane, click the **green plus (+)** to select your files.
- Click Save for Ocean.



Medical History...

Attachments

Buttons: [Red Plus (+)], [Red Minus (-)], [Blue Plus (+)], [Blue Minus (-)]

☐ Show Enclosure Names

Options

Figure 20: QHR Accuro attach letter

☐ Save to Chart as PDF
 ☒ Close After Faxing
 Title: Ocean Attachments

Options
 Add to Letter Queue
 Save for Ocean
Send Letter
 Print
 Preview

Figure 21: QHR Accuro Save for Ocean

3. Click Refer to launch the Healthmap

Bell (604) 889-8898
 Fax () -
 Preferred Contact Method

cates

e Patient
 Patient Relationships...
 Merge
 Update Patient
 Clear (F1)

at
 Logout
 Ocean Portal
 Patient Summ...
 Refer
referral appt n...

Figure 22: QHR Accuro Refer CDS button

4. Continue to [4.2 Navigating the Healthmap](#) or review below for sending an eReferral without an attachment.

QHR Accuro: Send without an attachment

1. Launch Ocean from the patient chart

- Log in to QHR Accuro.
- Search for and open the patient EMR Chart.

Health #

Identifier

Birthdate

Search Results:

- Patel Priya 9612340009 1994-Jul-03
- Patel Priya 8577889768 1997-Aug-13

Office Provider: --None--

Private Billing | Insurer Rules | Providers

MM/DD/YYYY ☐ Infant File Number

Deceased ☐ MM/DD/YYYY

Figure 23: QHR Accuro patient search

- Select the **Refer** button to launch the Ocean.

604) 889-8898 Fax () - Preferred Contact Method

Logout Ocean Portal Patient Summ... **Refer** referral appt n...

Figure 24: QHR Accuro CDS Refer button

2. Continue to [4.2 Navigating the Healthmap](#)

Med Access: Send with attachment

- 1. Open the patient chart
 - Log in to Med Access
 - Click the **Search** icon

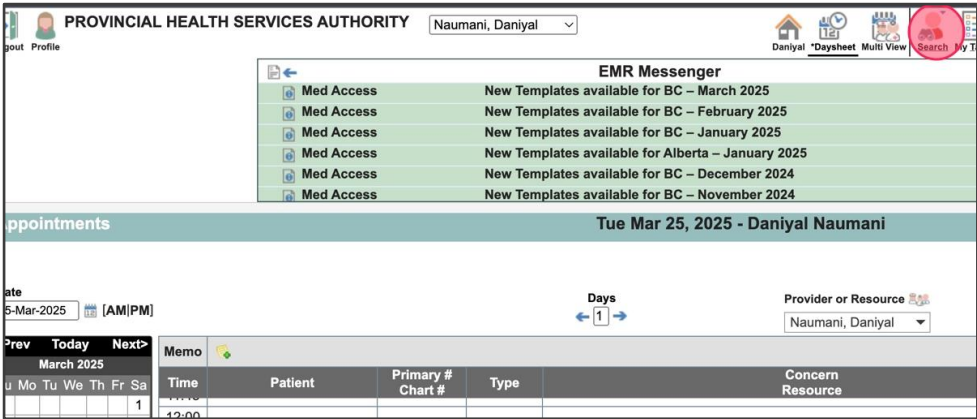


Figure 25: Med Access patient search icon

- Search for the patient and click their name to open their EMR chart.

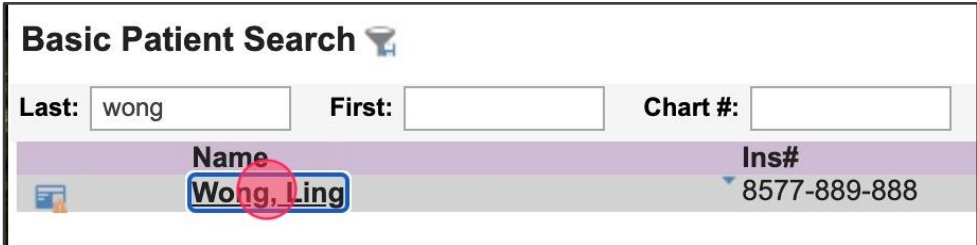


Figure 26: Med Access patient search

- 2. Create the attachment
 - In the chart, click the **Summary** icon.



Figure 27: Med Access Summary icon

- Select the documents you want to attach.

Chart Summary

Allergies

Drug Allergy

Status	Reported	Allergen	Severity	Reactions	Updated
☐ REVIEW NOT DONE					

Non-Drug Allergy

Status	Reported	Allergen	Severity	Reactions	Updated
☐ REVIEW NOT DONE					

Drug Intolerance

Status	Reported	Allergen	Severity	Reactions	Updated
☐ REVIEW NOT DONE					

Non-Drug Intolerance

Status	Reported	Allergen	Severity	Reactions	Updated
☐ REVIEW NOT DONE					

Profile

Nothing found to display

Tasks

Active Results

Due	Urgency	Owner	Description
20Mar25	Normal	Exam Room 1	Attachment, Ocean eReferral - Referral to BC PHSA DRO Test for Oscar Pro - Gastro
20Mar25	Normal	Yltest, Physician	Attachment, Ocean eReferral - Gastroenterology

Meds

Figure 28: Med Access Chart summary

- Click the **Print** icon in the top right corner.
- From the drop-down, choose Chart Summary (with Attachments).

Select Template View as Timeline Print Help

-888

Chart Summary

Chart Summary (with Attachments)

Full Medico-Legal Report

Pending Appt and Goals

Chart Summary (exclude notes)

Figure 29: Med Access Select print Chart Summary with attachments

- Review the generated attachment.
- Click the **Ocean logo** in the top right.

Daniyal Naumani
PROVINCIAL HEALTH SERVICES AUTHORITY
BC

Chart Summary

Ling Wong
209 Burnaby St
Vancouver, BC V3L 4V8
(604) 889-8898 | (604) 889-8898

PHN: 8577889888 Chart#:
DOB: 13-Aug-1997 Age: 27 yrs
Gender: F

Due	Priority	Owner	Description	Reason	Recur
20Mar25	Normal	, Exam Room 1	Ocean eReferral - Referral to BC PHSA DRO Test for Oscar Pro - Gastroenterology		none
20Mar25					Final

Figure 30: Med Access attachment

- Name the attachment and click **OK**.

phsa.med-access.net says

Attachment name:

Chart Summary

Cancel OK

Chart Summary

Ling Wong
209 Burnaby St
Vancouver, BC V3L 4V8
(604) 889-8898 | (604) 889-8898

PHN: 8577889888 Chart#:
DOB: 13-Aug-1997 Age: 27 yrs
Gender: F

Tasks

Due	Priority	Owner	Description	Reason

Figure 31: Med Access name the attachment

- Close the attachment and return to the patient chart.

3. Launch Ocean and start a new referral

- Click the **Launch** icon to open the EMR extensions.

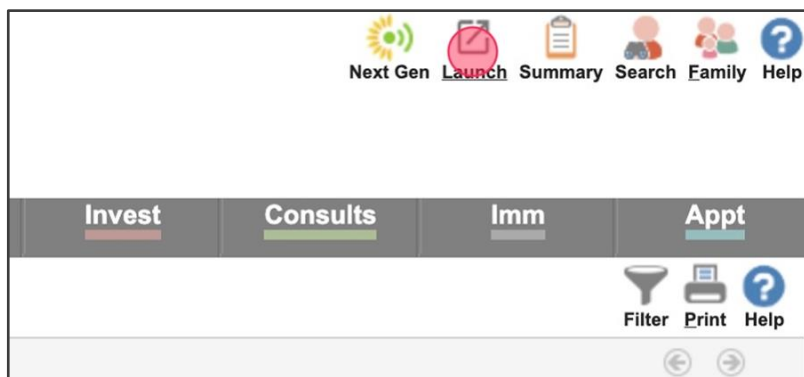


Figure 32: Med Access Launch icon

- Locate the Ocean extension and click **View Patient**.

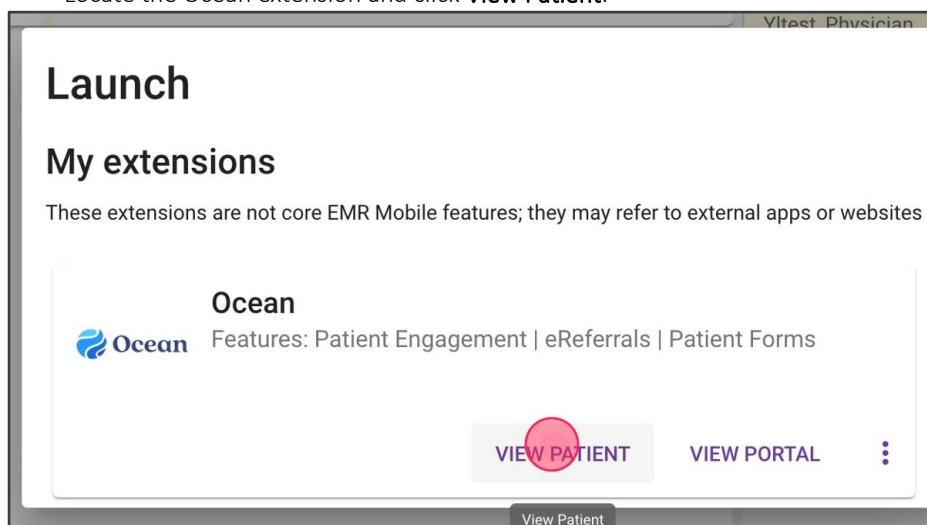


Figure 33: Med Access Ocean extension

- Click the **Send eReferral** button.

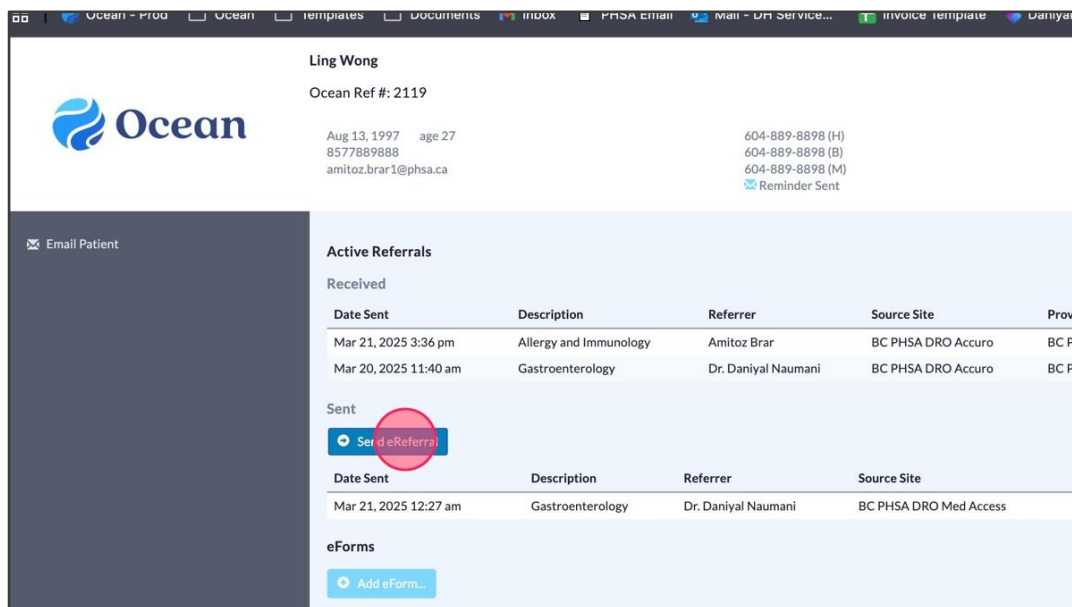


Figure 34: Ocean Patient Dashboard

4. Continue to [4.2 Navigating the Healthmap](#) or review below for sending an eReferral without an attachment.

Med Access: Send without an attachment

1. Access the patient chart

- **Log in** to your Med Access EMR account.
- Click the **Search** icon.



Figure 35: Med Access Search icon

- Search for the patient and select their name to open their chart.

Basic Patient Search

Last: First: Chart #:

Phone #: DOB: Status:

Name	Ins#	DOB	Gender
Patel, Priya	8577 889 768	13-Aug-97	F

Ms Priya Patel
 27 years 13-Aug-1997 Female
 Cellular Phone: (604) 889-8898 Ins#: 8577-889-768

Figure 36: Med Access Patient search

2. Launch Ocean from the EMR

- In the patient's chart, click the **Launch** icon in the top right to open EMR Extensions.

Next Gen **Launch** Summary Search Help

Profile Labs Invest Consults Imm Appt

Filter Print Help

Figure 37: Med Access Launch icon

- Find the Ocean extension and click **View Patient**.

Launch

My extensions

These extensions are not core EMR Mobile features; they may refer to external apps or websites

Ocean
 Features: Patient Engagement | eReferrals | Patient Forms

VIEW PATIENT **VIEW PORTAL**

View Patient Attachment, Ocean eReferral - Gastro

Figure 38: Med Access Ocean extension

3. Send the eReferral

Active Referrals

Received

Date Sent	Description	Referrer	Source Site
Mar 11, 2025 4:23 pm	Gastroenterology	Dr. Daniyal Naumani	BC PHSA DRO Oscar Pro
Mar 11, 2025 3:35 pm	Gastroenterology	Dr. Daniyal Naumani	BC PHSA DRO Oscar Pro

Sent

Send eReferral

Date Sent	Description	Referrer	Source Site	P
Mar 14, 2025 2:25 pm	Gastroenterology	Dr. Daniyal Naumani	BC PHSA DRO Med Access	Bo
Mar 13, 2025 2:07 pm	Gastroenterology	Dr. Daniyal Naumani	BC PHSA DRO Med Access	Bo

Figure 39: Ocean Patient Dashboard

4. Continue to [4.2 Navigating the Healthmap.](#)

OSCAR Pro: Send with an attachment

1. Prepare the attachment in the Attachment Manager

- **Log in** to Oscar PRO
- Open the patient's chart.
- Scroll down and click the **Attachment Manager** icon at the bottom of the window.

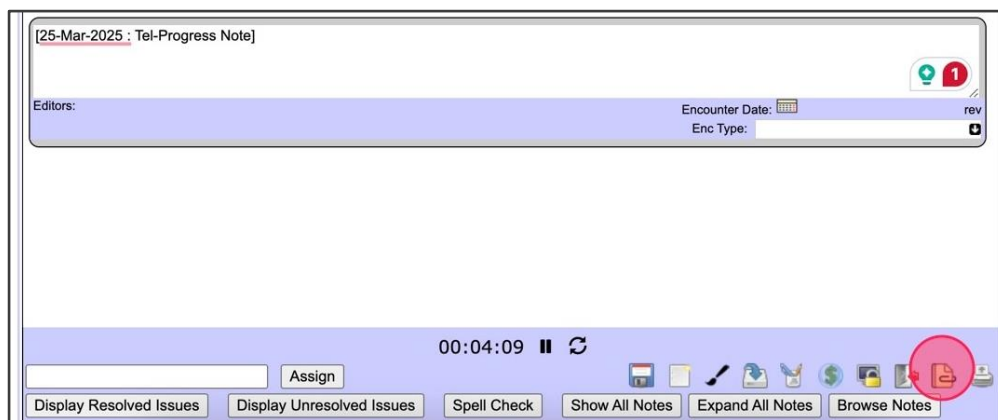


Figure 40: OSCAR Pro: Prepare the attachment

- Select the attachments you want to include.
- Click **Save for Ocean** to prepare them for the referral.

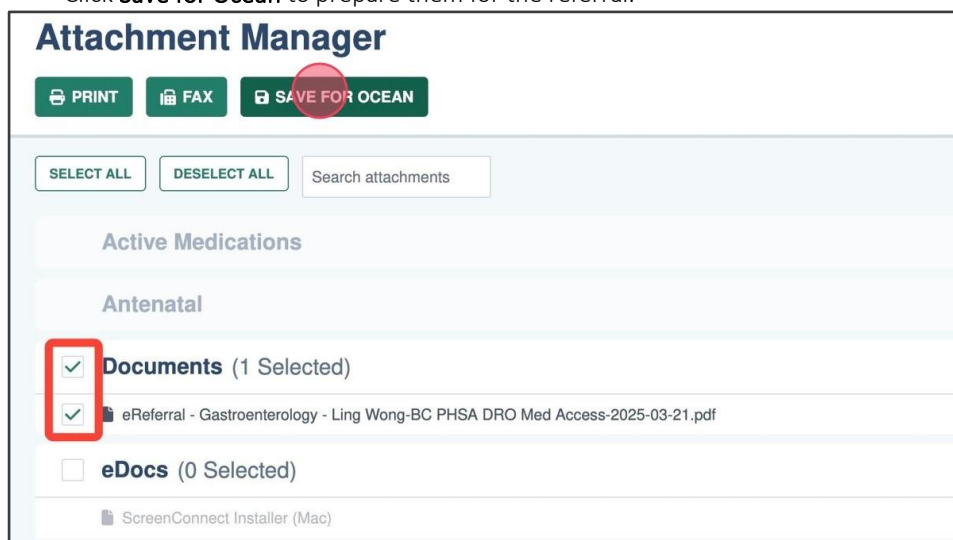


Figure 41: OSCAR Pro: Select attachments & Save for Ocean button

- If this is your first time, review the prompt check Don't show again (optional), and/or click OKAY.

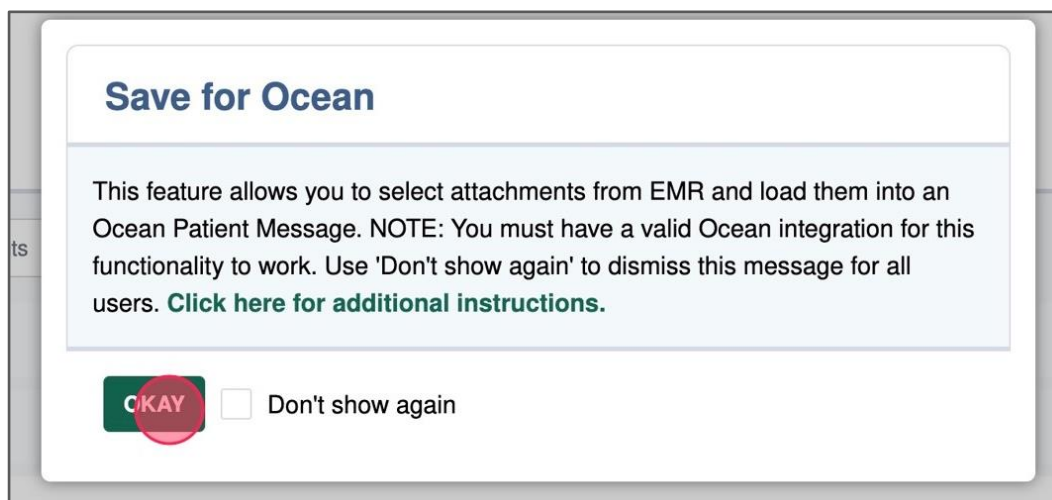


Figure 42: OSCAR Pro: Save for Ocean > Okay button

2. Launch Ocean

Option 1

- a) Click the small **arrow** to expand the Ocean toolbar.



Figure 43: OSCAR Pro: Expand arrows on the Ocean tool bar

- b) Click **Refer** to launch the Ocean Healthmap.

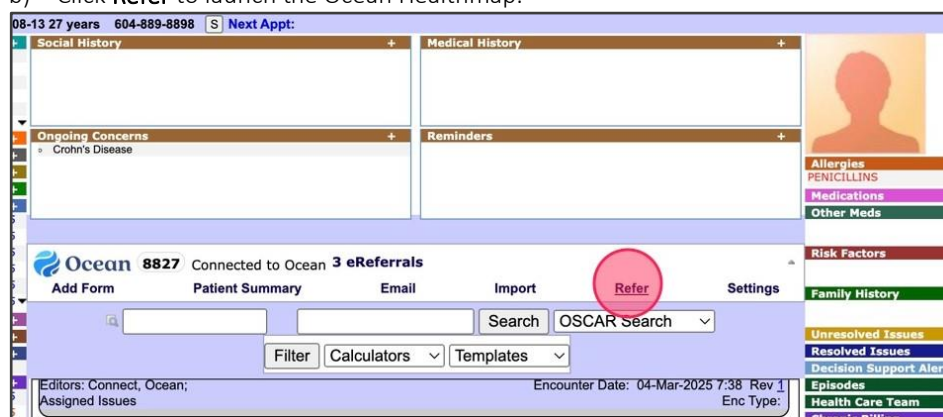


Figure 44: OSCAR Pro: Ocean tool bar > Refer

Option 2

- a) Click the + in the **Consultations** section.



Figure 45: OSCAR Pro: Consultations section

- b) Click **Refer** next to the Ocean logo at the top right to open the Ocean Healthmap.

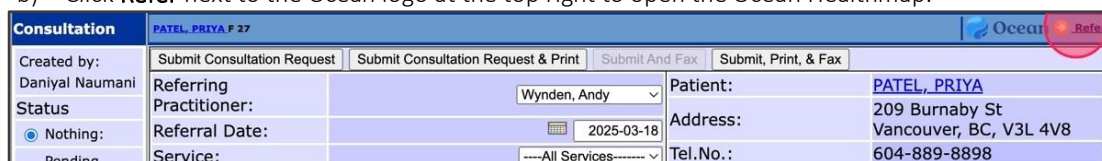


Figure 46: OSCAR Pro: Refer button by Ocean logo

3. Continue to [4.2 Navigating the Healthmap](#), or review below for sending an eReferral without an attachment.

OSCAR Pro: Send without an attachment

1. Open the patient's chart

- Log in to OSCAR Pro
- Search for the patient you would like to send an eReferral for.

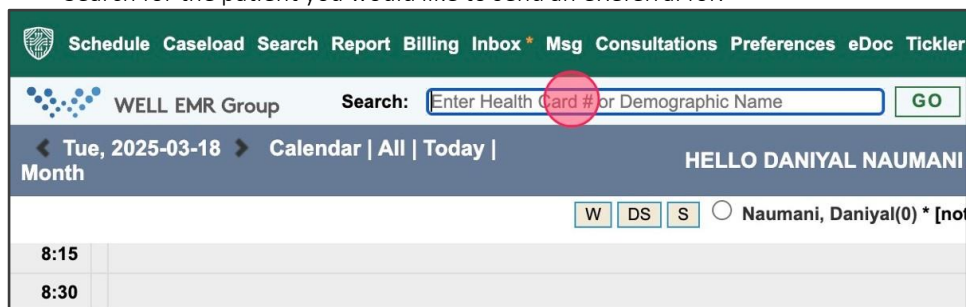


Figure 47: OSCAR Pro: Patient search

- Click **E** to open the patient's eChart.

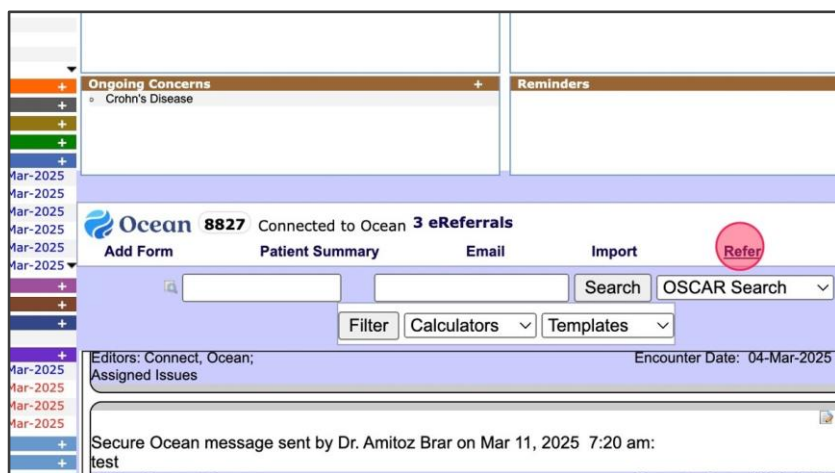


Figure 50: OSCAR Pro: Patient cart Ocean Refer button

Option B: Use the Consultations section

a) Select the + in the **Consultations** section.

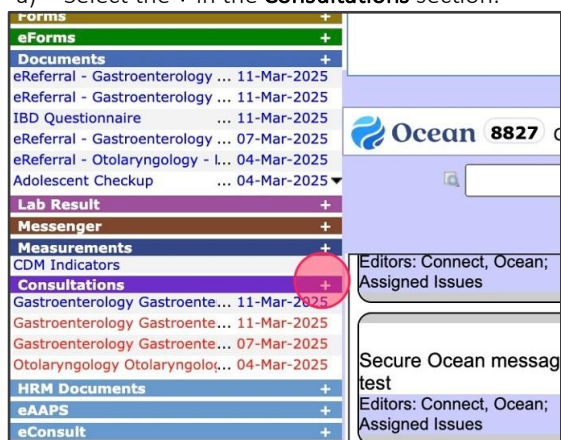


Figure 51 OSCAR Pro: Patient chart consultation tab

b) Click **Refer** next to the Ocean logo in the top right corner to open the Ocean .

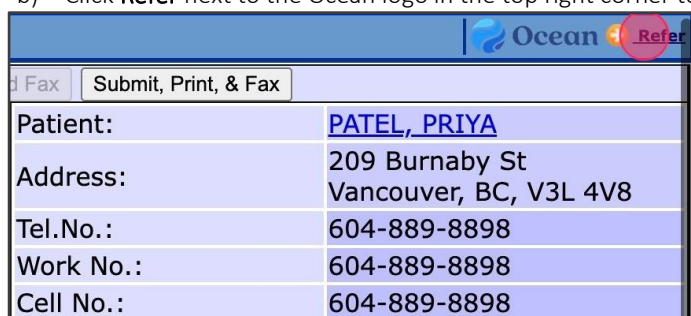


Figure 52: OSCAR Pro: Patient chart consultation tab Refer button

3. Continue to [4.2 Navigating the Healthmap](#)

Ocean Portal: Without an attachment

1. Sign in

- Open your web browser and go to <https://ocean.cognisantmd.com/>
- **Sign in** to the Ocean Portal by entering your username and password.

2. Open the Healthmap

- Select the **Menu** icon on the top left of the screen next to the Ocean logo. A dialog box will open.

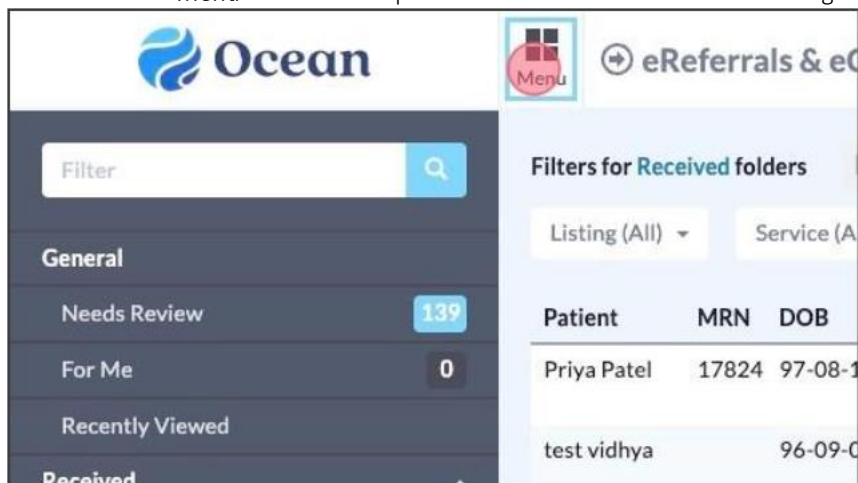


Figure 53: Menu

- Select the **Healthmap** in the lower-right corner of the dialogue box to launch it.

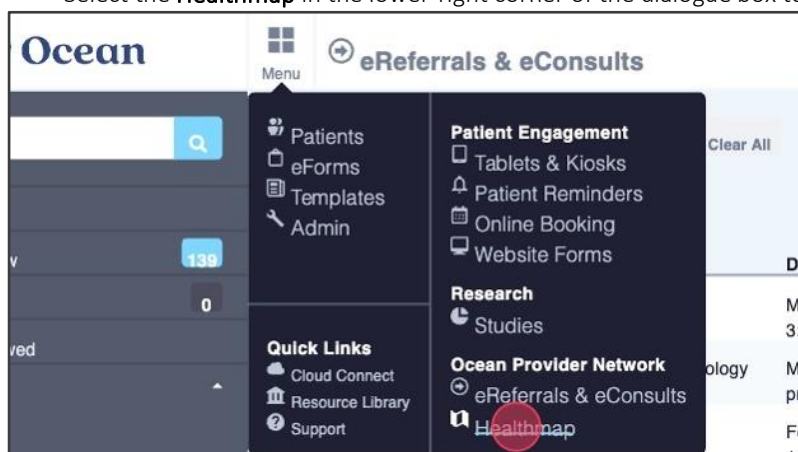


Figure 54: Menu > Healthmap

3. Continue to [4.2 Navigating the Healthmap](#)

Resources for you and your team

- Video
 - [Send an eReferral in QHR Accuro](#)
 - [Add attachments to a new eReferral in QHR Accuro](#)
 - [Send an eReferral in Med Access](#)

- [Add attachments to a new eReferral in Med Access](#)
- [Send an eReferral in OSCAR Pro](#)
- [Add attachments to a new eReferral in OSCAR PRO](#)
- [Send an eReferral in the Ocean web portal](#)
- [Add attachments to a new eReferral in the Ocean web portal](#)

- **PDF**

- [Send an eReferral in QHR Accuro](#)
- [Add attachments to a new eReferral in QHR Accuro](#)
- [Send an eReferral in Med Access](#)
- [Add attachments to a new eReferral in Med Access](#)
- [Send an eReferral in OSCAR Pro](#)
- [Add attachments to a new eReferral in Oscar PRO](#)
- [Add attachments to a referral in the web portal](#)

3.2 Navigate the Ocean Healthmap

The Healthmap is where you search for and select a specialist, clinic or service to send your eReferral to. This section helps you explore the Healthmap and become familiar with its features.

Before you begin

Pre-requisites:

- Completed a Site review session with DRO team
- Confirm you are in test mode
- Access to test patient information

Difficulty:

- Intermediate (comparable to creating or updating a patient chart)

Time to complete:

- 15 minutes

Technology needed:

- Technology requirements are the same for all sections.
- *For full details, see Ocean browser recommendations*

When you are done you will be able to:

- Enable and disable test mode
- Navigate the to find and select an eReferral recipient
- Apply general and advanced search and filters
- Review the details of a directory listing
- Select an eReferral recipient
- Add/remove favorites sites on the

Review the information

The following video provides a quick overview of the concepts in this section.

→ **For General** (all users)

[Navigate the Ocean Healthmap](#)

Complete the steps

Explore the Healthmap

1. Toggle into test mode

- At the bottom left corner of the screen, toggle into **test mode**.

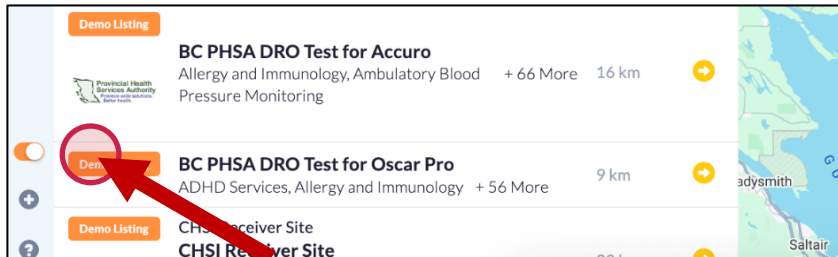


Figure 55: Test mode toggle

2. Use the search functions in Healthmap

- At the top of the screen, locate the **search bar**

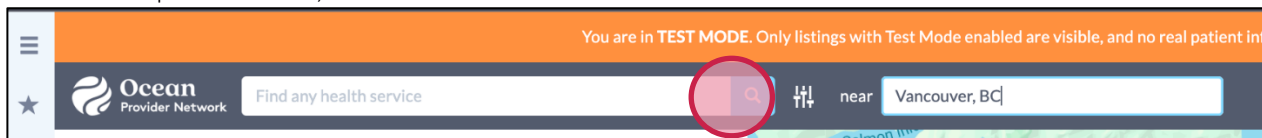


Figure 56: Search bar

- Select the **search bar**, then type:
 - A specialty
 - Referred to as a **Health Service Offering** in Ocean such (i.e. Dermatology).
 - A specific service
 - A specific physician
 - By their name.
 - A clinic name.
- At the top, select the **near text box** located on the right to find:

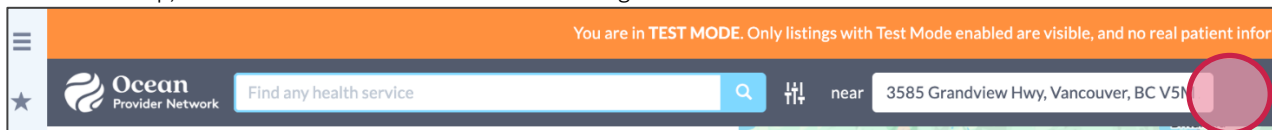


Figure 57: Patient's address

Your patient's [test patient's] address

Note: The patient's address will only appear in search results for users with an integrated EMR.

3.

Advanced search functions

- Select the **levels** icon next to the search bar.

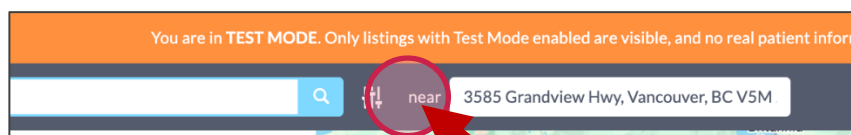


Figure 58: Advanced search

- Review the Advanced Search and Filtering options.
- Select a **language**
- Select maximum wait time

Note: To start a new search, remember to remove the filter you added

4. Search for BC PHSA DRO Training Receiving Site

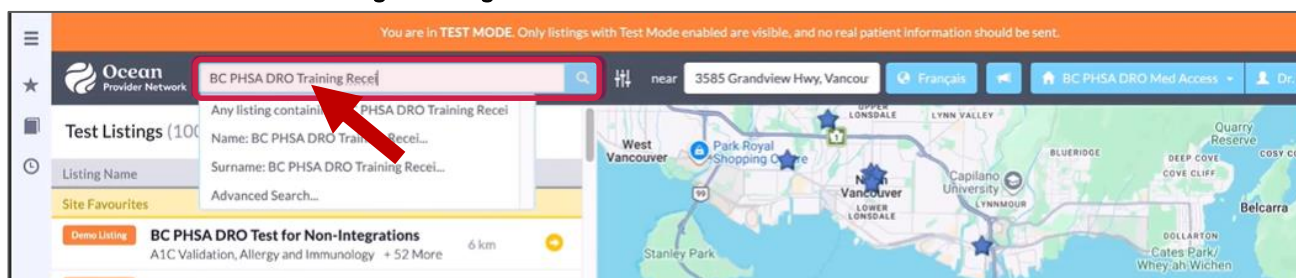


Figure 59: Directory listing search results

Note: When you are in test mode the arrows will be orange, when live, these will be green. Only choose directory listings with a green arrow. This means they are accepting eReferrals.

5. Select and open the BC PHSA DRO Training Receiving Site directory listing to view the site's details.

Locate these **four key areas** within the listing:

1. Contact information (updated by the clinic)
2. Distance (from patient's address)
3. Description (brief overview of what clinic offers, such as the population they treat, doctors that work there, and important notes)
4. Health services offering(s) (specific services offered by the specialist(s) who work there.



Figure 60: Directory listing details (note: this example doesn't show distance)

6. Select a Health service offering to see details about:

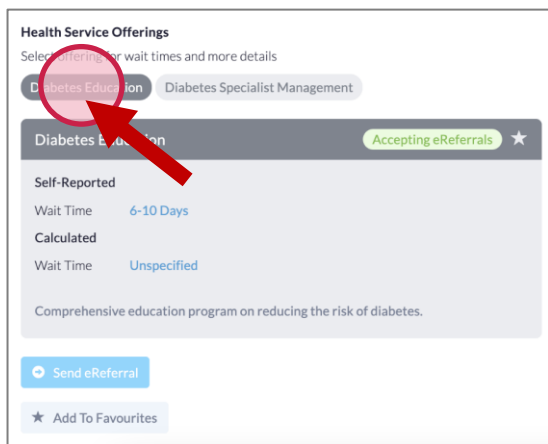


Figure 61: Health service offering (HSO)

- Self-reported wait times (by the clinic)
- **Calculated wait-time** (by Ocean based on the volume (6+) of referrals received by the clinic)
- Languages offered

7. Add a directory listing to your favorites list.

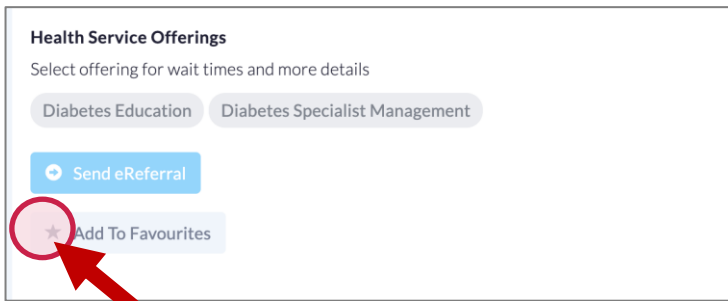


Figure 62: Add to favorites

- At the bottom left of the listing, select the **Add to Favourites** button.
- Next, select **My personal favourites** to add it to your favourites.

8. View and edit your favourite directory listings.

- Select **star** icon at the top left of your screen.
- You will see your personal favorites, clinical favorites and popular listings in your region.

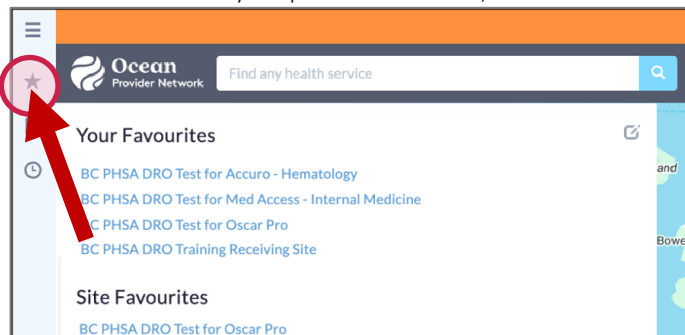


Figure 63: View & edit your favourites

- Edit your Favourites list by selecting the **grey edit** icon in the right corner of the list.

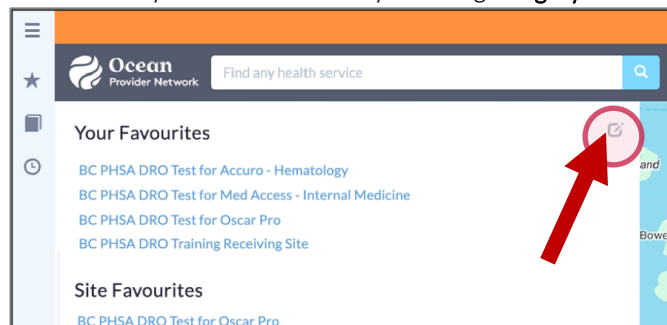


Figure 64: Site Favourite edit icon

- Delete a Favorite listing by selecting the **red** icon

Resources for you and your team

These are resources you can share with your team:

- **Video**
 - [Send an eReferral in QHR Accuro](#)
 - [Add attachments to a new eReferral in QHR Accuro](#)
 - [Send an eReferral in Med Access](#)

- [Add attachments to a new eReferral in Med Access](#)
 - [Send an eReferral in OSCAR Pro](#)
 - [Add attachments to a new eReferral in OSCAR PRO](#)
 - [Send an eReferral in the Ocean web portal](#)
 - [Add attachments to a new eReferral in the Ocean web portal](#)
- **PDF**
 - [Send an eReferral in QHR Accuro](#)
 - [Add attachments to a new eReferral in QHR Accuro](#)
 - [Send an eReferral in Med Access](#)
 - [Add attachments to a new eReferral in Med Access](#)
 - [Send an eReferral in OSCAR Pro](#)
 - [Add attachments to a new eReferral in Oscar PRO](#)

3.3 Submit the eReferral

In the previous section, you reviewed an active directory listing found by searching and filtering the Healthmap. You also practiced adding the listing to your favourites.

This next section involves selecting the Health Service Offering (HSO) from the Directory Listing and completing the associated eReferral form. The eReferral form will have three sections to complete, some of which are mandatory for submission. If you are using an integrated EMR, some content will pre-populate, such as patient demographics, pulled from your patient's chart, with some manual additions. For those using a non-integrated EMR or only the Ocean Portal, the form will be fully completed manually.

Additionally, this eReferral form will trigger notifications to you as it is processed through its various statuses. Patients will also have visibility into the eReferral status if they have consented to receive email notifications.

Before you begin

Pre-requisites:

- *You are a Site Admin for your Ocean site*
- *For sites using an EMR, admin access to your EMR*
- *Confirm you are in test mode*
- *Access to test patient information*
- *Referral target- self-sending site or PHSA Training Referrals site*

Difficulty:

- *Intermediate (comparable to creating or updating a patient chart)*

Time to complete:

- *15 minutes*

Technology needed:

- *Technology requirements are the same for all sections.*
- *For full details, see [Ocean browser recommendations](#)*

When you are done you will be able to:

- *Identify the three sections of an eReferral*

- Patient demographic section
- Referral form body
- Refers information
- Locate the Save for later button
- Review the two pop messages before the eReferral is sent
- Locate where the copy of the referral form summary
 - EMR users
 - Ocean portal users

Review the information

The following video provides a quick overview of the concepts in this section.

EMR users: [Parts of the eReferral form](#)

Ocean Portal users: [Parts of the eReferral form](#)

Complete the steps

1. Scroll to Health Service Offering (HSO)

- This is found on the directory listing you selected in the previous section.

2. Choose the appropriate service from the listing.

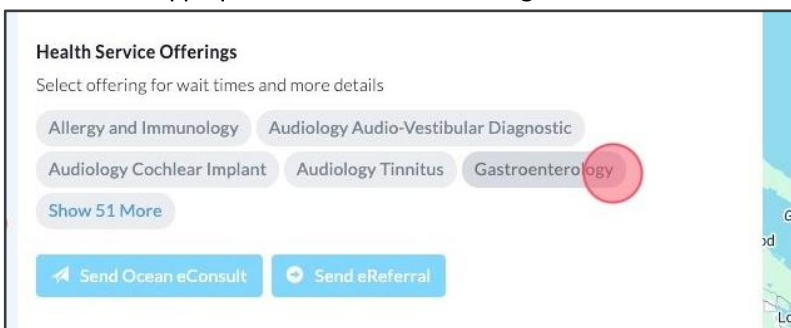


Figure 65: Select HSO

3. Click Send eReferral.

- This step opens the eReferral form for you to complete

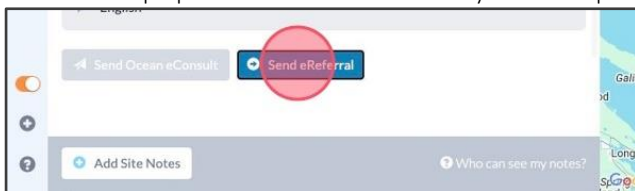


Figure 66: Send eReferral

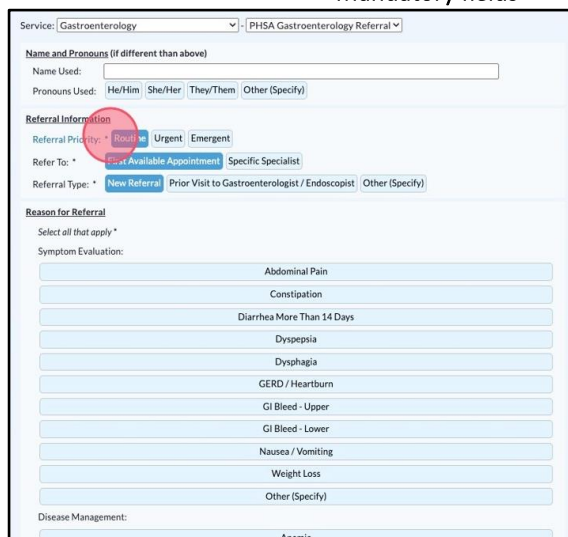
Jump to your EMR section to complete the training steps:

QHR Accuro | **Med Access** | **Oscar PRO** | **Ocean Portal**

QHR Accuro: With an attachment

4. Complete and send the eReferral

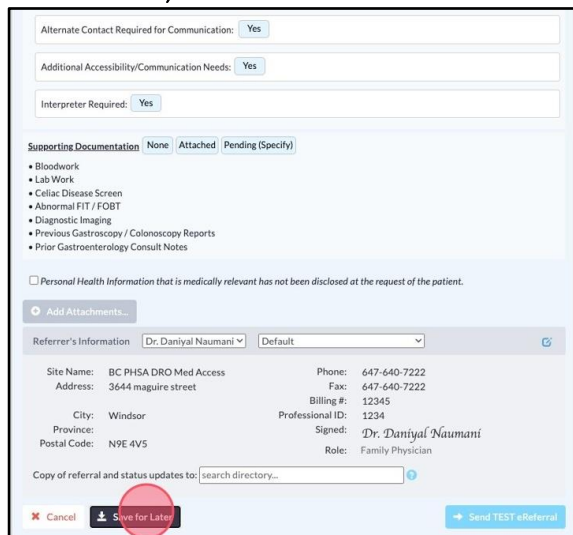
- Enter the **patient's demographic** information in the Patient Information section.
- Fill out the referral form. **Mandatory fields** are marked with an asterisk (*).



The screenshot shows the 'PHSA Gastroenterology Referral' form. The 'Referral Information' section has several mandatory fields marked with asterisks: 'Referral Priority' (with a dropdown menu showing 'Rout...', 'Urgent', and 'Emergent'), 'Refer To' (with a dropdown menu showing 'First Available Appointment' and 'Specific Specialist'), and 'Referral Type' (with a dropdown menu showing 'New Referral', 'Prior Visit to Gastroenterologist / Endoscopist', and 'Other (Specify)'). The 'Reason for Referral' section has a mandatory field 'Select all that apply *' followed by a list of symptoms: Abdominal Pain, Constipation, Diarrhea More Than 14 Days, Dyspepsia, Dysphagia, GERD / Heartburn, GI Bleed - Upper, GI Bleed - Lower, Nausea / Vomiting, Weight Loss, and Other (Specify). The 'Disease Management' section has a mandatory field 'Anemia'.

Figure 67: eReferral form mandatory field indication

- If needed, select **Save for Later** to save the referral and come back to it within 30 days.



The screenshot shows the bottom section of the eReferral form. It includes fields for 'Alternate Contact Required for Communication' (Yes), 'Additional Accessibility/Communication Needs' (Yes), and 'Interpreter Required' (Yes). There is a section for 'Supporting Documentation' with options 'None', 'Attached', and 'Pending (Specify)'. Below this is a checkbox for 'Personal Health Information that is medically relevant has not been disclosed at the request of the patient.' The 'Add Attachments...' button is highlighted. The 'Referrer's Information' section shows 'Dr. Daniyal Naumani' as the referrer. The bottom of the form has three buttons: 'Cancel', 'Save for Later' (highlighted with a red circle), and 'Send TEST eReferral'.

Figure 68: eReferral form Save for Later button

- Select **Send eReferral** once the form is complete.

Figure 69: Send eReferral

- Confirm patient consent for email updates on the Obtain Patient's Email Consent pop-up box.
- Confirm your clinical information.
- Review and confirm the confirmation screen.

Figure 70: Review referral confirmation message

Note: A copy of the referral summary will be automatically imported into the EMR.

QHR Accuro: Without an attachment

4. Complete and send the referral

- Fill out the referral form.
- **Mandatory fields** are marked with an asterisk (*).
- **If needed**, select **Save for Later** to save the referral and come back to it within 30 days.
- Click **Send eReferral** when the form is complete. Follow the prompts to confirm all details
- Confirm patient consent for email updates.
- Confirm your clinical information is correct.
- Review the eReferral confirmation message.

Note: A copy of the referral summary will be automatically imported into the EMR.

eReferral Sent

The referral was sent successfully.

Summary:

Sent referral to BC PHSA DRO Test for Accuro
 10151 No. 3 Road, Richmond, BC, V7A 4R6 Phone: 604-565-7676 Fax: 604-565-9898
 dro.program@phsa.ca

Referral Information

Priority: **Routine**

Refer To: First Available Appointment

Referral Type: New Referral

Reason for Referral

Symptom Evaluation:
 Abdominal Pain

Clinical Message: None

☐ Include map

Figure 71: Referral form summary

Med Access: With an attachment

4. Fill out and send the eReferral

- Complete the referral form (*required fields are marked with an asterisk).
- Click Add Attachments.

Interpreter Required: ☒ Yes

Supporting Documentation: ☐ None ☐ Attached ☐ Pending (Specify)

- Lab Work (Pulmonary Function Test)
- Diagnostic Imaging
- Consult Notes
- Assessments

☐ Personal Health Information that is medically relevant has not been disclosed at the request of the patient.

Add Attachments...

Referrer's Information:

Site Name: BC PHSA DRO Med Access Phone: 647-640-7222
Address: 3644 maguire street Fax: 647-640-7222
City: Windsor Billing #: 12345
Province: Professional ID: 1234
Postal Code: N9E 4V5 Signed: Dr. Daniyal Naumani
Role: Family Physician

Copy of referral and status updates to:

Figure 72: Add attachment

- When prompted, click **OK** to attach the file.

ocean.cognisantmd.com says

Would you like to include the following attachments from Med Access?

For safety reasons, you must preview each attachment to ensure they are the documents you intend to include.

Chart Summary.pdf

Figure 73: Add Attachment > OK

- **Close** the Select an Attachment window.

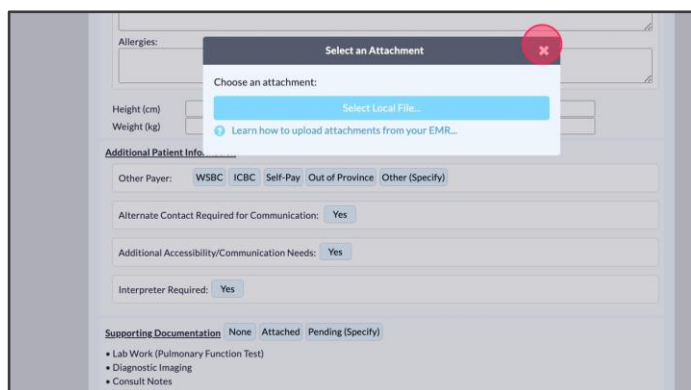


Figure 74: Close the Select Attachment window

- (Optional) Select **Save for Later** if you want to complete the referral within 30 days.

Figure 75: Save for Later

- Select Send eReferral.

Figure 76: Send eReferral

- Confirm patient consent for email updates.

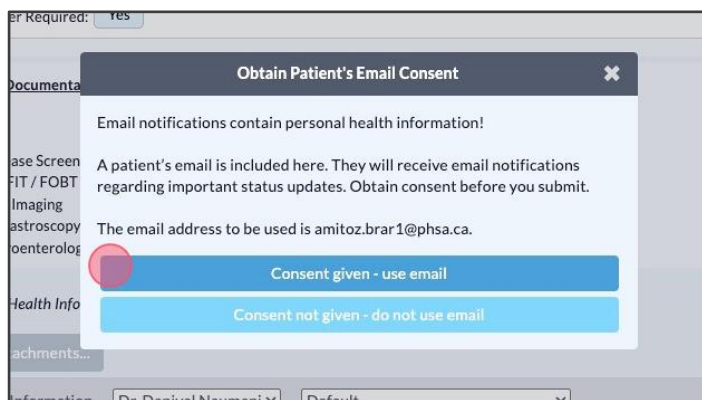


Figure 77: Obtain Patient's Email Consent

- Confirm your clinical information.

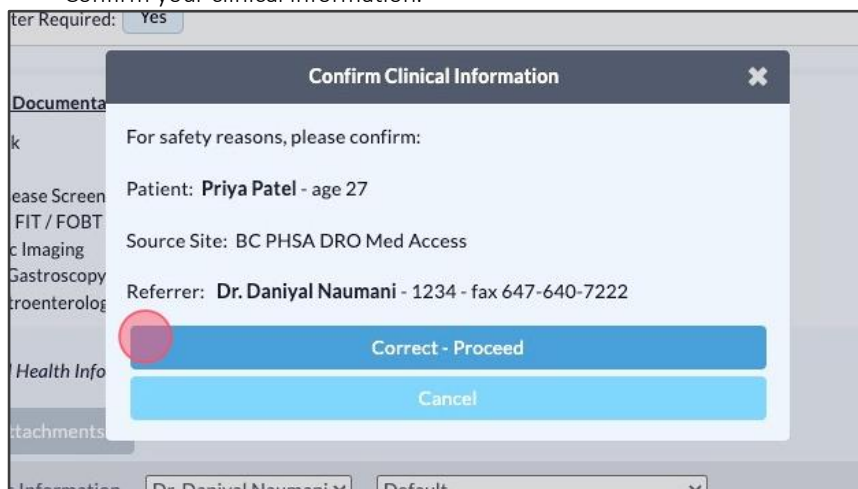


Figure 78: Confirm Clinical Information

- Review the eReferral confirmation.

Note: A copy of the referral will be imported into the EMR as an Active Task.

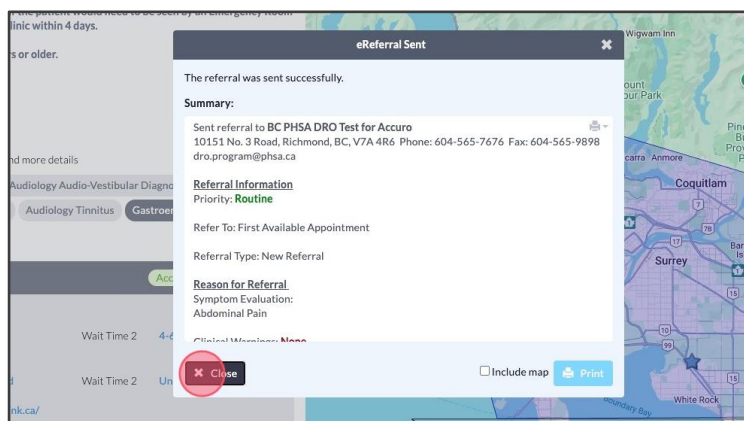


Figure 79: Review the eReferral confirmation

Med Access: Without an attachment

4. Complete and send the referral

- Fill out the referral form (*mandatory fields are marked with an asterisk).

Figure 80: eReferral form mandatory field indication

- (Optional) Click **Save for Later** if you'd like to complete the referral within 30 days.

Figure 81: eReferral form Save for Later button

- Click Send eReferral.
- Confirm patient consent for email updates.
- Confirm your clinical information.
- Review and confirm the eReferral submission.

Note: A copy of the referral summary will be imported into the EMR as an Active Task.

OSCAR Pro: With an attachment

4. Fill out and send the eReferral

- Fill out the referral form (mandatory fields are marked with *).

Service: Gastroenterology | PHSA Gastroenterology Referral

Name and Pronouns (if different than above)
Name Used:
Pronouns Used: ☐ He/Him ☐ She/Her ☐ They/Them Other (Specify)

Referral Information
Referral Priority: * ☐ Routine ☐ Urgent ☐ Emergent
Refer To: * ☐ First Available Appointment ☐ Specific Specialist
Referral Type: * ☐ New Referral ☐ Prior Visit to Gastroenterologist / Endoscopist Other (Specify)

Reason for Referral
Select all that apply *
Symptom Evaluation:
☐ Abdominal Pain
☐ Constipation
☐ Diarrhea More Than 14 Days
☐ Dyspepsia

Figure 82: eReferral form mandatory field indication

- Optional:** Select **Save for Later** if you need to complete the referral later (you have up to 30 days).

Consult Notes
Assessments

☐ Personal Health information that is medically relevant has not been disclosed at the request of the patient.

Add Attachments...

20250320212804_LingWong-BCPHSADROMedAccess-2025-03-21.pdf

Referrer's Information: Dr. Daniyal Naumani

Site Name: BC PHSA DRO Oscar Pro
Address: 3644 maguire street
City: Windsor
Province: N9E 4V5
Postal Code: N9E 4V5
Phone: 647-640-7222
Fax: 647-640-7222
Billing #: 12345
Professional ID: 1234
Signed: Dr. Daniyal Naumani
Role: Family Physician

Copy of referral and status updates to: search directory...

Cancel Save for Later Send TEST eReferral

Figure 83: Save for later

- Click **Send eReferral** to complete the submission.

Figure 84: Send eReferral

4. Confirm and finalize

- Confirm patient consent for email updates (if applicable).

Figure 85: Obtain Patient's Email Consent

- Confirm your clinical information.

Figure 86: Confirm Clinical Information

- Review and confirm the eReferral.

Figure 87: Review the eReferral confirmation

Note: A copy of the eReferral summary will be imported into the EMR.

OSCAR Pro: Without an attachment

4. Fill out and send the eReferral Fill out the referral form (mandatory fields have a *).

Figure 88: eReferral form mandatory field indication

Optional: Click **Save for Later** to save the referral and return to it within 30 days.

Figure 89: eReferral form Save for Later button

- Click Send eReferral.

Referrer's Information Dr. Daniyal Naumani

Site Name: BC PHSA DRO Oscar Pro	Phone: 647-640-7222
Address: 3644 maguire street	Fax: 647-640-7222
City: Windsor	Billing #: 12345
Province:	Professional ID: 1234
Postal Code: N9E 4V5	Signed: Dr. Daniyal Naumani
	Role: Family Physician

Copy of referral and status updates to:

Cancel Save for Later **Send TEST eReferral**

Figure 90: Send eReferral

- Confirm patient consent for email updates.

Obtain Patient's Email Consent

Email notifications contain personal health information!

A patient's email is included here. They will receive email notifications regarding important status updates. Obtain consent before you submit.

The email address to be used is amitoz.brar1@phsa.ca.

Consent given - use email

Consent not given - do not use email

Figure 91: Obtain Patient Email Consent

- Confirm your clinical information.

Confirm Clinical Information

For safety reasons, please confirm:

Patient: **Priya Patel** - age 27

Source Site: BC PHSA DRO Med Access

Referrer: **Dr. Daniyal Naumani** - 1234 - fax 647-640-7222

Correct - Proceed

Cancel

Figure 92: Confirm Clinical Information

- Review the referral confirmation message.



Figure 93: Review referral confirmation message

Note: A PDF copy of the referral summary will be imported into the EMR in the Documents section

Ocean Portal: With an attachment

4. Use your normal document creating steps but save as PDF

- Ocean portal users, continue with your normal process for creating documents for fax or mail in your EMR.
- Instead of printing out your documents, **save as a PDF to your computer** (local drive).
- Add the attachment from the local drive directly to the eReferral form before sending the eReferral.

Ocean Portal: Without an attachment

4. Complete the eReferral form

- Enter the patient's demographic information in the Patient Information section.
- Fill out the referral form.
- Mandatory fields are marked with an asterisk (*).

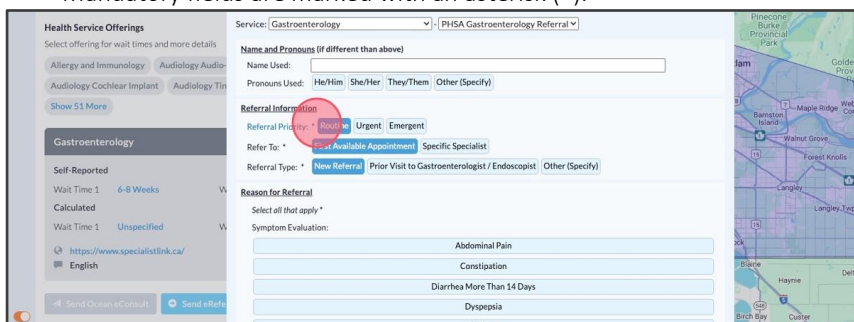


Figure 94: eReferral form mandatory field indication

- If needed, select **Save for Later** to save the referral and come back to it within 30 days.

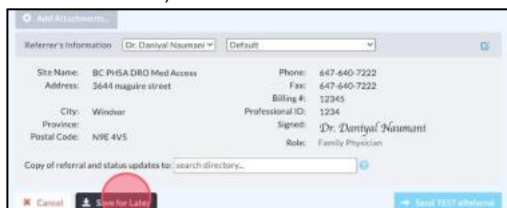


Figure 95: eReferral form Save for Later button

- Select **Send eReferral** when the form is complete.

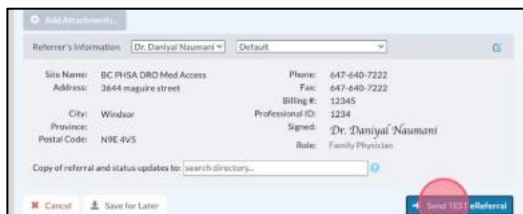


Figure 96: Send eReferral

- Confirm patient consent for email updates on the Obtain Patient's Email Consent pop-up box.
- Confirm your clinical information.
- Click **Print** to view the PDF copy

- Download and manually upload the eReferral to your EMR.

Excellent! You now have sent a test eReferral!

Email the DRO team at dhiservicedelivery@phsa.ca to confirm your test eReferral has been sent.

Important: You cannot complete the Training phase until the DRO Team confirms that your training referral(s) have been successfully sent.

Resources for you and your team

- **Video**
 - [Add attachments to a new eReferral in QHR Accuro](#)
 - [Add attachments to a new eReferral in Med Access](#)
 - [Add attachments to a new eReferral in OSCAR PRO](#)
 - [Add attachments to a new eReferral in the Ocean web portal](#)
- **PDF**
 - [Add attachments to a new eReferral in QHR Accuro](#)
 - [Add attachments to a new eReferral in Med Access](#)
 - [Add attachments to a new eReferral in OSCAR PRO](#)

3.4 Navigating the eReferral landing page: Track, view and review

The eReferrals have been sent. Patients who opted to receive email notifications will receive a notification that an eReferral has been sent on their behalf.

In this next section, you'll see how to manage your sent eReferrals and track the folders they move through during its life cycle. This section also explains how to use filters within the folders and on the eReferrals & eOrders landing page and how to send a message to a specialist.

Before you begin

Pre-requisite:

- Ocean user account
- *Sent* a test eReferral

Difficulty:

- Easy (comparable to creating an email)

Time to complete:

- 15 minutes

Technology needed:

- *Technology requirements are the same for all sections. For full details, see [Ocean browser recommendations](#)*

When you are done you will be able to:

- Navigate the eReferral & eOrders landing page & folders
- View & track eReferrals within folders

- View and identify parts of a completed eReferral

Review the information

QHR Accuro: [Track an eReferral](#)

Med Access: [Track an eReferral](#)

OSCAR PRO: [Track an eReferral](#)

Ocean Portal: [Track an eReferral](#)

General: [Manage an eReferral](#)

General: [Review the appointment status in Ocean](#)

Complete the steps

1. Navigate to the eReferrals & eOrders landing page to track the eReferral(s).

- EMR users: Log in to Ocean from your EMR.

QHR Accuro

- Select your **Ocean CDS** button.

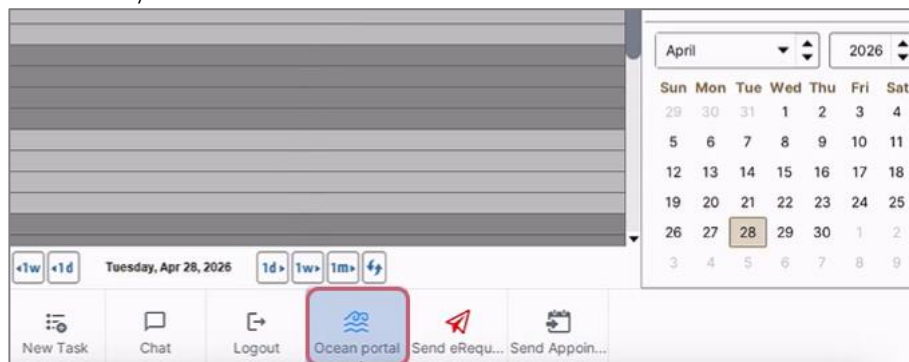


Figure 97: QHR Accuro CDS button

- If you don't have an Ocean CDS button
 - Select the **target Menu** on the bottom left of the screen
 - Hover over **CDS**
 - Select Ocean Portal

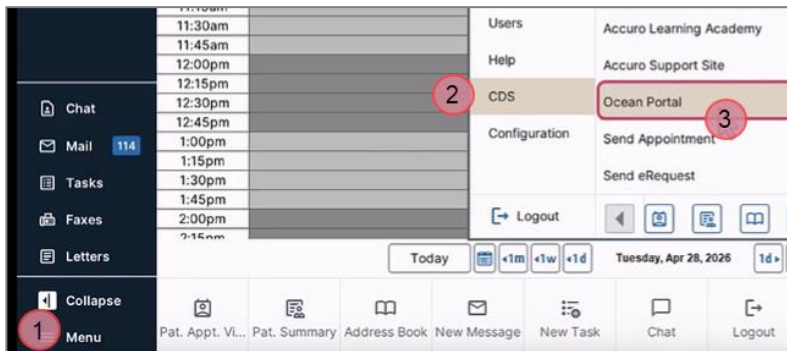
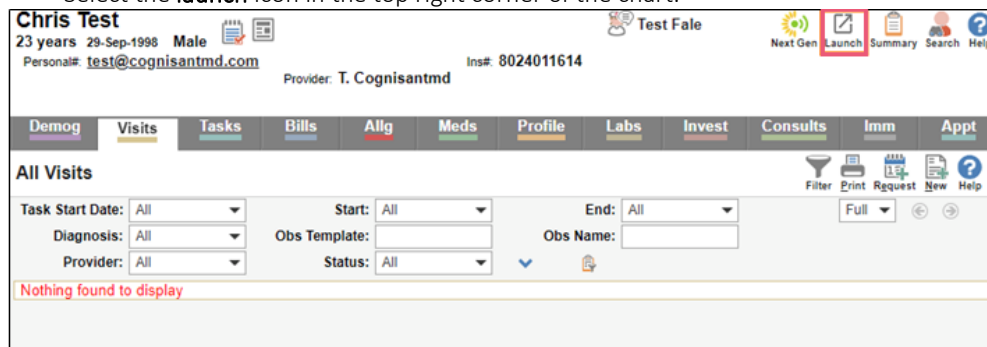


Figure 98: QHR Accuro Using the Menu button to find Ocean Portal link

Med Access

- Select the **launch** icon in the top right corner of the chart.



Chris Test
 23 years 29-Sep-1998 Male
 Personal#: test@cognisantmd.com Ins#: 8024011614
 Provider: T. Cognisantmd

Next Gen **Launch** Summary Search Help

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults Imm Appt

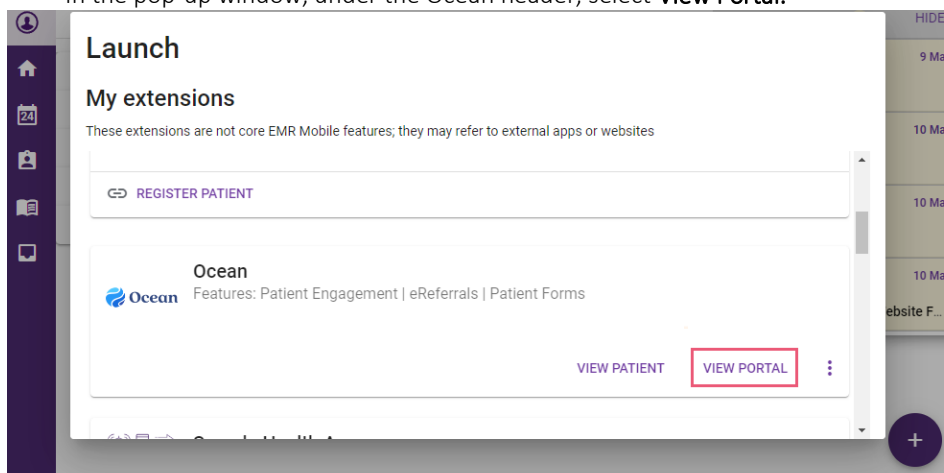
All Visits

Task Start Date: All Start: All End: All
 Diagnosis: All Obs Template: Obs Name:
 Provider: All Status: All

Nothing found to display

Figure 99: Med access: Launch icon

- In the pop-up window, under the Ocean header, select **View Portal**.



Launch

My extensions

These extensions are not core EMR Mobile features; they may refer to external apps or websites

REGISTER PATIENT

Ocean
 Features: Patient Engagement | eReferrals | Patient Forms

VIEW PATIENT **VIEW PORTAL**

Figure 100 : Med Access: View portal

OSCAR PRO

- From the Ocean toolbar in the middle of the chart, click the **Ocean icon**.



Figure 101: OSCAR Pro: Ocean icon

Ocean Portal

Go back to the eReferrals & eConsults landing page (Home page)

- From the Healthmap, select **your name** in the top right corner and then select **home**

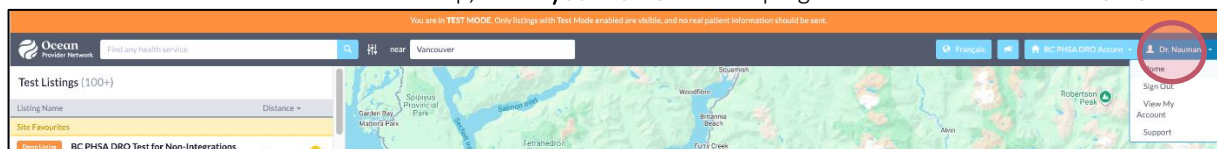


Figure 102: Go back to eReferrals & eConsults page from the Healthmap

2. Review how eReferral moves through the folders

The eReferrals move through the folders on the left side of the eReferrals & eConsults landing page.

- Select **Sent** to expand the folder menu.

Patient	MRN	DOB	Description
Test first name Test Last Name	131	1980-JAN-02	Audiology
Tian Berger	126	1982-MAY-03	Dermatology
Yesyou Notme	128	2001-JAN-20	Dermatology
James Bond	123	1993-NOV-12	Audiology
Yeager Eren	127	1999-DEC-15	Audiology
August July	124	1956-APR-02	Audiology
Test first name Test Last Name	131	1980-JAN-02	Audiology
Rua3 Gerrard	133	2001-MAR-04	Dermatology
Rose1 Test	62	1976-JAN-01	Dermatology
Hello Test	136	2017-APR-04	Audiology
Zues Bella	157	1990-OCT-10	Orthopedics
Chocolate Test	100	2001-JAN-01	Audiology
Goose Mettler	5	2020-FEB-02	Internal Medicine
chocolate test	151	2000-JAN-01	Audiology
Wanda Smith	92	1979-FEB-11	Dermatology
Michael Test	174	1952-MAR-26	Audiology

Figure 103: eReferral folders > Sent

3. Try these *optional* activities in the folder section

- If the received folder menu is open, you can select it to collapse it.
- Select each folder to view its contents and follow the potential flow of an eReferral.
- Try using the filter and sorting options in the following folders:
 - **Awaiting response, Pending booking and Completed** folders: Sort by referring clinician and service.

Filters for **Sent** folders Save Filters Clear All

Referring Clinicians (All) Service (All)

Figure 104: Filters

- **Booked Unconfirmed** and **Booked Confirmed** folders: Sort the eReferral based off appointment date and patient's email.



Figure 105: Filters

- Review this article [Can I filter the eConsults/eReferrals in my Ocean Site?](#)

4. Review the General section

In the top left corner of the folder section, you'll see the General section. These folders have eReferrals that need your review and action.



Figure 106: General section

- **Needs review**
 - Shows any eReferral that has been updated by someone else since it was last reviewed.
 - An eReferral in this folder will have either a new note or a new message that needs to be acknowledged.
 - For an eReferral to exit this folder, you need to open it, read it and then select **Reviewed**.
- **For me**
- All eReferrals assigned to you.
 - Recently viewed: a shortcut that allows you to quickly return to a recently viewed eReferral.

5. Review sent eReferral(s)

- To review the sent eReferral record:
 - Go to the **Sent** folder section and select the **Awaiting Response** folder.
 - Select the **patient's name** to open the eReferral.

6. Familiarize yourself with the six sections of the [patient's] eReferral record

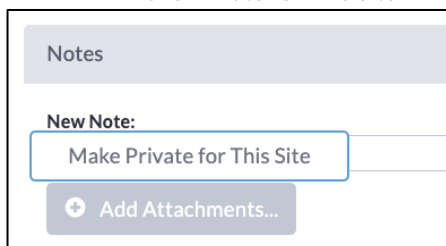
- **General section:**
 - eReferral summary of patient demographics and referrer information, including contact details.
- **Referral Form Summary section:**
- A summary of the information entered by the sender into the eReferral form.
- **Patient's Note:**
 - this is a section used to email the patient and to send and show the info from completed patient e-forms and questionnaires.
- **Scheduling Section:**
 - The specialist can book and confirm appointments and provide appointment instructions to the patient (if using email).
 - Appointment details shown here will also generate an email to you as the referrer.

- **Notes Section:**

- You and the specialist can add general notes you take about the eReferral, and where the specialist can add consult notes.
- You can add private notes that are only visible to your clinic. These are internal notes, not visible to the specialist clinic .

- **To make a note private, select New note.**

- Select **Make Private for This Site.**

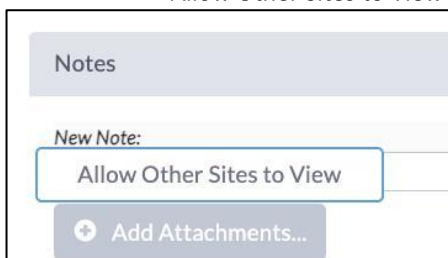


The screenshot shows a 'Notes' section header. Below it, a 'New Note:' dropdown menu is open, displaying the option 'Make Private for This Site'. Below the dropdown is a button labeled '+ Add Attachments...'.

Figure 107: Notes section > Make Private for This Site

- **To make this note visible to the specialist site**

- Select **Allow Other Sites to View**



The screenshot shows a 'Notes' section header. Below it, a 'New Note:' dropdown menu is open, displaying the option 'Allow Other Sites to View'. Below the dropdown is a button labeled '+ Add Attachments...'.

Figure 108: Notes section > Allow Other Sites to View

- **Messaging section:**

- Communicate with the specialist, such as providing or requesting quick updates about the eReferral or sending further information like labs and or digital information.

OceanMD
Provider Network

Roz Testing Allergy and Immunology - Test eReferral MRN: 88 5370 Action

General

For: BC PHSA DRO Test for Accuro
Sent by Dr. Anu Dosanjh via eReferral on Apr 28, 2025 at 4:56 PM

Patient:
Roz Testing ♀
dob: May 5, 1980 Page 45
HN: BC 9841599872
10 Front Street
Burnaby, BC
V3J 0A4
jacquie.odorne@phsa.ca
620-555-5555 (M)

Referred by:
Dr. Anu Dosanjh
BC PHSA DRO Accuro
111 Test Street
Delta
V2V2V2
Billing # 55555
Professional ID 55555
604-333-3333
555-555-5555

Copy of referral and status updates to:

Notes

New Note:

Messaging

Dr. Anu Dosanjh - BC PHSA DRO Accuro
To: Referrer (Dr. Anu Dosanjh / BC PHSA DRO Accuro)
Apr 28, 2025 at 4:59 PM
Please send most recent labs
To:

Send

Referral Form Summary

Referral Information
Refer To: First Available Appointment

Reason for Referral
Food Allergy
Name and History of Each Food Allergy: DAIRY

Patient Summary
Current Problem List: Asthma
Current Medications: amino acids/multivit with iron, minerals Oral Tablet Dosages: 1 Tablet(s) Once daily for 1 Day(s) starting on 2024-Oct-02
VENTOLIN HFA 100 MCG INHALER Dosages: 1-2 Spray(s) Once daily for 1 Day(s) starting on 2024-Oct-02
Allergies: No known drug allergies
No known drug intolerances
No known non-drug allergies
No known non-drug intolerances

Patient's Note

Scheduling

Initial Visit Date: Medium:

Comments for Referrer and Patient:

Needs review:

Figure 109: The six sections of the [patient's] eReferral record

7. (Optional) Practice editing some content within the eReferral.

Use the grey edit icon to edit the following sections within the eReferral:

- Patient information

Patient:
Roz Testing ♀
dob: May 5, 1980 Page 45
HN: BC 9841599872
10 Front Street
Burnaby, BC
V3J 0A4
jacquie. [redacted] a.ca
620-555-5555 (M)

Figure 110: eReferral record > Patient > grey edit icon

- Medical history

Referral Form Summary

Referral Information
Refer To: First Available Appointment

Figure 111: eReferral record > Referral Form Summary > grey edit icon

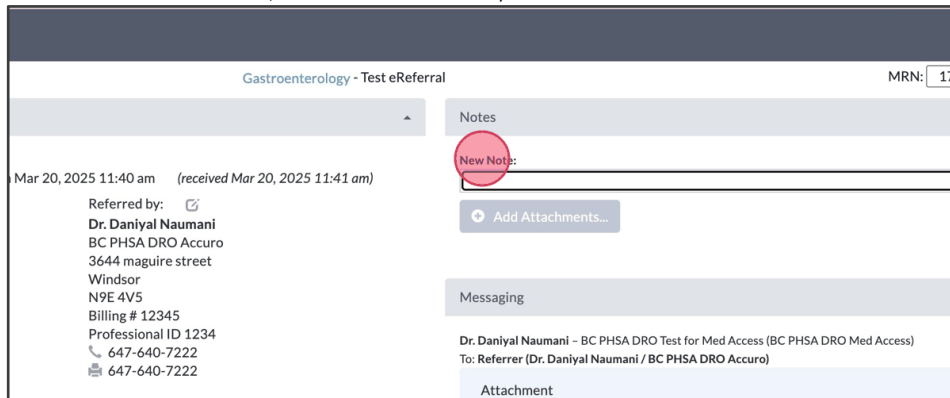
- For more detail see the 'Opening an eConsult' section of [Understanding the eReferrals & eConsults View – OceanMD](#). The video starts at 2:31 mins.

8. Practice sending secure messages to a Specialist.

- With the eReferral record still open, enter text into the **messaging** section or select the **speech bubble** to use a canned response.
 - To send the response, select the **Send button**, [Save] and then select **Close**.

9. Start a private note

- Create a note on an Ocean eReferral that is visible only to users at your Ocean site.
 - Open the Ocean eReferral you want to add a note to.
 - In the Notes section, click the text that says **New Note**.



Gastroenterology - Test eReferral MRN: 178

Notes

New Note:

Mar 20, 2025 11:40 am (received Mar 20, 2025 11:41 am)

Referred by: Dr. Daniyal Naumani
BC PHSA DRO Accuro
3644 maguire street
Windsor
N9E 4V5
Billing # 12345
Professional ID 1234
647-640-7222
647-640-7222

Add Attachments...

Messaging

Dr. Daniyal Naumani - BC PHSA DRO Test for Med Access (BC PHSA DRO Med Access)
To: Referrer (Dr. Daniyal Naumani / BC PHSA DRO Accuro)

Attachment

Figure 112: Notes> New Note

- Set the note to private
 - Select **Make Private for This Site**.



Gastroenterology - Test eReferral MRN: 17826 2119 Action

Notes

New Note:

Make Private for This Site

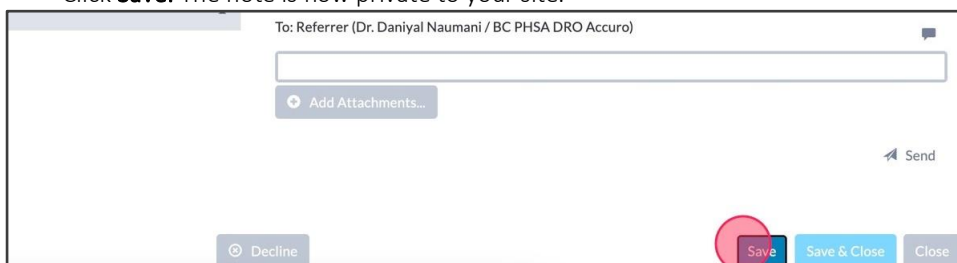
received Mar 20, 2025 11:41 am)

man
ccuro
reet

Add Attachments...

Figure 113: Notes > New Note > Make Private for This Site

- When the **New Note** text turns italic, type your note.
- Click **Save**. The note is now private to your site.



To: Referrer (Dr. Daniyal Naumani / BC PHSA DRO Accuro)

Add Attachments...

Send

Decline Save Save & Close Close

Figure 114: Save button to make note private

10. Add reviewer note

- Select **Needs Review** to assign the referral to be reviewed by another user on your Ocean site.

Referral Form Summary

Name and Pronouns

Name Used: Test first name

Referral Information

Reason for Referral / Clinical Question: Test

Patient's Note

Scheduling

Initial Visit Date: Jul 17, 2024 1:30 AM Medium: Video Visit

Follow-Up Date: Jul 18, 2024 12:10 AM Medium: In Person at 10151 No. 3 Road

Appointment: Jul 18, 2024 12:10 AM Medium: In Person at 10151 No. 3 Road

Anticipated Wait Time to Initial Visit Date: Confirm

Comments for Referrer and Patient:

Add Attachments...

Any scheduling changes will send an email notification to the referrer and the patient.

Needs review:

Enable Review Mode

Figure 115: Needs Review field

11. Submit compensation

- Submit request for compensation link

The eReferral is now with the Specialist clinic and you will only need to action information if the Specialist asks. It will be in your Needs review folder.

Resources for you and your team

- Webpage & Video
 - [View & track your eReferral](#)
 - [Understanding the eReferrals & eConsults View](#)

Note: While this video focuses on the Receiving folders, the same function also apply to senders. It highlights features such as filtering and parts of an eReferral.
- Video
 - [Send an eReferral in QHR Accuro](#)
 - [Send an eReferral in Med Access](#)
 - [Send an eReferral in OSCAR Pro](#)

Need help? Contact us DRO.Program@phsa.ca

Learn More

To continue learning and get eReferrals working for you, we recommend the following resources:

- Sign up for [Ocean Academy](#) for additional practice and ongoing learning

Bookmark these important sites:

- [Ocean support](#) website
- [Digital Referrals & Orders](#) website

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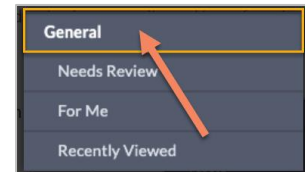
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Glossary

 Hyperlinked terms are clearly defined on the [Ocean glossary page](#).

- **Administrator:** [also referred to as Site Administrator, Site admin, Ocean site admin]
 - Has full rights to configure the Ocean site.
 - Can access the admin panel and see the admin cog icon, manage users, assign permissions, and oversee site-level settings.
 - Can add/remove users and ensure the site is set up correctly.
- [Clinical Delegate](#)
- [Clinic Support Staff](#)
- [Directory Listings](#)
- **DRO:** Digital Referrals & Orders program
- **EMR:** Electronic medical record
- [EMR User Account](#)
- [Health Service Category \(HSC\)](#)
- **General folder group:** eReferrals that you need to action upon.
- **Needs Review:** this folder shows any e-referral that has been updated since you last reviewed it.
 - eReferrals in the Needs Review inbox have a message that needs to be acknowledged.
 - Ensure once you open an eReferral, you click “Reviewed...” once they’ve been reviewed so they exit this inbox and can continue to be managed
- **For Me:** all eReferral assigned to you.
- **Recently Viewed:** Allows you to quickly return to a recently viewed eReferral.



General user: [also referred to as All users, Regular user]

Any non-admin user.

Can log in and use the Ocean site to send or receive eReferrals

Cannot make administrative or configuration changes.

- [MRN](#)
- [Ocean eForm](#)
- [Ocean Form](#)
- [Ocean Platform](#)
- [Ocean Site](#)
- [Ocean Site Admin](#)
- [Ocean User Account](#)

Ocean (web) portal user: Users with no EMR or use an unintegrated EMR to access their Ocean site/eReferrals.

- **PHSA support site:** Provides technical and troubleshooting support during implementation.
 - Recommend adding and keeping the PHSA Support on your site until Go-live.
 - The support site can be removed by Ocean Site Admin at any time.
- **Received folder group:**

- **New:** When you received a new eReferral it will sit in the “NEW” folder. These are referrals you haven’t yet accepted.
 - Pending Booking: Accepted eReferrals that have not been booked for appointments.
 - Booked Unconfirmed: Accepted e-referrals that have an appointment booked, where the appointment is not yet confirmed.
 - Booked Confirmed: Accepted eReferrals that have an appointment booked and confirmed with the patient.
 - Awaiting Reply: eReferrals for which you have followed up with referrer for more info and are currently awaiting reply.
- Received (All): All received eReferrals, in any status, which have been sent to your site.
 - Completed: eReferrals that you have completed (where the appointment has passed).
 - Forwarded (All): Shows any eReferrals you have forwarded to a new specialist because you can’t take on the patient.
Task location: *In the eReferral > Action > Forward > select the listing you’d like to forward this to.*
- Then this e-referral will no longer belong to you.
- Declined: Your declined eReferrals.
 - Cancelled: eReferrals the sending provider cancelled .
- **Regional Authority (RA):** A special Ocean site used by provincial or regional programs to help manage Ocean across many clinics.
- **Shared Encryption Key (SEK):** is a clinic-specific passkey used to encrypt and decrypt patient data in Ocean.
- Sent folder group:
 - **Sent (All)** - All outgoing eReferrals, in any status, that have been sent to a specialist are shown here.
 - **Incomplete** – eReferrals that you started and then Saved for Later.
 - **Awaiting Response** – eReferrals that have been sent but not yet accepted by the specialist.
 - **Accepted as Walk-in** - Any sent consults and/or eReferrals that have been accepted as a walk-in appointment by the recipient.
- **Pending Booking** – eReferrals accepted by the receiving specialist that have not been booked for appointments.
- **Booked Unconfirmed** – eReferrals accepted by the receiving specialist that have an appointment booked, where the appointment is not yet confirmed.
 - **Booked Confirmed** - eReferrals accepted by the receiving specialist that have an appointment booked and confirmed with the patient.
 - **Completed** - eReferrals that have been completed by the specialist.
- **Declined** – eReferrals that were declined by the specialist.
- **Cancelled folder** – eReferrals that you, the sending provider, cancelled.
- Signing authority: Someone with legal or organizational signing authority, who is authorized to sign on behalf of all users at your site, is required to sign the Health User Participation Agreement (HUPA).
- Support site
- Trusted User

