

# TELUS PSS RECEIVER – QUICK REFERENCE GUIDE

(STANDARD INTEGRATION WITHOUT CLOUD CONNECT)

## Key Links

**Ocean Portal:** <https://ocean.cognisantmd.com/>  
**Ocean Healthmap:** <https://oceanhealthmap.ca/>  
**Guides/FAQs:** <https://support.cognisantmd.com/hc/en-us>

## Technical Support

**Email:** [techsupport@thinkresearch.com](mailto:techsupport@thinkresearch.com)  
**Phone:** 1-855-846-5805  
(Weekdays 9:00am - 5:00pm EST)

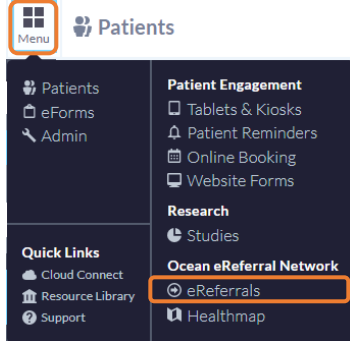
Please click on the section titles to be linked to additional support articles and screenshots.

### Viewing Received eReferrals in the Ocean Portal

1. Click the **Portal** button on the Ocean Toolbar in any patient's chart to be brought to Ocean Portal.



2. View received referrals on the **eReferrals Page**. If required, navigate to the eReferrals page by clicking **Menu > eReferrals**.



3. Each referral is shown as a row, and each column provides key information about the referral. Click on a row to open a referral and view its full detail.

Patient	MRN	DOB	Description	Date Sent	Source	Site
Sally Smith		00-10-01	Cardiology	Oct 6, 2021 6:42 pm	Dr. Sean Sender	TRC Family Health Team

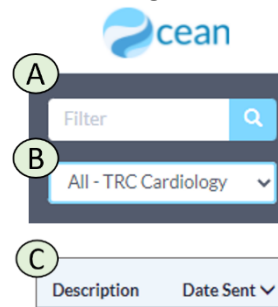
### eReferral Inboxes on the eReferrals Page

The inboxes along the left of the eReferrals View group referrals by their status.

Needs Review	10	- Referrals flagged for review
For Me	2	- Referrals flagged for your review using "Notify Feature"
Recently Viewed		- Referrals viewed within past 48 hours
Received		
New	30	- New referrals, have not been accepted or declined
Pending Booking	8	- Accepted referrals, but no scheduling information yet
Booked Unconfirmed	3	- Referrals with scheduling information that has not been confirmed
Booked Confirmed	10	- Referrals with scheduling information that has been confirmed
Awaiting Reply	3	- Referrals waiting for additional info from referrer and awaiting reply
All Received		- All referrals received, regardless of current status
Completed	2	- Referrals that have been completed
Forwarded (All)	0	- Referrals that have been forwarded to another site
Declined	4	- Referrals that have been declined
Cancelled	1	- Referrals that have been cancelled

### Filtering and Sorting on the eReferrals Page

- A) Use the Filter Bar in the top-left to filter by surname of the patient or referring clinician.
- B) Use the Filter dropdown in the top-left to filter by the Healthmap listing or referred service.
- C) Click column headers to either group referrals, or sort in ascending, descending order.



### eReferral Icons

Icons at the right on the right of the referral rows provide additional information and actions.

Icon	Description
	There is a message associated with the referral
	View this patient's previous eReferrals
	An attachment is associated with the referral
	A backup copy of the referral has been exported
	Edit details (e.g. contact details, referral form)
	A component of the referral requires review
	A component of the referral that was previously requiring review has been reviewed

## Referral View and Management

Click on a referral from the eReferrals page to open it.

Click **Accept** or **Decline** buttons to accept or decline a referral as appropriate.

**1** General

For: TRC Cardiology West  
Sent by Dr. Sean Sender on Nov 4, 2021 12:41 pm

Patient: James Doe  
dob: Oct 1, 1950 M age 71  
HN: ON 1525525592  
123 Cherry Lane  
Toronto, ON  
M1V3N2  
patientemail@gmail.com  
416-555-5555 (M)

Referred by: Dr. Sean Sender  
TRC Primary Care  
123 Primary Care Street  
123 Test Street  
Toronto, Ontario  
M1V3N2  
Billing # 54678  
416-299-4252  
CPSO # 43564  
416-299-6333

Copy of referral and status updates to:

**2** Referral Form Summary

Patient Information  
Height (cm): 170  
Weight (kgs): 70  
BMI: 24.2

Reason for Referral  
Please see this 70 year old gentleman -- new onset chest pain

Cardiovascular Testing Request  
• Exercise Stress Test Only (GXT)

Patient's Note

**3** Scheduling

Appointment: pending  
Time: Medium: In Person at 1527 Main St  
Confirmed  
Comments for Referrer and Patient:  
Any scheduling changes will send an email notification to the referrer and the patient.  
Needs review: Enable Review Mode

**4** Notes

New Note:  
Upload File...

**5** Messaging

Dr. Sender Sean - Referrer (Dr. Sender Sean / TRC Primary Care) Nov 4, 2021 12:41 pm  
To: TRC Cardiology West  
Attachment  
JD-Health-History-Form - 20211104.pdf  
To: Referrer (Dr. Sender Sean / TRC Primary Care)  
Add Attachments... Send

**6** Action

Decline Accept

1. The **General Section** contains information on the patient, the referral sender, and any copied stakeholders. Use the grey edit icon if needed.
2. The **Referral Form Summary** is a summary of the information entered by the sender into the referral form. Use the grey edit icon if needed.

3. The **Scheduling Section** is where appointment date, time, medium is entered. Booking comments and attachments for the patient can be added here. Additions or changes to the scheduling section trigger email notifications to the referrer and patient (if email has been provided). 'Anticipated Time to Appointment' can be used to communicate an estimated wait time to referrer.
4. The **Notes Section** is generally used for a site's internal notes to help coordinate between staff members. Right-clicking your notes and selecting "Make Private for Site" will make them only appear for your site's users only.
5. The **Messaging Section** is used to send and respond to messages from the referral sender or other stakeholders. Attachments on the referral can also be added and viewed here. Choose the recipient and click **Send** to deliver the message and trigger and email notification to the recipient.
6. The **Action Menu** provides additional options. For further information see: [What do the different Action Menu items mean?](#)

MRN:	Action
Download Referral Record	PDF containing a fulsome record of the referral.*
Download Referral Note	PDF summary including stakeholder information and referral note.
Download Patient Handout	PDF handout intended to be printed and provided to patient.
Download Status Notification Sheet	PDF document that can be printed and sent to another provider to notify them of status updates if they are not yet on Ocean.
Import into EMR	
Export	Opens a referral summary that can be copied into another system.
View Event Log	Record of actions taken on a referral. Also identifies unique referral reference and referral purge date.
View Patient History	Review additional referrals for patient sent or receive by the same site.
Forward...	Forward a referral to another directory listing.
Add Related Referral...	Make a copy of referral which can be managed separately from original.
Await Reply	Moves referral to the "Awaiting Reply" inbox, until receive required info from the sending site.
Mark as Test	Used to flag test referrals and remove them from the site's analytics.

## Sample Receiving Workflow for Telus PSS

The description below covers common referral management actions. Receivers may add, change, or omit some actions to match their workflow.

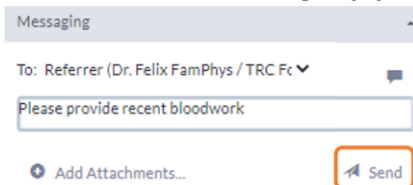
1. Click the **Portal** button on the Ocean Toolbar in any patient's chart to be brought to Ocean Portal.



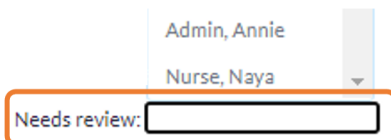
2. View incoming referrals in the **New** inbox. Click on the row to open the referral and review its full detail.



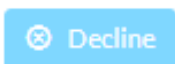
3. If needed, request more information from the referrer using the **Messaging** pane and click **Send**. This referral will move to the **Awaiting Reply** inbox.



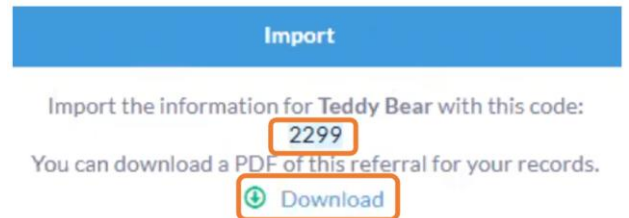
4. To assign a referral for another user at your site to review, click the **Needs review** field in the bottom-left and choose a user to review the referral, then click **Notify**. This will send the user an email notification and move the referral to the **Needs Review** inbox, and the reviewer's **For Me** inbox.



5. If referral is to be declined at this point, click the **Decline** button at the bottom of the referral. You will be asked to provide a reason for the decline, and to provide a message to the referrer. This will move the referral to the **Declined** inbox.



6. To accept the referral at this point, click the **Accept** button, and Ocean will provide a **Import Code** and a **Download** link for a PDF of the referral.



- a. Search Telus to determine if this patient's profile already exists. If not create a basic "patient stub profile" in PSS with the patients First and Last Name.



- b. Click **Import** on the Ocean Toolbar inside the existing or new patient's profile and enter the import code. This will import the patient's demographics and add the Referral Form Summary to the patient's notes.



- c. Use the **Download** link to save a PDF of the entire referral record (including messaging and attachments). This PDF is usually saved to PSS' scanned documents folder, and assigned to the patient through the **Managed Received Documents** workflow OR the PDF can be saved to a folder on the hard-drive and dragged onto a note in the patient's chart, then deleted from the hard drive.

7. If needed, use PSS internal messaging to have the referral brought to the attention of another Telus PSS user for review and triage.

8. The booking administrator can book the patient as per their usual process, and add the appointment to the Telus scheduler.



9. Once the appointment has been added to the Telus scheduler, access the **Ocean eReferral Appointment Notification Form** from the patient's chart by clicking **View > Custom Form** (shortcut F2). Locate and select this form and click **Choose This Form**, which will open a browser window to move the appointment details to the Scheduling pane in Ocean.

- Indicate the appointment **Medium**, and if the referral time has been **Confirmed** with the patient using the checkbox.
- If desired, add booking comments or attachments to be included in the notification email to the patient.
- Multiple appointments can be added to a referral by clicking the **plus (+)** in the Scheduling pane.
- Click **Save**. The referral will move to the **Booking Unconfirmed** or **Booking Confirmed** inbox as appropriate, and a booking notification email will be sent to the patient and referrer.

- Once the booked appointment date of the appointment has passed, the **Completed** button will appear at the bottom of a referral. Clicking this button will move the referral to the **Completed** inbox. Alternatively, sites can be configured to automatically complete referrals on a specified number of days after the appointment date. [See this support article](#) for more details.



- Reports or test results generated from eReferrals are typically provided back to the referrer in the clinic's standard way (e.g. via fax or HRM).

## Reviewing Referrals

### To assign a referral to another user to review in Ocean:

Click the **Needs review** field in the bottom-left, choose a user to review the referral, then click **Notify**. This will send the user an email notification, move the referral to the **Needs Review** inbox, and to the referrer's **For Me** inbox.

Referrals in the **Needs Review** inbox have a message that needs to be acknowledged. Ensure you click **Reviewed** once they've been reviewed so they exit this inbox, and can continue to be managed.



### To navigate and review multiple referrals in an inbox:

Click **Enable Review Mode** in the bottom-left of a referral. This will add the **Next** button in the bottom-right which can be clicked to easily move from one referral to another.

### To access your site's Review Note to assist with review, triaging, and protocoling:

Click the speech icon in the **Notes** section and click **Review...** Once saved, a summary of the Review Note will be added to the Notes section along with a date and time stamp.

## Deletion Warnings and Purging

Ocean is not a long-term repository of health information. All referral records are eventually deleted. Most referrals are stored for **12 months** after they are initiated, with some exceptions. For further information, see: [How long will my eReferrals be stored in Ocean?](#)

### Deletion Warnings

For referrals not already marked as **Completed**, Ocean sends a Deletion Warning email 14 days in advance of the referral being removed from Ocean. The referral will be moved to the **Deletion Warnings** inbox. These referrals should be completed (if appropriate) and referral information should be moved to another system (e.g. Telus PSS) for long term storage.

### Checking Referral Purge Date

You can check the scheduled date when a referral will be purged from Ocean by open the referral, clicking the Action Menu, then clicking the Event Log.

MRN: 

Action

Download Referral Record  
Download Referral Note  
Download Patient Handout  
Download Status Notification Sheet  
Import into EMR  
Export  

View Event Log

Event Log


Referral References: b9f31fd2-d35e-40c3-91a2-f5e225fba5c

Type	Date	User	User Location
Sent	Nov 4, 2021 12:41 pm	Sender: Sean	TRC Primary Care
Automatic email sent to patient	Nov 4, 2021 12:41 pm	Sender: Sean	TRC Primary Care
Referral record generated	Nov 4, 2021 12:45 pm	Sender: Sean	TRC Cardiology
Patient Demographics Update	Nov 17, 2021 2:28 pm	Sender: Sean	TRC Cardiology

This referral is scheduled to be purged from Ocean on: Nov 4, 2022

Extending the Purge Date

Referrals in the Deletions Warning inbox can be extended for an additional 60 days by clicking the refresh icon at the right of the referrals row.

Date Sent	Source	Site	Provider	Protocol	Priority	Noted
Oct 1, 2020 05 am	KJ Singh [Demo Only]	TRC FHT	TRC Demo Receiver			20/10/22 7:46 am 

Managing Split Referrals

Some referral forms are set up such that multiple health services or exams can be ordered on a single form. If set up this way, receivers may choose to split these referrals into multiple “child referrals” and each can be managed and booked separately. Splitting is done manually done via the **Split** button or automatically via a site setting. For further information, see [this support article](#).