

OSCAR PRO SENDERS – QUICK REFERENCE GUIDE

Key Links

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

Technical Support

Email: 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.

Sending an eReferral

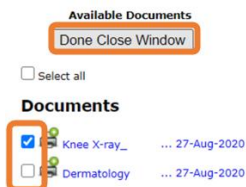
1. Enter a patient's Encounter chart, locate the **Consultations** section, and click the **plus (+)**.



2. If including documents from the patient's chart in your referral, click **Attach File to Consultation** on the left.



3. Check off the desired Documents to include, then choose **Done Close Window**.



4. Confirm the list of attachments in the left pane is correct, and click **Refer** in the top-right of the Consultation Window.



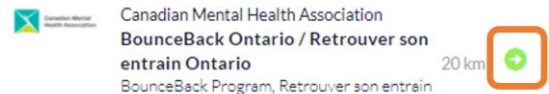
(top-right)

Note: any text added to the Consultation window will not be added to the Ocean eReferral, therefore do not make further edits to this window. The Consultation Window will automatically close upon clicking Refer.

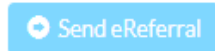
5. Locate listing you would like to refer to using:

- Search bar
- Directory
- Favourites

6. Check that the listing is accepting eReferrals as indicated by the green arrow.



7. Click on desired listing then click **Send eReferral** to open the electronic referral form.



8. Complete the electronic referral form. Use the **Add Attachments** button near the bottom of the form if you need to include documents from your computer hard drive (i.e. not from OSCAR).

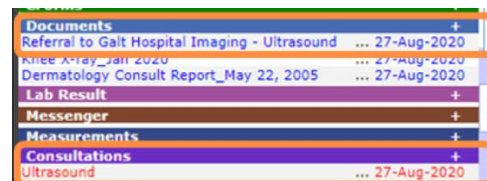


9. Complete the electronic referral form, and click **Send Referral**. You may be asked if you have the patient's email consent (if email included), and to confirm you've selected the correct patient and referrer.



10. Upon sending, a **Consultation** will be added in the patient's Encounter Chart containing the details of the eReferral, and the Consultation status will update automatically as the receiver manages the referral. A record of the sent referral will be added to

Documents



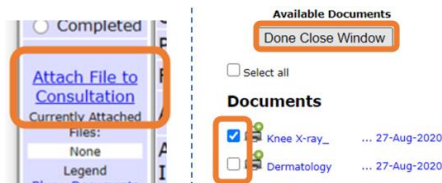
Note: If you are sending a patient for multiple services (e.g. tests or consultations) and would like each individual service to be associated with it's own Consultation in OSCAR, please complete a separate eReferral for each referred service.

Attach a Document from OSCAR to a Referral that is Already Sent

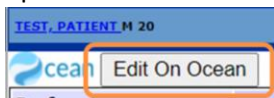
1. From the patient's Encounter Chart, open the Consultation that is associated with the sent eReferral.



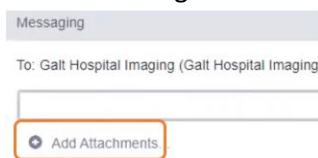
2. Click **Attach File to Consultation** on the left pane, then check off desired Documents to include, and click **Done Close Window**.



3. Click **Edit on Ocean** on the Consultation Window to open the eReferral in Ocean.

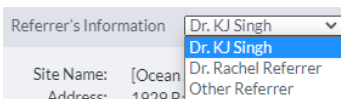


4. Locate the Messaging Pane, click **Add Attachments**, and select the desired file you attached. Include a written message if necessary and click **Send**.



Send a Referral as a Delegate for Another User

1. If sending on behalf of another user who has assigned you as a delegate, select that user's name from the **Referrer's Information** dropdown before clicking send on the electronic referral form.

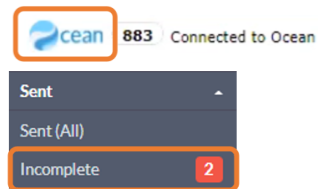


Save a Referral for Later Completion

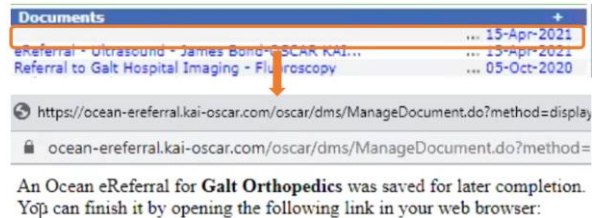
1. Click the **Save for Later** button on the bottom of the referral form at any point while completing it*



2. Within the next 30 days, any Ocean user at your site can then click the **Ocean Logo** on the Toolbar to access the Ocean Portal, and locate the in-progress referral in the **Incomplete** inbox of the **eReferrals** page. Click the in-progress referral to resume.

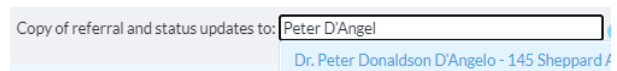


*This process also generates a **Document** for the patient with a link to re-access the in-progress referral. As an alternate way to resume the referral, this link can be copied and pasted into a new browser window. You may be required to sign in to Ocean on your browser.



Copy a Provider to Receive a Copy of the Referral and Status Updates

1. Search the provider's name in the Ocean directory using the field at the bottom of the electronic form.



2. If the provider can receive online communication from Ocean, they will receive an email notification and a copy of the referral in their Ocean Portal.

If the provider cannot receive online communication from Ocean, then Ocean will prompt you to print and fax a copy of the referral to the provider in the referral sent window.

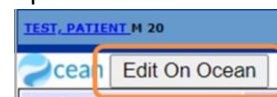
Fax the referral to the following recipients if you would like them to receive it:
• Dr. Offline Provider [Demo Only] - Phone: 705-444-3332 Fax: 705-476-6543

View a Sent eReferral in Ocean

1. From the patient's Encounter Chart, open the Consultation that is associated with the sent eReferral.



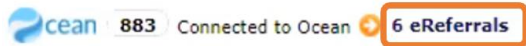
2. Click **Edit on Ocean** on the Consultation Window to open the eReferral in Ocean.



3. See the **Referral View and Management** section in this document for further information on what actions are possible from this view.

View Patient Dashboard to Review Pt's Active Referrals

- From the patient's Encounter Chart, click the **eReferrals** link on the Ocean Toolbar to be brought to the Ocean Patient Dashboard which links and summarizes information regarding the patient's active referrals.

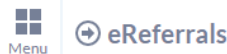


View ALL Sent eReferrals in the Ocean Portal

- Click the **Ocean Logo** on the Ocean Toolbar in any patient's Encounter Chart to be brought to Ocean Portal.



- From the **eReferrals** page, you can get a view of sent eReferrals for all patients categorized into different inboxes (see **eReferral Inboxes** section below).



- Click anywhere on a referral to open it and view its full detail.

Patient	DOB	EMR ID	Status	Service	Referral Date	Recipient	Clinician	Messages
Jane Doe	50-10-01		Sent - Not yet reviewed by TRC	Cardiology	Oct 28, 2021 5:36 pm	TRC Cardiology East	KJ Singh	

Filtering and Sorting in the Ocean Portal

- Use the filter in the top-left to search by patient or referring clinician surname.

× 🔍 Print Refer

Patient with surname 'smi...'

Referring clinician with name containing 'smith'

Provider with name containing 'smith'

- Click column headers to group referrals by category, or sort in ascending or descending order.

Description	Date Sent
Cardiology	Oct 29, 2021 1:43 pm
Cardiology	Oct 29, 2021 1:40 pm

eReferral Icons in the Ocean Portal

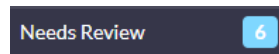
Icon	Definition
	There is a message associated with the referral
	View this patient's previous eReferrals
	An attachment is associated with the referral
	A backup copy of the referral has been exported
	Edit patient level details (email, phone, address)
	A component of the referral requires review
	A component of the referral that was previously requiring review has been reviewed

eReferral Inboxes

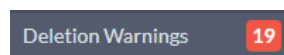
- On the eReferrals page in the Ocean Portal, the inboxes along the left group referrals by their status.

Sent	
Sent (All)	29 - All sent Referrals
Incomplete	0 - Referrals saved-for-later completion; click to resume
Awaiting Response	16 - Referrals that have not yet been accepted or declined
Accepted as Walk-In	0 - Referrals accepted by a walk-in service
Pending Booking	0 - Referrals that have been accepted, but no scheduling information yet
Booked Unconfirmed	3 - Referrals with scheduling information that has not yet been confirmed
Booked Confirmed	8 - Referrals with scheduling information that has been confirmed
Completed	1 - Referrals that have been completed
Declined	1 - Referrals that have been declined
Cancelled	0 - Referrals that have been cancelled by the sender
Deletion Warnings	0 - Referrals to be purged from Ocean within 2 weeks

- 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.



- Referrals are moved to the **Deletion Warnings** folder if they will be purged from Ocean within 14 days. Click the refresh icon to keep storing the referral for an additional 60 days. For further information see the following support article: [How long will my eReferrals be stored in Ocean?](#)



eReferrals Testpatient	80-01-01 Low Back Pain	Nov 11, 2020 2:35 pm	KJ Singh [Demo Only]	TRC Testing	TRC Testing	
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Referral View and Management

Click on a referral row in the Ocean portal to open it.

Ocean eReferral Network

John Doe Cardiology Services - Test Referral MRN: **6** [Action](#)

1 General

Sent by Dr. KJ Singh on Nov 1, 2021 4:53 pm
Phone: 416-645-2929
Fax: 416-645-2930

Patient: John Doe
dob: Jan 1, 1950 Male 71
HN: ON 5559330532 PT
123 Cherry Lane
Toronto, ON
M1V3N2
john.doe@gmail.com
647-380-5559 (H)
416-299-4255 (M)

Current recipient: TRC Cardiology
351 King St E
Toronto, ON
M5A 2W4
 123-123-1234

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
New onset chest pain with exertion

Cardiovascular Testing Request
• Exercise Stress Test Only (GXT)

Patient's Note

3 Scheduling

No appointment yet recorded.

[Disable Review Mode](#) [Next](#) [Close](#)

4 Notes

New Note:

5 Messaging

Dr. KJ Singh - Referrer (Dr. KJ Singh / TRC Family Health Team) Nov 1, 2021 4:54 pm

To: TRC Cardiology

Attachment

JD - Health History.pdf

To: TRC Cardiology

Add Attachments... Send

1. The **General Section** contains information on the patient, the referral recipient and any copied stakeholders. Use the edit icons to edit information if needed.
2. The **Referral Form Summary** is a summary of the information entered by the sender into the referral form. Use the edit icon to edit information if needed.
3. The **Scheduling Section** will display the appointment date, time, as well as any booking comments once it has been populated by the referral receiver.
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.

5. The **Messaging Section** is used to send messages to the receiver. Attachments are also viewed and added here. Click **Send** to deliver your message.
6. The **Action Menu** gives access to additional options. For further information see: [What do the different Action Menu items mean?](#)

MRN: <input type="text"/>	Action
Download Referral Record	PDF containing a fulsome record of the referral.
Download Referral Note	PDF summary includes stakeholder information and referral note.
Download Patient Handout	PDF including patient info, recipient info, map of location, future appt info and booking attachments.
Download Status Notification Sheet	
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	View history of referrals sent by this ocean site for the same patient.
Cancel Referral	Cancels a referral.
Resubmit	Found on cancelled or declined referrals. Can be used to resubmit to the same listing/site.