OCEAN PORTAL RECEIVERS – QUICK REFERENCE GUIDE

VERSION 1 – NOV 2021

| Key Links	Technical Support
Ocean Portal: https://ocean.cognisantmd.com/ **Ocean Healthmap: https://oceanhealthmap.ca/** **Guides/FAQs:** https://support.cognisantmd.com/hc/en-us	**Email:** techsupport@thinkresearch.com **Phone: 1-855-846-5805** (Weekdays 9:00am - 5:00pm EST)

Viewing Received Referrals

1. Visit https://ocean.cognisantmd.com/ in browser and log in.

2. Click Menu near the top-left, then click eReferrals to view the page where you manage incoming eReferrals.
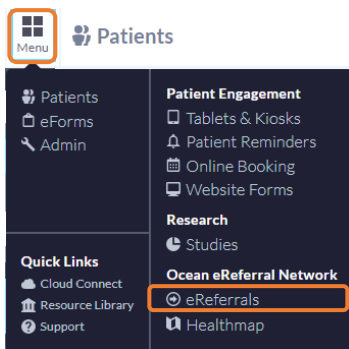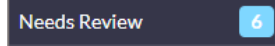

3. Each referral is a row, and each column provides key information. Click anywhere on a referral to open it and view its full detail.

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.

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1. The inboxes along the left of the eReferrals View group referrals by their status. For further information see: What do the different eReferral inboxes mean?

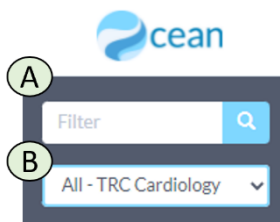2. Referrals in the **Needs Review** inbox have a message that needs to be acknowledged. Ensure you click "Reviewed…" once they've been reviewed so they exit this inbox, and can continue to be managed.
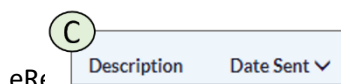

eReferral Icons

Icons at the right on the right of the referral rows provide additional information about the referral. For further information see: What do the icons and buttons mean?

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. 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.

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?

*Download Referral Record in a common way to create a PDF of the referral to move information from Ocean to another patient management system.

Reviewing Referrals

To assign a referral to another user to review:
Click the "Needs review" field in the bottom-left, to choose another member of Ocean site to review the referral, then click "Notify". This will send that user an email notification, move the referral to your "Needs Review" inbox, and to that user's "For Me" inbox.

To easily navigate and review multiple referrals:
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…"to access your site's Review Note. Once saved, a summary of the Review Note will be added to the Notes section, and priority and protocol will be added to the referral in the eReferrals page view (if applicable).

> Note: When you have finished reviewing a referral from the **Needs Review** inbox, ensure you have clicked "Reviewed" so that it is removed from this inbox, and can be managed further.

Marking an eReferral as Complete

Manually Completing Referrals
The "Completed" button appears along the bottom of an eReferral after the appointment date for the referral has pass. Click this button to move the referral to the "Completed" inbox.

Automatically Completing Referrals
Ocean sites can also be configured to automatically close Referrals after a set number of das from the latest appointment. For further information, see Can Ocean Automatically Mark Booked Referrals as Closed at my Site?

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 (or paper record) for long term storage as needed.

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 clicking the Event Log.

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.

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