

OCEAN PORTAL RECEIVERS – QUICK REFERENCE GUIDE

VERSION 1 – NOV 2021

Key Links

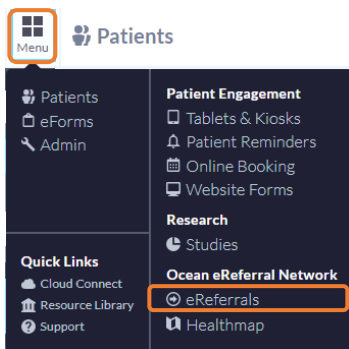
Ocean Portal: <https://ocean.cognisantmd.com/>
Ocean Healthmap: <https://oceanhealthmap.ca/>
Guides/FAQs: <https://support.cognisantmd.com/hc/en-us>

Technical Support

Email: techsupport@thinkresearch.com
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.



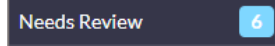
3. Each referral is a row, and each column provides key information. Click anywhere on a referral to open it and view its full detail.

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

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?](#)

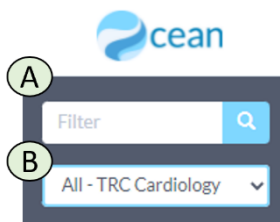
| | | |
|--------------------|----|--|
| Needs Review | 10 | - Referrals flagged for review |
| For Me | 2 | - Referrals flagged for your review using "Notify Feature" |
| Recently Viewed | | - Referrals viewed within past 48 hours |
| Received | | |
| New | 30 | - New referrals, have not been accepted 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 |

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.

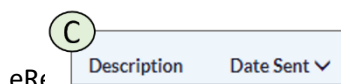


Filtering and Sorting on the eReferrals Page

- 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 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 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)

3 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 Close

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?](#)

| 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. |

*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.

Needs review: → Notify

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.

Needs review: Enable Review Mode → Next Close

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).

Notes

Review...

Contact attempted

Review

Priority: P1 P2 P3 P4 P5

Comments:

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.

Completed → Completed 1

Automatically Completing Referrals

Ocean sites can also be configured to automatically close Referrals after a set number of days 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.

MRN: Action

Download Referral Record

Download Referral Note

Download Patient Handout

Download Status Notification Sheet

Import into EMR

Export

View Event Log

View Patient History

Event Log

Referral Reference: b9f31f02-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.

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

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