

# OCEAN PORTAL SENDERS – QUICK REFERENCE GUIDE

VERSION 1 – NOV 2021

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

### Sending an eReferral

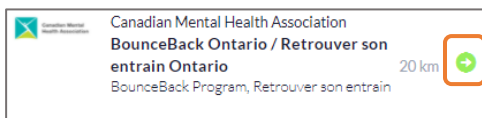
1. Visit <https://oceanhealthmap.ca/> in browser.
2. Click **Sign In** (top-right). Enter your Ocean Username and password.



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

- Search bar
- Directory 
- Favourites 

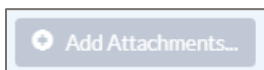
4. Check that the listing is accepting eReferrals as indicated by the green arrow.



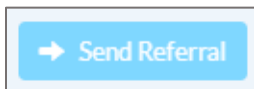
5. Click on desired listing then click **Send eReferral** to open the electronic referral form.



6. **Complete** the electronic referral form. Use the **Add Attachments** button near the bottom of the form to include documents from your hard drive.



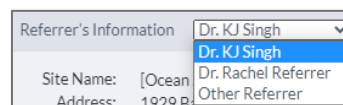
7. Click **Send Referral**.



Confirm whether you have the patient's email consent (if an email address is included), and confirm key clinical information (correct Patient and Referrer) to send the eReferral.

### 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.

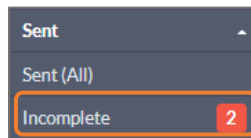


### Save a Referral for Later Completion

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

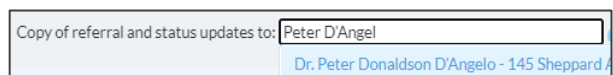


2. Any user from your site can locate the referral in the Incomplete inbox of the Ocean portal to resume it



### 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.

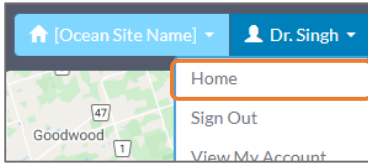
If the provider cannot receive online communication from Ocean, then Ocean will prompt you to print and fax a copy of the referral to the provider in the referral sent window.

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

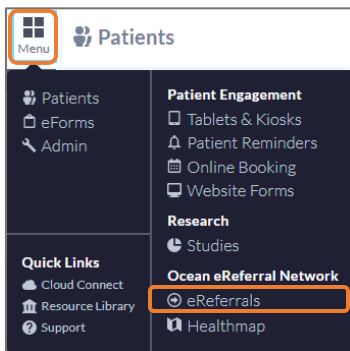
## Viewing Sent eReferrals in the Ocean Portal

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

Or, if logged into the Ocean Healthmap, click your name in the top right, then click **Home**.



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

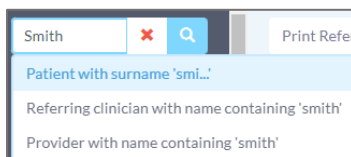


3. Click anywhere on a referral to open it and view its full detail.

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

## Filtering and Sorting in the Ocean Portal

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



2. 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

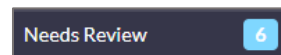
Icon	Definition
	There is a message associated with the referral
	View this patient's previous eReferrals
	An attachment is associated with the referral
	A backup copy of the referral has been exported
	Edit patient level details (email, phone, address)
	A component of the referral requires review
	A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

## eReferral Inboxes

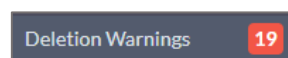
1. The inboxes along the left group referrals by their status. For further information see the following support article: [What do the different eReferral inboxes mean?](#)

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

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.



3. 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 from the eReferrals page 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    M age 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 on the referral are also viewed and added here. Click **Send** to deliver your message.
6. The **Action Menu** gives access to additional options.

MRN: [ ] **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.