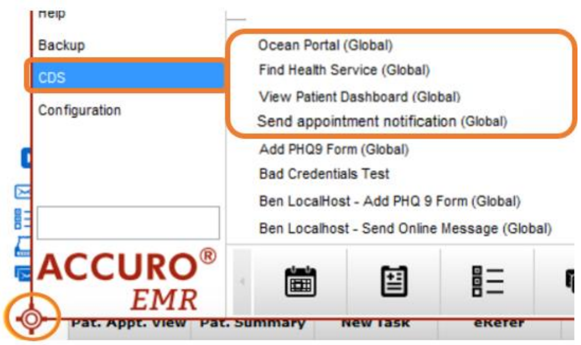
ACCURO RECEIVERS – QUICK REFERENCE GUIDE

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

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

Note:

- Depending on your setup and display preferences, you will either use **CDS Links or CDS Buttons** to perform actions related to Ocean eReferrals
- CDS Links are found by clicking the Accuro Target Menu > CDS



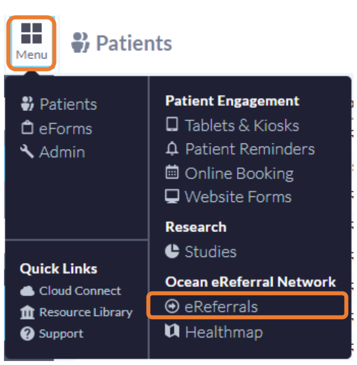
- If CDS Buttons have been added for convenience, they will displayed on the Quick Action Bar

- The naming of buttons and links in your Accuro may vary slightly from those described here

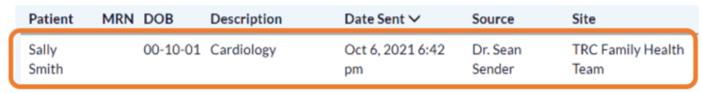
Viewing Referrals in the Ocean Portal

1. Click the **Ocean Portal** link or button to open the Ocean Portal in a browser window.

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

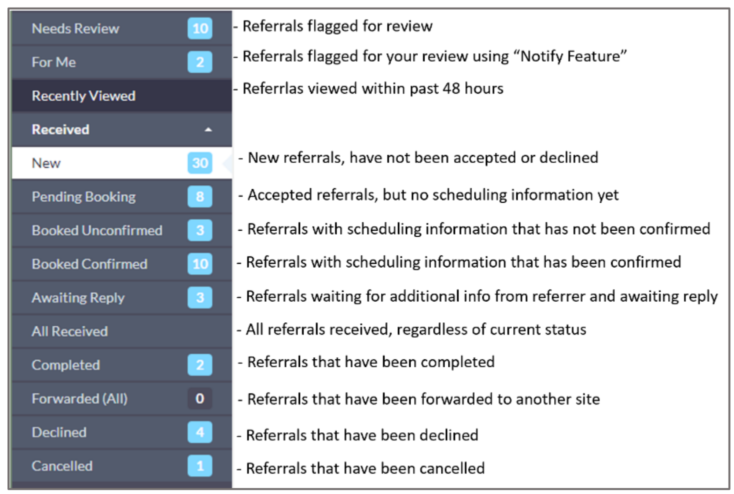


3. Each referral is shown as a row, and each column provides key information about the referral. Click on a row to open a referral and view its full detail.



eReferral Inboxes

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



eReferral Icons

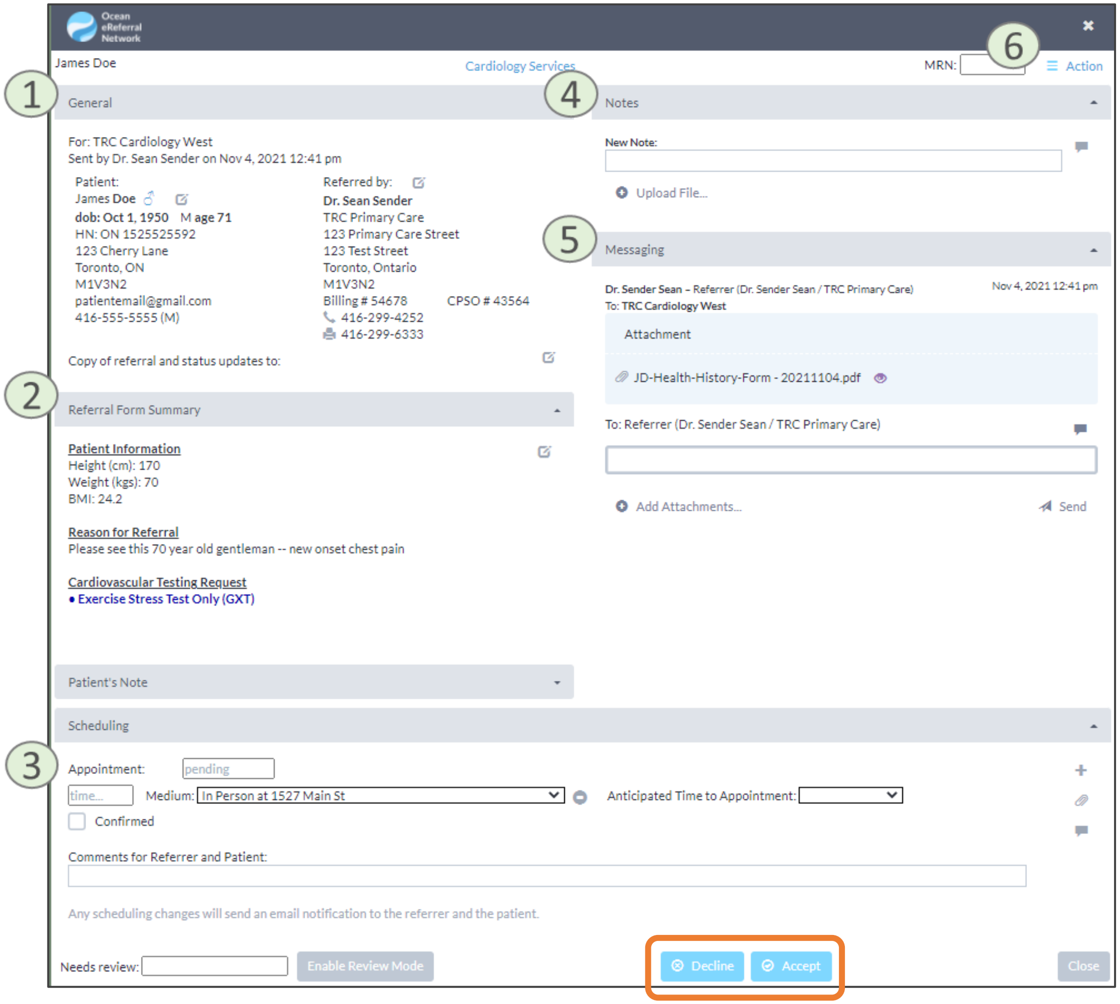
Icons at the right on the right of the referral rows provide additional information and actions.

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. The **General Section** contains information on the patient, the referral sender, and any copied stakeholders. Use the grey edit icon if needed.

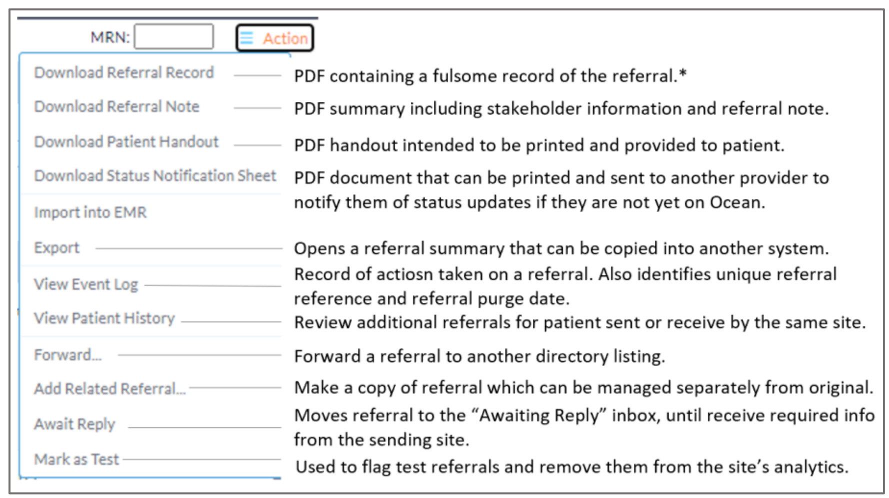
2. The **Referral Form Summary** is a summary of the information entered by the sender into the referral form. Use the grey edit icon if needed.

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?]



Sample Receiving Workflow for Accuro

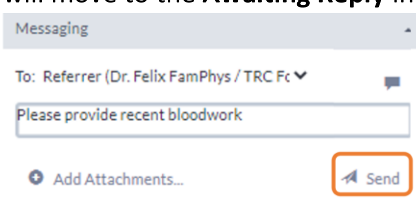
The description below covers common referral management actions. Receivers may add, change, or omit certain actions to better match their workflow.

1. Click the **Ocean Portal** link or button to open the Ocean Portal in a browser window.

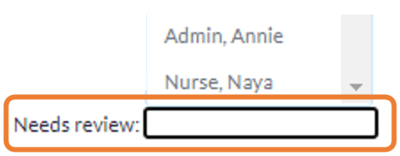
OR

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

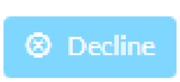
3. If needed, request more information from the referrer using the **Messaging** pane and click **Send.** This referral will move to the **Awaiting Reply** inbox.



4. To assign a referral for another user as 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 inform you that the patient has been sent to Accuro, and the referral will move to the **Pending Booking** inbox.

a. If a patient exists in Accuro with a matching healthcard number, Ocean will download the referral and attachments to the patients's Virtual Chart.

b. If no patient exists in Accuro with a matching healthcard number, Ocean will create the patient's profile in Accuro with the provided demographics and download a PDF of the referral and attachments to the patient's Virtual Chart.

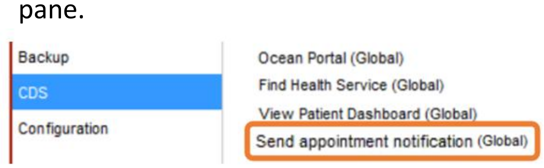
c. Additional details (e.g. family or referring physician) can be manually added to the chart if needed.

Note: if no healthcard number was provided for the patient, they will not be sent to Accuro automatically. The patient must be located or created manually, and the ***Download*** *link can be used to create a PDF that can be manually placed in the Virtual Chart.*

7. If needed, the eReferral document in the Virtual Chart can be sent to another Accuro user for review using a **Task** or by right-clicking and selecting **Modify Provider** and sending to the desired user's inbox.

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

9. Once the appointment has been added to the Accuro scheduler, click the [Send Appointment Notification](#) link or button with the patient selected to send the appointment date and time to the Ocean scheduling pane.



OR

a. Indicate the appointment medium, and if the referral time has been **Confirmed** with the patient using the checkbox.

b. If desired, add booking comments or attachments to be included in the notification email to the patient.

c. Multiple appointments can be added to one referral by clicking the **plus (+)** in the Scheduling pane.

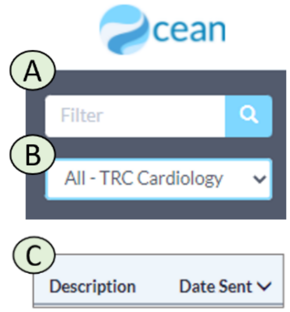
d. Click **Save**. The referral will move to the **Booking Unconfirmed** or **Booking Confirmed** inbox as appropriate, and a booking notification email will be sent to the patient and referrer.

10. 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.

11. 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).

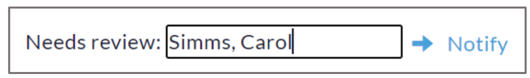
Filtering and Sorting on the eReferrals Page

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.

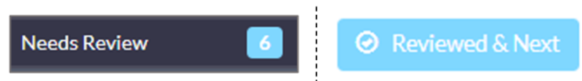


Reviewing Referrals

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.

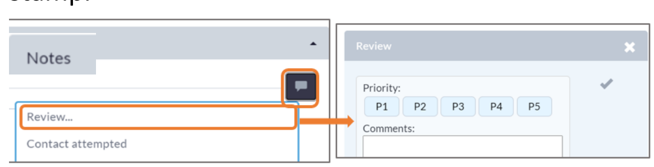


Referrals in the **Needs Review** inbox have a message that needs to be acknowledged. Ensure you click **Reviewed** once they've been reviewed so they exit this inbox, and can continue to be managed.



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

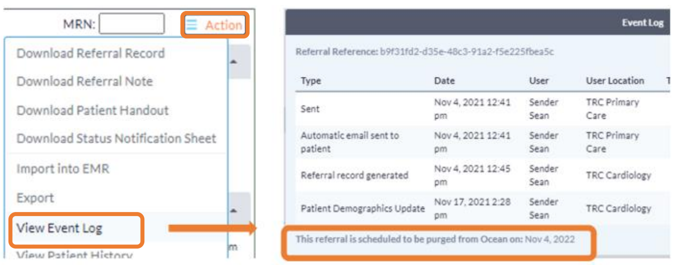
Ocean is not a long-term repository of health information. All referral records are eventually deleted. Most referrals are stored for **12 months** after they are initiated, with some exceptions. For further information, see: [How long will my eReferrals be stored in Ocean?]

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. Accuro) for long term storage.

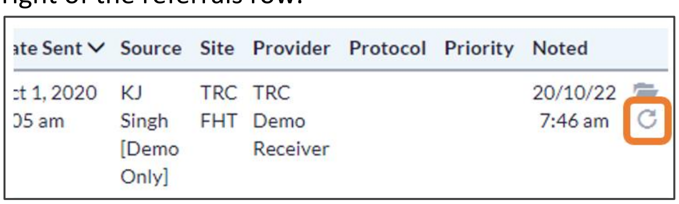
Checking Referral Purge Date

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.



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 [this support article].