

ACCURO 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>

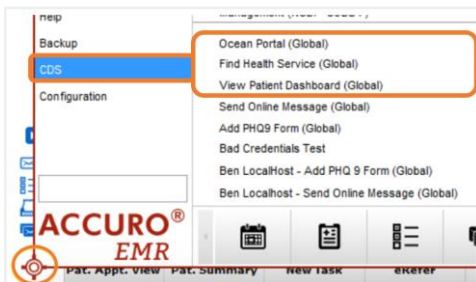
Technical Support

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.

Note:

- Depending on your setup and display preference, 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



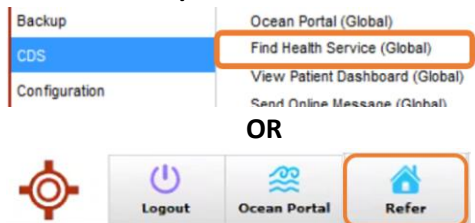
- If CDS Buttons have been [added for convenience](#), they will displayed on the Quick Action Bar



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

Sending an eReferral

- With a patient selected in Accuro, click the **Find Health Service/Refer** link or button.



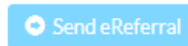
- Locate listing you would like to refer to using:

- Search bar
- Directory
- Favourites

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



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

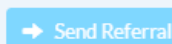


- Complete the electronic referral form. Use the **Add Attachments** button near the bottom of the form to include documents from your hard drive (i.e. not directly from Accuro)



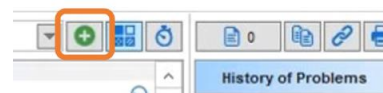
See the following section to attach a Clinical Note or Document from Accuro to an eReferral.

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



Attach a Clinical Note or Document From to an eReferral

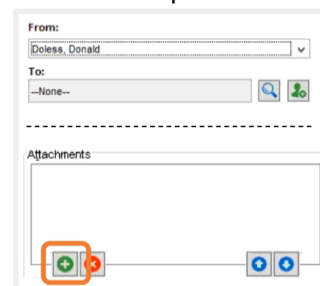
- Go to the **Encounter Notes** section of the patient you wish to send an eReferral for and click the **Green Plus** to add a note (shortcut CTRL+F11).



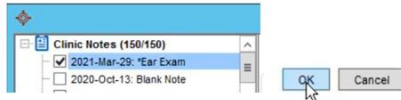
- Leave the note blank and click **Generate Letter**.



- In the letter window, ensure the **From** provider is correct in the top left, leave the **To** recipient blank, then click the **Green Plus** in the attachments pane.



4. Select desired attachments from the patient chart to include, then click **OK**.



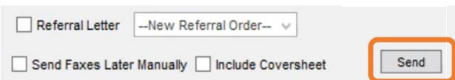
5. Click **Save to Chart as PDF** and click **Apply**.



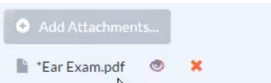
6. Click **Send Letter** and click **Yes** to confirm you would like to save the letter with attachments and no recipient to the patient's chart.



7. In the Letter/Fax Recipients window you can choose to add New Referral Order, or include a Coversheet, and then click **Send**.



8. You can now click the **Find Health Service/Refer** link or button to start a referral. Ocean will include unused generated letters with the current date to the bottom of the referral form form.



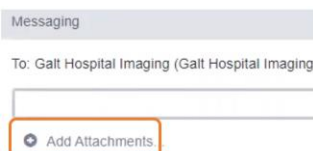
Use the **Eye** icon to preview the attachment.

Attach a Clinical Note to a Referral that is Already Sent

1. Save a Generated Letter to the patient's chart by following steps 1-7 in the previous section.
2. Open the sent eReferral using the **Patient Dashboard** link or button.

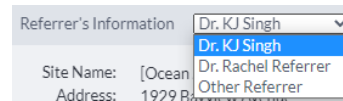


3. Choose the desired referral, locate the Messaging pane and click **Add Attachments**. Select the desired attachment from the list and click **Send**.



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.

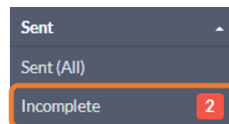


Save a Referral for Later Completion

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



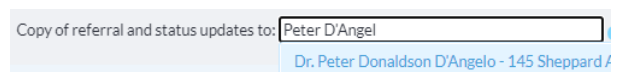
2. Within the next 30 days, *any* Ocean user at your site can then click the **Ocean Portal** link or button in Accuro, and locate the in-progress referral in the **Incomplete** inbox of the eReferrals page in the Ocean portal. Click the in-progress referral to resume.



This process also generates an **Encounter Note for the patient with a link to re-access the in-progress referral. As an alternate way to resume, you can copy and paste that link into a new browser window. You may be required to sign into 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.

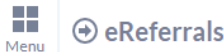
Fax the referral to the following recipients if you would like them to receive it:
• Dr. Offline Provider [Demo Only] - Phone: 705-444-3332 Fax: 705-476-6543

View Patient Dashboard to Review Pt's Active Referrals

1. With the patient selected, click the **Patient Dashboard** link or button in Accuro to be brought to the patient dashboard in Ocean, which links and summarizes information regarding the patient's active referrals.
2. Click on a referral listed to access the **Referral View**. See the **Referral View and Management** section in this document for further information on what actions are possible from this view

View ALL Sent eReferrals in the Ocean Portal

1. Click the **Ocean Portal** link or button in Accuro, to access the Ocean Portal in a browser window.
2. If needed, navigate to the eReferrals page by clicking Menu -> eReferrals.
3. From the **eReferrals** page, you can get a view of sent eReferrals for all patients categorized into different inboxes (see **eReferral Inboxes** section below).



4. 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

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

Patient with surname 'smi...'

Referring clinician with name containing 'smith'

Provider with name containing 'smith'

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 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

1. 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

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.

Needs Review	6
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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?](#)

Deletion Warnings	19
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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.

1 General

John Doe Cardiology Services - Test Referral MRN: **6** Action

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

Patient:
John Doe Current recipient:
dob: Jan 1, 1950 M age 71
HN: ON 5559330532 PT TRC Cardiology
123 Cherry Lane 351 King St E
Toronto, ON Toronto, ON
M1V3N2 M5A 2W4
john.doe@gmail.com 123-123-1234
647-380-5559 (H)
416-299-4255 (M)

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.

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

Disable Review Mode Next Close

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.