E-REFERRAL QUICK REFERENCE
Portal Sender

1.Open your web browser and go to
https://ocean.cognisantmd.com/ **to securely login (should be to site Demo SE Medical Clinic- Portal). You should bookmark this URL.**

To choose an alternate site **click on your name** at top right of screen and **choose the site** from the list. Go back to list and choose **Make Default**.

2. Ocean will open to the eReferrals page. At the bottom of the Sidetabs section on the left is the Actions section. Click on View Directory.

3. The Ocean Healthmap will Open. Click on the ★ **icon on the left Sidebar and choose the Receiver you wish to send the eReferral to.**

4. The Receiver Information screen will open, showing the contact information, and displaying Health Service Offerings.

5. To check Wait Times, click on the HSO (as above) and the wait time will appear.

Click on Send eReferral.

6. The eReferral form will open for that site. Enter the patient demographic information in the Patient Information section.

7. Complete the rest of the form. Where there are choices, it is only necessary to choose the positive results, unless there is an asterisk at the end of the choice which indicates it is a mandatory field.

8. At the bottom of the eReferral, choose Send eReferral and the eReferral will appear in the New sidetab in the Receiver portal. If interrupted choose Save for Later, so that the eReferral will move to the Incomplete sidetab of the portal.

9. The Email Consent window will open. Select the appropriate response.

10. You must now review and confirm the clinical information, or cancel if the patient information is incorrect, or the referral was created on the wrong patient.

11. The eReferral Sent window appears, advising the eReferral was sent successfully, and displaying the encapsulated referral.

You have the option to Close, or Print the eReferral to provide the patient with a copy.

An email will be sent to the Receiving site, and to the patient.

ACCESS PORTAL

To access the Portal at any time from the Healthmap click on your name at top right and choose Home.

EXPLAINING THE PORTAL

The Sidetabs are:

1. **Needs Review – messages that require a response appear here.**

2. **For me – some sights forward referrals to a particular staff member who will access their messages here.**

3. **Sent all – all referrals sent from this site appear here.**

4. **Incomplete – all referrals Saved for Later will appear here until (a) completed and sent or (b) be removed if no action taken within 30 days.**

5. **Awaiting respons – all referrals sent but not yet accepted appear here.**

6. **Acccepted as Walk-In – generally used by DI sites for walk in XRay referrals.**

7. **Pending Booking - displays all referrals that are Accepted but not yet Booked.**

8. **Booked Unconfirmed – displays all referrals that have been booked but are not yet confirmed by the patient.**

9. **Booked Confirmed – displays referrals where the patient has confirmed the appointment.**

10. **Completed – displays the referrals where the receiver marks the patient interaction as complete.**

11. **Declined – displays all referrals which have been declined. A message also appears in Needs Review for each declined referral so that the Receiver is advised of the Decline.**

12. **Cancelled – displays all cancelled referrals.**

13. **Deletion Warnings – displays all referrals which are about to be deleted from the system.**

FILTERING

eReferrals can be filtered by patient, provider and Referrer by typing name in the search field and choosing the filter, eg patient with surname test as below.
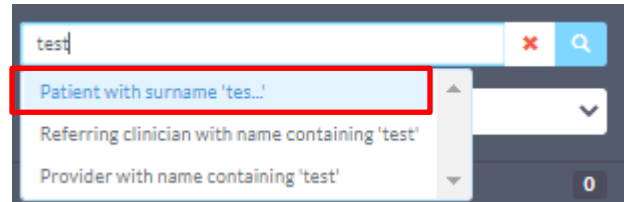
SAVE FOR LATER FUNCTION

1. f you are interrupted while creating an eReferral, Click the Save for Later button at bottom of the eReferral.

2. The referral will appear in the Incomplete Sidetab in the Ocean Portal.

You should open and complete the eReferral and Click Send eReferral at the bottom of the page.

REFERRAL LIST

This displays the patient name, dob, Status, Service, Recipient (Receiver), Clinician and messages. To open a referral they simply click on the referral from the Referral List.

RESPONDING TO MESSAGES

1. Open the eReferral in the Needs Review sidetab.

2. If required, Edit the eReferral by choosing the Edit button in the Patient information or eReferral sections.

Patient:
Jackie Smith ♀ [edit icon]
dob: Oct 10, 1989   F age 30
71 Adam St
Belleville, ON
K8N 5K3
eparks@qhc.on.ca
555-555-5555 (M)

Current recipient:
Quinte Health Care Diagnostic Imaging
265 Dundas St E.
Belleville, Ontario
K8N 5A9
📞 613-969-7400

Referral Note ▲

Quinte Health Care Diagnostic Imaging eReferral Form
Patient Information   [edit icon]
Height (cm): 189
Weight (kgs): 89
BMI: 24.9

Make your edits

3. In the Messaging section choose the Receiver from the dropdown in the TO field

Enter your message in the text field, Click Send.

Messaging ▲

Dr. Jo-Anne Croydon – Referrer (DEMO SE Medical Clinic (PSS))
To: DEMO South East Orthopedic Central Intake   Nov 11, 2019 1:53 pm
Attachment
📎 english-class-x-hip-fig09-normal-anatomy-ap-image-hip-blanco (1).jpg

To: [Referrer (DEMO SE Medical Clinic (▼]   💬
[enter text here]
● Add Attachments...   ◁ Send

4. Click Reviewed and Close at the bottom of the eReferral.

[⊘ Reviewed & Close]

CANCEL AN EREFERRAL

1. If you need to cancel an eReferral for any reason (eg patient deceased, patient had the surgery on an emergency basis, etc) open the eReferral.

2. Click on the Action menu at the top right of the eReferral and choose Cancel.

MRN: 80   9348   ☰ Action
Download Referral Record
Download Referral Note
Download Patient Handout
Download Status Notification Sheet
Import into EMR
Export
View Event Log
View Patient History
Forward...
Add Related Referral...
Await Reply
Delete
Cancel

3. Enter a Reason for the cancellation, eg, patient deceased, received care on emergency basis etc., and click Proceed to Cancel Referral. An email will be sent to the Receiving site advising them of the cancellation, and the reason.

RESUBMIT A DECLINED REFERRAL

1. If an eReferral is Declined you will receive a message in the Needs Review sidetab.

2. If you want to resubmit the referral with an explanation, Open the eReferral and send a message to the Receiver, explaining why you are resubmitting,

To: [DEMO South East Orthopedic Central Int ▼]   [enter your message here]   ▢
                        ● Add Attachments...   ◁ Send

3. Press Send, then Click on the Action Menu at top Right of referral and Choose Resubmit.

MRN: 53   ☰ Action
Download Referral Record
Download Referral Note
Download Patient Handout
Download Status Notification Sheet
Import into EMR
Export
View Event Log
View Patient History
Forward...
Resubmit

The referral will be resubmitted to the Receiver with the added information. Click Close.