

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.

Sign In

User Name
User Name

Password
Password

Remember me on this computer

Secure Sign In

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.

Dr. Croydon
jeroydon

DEMO SE Medical Clinic - Portal
Site # 5937 (Default, Supported)

Switch Sites *Sort By Number*


Search Site name or number

- 6433 Bancroft Community FHT - Manor Site
- 6258 Bancroft Community FHT - Oak Street
- 6641 Belleville X-Ray & Ultrasound

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.

Actions

- New Inbound Referral
- View Directory
- Claim Requisition
- Export
- Update Wait Times
- Patient History

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.

Quinte Health Care - Belleville General Hospital
Diagnostic Imaging

265 Dundas St E., Belleville, Ontario K8N 5A9
613-969-7400 x2494
English

Health Service Offerings
Select offering for wait times and more details

X-Ray / Radiography Ultrasound MRI Breast Ultrasound
Mammography Show 17 More

Send eReferral

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

Abnormal Pregnancy Screening Support CT

CT Accepting eReferrals

Wait Time 27 days

Click on Send eReferral.

Send eReferral

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

Patient Information

Surname: First: DOB: Gender: HN: Address: Mobile #: Home #: Business #: Email:

yyyy/mm/dd
O Male O Female O Other
province health number VC
street line 2 city provi postal

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.

Generic Diagnostic Imaging eReferral Form

Patient Information

Referring Provider is not Primary Care Provider

Height (cm):

Weight (kgs):

Preferred Language: English Other

Patient Consents to Voicemail? No Yes

Motorized Wheelchair? No Yes

Hoyer Lift Required? No Yes

Pediatric Under 10 Years Old? No Yes

WSIB? No Yes

Other Insurance? No Yes

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.

Referrer's Information:

Site Name: DEMO SE Diagnostic Imaging Phone: 613-332-5141
 Address: 12 Anystreet Fax: 613-332-5141
 Suite 303 and 305 Billing #: 123456
 City: Kingston Professional ID: 12345
 Province: ON Signed: J. CroydonMD
 Postal Code: K6V6E5 Clinician Type: Family Physician

Copy of referral and status updates to:

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

Obtain Patient's Email Consent

If the patient's email is included in the referral here, the patient will be notified with status updates to the referral.

Since the referral may contain **private health information**, please ensure you have the patient's consent before proceeding.

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.

Confirm Clinical Information

For safety reasons, please confirm:

Patient: **Jo-Anne Test** - age 50

Referrer: **J. CroydonMD** - 12345 - fax 613-332-5141

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.

eReferral Sent

The eReferral was sent successfully.

Summary:

Sent eReferral to DEMO South East Orthopedic Central Intake
 16 Stuart St, Kingston, ON, K7L. Phone: 613-555-5555 Fax: 613-555-6666
[SE LHIN Hip and Knee Arthritis Referral Form](#)

Patient Information
 Height (cm): 165
 Weight (kgs): 82
 BMI: 30.1
 Preferred Language: English
 WSIB: No

Reason for Referral
URGENT
 Affected Joint(s): Right Hip
 Diagnosis: Osteoarthritis
 Consultation Type: Hip Replacement (Primary)
 Would the patient consider replacement surgery? "Yes"

Include map

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.

Dr. Croydon

EXPLAINING THE PORTAL

The Sidetabs are:

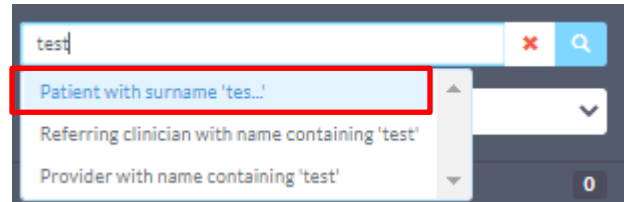
Needs Review	6
For Me	0
Recently Viewed	
Received	
Sent	
Sent (All)	
Incomplete	1
Awaiting Response	83
Accepted as Walk-In	0
Pending Booking	29
Booked Unconfirmed	30
Booked Confirmed	18
Completed	3
Declined	5
Cancelled	17
Deletion Warnings	1

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. Accepted 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. If 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.

Patient	DOB	EMR ID	Status	Service
• fname	59-10-10		Sent - Not yet reviewed by SE Diagnostic Imaging Demo Site	CT
• fname first name	59-10-10		Sent - Not yet reviewed by SE Diagnostic Imaging Demo Site	CT
• fname last name	59-10-10		Sent - Not yet reviewed by SE Diagnostic Imaging Demo Site	CT
• Iname fname	59-10-10		Sent - Not yet reviewed by SE Diagnostic Imaging Demo Site	CT


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 
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 
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-bianco (1).jpg

To: [Referrer (DEMO SE Medical Clinic)]

enter text here


 

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



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 

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

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

MRN: 53 

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**.