

E-REFERRAL QUICK REFERENCE

Receiver, Telus PSS

1. Go to the Ocean website

<https://ocean.cognisantmd.com>

2. Enter your user name and password in the appropriate fields

3. Ocean will open to the eReferrals page. New eReferrals will appear in the New sidetab.

4. Select an eReferral from the list.

Patient	MRN	DOB	Description
John Doe	481	55-07-20	Diabetes Education
Morris Nunez	509	48-05-11	Endocrinology
Stacey Ming		84-08-16	Ophthalmology

5. The eReferral will open. Click the **Accept** Button if taking the patient on or **Decline** if not.

6. The **Import** window will appear displaying the Ocean patient reference number.

7. Open your Telus EMR and **create a straw chart for the patient**, using first and last name, unless they have been seen previously. Click the **Import** button on the Ocean toolbar

8. The Import window will open. Enter the **Patient Reference Number** and click **OK**.

9. The eReferral information now appears in the notes.

10. To enter a triage note, **click on the bubble icon at top right** of the eReferral, and **click Review**

10. Return to the Ocean Portal and click the **X** to close the import window.



11. This referral will be moved to the **Pending Booking** Status.



12. You may now move on to the next New eReferral in the list.

Referral	MRN	DOB	Description
John Doe		55-07-20	Diabetes Education
Maria Nunez		48-05-11	Endocrinology
Stacey Ming		84-08-14	Ophthalmology

Booking Apointments in Pending Booking

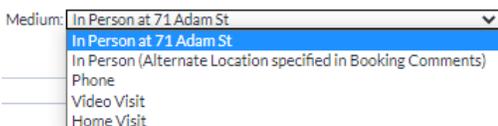
- To book patient appointments, choose the **Pending Booking** sidetab as above.
- Select a patient you wish to book, the eReferral will open.

Patient	MRN	DOB	Description	Date Sent	Source
Judy Smith	221	80-06-25	General Surgery	Jul 19, 2021 1:22 pm	Alexander Russell
Jack Accuro		80-03-12	General Surgery	May 7, 2021 2:38 pm	Alexander Russell
Judy Smith	221	80-06-25	General Surgery	May 7, 2021 8:23 am	Alexander Russell
Jack Smith	221	74-01-01	General Surgery	Mar 10, 2021 7:14 pm	Alexander Russell

3. Choose the **date and time** in the **Appointment** field.



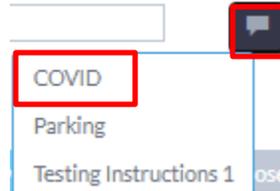
4. Choose the **Medium** from the **dropdown**.



5. Type booking comments in the **Comments for Referrer and Patient** field, (no protected Health info please), or



click the **Bubble** Icon to choose from a list of canned messages

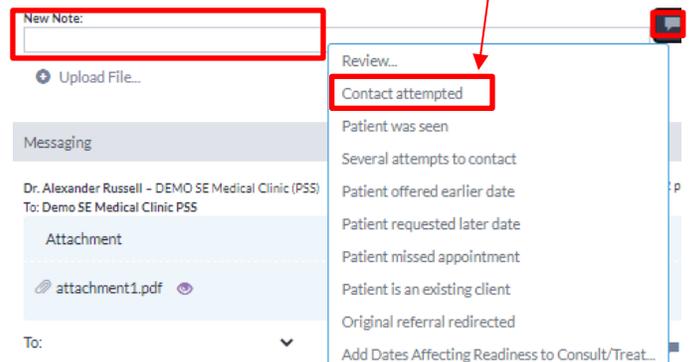


6. Click **Save and Close**.

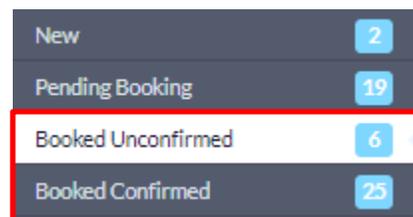


Please Note: Both the eReferral sender and the patient will receive emails regarding the appointment. The patient will be asked to confirm the appointment date and time by pressing the Confirm Appointment button in the email, or contact the office directly via phone or email to arrange an alternative date.

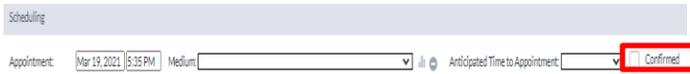
7. You can add additional comments to the eReferral for your own or your colleagues information by clicking the **Bubble** Icon in the Notes section and choosing a response from the drop down, or type into the **New Notes** field.



8. The referral moves to the **Booked Unconfirmed** sidetab until it is Confirmed, when it will move to the **Booked Confirmed** status.



9. If a booking is confirmed on the phone with the patient, click the **Confirmed** check box and the eReferral will move to the Booked Confirmed sidetab.



10. To close an eReferral when the patient has been seen, click the **Booked Confirmed** sidetab, and reselect the eReferral from the list. The eReferral will open.

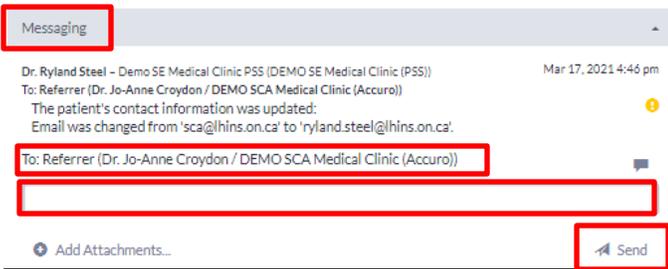
11. In the eReferral window, at the bottom of the referral, click the **Completed** button.



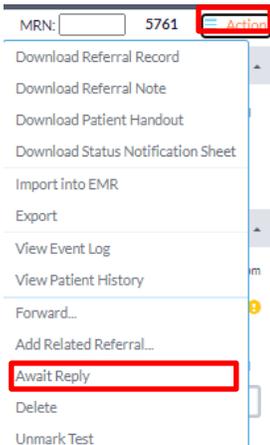
Please Note: an email will be sent to the referrer advising the patient has been seen.

Sending Emails which Require a Reply

1. If you require further information from a referrer, open the eReferral, and in the **Messages section, Select the recipient**, and **enter your comments in the text box** that appears. Click the **Save** button.



2. In the Action menu at the top of the form, Click Action and choose Awaiting Reply. The referral sender will receive an email notifying them of your comments.



The referral will be moved to the **Awaiting Reply** sidetab.

New	2
Pending Booking	19
Booked Unconfirmed	6
Booked Confirmed	25
Awaiting Reply	6