

TELUS PSS SENDERS – QUICK REFERENCE GUIDE

| Key Links | Technical Support |
|--|--|
| Ocean Healthmap: https://oceanhealthmap.ca/ Ocean Portal: https://ocean.cognisantmd.com/ Guides/FAQs: https://support.cognisantmd.com/hc/en-us | 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.

Sending an eReferral

1. From a patient’s profile in PSS, locate the Ocean Toolbar, and click **Refer** to launch the Healthmap.



2. Locate listing you would like to refer to using:

- Search bar
- Directory
- Favourites

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



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



5. 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 PSS).



See the following section to attach a Clinical Note from PSS to an eReferral.

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



7. Return to the patient chart in PSS. Ocean will automatically add referral summary, and an eReferral Custom Form to track the status of the referral.

Attach a Clinical Note from PS Suite to a New eReferral

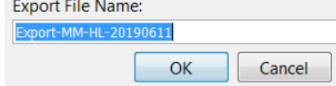
1. Find the note(s) in the patient chart that you want to add as a PDF Attachment. Check the checkbox next to the note to **“Green Bar”** the note.



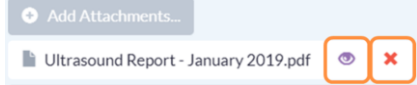
2. Click the **Refer** on the Ocean Toolbar .



3. Rename file as desired and click OK.



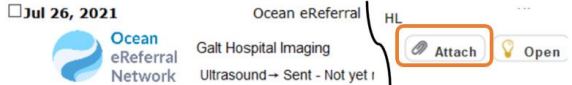
4. Locate the listing, and select to **Send eReferral**. The attachment will be included near bottom of the referral form. Use the **Eye** icon to preview the attachment, or the **X** to remove.



Attach a Clinical Note to a Referral that is Already Sent

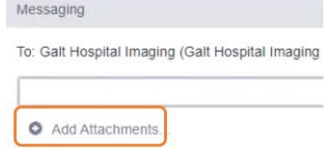
1. In the patient’s chart, click the checkbox next to the note to **“Green Bar”** the note.

2. Click **Attach** on the Ocean eReferral form for the referral. Rename the file as desired as click OK.



3. Open the sent eReferral in Ocean by clicking the **Open** on the same Ocean eReferral form.

4. Locate the Messaging pane, and click **Add Attachments**, and select the desired file you’ve attached. Include a written message if necessary 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.



This will add the Ocean Incomplete eReferral custom form to the patient's profile in PSS, and an internal message will be triggered.

2. Any Ocean user at your site can then visit the patient profile in PSS and click **Resume Completing eReferral** on this custom form to open the saved eReferral.

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.

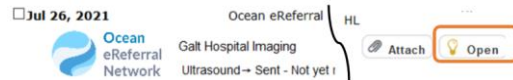
2. If the provider can receive online communication from Ocean, they will receive an email notification and a copy of the referral in their Ocean Portal.

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 the Sent eReferral

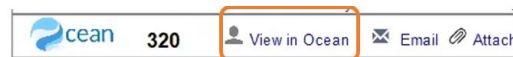
1. Locate the Ocean eReferral form in the patient's notes, and click **Open** to view the referral in Ocean.



2. See the **Referral View and Management** section in this document for further information on what actions are possible from this view.

View Patient Dashboard to Review Pt's Active Referrals

1. Click the **View in Ocean** button on the Ocean Toolbar to be brought to the patient dashboard, which links and summarizes information regarding the patient's active referrals.



View ALL Sent eReferrals in the Ocean Portal

1. Click the **Portal** button on the Ocean Toolbar in any patient's chart to be brought to Ocean Portal.



2. From the **eReferrals** page, you can get a view of sent eReferrals for all patients categorized into different inboxes ((see **eReferral Inboxes** section below).



3. Click anywhere on a referral to open it and view it's 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.

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 |

Referral View and Management

Click on a referral row in the Ocean portal to open it.

The screenshot displays the Ocean eReferral Network interface for a referral. At the top, it shows the patient name 'John Doe', the service 'Cardiology Services - Test Referral', and the MRN. The interface is divided into several sections:

- 1 General:** Contains patient and recipient information. Patient: John Doe, DOB: Jan 1, 1950, Age 71, Address: 123 Cherry Lane, Toronto, ON. Recipient: TRC Cardiology, 351 King St E, Toronto, ON.
- 2 Referral Form Summary:** Includes Patient Information (Height: 170 cm, Weight: 70 kg, BMI: 24.2), Reason for Referral (New onset chest pain with exertion), and Cardiovascular Testing Request (Exercise Stress Test Only (GXT)).
- 3 Scheduling:** Shows 'No appointment yet recorded.'
- 4 Notes:** Includes a 'New Note:' text input field.
- 5 Messaging:** Shows a message to 'TRC Cardiology' with an attachment 'JD - Health History.pdf' and a 'Send' button.








An 'Action' menu is located in the top right corner, which is expanded in the bottom right of the image to show options like 'Download Referral Record', 'Import into EMR', 'View Event Log', etc.

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: | Action |
|------|---|
| | Download Referral Record — PDF containing a full 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. |

eReferral Icons in the Ocean Portal

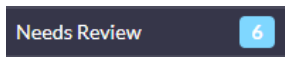
| Icon | Definition |
|---|--|
|  | There is a message associated with the referral |
|  | View this patient's previous eReferrals |
|  | An attachment is associated with the referral |
|  | A backup copy of the referral has been exported |
|  | Edit patient level details (email, phone, address) |
|  | A component of the referral requires review |
|  | A component of the referral that was previously requiring review has been reviewed |

eReferral Inboxes

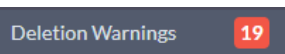
1. On the eReferrals page in the Ocean Portal, the inboxes along the left group referrals by their status.

| 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.



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?](#)



| | | | | | | |
|---------------------------|------------------------------|----------------------------|----------------------------|----------------|----------------|---|
| eReferrals Testpatient | 80-01-01 Low Back Pain | Nov 11, 2020 2:35 pm | KJ Singh [Demo Only] | TRC Testing | TRC Testing |  |
|---------------------------|------------------------------|----------------------------|----------------------------|----------------|----------------|---|