

eReferral Summary for Receiving Sites – Quick Guide

THIS GUIDE GIVES OCEAN USERS THE STEPS TO RECEIVE AND MANAGE OCEAN EREFERRALS. PRIOR TO SENDING REFERRALS, YOUR SITE IS REQUIRED TO SIGN THE HEALTH USER PARTICIPATION AGREEMENT.

Step 1: Understanding the eReferrals View

- Learn how to navigate Ocean's [eReferrals dashboard](#), viewing, tracking, and managing your eReferrals. Review the eReferrals sections and folders.

Step 2: Accepting & Declining Referrals

- New eReferrals can be [accepted or declined](#).
- If you decline an eReferral the sender will be notified automatically. Please ensure you provide details on the reason you're declining the eReferral.
- You can easily [assign an eReferral](#) to another user in your Ocean site.
- You can add a [Referral Note](#) to the eReferral including priority and comments, if this fits with your clinic's practice.

Step 3: Messaging within an eReferral

- The [Messaging](#) functionality within the eReferral allows users to communicate with one another to gather additional information.
- You can use the [Action Menu](#) to move the referral to the **Awaiting Reply** folder until you receive the information you need.

Step 4: Scheduling the Referral Appointment

- [Adding appointment details](#) to the eReferral will update both the referring provider and the patient, if the patient consent was provided.

Step 5: Completing the Referral

- Once the scheduled appointment date for the referral has passed, you are able to [complete](#) the referral.

Step 6: Advanced Features (Optional)

- Explore [advanced features](#) for managing your referrals.
- These advanced features are optional and include topics such as [accessing eReferral analytics](#) and [viewing referral history](#).