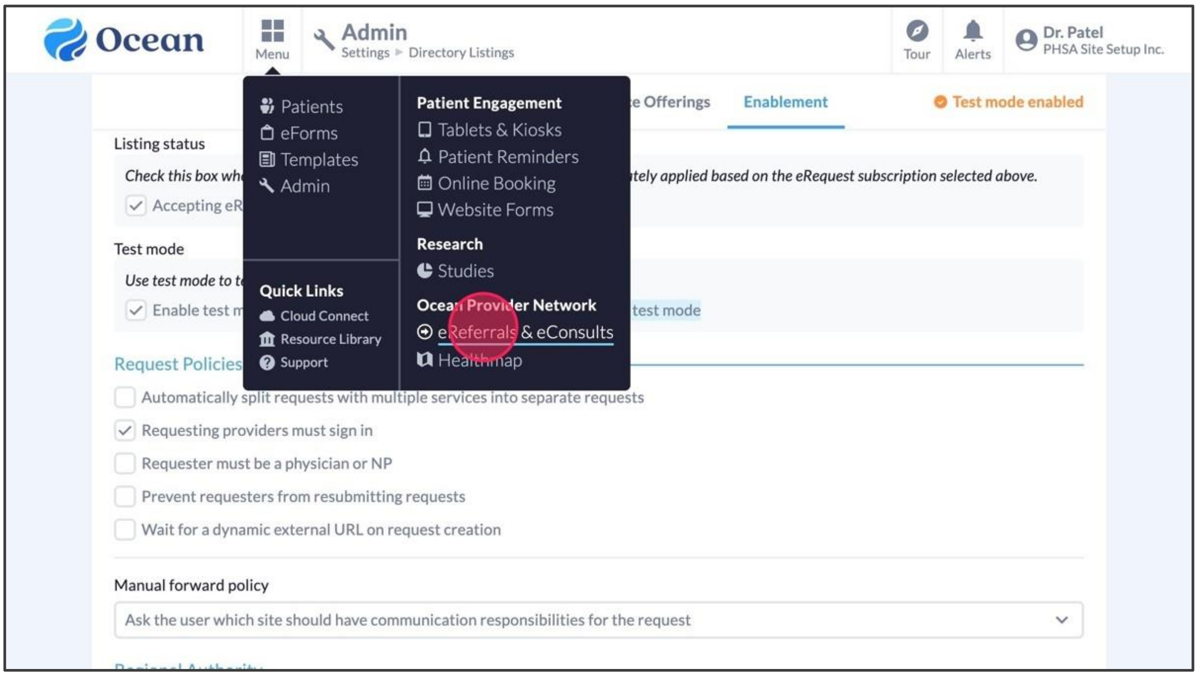
Configure eReferral settings in Ocean

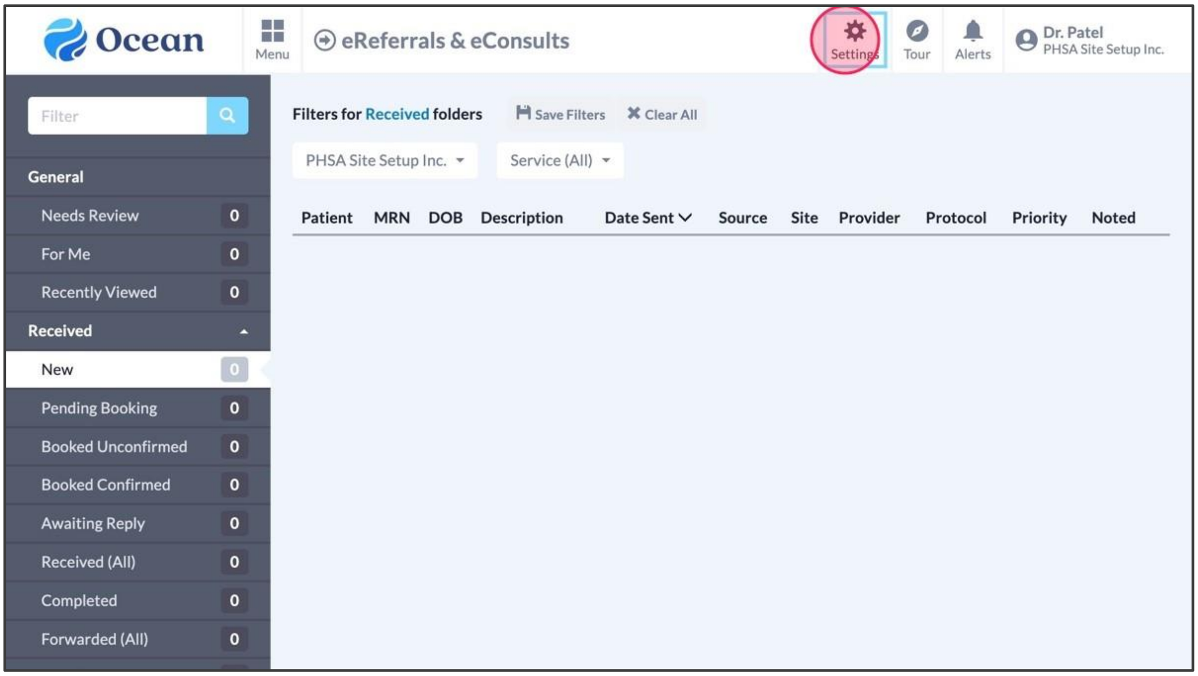
This guide walks you through how to configure eReferral settings in Ocean, including policy details, trustee/custodian status, auto-close behavior, notification settings, and appointment time preferences.

Step 1: Access eReferral settings

1. Log in to your Ocean account.
2. Click the **Menu** in the top-left corner and select **eReferrals & eConsults.**

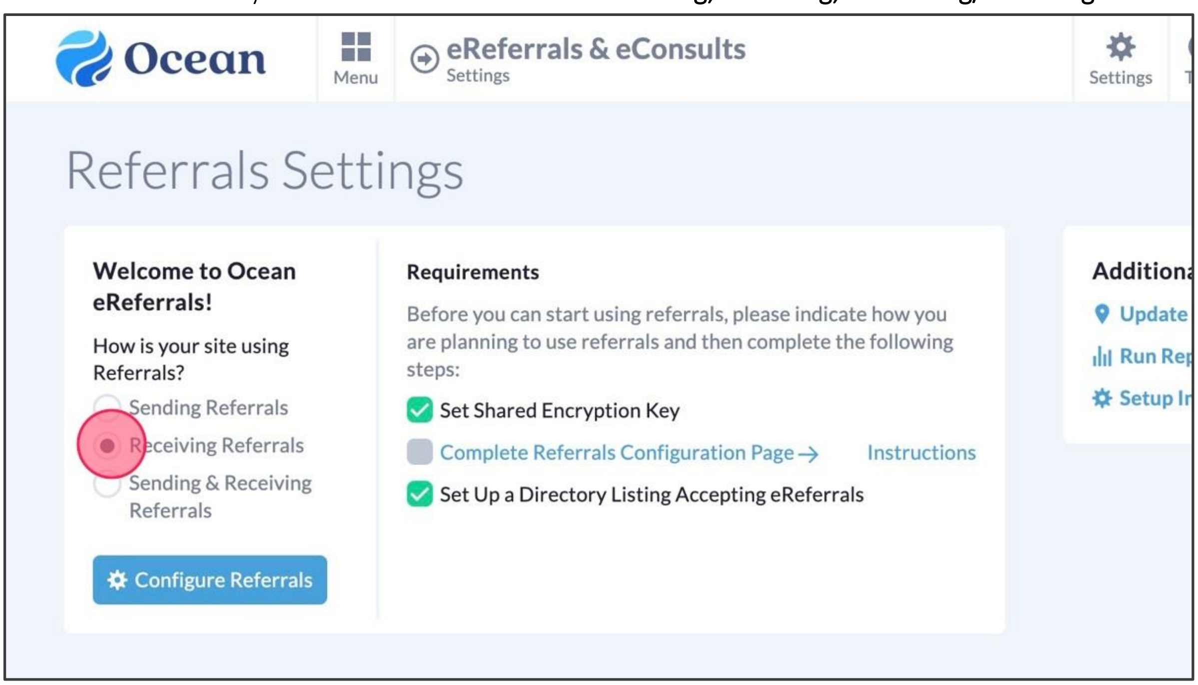


3. Click the **Settings** button in the top-right corner.

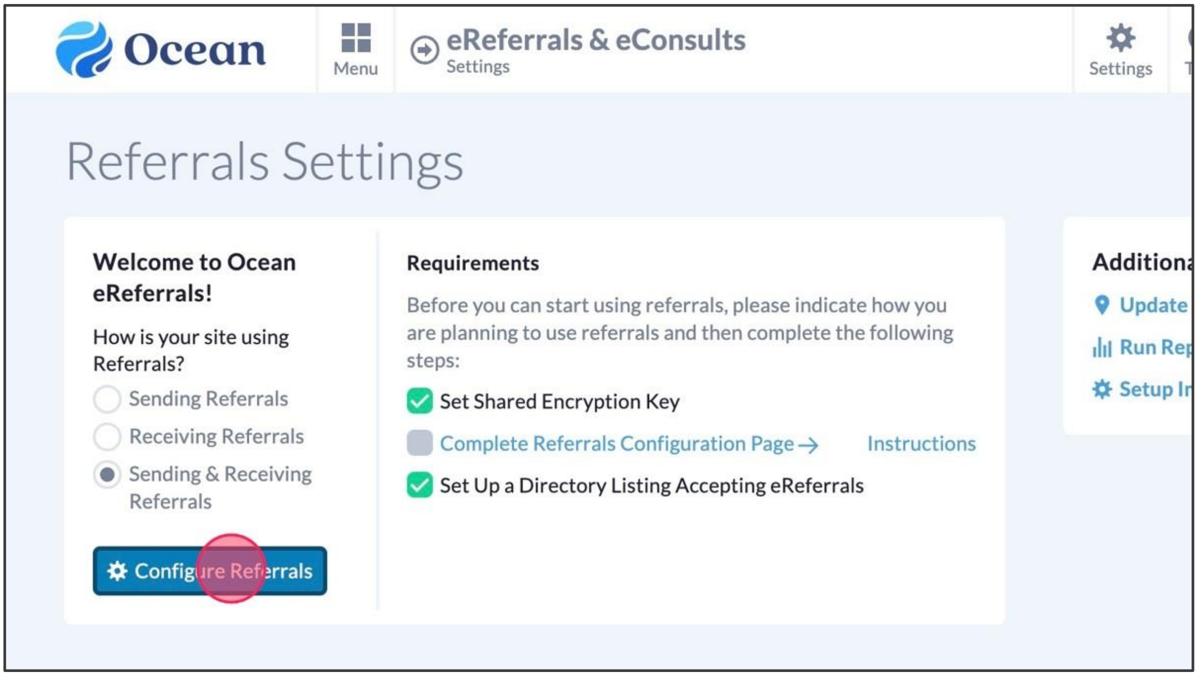


Step 2: Select referral mode and configure custodian info

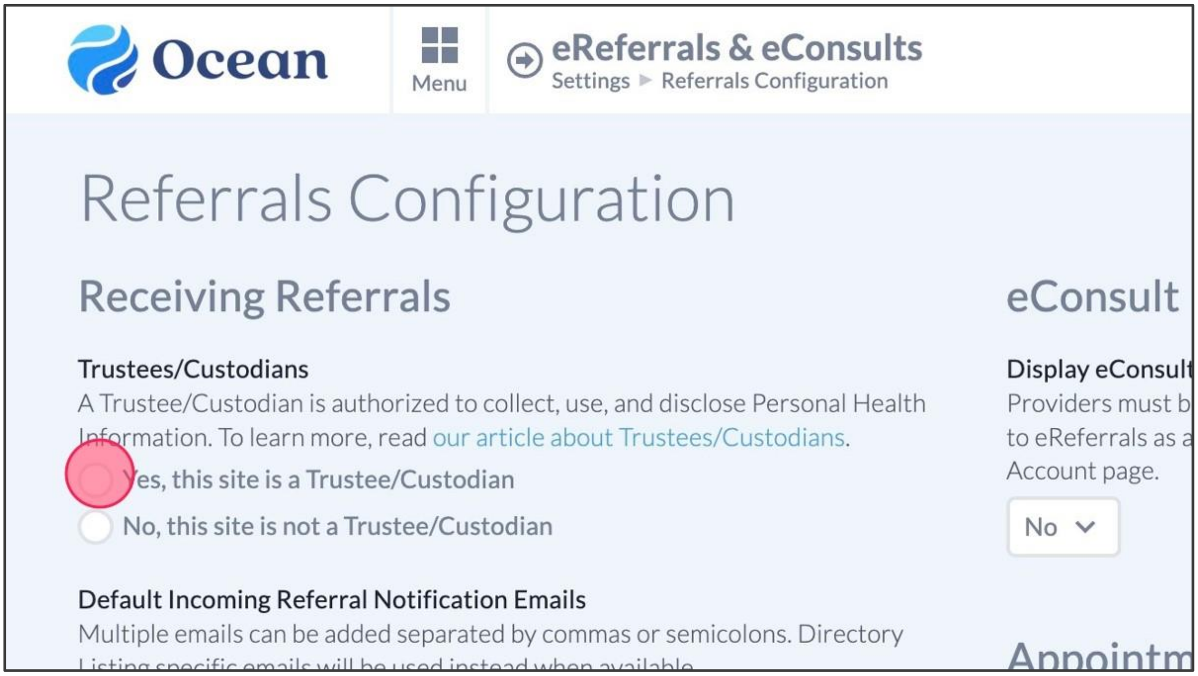
1. Choose how your site uses Ocean referrals: **Sending, Receiving, or Sending/Receiving**.



2. If your site is receiving referrals, click **Configure Referrals**.

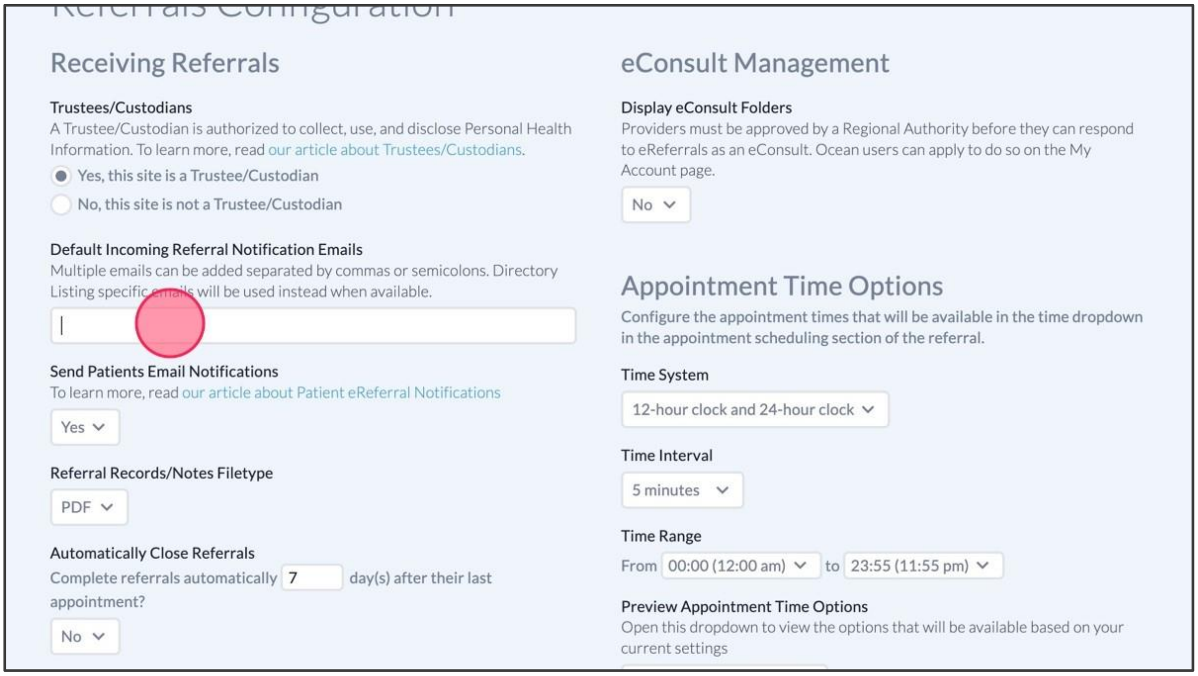


3. Select **Yes, this site is a Trustee/Custodian**.

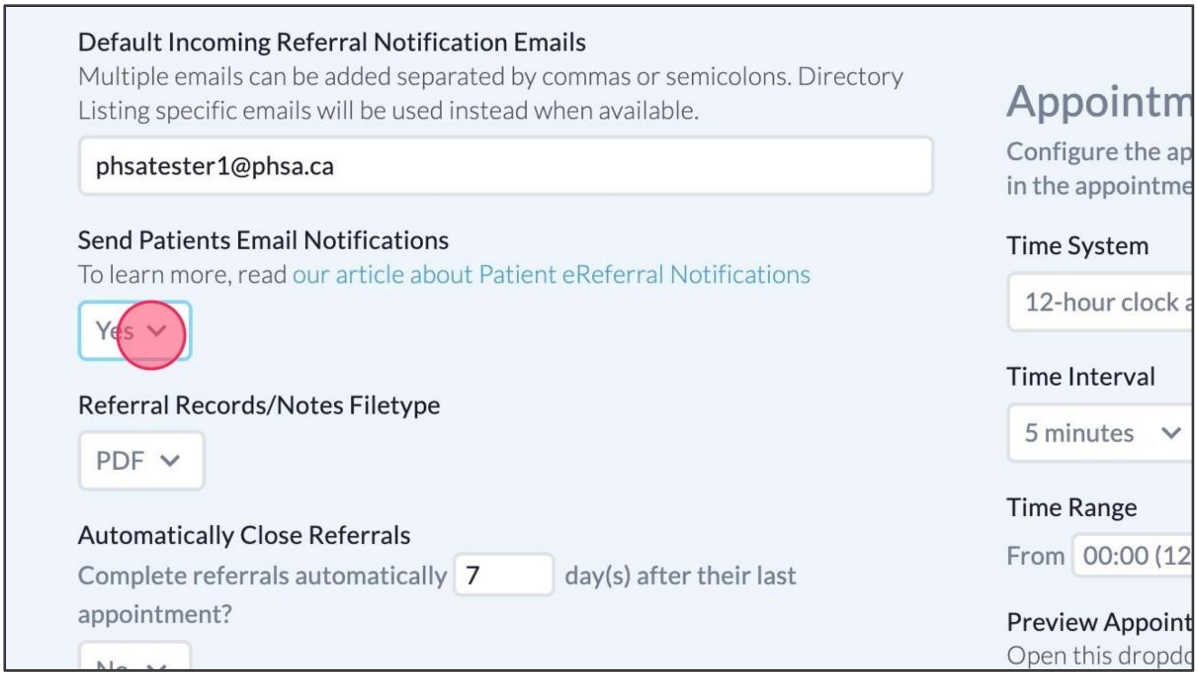


Step 3: Set referral and patient notification preferences

1. In the **Default Incoming Referral Notification Emails** field, enter the email address where referral alerts should be sent.

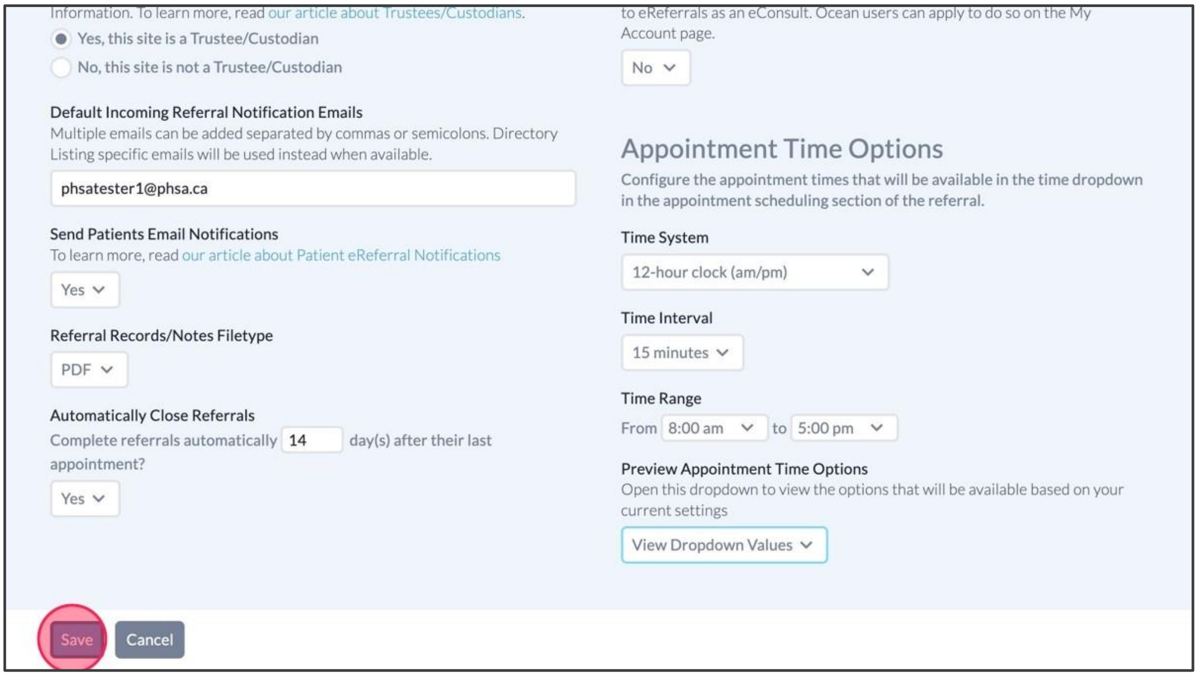


2. From the **Send Patients Email Notifications** drop-down, choose whether to notify patients automatically.



Step 4: Configure auto-close and time settings

1. Decide if referrals should auto-close after the last appointment.
   a. If **Yes**, enter the number of days after the appointment to close the referral.
   b. If **No**, skip this field.
2. In the **Time System** drop-down, choose a time format: **24-hour**, **12-hour**, or **Both**.
3. In the **Time Interval** field, enter the interval between appointments (e.g., 15 or 30 minutes).
4. If using the Ocean portal, enter your **clinic hours** in the **Time Range** field.
5. Click **Save** to apply all settings.



Tips (Optional)

- Only receiving sites see the Configure Referrals option.
- Setting patient email notifications reduces the need for manual updates.