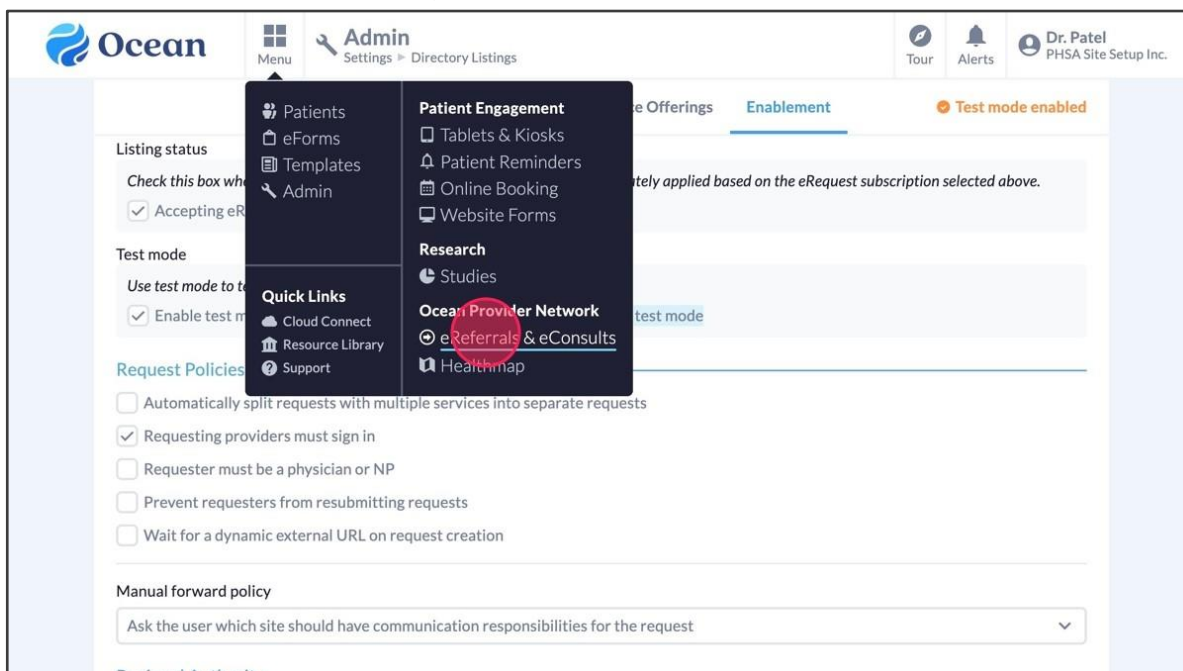


Configure eReferral settings in Ocean

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.

The screenshot shows the Ocean eReferrals & eConsults interface. The top navigation bar includes the Ocean logo, a Menu icon, and the title 'eReferrals & eConsults'. On the right side of the top bar, there are icons for Settings (circled in red), Tour, Alerts, and a user profile for 'Dr. Patel PHSa Site Setup Inc.'. The left sidebar contains a 'Filter' search bar and a list of folders under 'General' and 'Received'. The 'Received' folder is expanded, showing sub-folders like 'New', 'Pending Booking', 'Booked Unconfirmed', 'Booked Confirmed', 'Awaiting Reply', 'Received (All)', 'Completed', and 'Forwarded (All)', each with a count of 0. The main content area displays 'Filters for Received folders' with dropdowns for 'PHSA Site Setup Inc.' and 'Service (All)'. Below the filters is a table header with columns: Patient, MRN, DOB, Description, Date Sent, Source, Site, Provider, Protocol, Priority, and Noted.

Step 2: Select referral mode and configure custodian info

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

The screenshot shows the 'Referrals Settings' page in the Ocean eReferrals & eConsults interface. The top navigation bar includes the Ocean logo, a Menu icon, and the title 'eReferrals & eConsults'. On the right side of the top bar, there are icons for Settings (circled in red), Tour, Alerts, and a user profile for 'Dr. Patel PHSa Site Setup Inc.'. The main content area is titled 'Referrals Settings' and contains three sections: 'Welcome to Ocean eReferrals!', 'Requirements', and 'Additional'. The 'Welcome to Ocean eReferrals!' section asks 'How is your site using Referrals?' and has three radio button options: 'Sending Referrals', 'Receiving Referrals' (selected and circled in red), and 'Sending & Receiving Referrals'. Below these options is a 'Configure Referrals' button. The 'Requirements' section lists three steps: 'Set Shared Encryption Key' (checked), 'Complete Referrals Configuration Page' (with a link to 'Instructions'), and 'Set Up a Directory Listing Accepting eReferrals' (checked). The 'Additional' section on the right has links for 'Update', 'Run Rep', and 'Setup In'.

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

The screenshot shows the 'Referrals Settings' page in the Ocean eReferrals & eConsults system. The page has a header with the Ocean logo, a 'Menu' button, and a 'Settings' button. The main content area is titled 'Referrals Settings' and contains three sections: 'Welcome to Ocean eReferrals!', 'Requirements', and 'Additional'. The 'Welcome' section asks 'How is your site using Referrals?' and has three radio button options: 'Sending Referrals', 'Receiving Referrals', and 'Sending & Receiving Referrals'. The 'Requirements' section lists three steps: 'Set Shared Encryption Key' (checked), 'Complete Referrals Configuration Page' (with a link to 'Instructions'), and 'Set Up a Directory Listing Accepting eReferrals' (checked). The 'Additional' section has three links: 'Update', 'Run Rep', and 'Setup In'. A red circle highlights the 'Configure Referrals' button at the bottom of the 'Welcome' section.

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

The screenshot shows the 'Referrals Configuration' page in the Ocean eReferrals & eConsults system. The page has a header with the Ocean logo, a 'Menu' button, and a 'Settings' button. The main content area is titled 'Referrals Configuration' and contains two sections: 'Receiving Referrals' and 'eConsult'. The 'Receiving Referrals' section has a sub-section 'Trustees/Custodians' with a description: 'A Trustee/Custodian is authorized to collect, use, and disclose Personal Health Information. To learn more, read our [article about Trustees/Custodians](#).' Below this are two radio button options: 'Yes, this site is a Trustee/Custodian' (highlighted with a red circle) and 'No, this site is not a Trustee/Custodian'. The 'eConsult' section has a sub-section 'Display eConsult' with a description: 'Providers must be logged in to eReferrals as a user on the Account page.' Below this is a dropdown menu with 'No' selected. The 'Default Incoming Referral Notification Emails' section has a description: 'Multiple emails can be added separated by commas or semicolons. Directory Listing specific emails will be used instead when available.'

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.

The screenshot displays the 'Referrals Configuration' interface, which is divided into two main sections: 'Receiving Referrals' and 'eConsult Management'.

Receiving Referrals

- Trustees/Custodians:** A section explaining that a Trustee/Custodian is authorized to collect, use, and disclose Personal Health Information. It includes a link to an article about Trustees/Custodians and two radio buttons: 'Yes, this site is a Trustee/Custodian' (selected) and 'No, this site is not a Trustee/Custodian'.
- Default Incoming Referral Notification Emails:** A section explaining that multiple emails can be added separated by commas or semicolons, and that listing specific emails will be used instead when available. A text input field is present, with a red circle highlighting it.
- Send Patients Email Notifications:** A section explaining that users can learn more about Patient eReferral Notifications. It includes a 'Yes' dropdown menu.
- Referral Records/Notes Filetype:** A section with a 'PDF' dropdown menu.
- Automatically Close Referrals:** A section explaining that referrals can be completed automatically a certain number of days after their last appointment. It includes a '7' input field and a 'No' dropdown menu.

eConsult Management

- Display eConsult Folders:** A section explaining that providers must be approved by a Regional Authority before they can respond to eReferrals as an eConsult. It includes a 'No' dropdown menu.
- Appointment Time Options:** A section explaining that users can configure the appointment times that will be available in the time dropdown in the appointment scheduling section of the referral. It includes a 'Time System' dropdown menu (set to '12-hour clock and 24-hour clock'), a 'Time Interval' dropdown menu (set to '5 minutes'), and a 'Time Range' section with 'From' and 'to' dropdown menus (set to '00:00 (12:00 am)' and '23:55 (11:55 pm)' respectively).
- Preview Appointment Time Options:** A section explaining that users can open this dropdown to view the options that will be available based on their current settings.

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

Default Incoming Referral Notification Emails

Multiple emails can be added separated by commas or semicolons. Directory Listing specific emails will be used instead when available.

Send Patients Email Notifications

To learn more, read [our article about Patient eReferral Notifications](#)

Yes ▾

Referral Records/Notes Filetype

PDF ▾

Automatically Close Referrals

Complete referrals automatically day(s) after their last appointment?

No ▾

Appointment

Configure the ap
in the appointme

Time System

12-hour clock a

Time Interval

5 minutes ▾

Time Range

From

Preview Appoint

Open this dropd

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.

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Information. To learn more, read our [article about Trustees/Custodians](#).

☒ Yes, this site is a Trustee/Custodian
☐ No, this site is not a Trustee/Custodian

Default Incoming Referral Notification Emails
Multiple emails can be added separated by commas or semicolons. Directory Listing specific emails will be used instead when available.

Send Patients Email Notifications
To learn more, read our [article about Patient eReferral Notifications](#)

Referral Records/Notes Filetype

Automatically Close Referrals
Complete referrals automatically day(s) after their last appointment?

to eReferrals as an eConsult. Ocean users can apply to do so on the My Account page.

Appointment Time Options
Configure the appointment times that will be available in the time dropdown in the appointment scheduling section of the referral.

Time System

Time Interval

Time Range
From to

Preview Appointment Time Options
Open this dropdown to view the options that will be available based on your current settings

Tips (Optional)

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