

# Add an attachment to a new eReferral in Med Access

This guide walks you through the steps to generate a chart attachment and include it with a new eReferral using Med Access.

## Step 1: Open the patient chart

1. Log in to Med Access and click the **Search** icon.

PROVINCIAL HEALTH SERVICES AUTHORITY | Naumani, Daniyal

EMR Messenger


- Med Access: New Templates available for BC – March 2025
- Med Access: New Templates available for BC – February 2025
- Med Access: New Templates available for BC – January 2025
- Med Access: New Templates available for Alberta – January 2025
- Med Access: New Templates available for BC – December 2024
- Med Access: New Templates available for BC – November 2024

My Appointments: Tue Mar 25, 2025 - Daniyal Naumani


Date: 5-Mar-2025 [AM|PM] Days: 1 Provider or Resource: Naumani, Daniyal

Time	Patient	Primary # Chart #	Type	Concern Resource
12:00				
12:15				
12:30				
12:45				
01:00				
01:15				
01:30				

2. Search for the patient and click their name to open their EMR chart.







**Basic Patient Search** 

Last:  First:  Chart #:

Name	Ins#
 <b>Wong, Ling</b>	8577-889-888




## Step 2: Create the attachment

1. In the chart, click the **Summary** icon.

Next Gen Launch **Summary** Search Family Help

**Profile** **Labs** **Invest** **Consults** **Imm** **Appt**

Filter Print Help

2. Select the documents you want to attach.

☐ Chart Summary

Allergies

Drug Allergy

Status	Reported	Allergen	Severity	Reactions	Updated
<input type="checkbox"/> REVIEW NOT DONE					

Non-Drug Allergy

Status	Reported	Allergen	Severity	Reactions	Updated
<input type="checkbox"/> REVIEW NOT DONE					

Drug Intolerance

Status	Reported	Allergen	Severity	Reactions	Updated
<input type="checkbox"/> REVIEW NOT DONE					

Non-Drug Intolerance

Status	Reported	Allergen	Severity	Reactions	Updated
<input type="checkbox"/> REVIEW NOT DONE					

☐ Profile
 

Nothing found to display

☐ Tasks
 

Active Results

Due	Urgency	Owner	Description
<input checked="" type="checkbox"/> 20Mar25	Normal	Exam Room 1	Attachment, Ocean eReferral - Referral to BC PHSA DRO Test for Oscar Pro - Gastro
<input type="checkbox"/> 20Mar25	Normal	Yltest, Physician	Attachment, Ocean eReferral - Gastroenterology

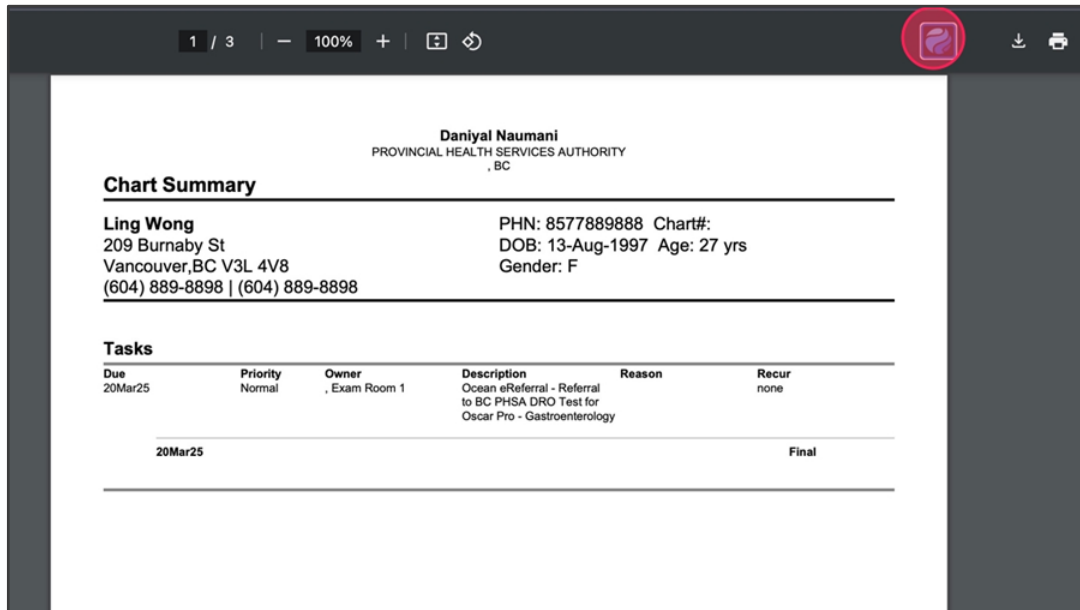
☐ Meds

- Click the **Print** icon in the top right corner.
- From the drop-down, choose **Chart Summary (with Attachments)**.

Select Template
 View as Timeline
 Print
 Help

Chart Summary
 **Chart Summary (with Attachments)**
 Full Medico-Legal Report
 Pending Appt and Goals
 Chart Summary (exclude notes)

- Review the generated attachment and click the **Ocean** logo in the top right.



**Daniyal Naumani**  
PROVINCIAL HEALTH SERVICES AUTHORITY  
, BC

**Chart Summary**

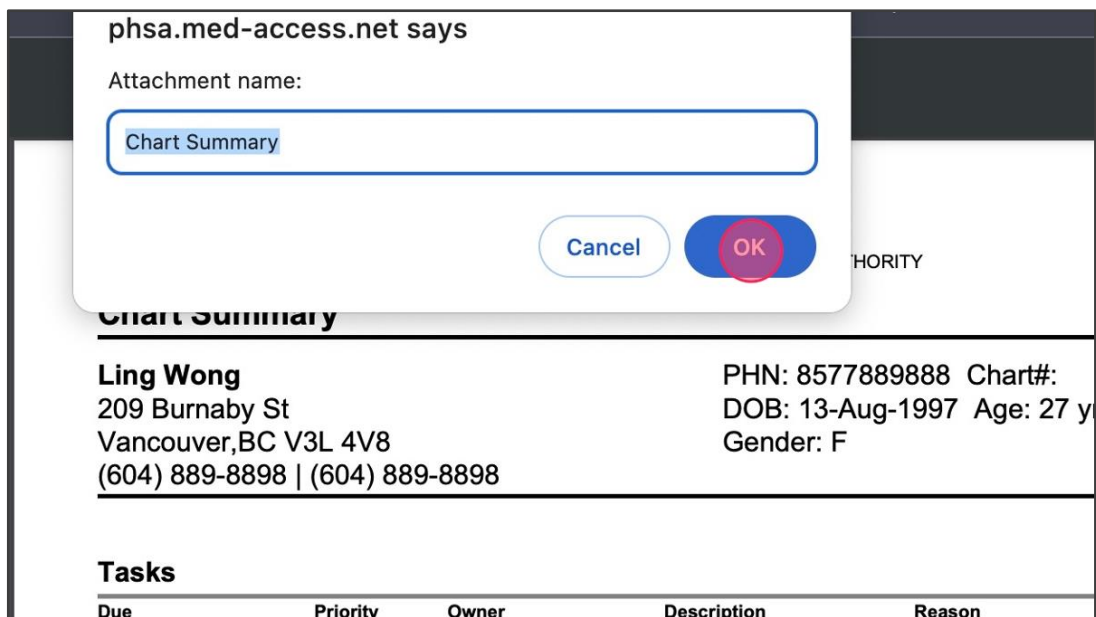
**Ling Wong**  
209 Burnaby St  
Vancouver, BC V3L 4V8  
(604) 889-8898 | (604) 889-8898

PHN: 8577889888 Chart#:  
DOB: 13-Aug-1997 Age: 27 yrs  
Gender: F

**Tasks**

Due	Priority	Owner	Description	Reason	Recur
20Mar25	Normal	, Exam Room 1	Ocean eReferral - Referral to BC PHSA DRO Test for Oscar Pro - Gastroenterology		none
20Mar25					Final

- Name the attachment and click **OK**.



**phsa.med-access.net says**

Attachment name:

Chart Summary

Cancel OK

**Chart Summary**

**Ling Wong**  
209 Burnaby St  
Vancouver, BC V3L 4V8  
(604) 889-8898 | (604) 889-8898

PHN: 8577889888 Chart#:  
DOB: 13-Aug-1997 Age: 27 y  
Gender: F

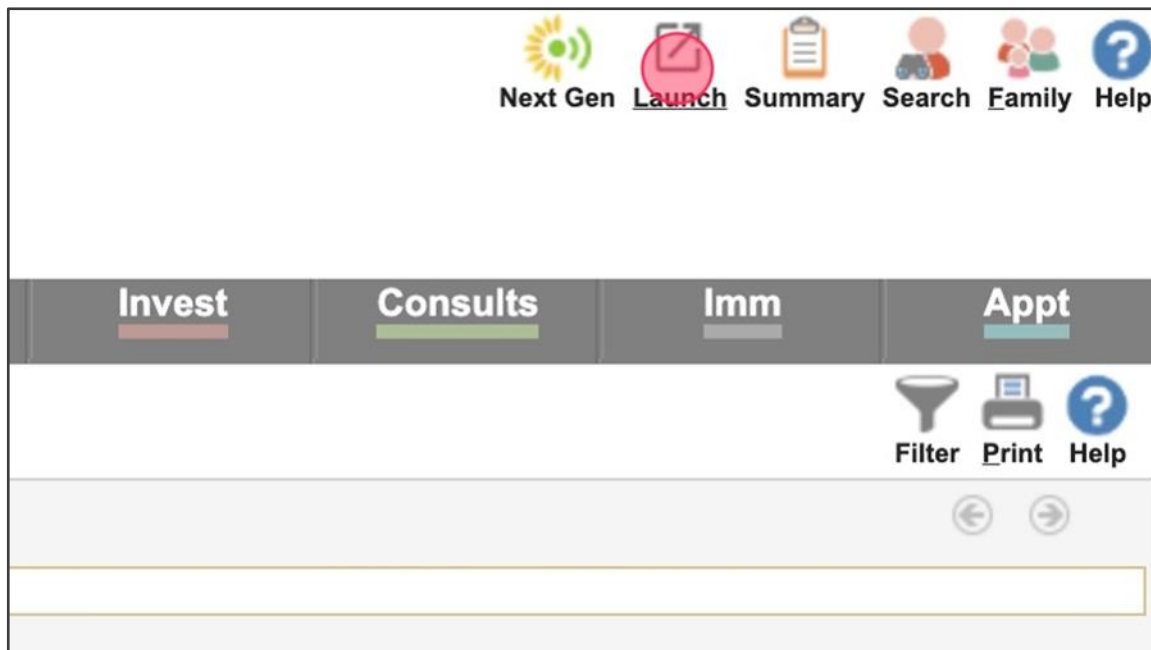
**Tasks**

Due	Priority	Owner	Description	Reason
20Mar25	Normal	, Exam Room 1	Ocean eReferral - Referral to BC PHSA DRO Test for Oscar Pro - Gastroenterology	
20Mar25				Final

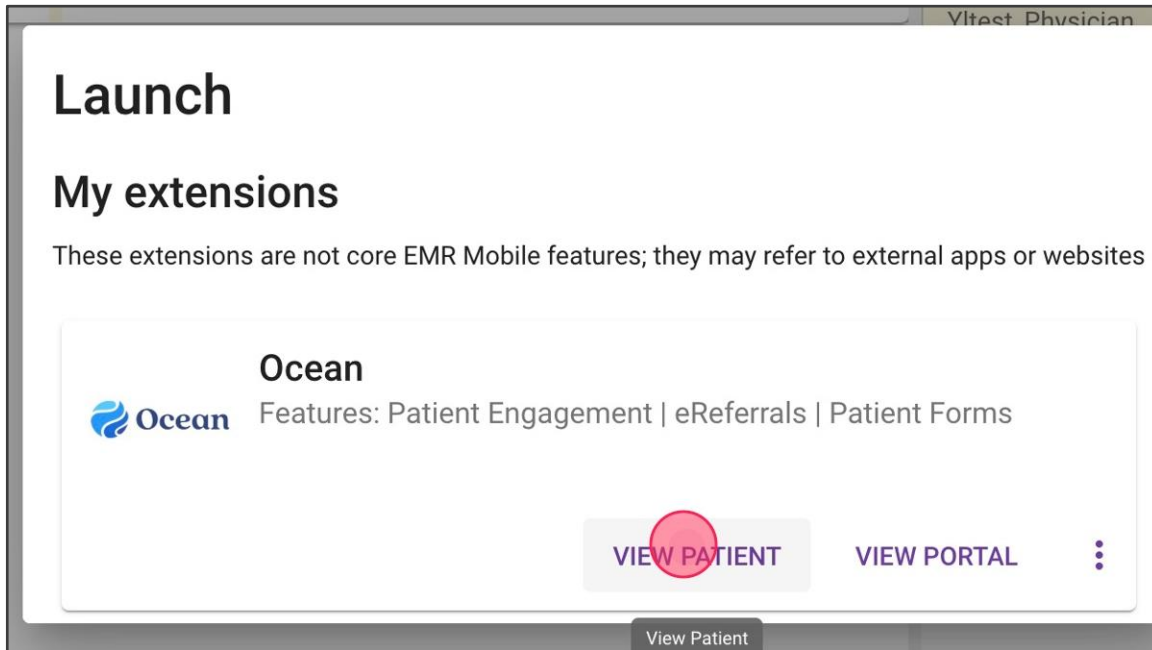
- Close the attachment and return to the patient chart.

### Step 3: Launch Ocean and start a new referral

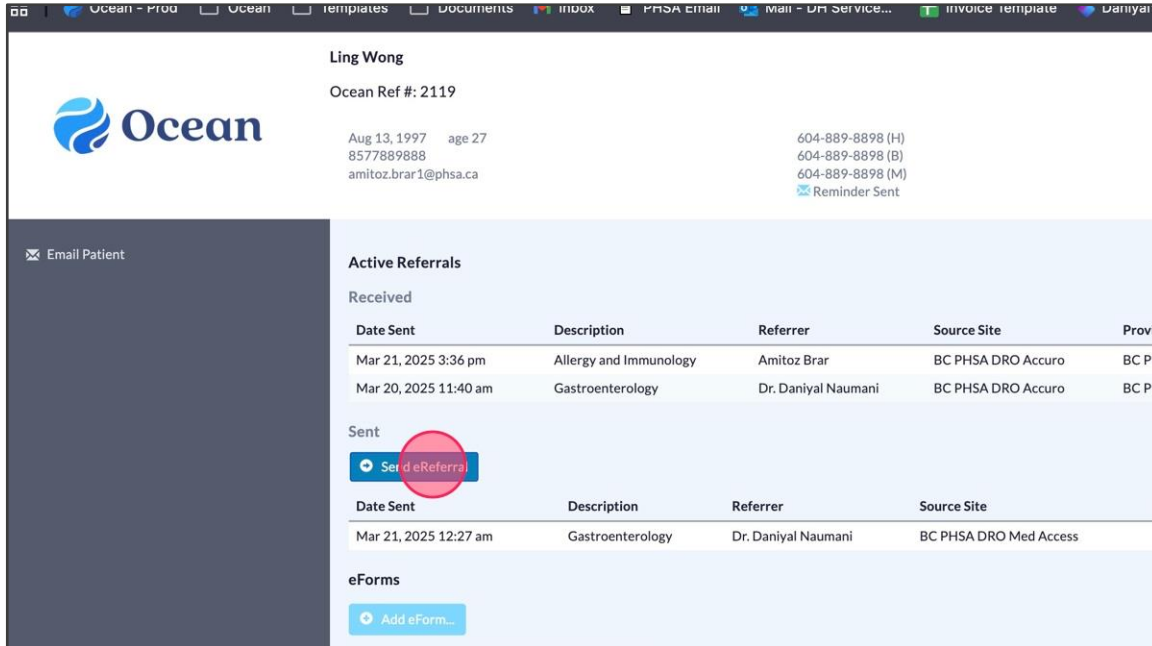
1. Click the **Launch** icon to open the EMR extensions.



2. Locate the **Ocean** extension and click **View Patient**.

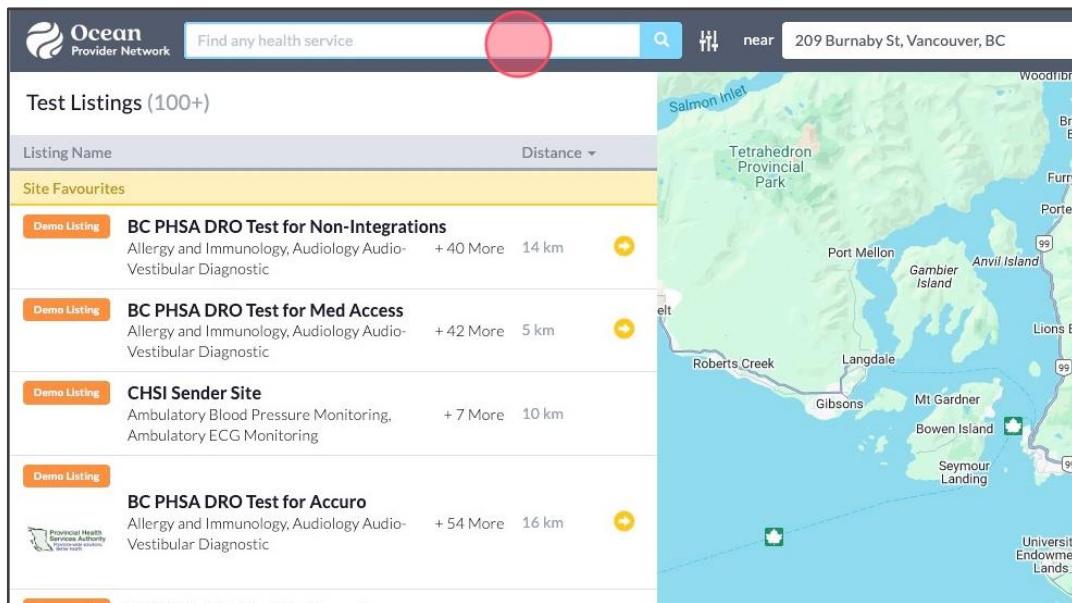


3. Click the **Send eReferral** button.

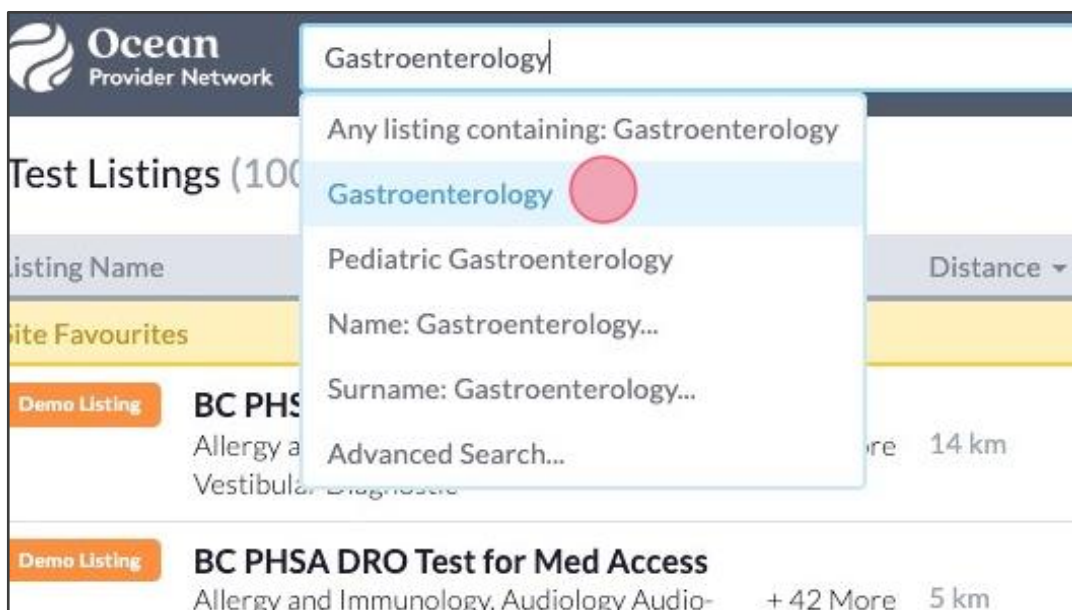


### Step 4: Search and select a referral target

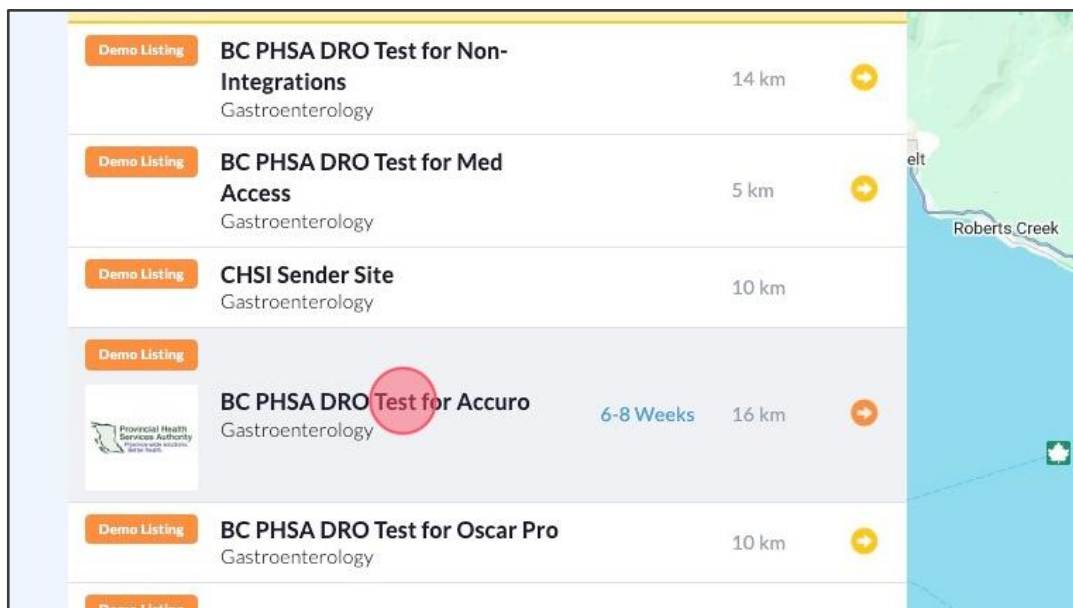
1. In the Healthmap, use the **Find any health service** field to search by clinic, physician, or service.



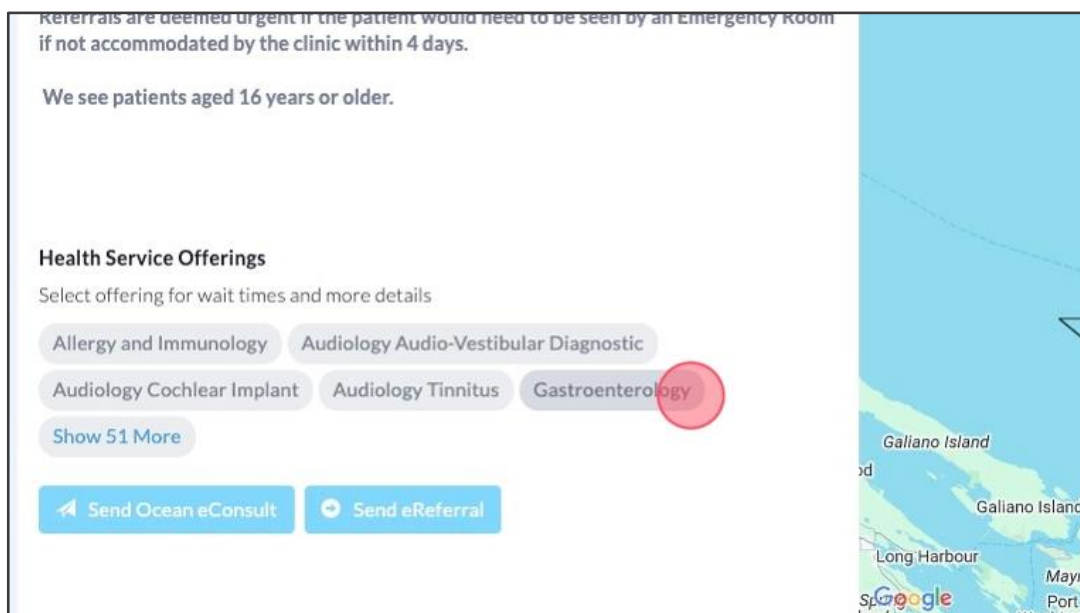
2. Select a search parameter.



3. Choose a directory listing from the sidebar and click it.



4. Scroll and select the appropriate service for the eReferral.



5. Click **Send eReferral** to open the referral form.

Audiology Cochlear Implant    Audiology Tinnitus    **Gastroenterology**

Show 51 More

**Gastroenterology**    **Accepting eReferrals** ★

**Self-Reported**

Wait Time 1    **6-8 Weeks**    Wait Time 2    **4-6 Weeks**

**Calculated**

Wait Time 1    **Unspecified**    Wait Time 2    **Unspecified**

<https://www.specialistlink.ca/>

English

Send Ocean eConsult    **Send eReferral**

### Step 5: Fill out and send the eReferral

1. Complete the referral form (\*required fields are marked with an asterisk).
2. Click **Add Attachments**.

Interpreter Required: **Yes**

**Supporting Documentation**    None    Attached    Pending (Specify)

- Lab Work (Pulmonary Function Test)
- Diagnostic Imaging
- Consult Notes
- Assessments

☐ Personal Health Information that is medically relevant has not been disclosed at the request of the patient.

**Add Attachments...**

Referrer's Information    Dr. Daniyal Naumani    Default

Site Name: BC PHSA DRO Med Access    Phone: 647-640-7222

Address: 3644 maguire street    Fax: 647-640-7222

City: Windsor    Billing #: 12345

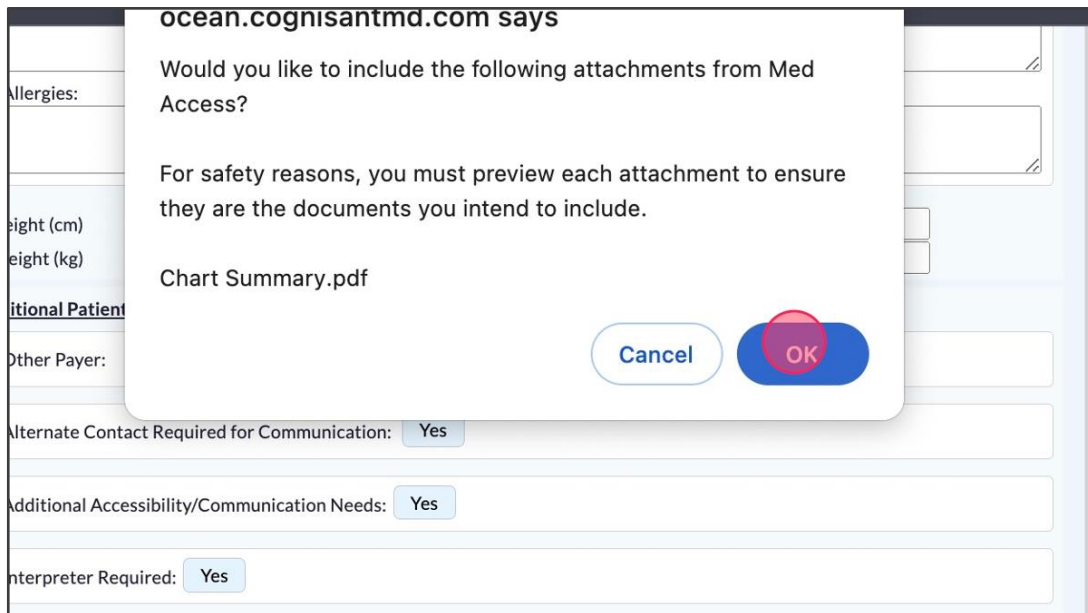
Province:    Professional ID: 1234

Postal Code: N9E 4V5    Signed: *Dr. Daniyal Naumani*

Role: Family Physician

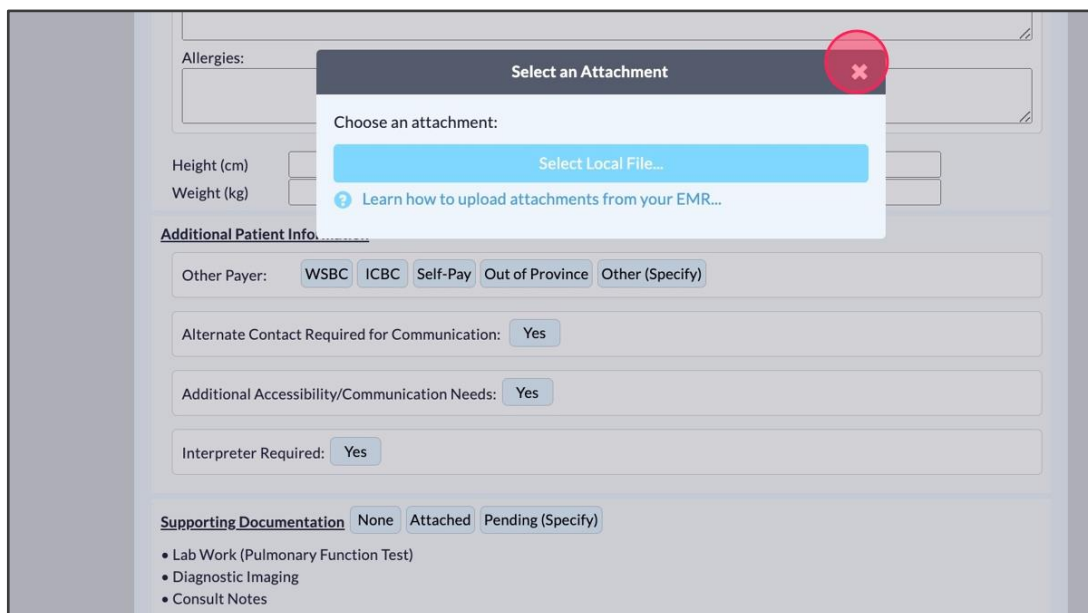
Copy of referral and status updates to:  search directory...

- When prompted, click **OK** to attach the file.



The screenshot shows a web form with fields for "Allergies:", "Height (cm)", "Weight (kg)", "Additional Patient Info", "Other Payer:", "Alternate Contact Required for Communication:", "Additional Accessibility/Communication Needs:", and "Interpreter Required:". A modal dialog box is open in the center, titled "ocean.cognisantmd.com says". The dialog contains the text: "Would you like to include the following attachments from Med Access?", "For safety reasons, you must preview each attachment to ensure they are the documents you intend to include.", and "Chart Summary.pdf". At the bottom of the dialog are "Cancel" and "OK" buttons. The "OK" button is highlighted with a red circle.

- Close the **Select an Attachment** window.



The screenshot shows the same web form as before, but with a different modal dialog box open. The dialog is titled "Select an Attachment" and has a red "X" button in the top right corner. It contains the text: "Choose an attachment:", "Select Local File...", and a link "Learn how to upload attachments from your EMR...". The background form is slightly dimmed.

- (Optional) Click **Save for Later** if you want to complete the referral within 30 days.

## Provincial Digital Health and Information Services

Partnering with the BC health sector, providers and citizens

• Diagnostic Imaging  
• Previous Gastroscopy / Colonoscopy Reports  
• Prior Gastroenterology Consult Notes

☐ Personal Health Information that is medically relevant has not been disclosed at the request of the patient.

+ Add Attachments...

Referrer's Information: Dr. Daniyal Naumani (selected), Default (selected)

Site Name: BC PHSA DRO Med Access  
Address: 3644 maguire street  
City: Windsor  
Province:  
Postal Code: N9E 4V5

Phone: 647-640-7222  
Fax: 647-640-7222  
Billing #: 12345  
Professional ID: 1234  
Signed: Dr. Daniyal Naumani  
Role: Family Physician

Copy of referral and status updates to: search directory...

Cancel Save for Later Send TEST eReferral

6. Click **Send eReferral**.

Personal Health Information that is medically relevant has not been disclosed at the request of the patient.

Add Attachments...

Chart Summary.pdf

Referrer's Information: Dr. Daniyal Naumani (selected), Default (selected)

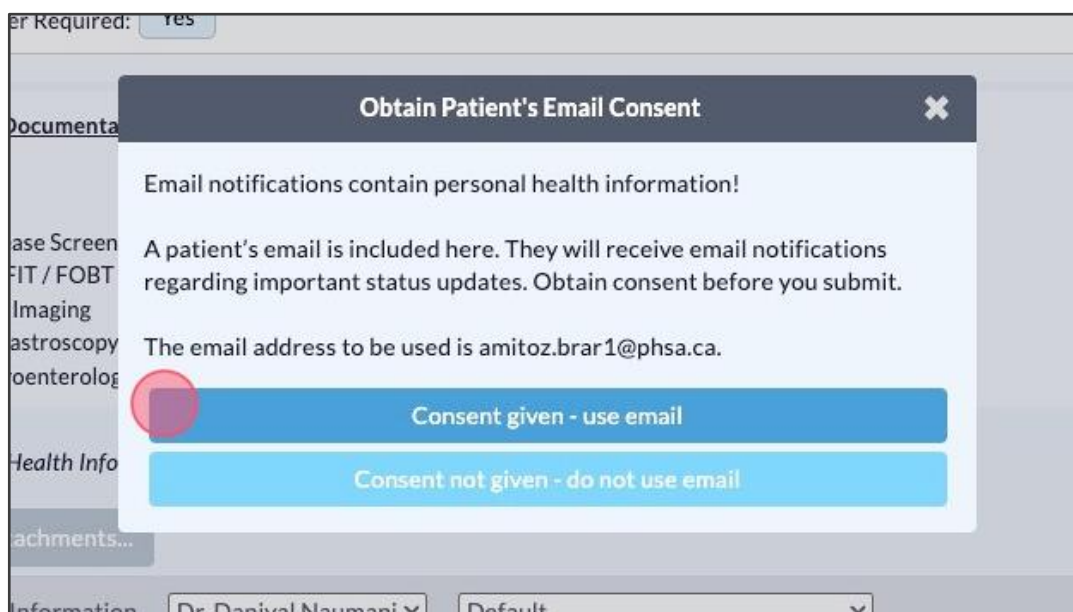
Site Name: BC PHSA DRO Med Access  
Address: 3644 maguire street  
City: Windsor  
Province:  
Postal Code: N9E 4V5

Phone: 647-640-7222  
Fax: 647-640-7222  
Billing #: 12345  
Professional ID: 1234  
Signed: Dr. Daniyal Naumani  
Role: Family Physician

Copy of referral and status updates to: search directory...

Cancel Save for Later Send TEST eReferral

7. Confirm patient consent for email updates.



er Required: ☐ Yes

**Obtain Patient's Email Consent** [X]

Email notifications contain personal health information!

A patient's email is included here. They will receive email notifications regarding important status updates. Obtain consent before you submit.

The email address to be used is amitoz.brar1@phsa.ca.

☐ Consent given - use email

☐ Consent not given - do not use email

Documenta

ase Screen

FIT / FOBT

Imaging

astroscopy

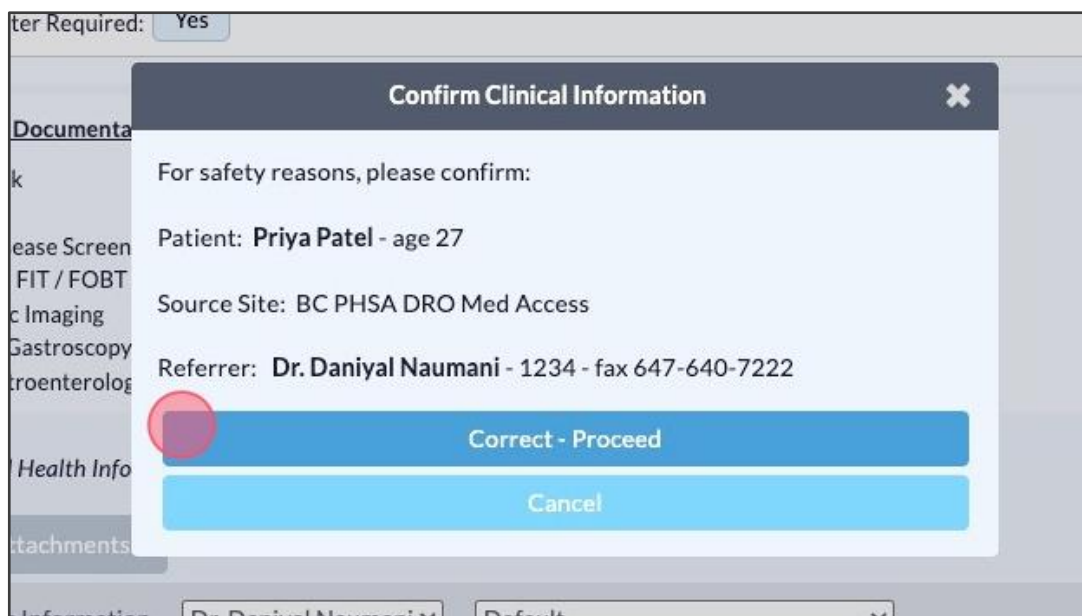
oenterolog

Health Info

achments...

Information: Dr. Daniyal Naumani [X] Default [v]

8. Confirm your clinical information.



ter Required: ☐ Yes

**Confirm Clinical Information** [X]

For safety reasons, please confirm:

Patient: **Priya Patel** - age 27

Source Site: BC PHSA DRO Med Access

Referrer: **Dr. Daniyal Naumani** - 1234 - fax 647-640-7222

☐ Correct - Proceed

☐ Cancel

Documenta

k

ase Screen

FIT / FOBT

c Imaging

Gastroscopy

roenterolog

Health Info

tachments

Information: Dr. Daniyal Naumani [X] Default [v]

9. Review the eReferral confirmation. A copy of the referral will be imported into the EMR as an Active Task.

## Provincial Digital Health and Information Services

Partnering with the BC health sector, providers and citizens

