

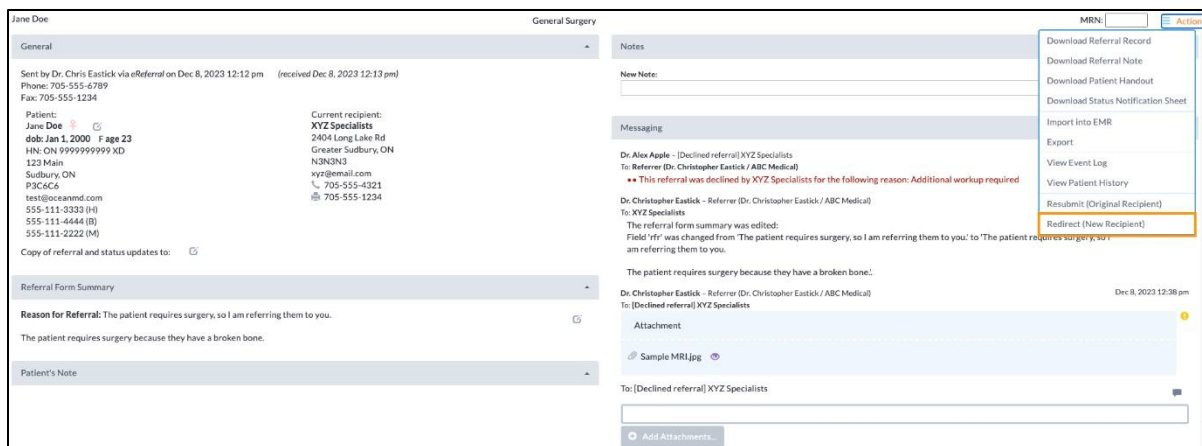
# eReferral Tips: January 2026

provided to the Ottawa West Four Rivers Primary Care Network on behalf of Ontario East eReferral

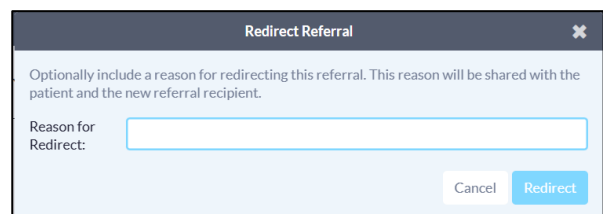
## Redirecting Declined eReferrals

Ocean now allows senders to redirect referrals following a decline by the receiver. The "**Redirect (New Recipient)**" option can be used to initiate a new referral to a brand-new recipient on the Ocean Healthmap, while reusing the patient demographic information and any attachments submitted from the original referral.

To redirect a declined referral, click into any declined referral's "**Action**" menu (in the top right corner) to find the "**Redirect (New Recipient)**" option. Once selected, you'll input your reason and then click **Redirect**.



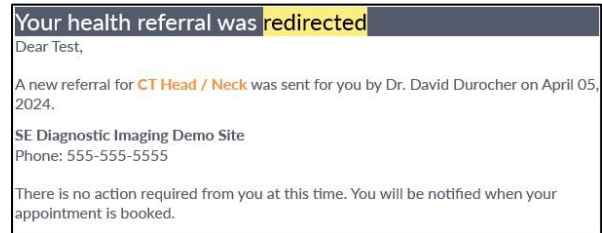
This launches you into the Ocean Healthmap where you can locate the appropriate listing for rerouting your referral. The user will complete all required sections of the new form and will see that patient demographics and attachments (from the original referral submission) will automatically carry over into the new referral form.



## The Patient Experience

When the sending clinic decides to redirect a referral to a new destination, the patient will receive a **redirected** notification which identifies the new destination.

**\*Note:** The notifications will contain the reason for decline/redirect, and an instructional note is included, informing patients that no action is required.



Once the redirected referral is sent, it appears as a new referral and trackable within your "**SENT>Awaiting Response**" folder, with the reason for the redirect appearing in the *messaging* pane. A copy of the original referral will remain in the "Declined" folder for reference.

These patient engagement notifications are only possible if the patient's email is included in the eReferral. To ensure this inclusion **add your patient's email into your EMR chart** and it will be auto-populate in the referral (though consent of email inclusion is always requested upon eReferral submission).

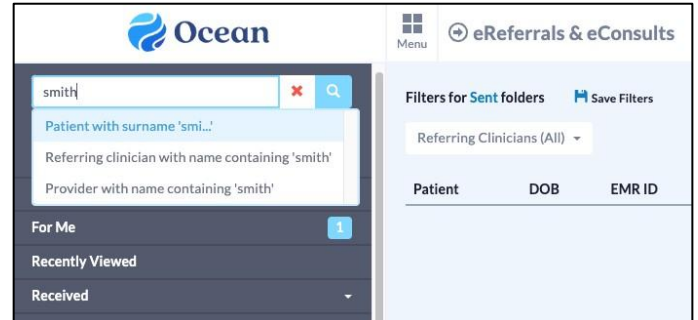
Looking for support regarding redirecting declined workflow? Please reach out to us at [contact@eReferralontarioeast.ca](mailto:contact@eReferralontarioeast.ca) for assistance.

# Standard and Enhanced Filtering in Ocean

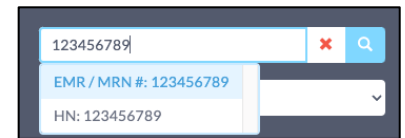
## Standard Filter Options for Senders

To quickly locate a specific or group of referrals, you can take advantage of the search bar in the top left corner using various input methods.

Users can perform searches for referrals using *Patient surname*, Referring clinician name, and/or Provider name.



Users can also enter matching HN and or MRN numbers to locate referrals.

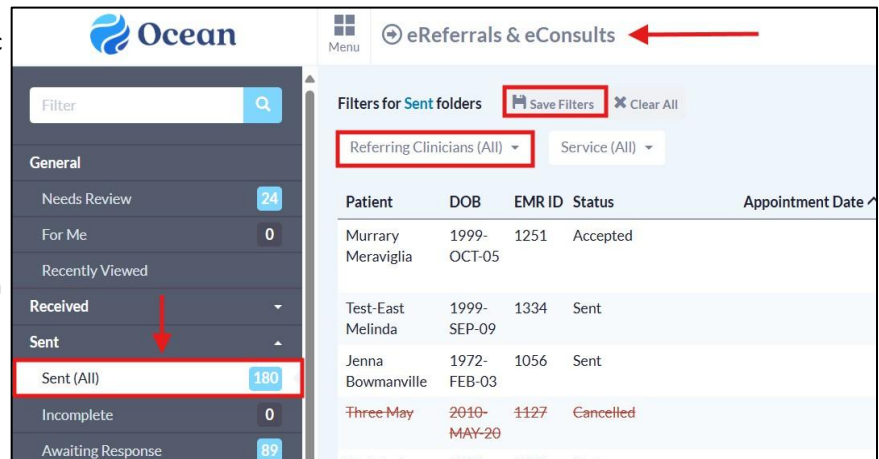


Once a search is performed using the search bar, referrals across all sets of folders will appear with that search criteria applied.

## Enhanced Filter Options for Senders

A new enhancement in Ocean eReferral now allows the user to **filter referrals by 'referring clinicians'**. Senders and their admins can now filter their view for specific Referring Clinicians so that only relevant referrals appear. This can help those users working at high volume Ocean sites.

To use this feature, navigate to your Ocean site's 'eReferrals & eConsults' page, and within any of the **'Sent'** folders and above your referral list, you'll see a dropdown list of **"Referring Clinicians (All)"** to choose from.

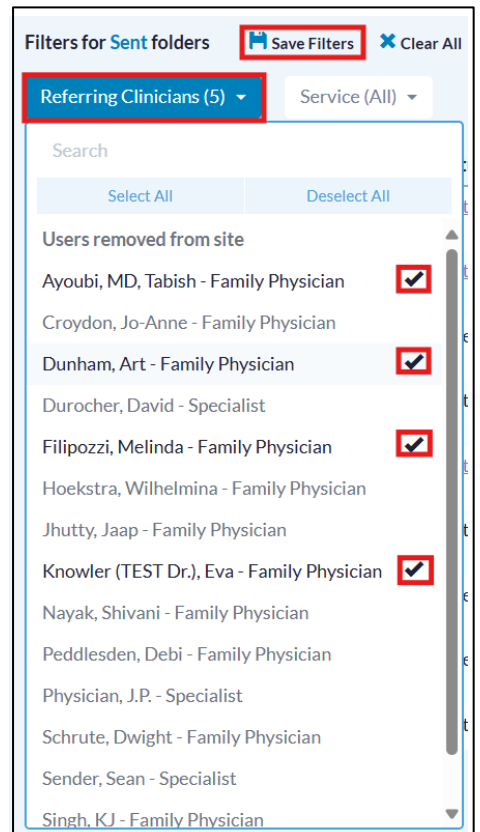


Select as many clinicians as you'd like and when saved, all the 'Sent' folders will filter the referrals for the referring clinicians chosen.

If you're in a folder and don't see your referrals, as per the filter, you'll see a **"CLEAR ALL"** option next to *Save Filters*, which when clicked will remove all filters. These enhanced filter settings are user specific and will remain when accessing Ocean on future visits. Only the user can Save or Clear their own filter settings.

**\*Note:** Applying enhanced filters are limited to the set of folders you are working in. To show relevant referrals in the **'Needs Review'** folder, users would need to apply filters to the **'General'** set of folders.

If you have any questions about standard or enhanced filtering, please visit this [Ocean Filtering](#) article or contact us at [contact@ereferralontarioeast.ca](mailto:contact@ereferralontarioeast.ca) for support.



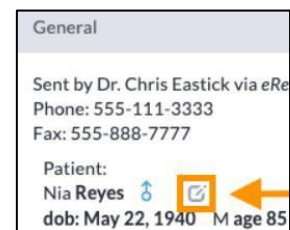
## Referral Record Functions

Ocean is a feature rich platform providing users flexibility when processing referrals. The features and functions available to the users within the referral record itself can help optimize referral management. This article will focus on some key sender functions that will support referral management.

### Changes to Referral Record Information

Ocean allows the user to change/update information in the referral record even after the referral has been submitted. The updating of patient demographics, such as phone number and email address, is very helpful to receiving clinics in supporting appointment confirmations. Additionally, users can change/update the original referral form fields to correct any input errors or change information related to the submission (order information, urgency, history, etc.).

- Patient Demographics can be edited by accessing the edit icon in the *General* section. (Note: that Date of Birth and Health Card number cannot be modified after submission.)



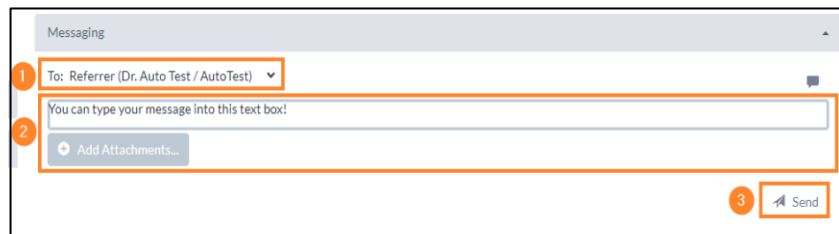
- The *Referral Form Summary* section allows users to review their original form selection AND apply changes to their original responses on the form. The edit icon here will have the original referral form appear for editing.



**\*Note:** Editing in these areas of the referral record will not automatically update back to your EMR.

### Bi-Directional Messaging

Ocean's bi-directional communication tool is built for direct communication between senders and receivers. Messages are stored and tracked within this section of the referral record and e-mail notifications are sent to the receiving clinic when a message is sent. Attachments can be included with any messaging, allowing users to submit new documents or any relevant attachments missed upon initial submission.



- Within the '**Messaging**' area of the eReferral, simply select the appropriate message recipient (if multiple parties are involved in the referral), type your message into the text box, optionally add an attachment, and press '**Send**'.

**\*Note:** the workflow for pulling in attachments with integrated systems varies from EMR to EMR

- Referral records that display the yellow exclamation icon require the user to review the message by clicking the Reviewed & Close button. Once actioned, the exclamation icon will be replaced by a checkmark, signaling to all stakeholders that the message has been reviewed.



## Action Menu

The Action menu is located on the top right-hand corner of the referral record screen and contains a variety of functions available to users. To review the full breadth of functionality, visit this [Action menu](#) article on Ocean.

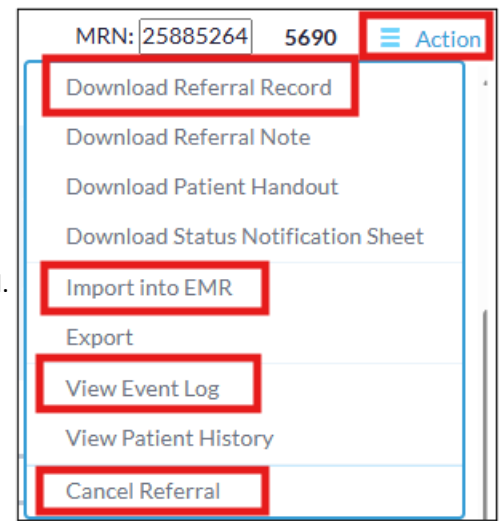
Below are some common functions widely used by senders on Ocean.

**Download Referral Record:** Opens a PDF document of the complete record in a new browser tab where it can be printed and/or downloaded.

**Import to EMR:** Triggers a new import of the referral into the integrated EMR.

**View Event Log:** Opens an event log of the various actions that have occurred on the referral.

**Cancel Referral:** Used by the sender when a referral to the current provider is no longer necessary.



Do you have follow-up questions about specific functions Ocean provides? Please reach out to us at [contact@eReferralontarioeast.ca](mailto:contact@eReferralontarioeast.ca) for support.