

eReferral Tips: March 2026

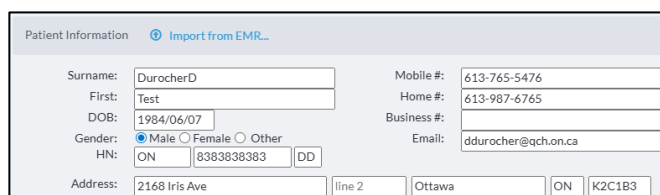
provided to the Ottawa West Four Rivers Primary Care Network on behalf of Ontario East eReferral

Ocean Forms

Ocean eReferral Forms are digital forms available to the referring community, within a directory listing once ready to accept e-referrals using the Ocean. There are a vast variety of custom eReferral forms on Ocean that have been built specific to the receiver's standards to collect all relevant referral information from referring providers on the first eReferral submission. In this article we will discuss the common features of an Ocean eReferral form, highlight some of the unique features available to users, and discuss the initiative by Ontario Health to move towards a standardized referral form model for all specialities.

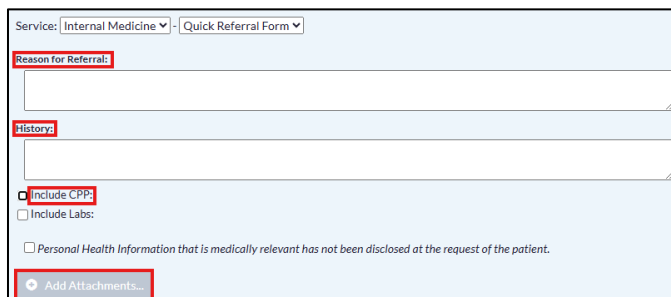
Common areas and Characteristics of Ocean Forms

Patient Information: The first section of the form contains relevant patient information that gets **auto-populated from your EMR** when initiating a referral from your patient chart. Note that the information which appears is editable, so the user can make changes to the information on screen.



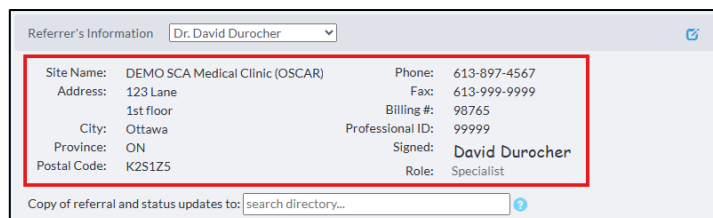
A screenshot of the 'Patient Information' section of an eReferral form. It features a header with 'Patient Information' and a link to 'Import from EMR...'. The form contains several input fields: Surname (DurocherD), First (Test), DOB (1984/06/07), Gender (Male selected), HN (ON 8383838383 DD), Address (2168 Iris Ave, line 2, Ottawa, ON, K2C1B3), Mobile # (613-765-5476), Home # (613-987-6765), Business #, and Email (ddurocher@qch.on.ca).

Clinical Information: The body of the referral form is where all relevant clinical information is added and selected. Section like *Reason for Referral*, *History*, and *CPP (cumulative patient profile)* are common sections for input. Forms often contain dynamic questions which when a specific selection is chosen, additional questions appear that are relevant only to that choice.



A screenshot of the 'Clinical Information' section of an eReferral form. It shows a dropdown for 'Service' set to 'Internal Medicine' and 'Quick Referral Form'. Below are three text input areas labeled 'Reason for Referral:', 'History:', and 'Include CPP:'. There are also checkboxes for 'Include Labs:' and 'Personal Health Information that is medically relevant has not been disclosed at the request of the patient.'. An 'Add Attachments...' button is at the bottom.

Referrer's Information: This area is mostly static containing populated information from your Ocean account. This includes billing number and professional ID.



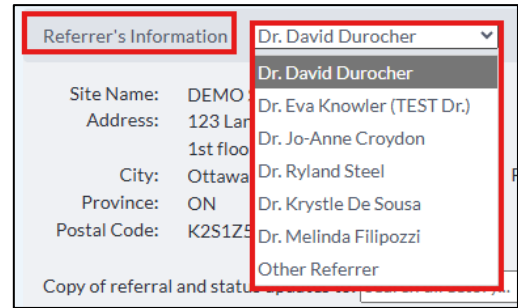
A screenshot of the 'Referrer's Information' section of an eReferral form. It shows a dropdown for 'Referrer' set to 'Dr. David Durocher'. Below is a table of information:

| | | | |
|--------------|---------------------------------|------------------|----------------|
| Site Name: | DEMO SCA Medical Clinic (OSCAR) | Phone: | 613-897-4567 |
| Address: | 123 Lane 1st floor | Fax: | 613-999-9999 |
| City: | Ottawa | Billing #: | 98765 |
| Province: | ON | Professional ID: | 99999 |
| Postal Code: | K2S1Z5 | Signed: | David Durocher |
| | | Role: | Specialist |

Below the table is a field for 'Copy of referral and status updates to:' with a search directory button.

Unique Form Features for Referrers

If your Ocean account has been configured as a **delegate**, the user can select another clinician from the available list, enabling an authorized staff/admin/clinician or colleague to send referrals on your behalf.

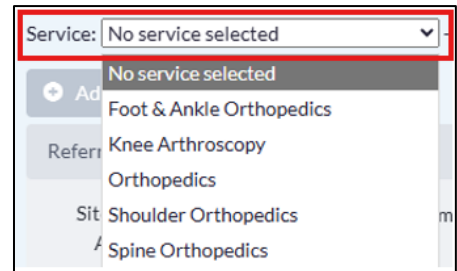


The screenshot shows a form section titled "Referrer's Information". On the right side, there is a dropdown menu currently displaying "Dr. David Durocher". The dropdown list is open, showing several other names: "Dr. David Durocher", "Dr. Eva Knowler (TEST Dr.)", "Dr. Jo-Anne Croydon", "Dr. Ryland Steel", "Dr. Krystle De Sousa", "Dr. Melinda Filipozzi", and "Other Referrer". The dropdown menu and the list of names are highlighted with a red border.

Mandatory fields on Ocean forms are fields that require an input selection. All required fields must be filled for a referral to be submitted.

*** Indicates a required field**

A recent update to Ocean forms with multiple services may now require the referring clinician to **select the desired service at the top of the form before the rest of the fields are displayed**. Keep an eye out for this new change, as a previously used form that opened on its own may now require this selection.



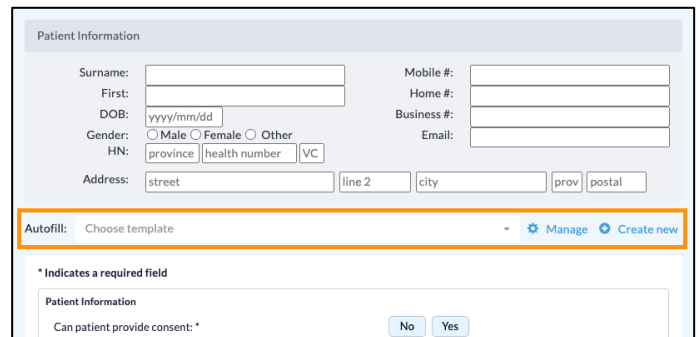
The screenshot shows a form section with a dropdown menu labeled "Service:". The dropdown is currently set to "No service selected". The dropdown list is open, showing several options: "No service selected", "Foot & Ankle Orthopedics", "Knee Arthroscopy", "Orthopedics", "Shoulder Orthopedics", and "Spine Orthopedics". The dropdown menu and the list of options are highlighted with a red border.

Autofill templates allow eReferral senders to save frequently used forms as templates that can be applied to future requests with a single click.

This eliminates the repetitive process of manually completing forms for commonly requested services, such as diagnostic imaging or lab orders.

This feature is available to users within the Healthmap, and templates can be created for any listing that is accepting eReferrals. This feature must be activated in your user settings, under *My Account* in Ocean.

Click [Auto Templates](#) to find out more information on this new feature.



The screenshot shows a form section titled "Patient Information". It contains several input fields: "Surname:", "First:", "DOB:" (with a date format "yyyy/mm/dd"), "Gender:" (with radio buttons for "Male", "Female", and "Other"), "HN:" (with sub-fields for "province", "health number", and "VC"), "Address:" (with sub-fields for "street", "line 2", "city", "prov", and "postal"), "Mobile #:", "Home #:", "Business #:", and "Email:". Below the input fields, there is an "Autofill:" section with a dropdown menu set to "Choose template" and buttons for "Manage" and "Create new". The "Autofill" section is highlighted with an orange border. Below the "Autofill" section, there is a note: "* Indicates a required field". At the bottom of the form, there is a question: "Can patient provide consent: *" with "No" and "Yes" buttons.

The Cumulative Patient Profile (CPP) appears as its own section for the purpose of mapping these specific fields directly from the sender’s EMR. Data will automatically flow into these fields if recognized from a compatible electronic medical record. CPP information that gets auto-populated can be manipulated prior to sending the referral.

Cumulative Patient Profile

Please delete any sensitive information you do not intend to share from the CPP

CPP attached separately (if not entered below)

Current problem list:

Past medical history:

Current medications:

Family history:

Allergies:

Standardized Referral Forms on Ocean

To reduce administrative burden and enhance both clinician and patient experience across the province, Ontario Health is transitioning from customized forms to standardized referral forms in support of the Patients Before Paperwork (Pb4P) initiative. As of March 2026, 21 standardized referral forms are available to new receivers joining the Ocean platform, and additional specialties are continually being identified and developed. For more information on and to review the available forms, please visit the Amplify Care website: <https://www.amplifycare.com/standardized-ereferral-forms/>.

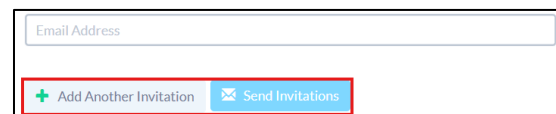
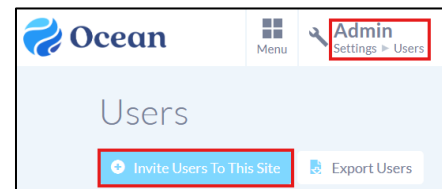
If you have any questions related to the features and function of Ocean referral forms and the standardized referral form initiative, please contact us at contact@ereferralontarioeast.ca.

Ocean Admin Tips and Tools

As an Admin/Site Lead for your Ocean site, you are responsible for managing the overall account as well as user access, delegate status, and for managing any listings associated with your Ocean site. This article provides a few tips and tricks related for managing these settings and provides a review of Admin/Site Lead responsibilities for Ocean sites for senders.

Managing your Site's Users

To add new users to the Ocean site, the Ocean admin travels to Admin>Users and can click the *Invite Users to This Site* button. This enables the admin to send invitation to one or more e-mail address.



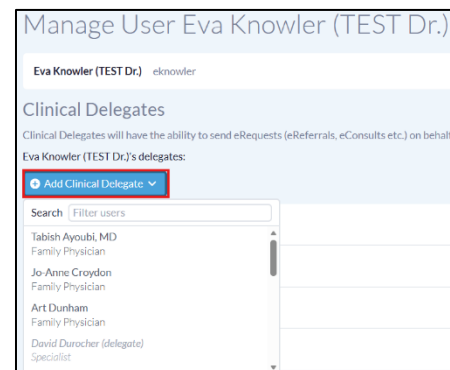
Once a user is registered on a site, the Ocean Admin can grant site admin access, manage user delegate settings, and/or remove user accounts from the Ocean site altogether.

| Ocean Users Registered at This Site | | | |
|-------------------------------------|----------------|------------------|---|
| Username | Full Name | User Role | Site Admin |
| artdunham | Art Dunham | Family Physician | <input checked="" type="checkbox"/> Manage User Remove User |
| ddurocher | David Durocher | Specialist | Manage User |

It is highly recommended that Ocean Admin users periodically (quarterly, annually, etc.) review the user list on their site to remove any past users from the clinic. This ensures that former members of the site cannot access current referrals and patient health information.

Managing Delegates

When the *Manage User* function on the *Users* page is selected, the Ocean admin can now select *Add Clinical Delegate* which enables the Ocean admin to manage the delegate status for all users. Becoming a clinical delegate allows an Ocean user to send referrals on their behalf of other authorized Ocean senders (i.e. MDs/NPs) on the site. A clinician can enable their own delegates in their *My Account* section of Ocean, or the Ocean Admin can simply assign the delegate status from the *Manage User* function in the *Users* page.



Directory Listings for Senders

While directory listing are required for receiving referrals, a secondary function of creating a directory listing on Ocean is to support the set up a new Ocean user's "sender" address because you can pull the clinic address from an existing Directory Listing instead of typing it in manually, saving the user times with the set up and from input errors.

To build a Directory Listing for your sending clinic, Ocean Admins will travel to MENU>ADMIN>DIRECTORY LISTINGS and select *Add New Listing*. Select fields on the Listing Information tab is required to be completed (Add Listing name, accept eRequests set to NO, Add Clinic Contact information. The Description field can be completed or left blank.

Listing name Add French

Will this listing accept eRequests?
No

Which language(s) should this listing use for eRequest notification emails?
 English only French only Bilingual (English first) Bilingual (French first)

Contact Information Add French

Listing address

Address line 1*
Enter a location

Address line 2

City* Province* Postal code
Select province A1B 2C3

Public-facing phone Fax

Service Details Add French

Description

In the user's account, go to Edit Clinical Contact Information>Clinic Locations> Add Location. From this screen, *Select Option* from Directory Listing(s), choose your Ocean Site (if you have more than one) and the Directory Listing, and save. Your clinic address will now appear in your account settings and will populate to the *Referrer's Information Section* of the referral form.

Add Clinic Location

Clinic Locations
Clinic Location information populates within the 'Referrer's Information' section of any eRequests submitted by you or your delegate(s).

Location Type
You may manually create one Clinic Location. Any additional Clinic Locations must be created using the details from the Ocean Site's [Directory Listings](#).

Select from Directory Listing(s) Enter manually

Ocean Site
DEMO SE Medical Clinic (PSS) (5017)

Directory Listing
Select Option
Search | Filter Options
DEMO SE Medical Clinic (PSS)
DEMO Testing OH PCCG RA- TELUS PSS

If you have any follow up is required relating to the Ocean Admin features and settings to your Ocean site above, please contact us at contact@ereferralontarioeast.ca for support.

Sending Users Linking Ocean to your EMR

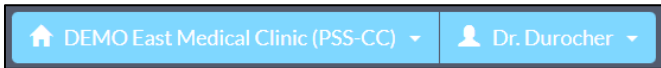
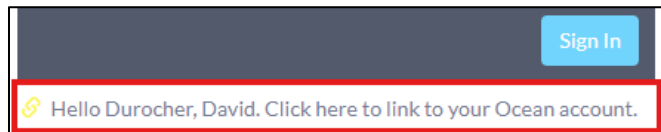
To activate the Single Sign-On and having referrals properly download to your EMR, each Ocean user must facilitate the connection between their EMR system and the Ocean platform. The process/experience of making this connection varies across EMR platforms. Below we will outline the connection process for the big 3 EMRs (Telus PSS, Oscar Pro, and Accuro).

Telus PSS

To facilitate the link using Telus PSS, the sending site user must open a patient chart and travel to the Ocean toolbar and select the *REFER* button.



The Refer button will launch the Ocean Health Map from your default browser on your PC. In the top right-hand corner, the user will find a link with the user's name and a link to make the connection. Once you click the link, you will be prompted to sign in with your Ocean Credentials. Once you log in, your name and clinic name will appear in the top right-hand corner. You have now successfully linked both systems.

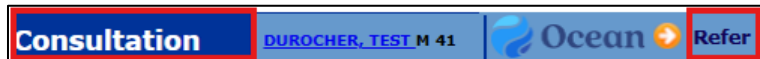


Oscar Pro

Facilitating the link using Oscar Pro is like that of TELUS PSS. Open a patient encounter screen in Oscar Pro and travel to the consultations '+' function.



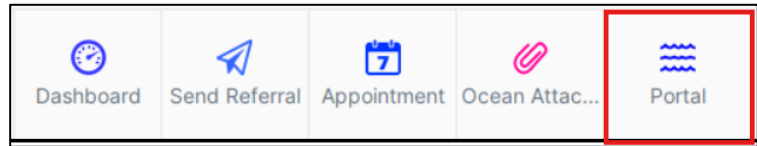
Within the consultation window, travel to and select the **Refer** button.



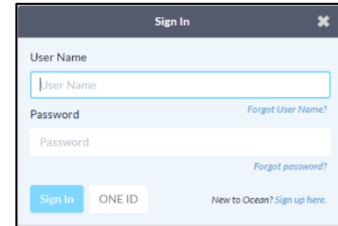
Follow the same steps outlined above in the TELUS steps associated with the Ocean HealthMap and linking your account.

Accuro

Facilitating the link through your Accuro EMR begins with selecting the *Portal* (sea waves icon) button.



An Ocean sign-in window appears requesting username and password inputs. Once logged in, your EMR is now connected to your Ocean site,



Verifying Links in Ocean

Each user can verify if they are connected to an EMR system under the *Linked EMR Users* section in the *My Account* section of Ocean. Here, the account holder can review how many EMRs their Ocean account is linked to. Users can choose to remove a link if I connection is no longer required.

| Linked EMR Users | | | | |
|--|--|-----------------------|---|--------------------------|
| If your Ocean site is integrated with an EMR, you can establish single-sign-on from your EMR user account into your Ocean user account. Each Ocean site you belong to can be linked to a unique EMR user. To link a new EMR user, sign in to your EMR account and launch the Ocean Healthmap or Patient Messages window from the EMR. Follow the prompt to sign into Ocean to automatically link your accounts. Your current list of linked EMR users will appear below. | | | | |
| Ocean Site # | Ocean Site Name | EMR | EMR Username | |
| 13562 | eServices CHR Test Site | | https://integrations.ca.inpuhealth.com/_https://integrations.ca.inpuhealth.com/Practitioner/69625 | ✖ Remove |
| 5013 | DEMO SCA Medical Clinic (OSCAR) | OSCAR Durocher, David | | ✖ Remove |
| 4649 | DEMO eServices Medical Clinic (Accuro) | Accuro 113 | | ✖ Remove |

For more information or support on linking your EMR account to your Ocean account, please contact us at contact@ereferralontarioeast.ca.