

Assigning eReferrals for review

For all eReferral users

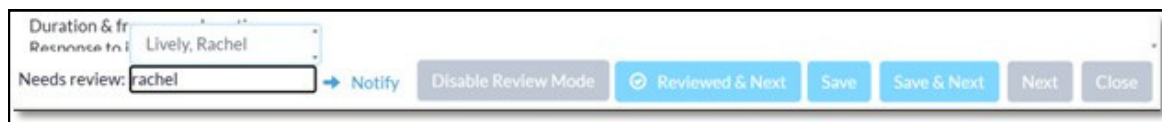
If you've ever assigned a task in your EMR to another user or handed a paper referral to a provider for review before processing, Ocean offers a similar option. You can assign an eReferral to another user within your Ocean site and if necessary, send them an email notification to let them know there's an eReferral or message that needs their attention.

The steps below walk you through how to assign an eReferral to another user for review.

Key Considerations

- eReferrals can be assigned to other users at any time.
- Enabling **Review Mode** can save time when assigning multiple eReferrals, as the next eReferral will automatically populate instead of closing.
- **Reviewed & Next** should be used when assigning eReferrals from the General folder group, while **Save & Next** should be used when assigning eReferrals from the Received and Sent folder groups.
- Reviewed eReferrals will automatically appear in the folder they originated from. (e.g., New eReferrals will appear in the New folder after review. eReferrals in Pending Booking will move back to Pending booking after review).

How to assign an eReferral



The screenshot shows a software interface for reviewing eReferrals. At the top, there is a dropdown menu labeled 'Duration & fr' with 'Lively, Rachel' selected. Below it, a text input field labeled 'Needs review:' contains the name 'rachel'. To the right of the input field is a blue button with a right-pointing arrow and the text 'Notify'. Further right are several buttons: a grey button labeled 'Disable Review Mode', a blue button with a checkmark icon labeled 'Reviewed & Next', a blue button labeled 'Save', a blue button labeled 'Save & Next', a grey button labeled 'Next', and a grey button labeled 'Close'.

1. Open an eReferral to review the options in the footer.
2. Click **Enable Review Mode**. If your review mode is already enabled, skip this step.
3. Begin typing the name of the user you'd like to assign the eReferral to.

4. If necessary, click **Notify** to send an email notification to the assigned user.
5. Click **Reviewed & Next**.
6. Save & Next if Reviewed & Next is not available.

After completing these steps, your eReferral will be found in the Needs Review folder and within the For Me folder of the assigned user. To learn how to review the eReferrals assigned to you, please refer to the tip sheet, “*Managing Assigned eReferrals for Review*”.