

Managing clinical delegates

For all Ocean users

A clinical delegate is an administrative staff member, nurse, or other health professional authorized to prepare and submit eReferrals on behalf of a provider.

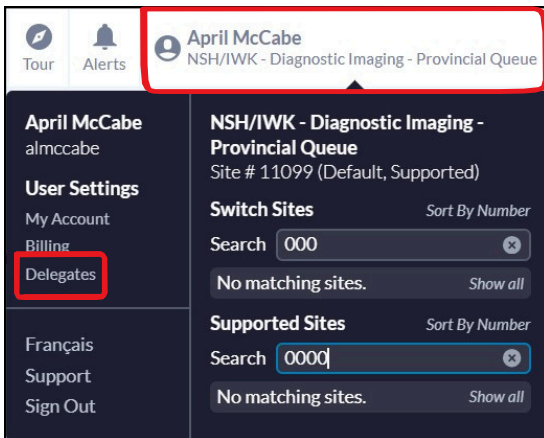
This approach can enhance workflow efficiency by enabling staff to manage administrative tasks such as completing referral forms, attaching medical records, and submitting eReferrals while the provider remains accountable for patient care.

Ocean users can manage their own clinical delegates while users with administrative access can add or remove delegates for all users.

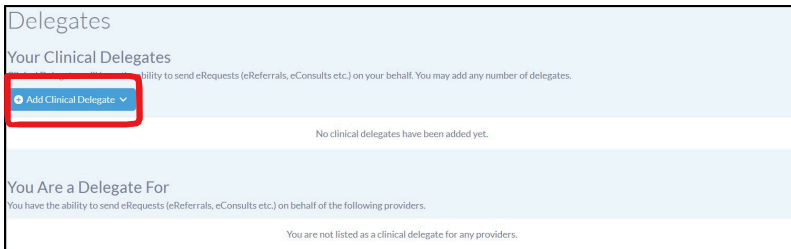
Note: Any user role may be assigned as a delegate but only those assigned to a physician or nurse practitioner can send eReferrals.

Adding a Delegate to send on your behalf:

- Click your name in the top right corner
- Select 'Delegates' under User Settings



- **Click** 'Add Clinical Delegate' button

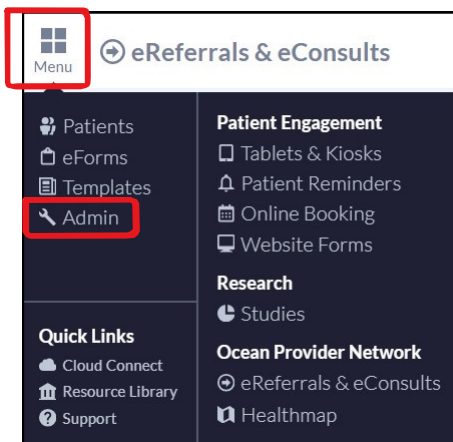


- Select the Ocean user(s) from the drop-down list that you wish to add as a delegate(s)

As a delegate, you can view the users you are assigned to under ‘You Are a Delegate For’. However, you cannot remove yourself from this list. Assigning or removing delegates for a provider must be completed by a user with Ocean administrative access. Please see steps below.

Managing Delegates for Ocean users (Ocean admin access required):

- **Click** ‘Menu’
- **Select** ‘Admin’



- **Select** ‘Users’
- Locate the Ocean user you wish to manage, and **click** ‘Manage User’
 - a. **Click** ‘Add Clinical Delegate’ to assign a clinical delegate to a provider
 - b. **Click** ‘Add as Delegate’ to assign the selected user as a delegate for a provider

Clinical Delegates

Clinical Delegates will have the ability to send eRequests (eReferrals, eConsults etc.) on behalf of this Ocean user. An Ocean user can have multiple clinical delegates.

April McCabe's delegates:

A Add Clinical Delegate

No clinical delegates have been added yet.

April McCabe is a delegate for the following users:

B Add as Delegate

No users have been added yet.

Remove user as a Delegate

Access the delegates page by following one of the two steps above.

- **Click 'Remove'** on the right

Full Name	Ocean Site(s)	Username	User Role	
Test Sender	TEST NSH/IWK Diagnostic Imaging Sender Site (11711)	testsender	Family Physician	Remove

Sending an eReferral as a Delegate

- Complete referral form on the Ocean Healthmap – See Tip sheet ‘Sending an eReferral’
- In the ‘Referrer’s Information’ section at the bottom of the referral form, **select** the correct provider from the dropdown selection
- **Click ‘Send eReferral’**

User role designation will change the view of how eReferrals are sent and received in Ocean.

Delegates with a user role assigned as Physician Assistant or Resident will appear as ‘On Behalf of: Provider’:

Referrer's Information Dr. Rachel Lively

Site Name: TEST NSH/IWK Diagnostic Imaging! Phone: 902-999-9999
 Address: 123 Main St Fax: 902-999-9999
 Billing #: 12345
 City: Halifax Professional ID: 12345
 Province: Nova Sent by Physician Assistant: **April McCabe**
 Postal Code: B3B3B3 Sent on behalf of: **Rachel Lively**
 Role: Family Physician


Copy of referral and status updates to:

Cancel **Save for Later** **Send eReferral**


Referred by:
April McCabe
Electronically signed: April
McCabe
On behalf of:
Dr. Rachel Lively
Electronically signed: Rachel
Lively
TEST NSH/IWK Diagnostic
Imaging Sender Site
123 Main St
Halifax, Nova Scotia
B3B3B3
902-999-9999 (P)
902-999-9999 (F)
Billing #: 12345
Professional ID: 12345




Delegates assigned other user roles will appear as the provider:

☞ Add Attachments...

Referrer's Information Dr. Rachel Lively 

Site Name:	Accuro NSH Test Site	Phone:	902-999-9999
Address:	123 Main St	Fax:	902-999-9999
		Billing #:	12345
City:	Halifax	Professional ID:	12345
Province:	Nova	Signed:	Rachel Lively
Postal Code:	B3B3B3	Role:	Family Physician

Copy of referral and status updates to: 

 Cancel  Save for Later  Send eReferral

Referred by:
Dr. Rachel Lively
Electronically signed: Rachel
Lively
TEST NSH/IWK Diagnostic
Imaging Sender Site
123 Main St
Halifax, Nova Scotia
B3B3B3
902-999-9999 (P)
902-999-9999 (F)
Billing #: 12345
Professional ID: 12345