

How to access eReferral analytics

For all Ocean users

Prerequisite

- Review the *Ocean Site Admin Privileges* tip sheet

Purpose

Ocean users can run analytic reports to gain meaningful insights into referral activity and overall workflow performance. These reports help identify trends such as wait times, referral volumes, decline rates, and user activity, enabling users to evaluate efficiency and pinpoint areas for improvement. By analyzing this data, clinics can make informed decisions to optimize processes, improve patient access to care, and ensure referrals are being directed and managed in a timely manner. Additionally, analytic reporting supports accountability and continuous quality improvement by providing objective data to guide operational and strategic planning.

Export user activities

Ocean users with administrative access can generate reports within the Ocean Portal that provide insights into individual user activity. Exported analytics include referral creations, viewing patient records and usage of secure messaging.

Ocean retains this data for 60 days. To request access to data beyond this period, please submit a ticket at referralsns.ca/ask.

Steps

- Log into the Ocean Portal or launch from your EMR
- Click Menu
- Click Admin
- Click Reports
- Under **Export User Activities:**
 - Optionally, select a date range
 - Add Start date and End date for a specific period
 - Add End date only to view all data received to a specific date
 - Add Start date only to view all data from a specific date onwards
 - Leave dates blank to view all data

- Select User
 - Choose All (defaulted) to export data analytics for all users in your Ocean site
 - To export a report for an individual user, click the dropdown menu to select the user
- Click 'Export... ' to generate a CSV file of user analytic information


Export User Activities

Pick a date range to export. You can leave the dates blank.

Start date

End date

User

 Export...

Export referral analytic data

Ocean users with administrative access at sites that **receive** eReferrals can export referral analytics data directly from the Ocean Portal. These reports provide insights such as wait times, referral volumes, decline rates, and sender/receiver provider patterns, among other metrics. Referral analytics data does not include patient health information; therefore, it remains accessible within your Ocean site indefinitely.

Steps

- Log into the Ocean Portal or launch from your EMR
- Click Menu
- Click Admin
- Click Reports
- Under **Export Referral Analytic Data:**
 - Choose Date Type
 - Referral Creation Date or Modification Date
 - Optionally, select a date range
 - Add Start date and End date for a specific period
 - Add End date only to view all data received to a specific date

- Add Start date only to view all data from a specific date onwards
 - Leave dates blank to view all data since started receiving referrals
- Select File Type
 - Clean (excludes test and deleted referrals) or All
- Export Template
 - Core Analytics Export, which are captured by the Ocean Platform by default and are available for all eReferrals
 - Custom templates can be created to export specific analytics, including priority, protocol, patient location, reason for referral, patient preference, archival date, etc.
- Click ‘Export Referrals...’ to export a CSV file of referral analytic data
- Click ‘Export Referral Messages...’ to export a CSV file of detailed analytic information about messages within the ‘Messaging’ section of each eReferral

Please note: Ocean only supports exporting up to 50,000 referral analytic records at once. Leaving the date range blank can exceed the limit and cause the exported file to fail.


Export User Activities

Pick a date range to export. You can leave the dates blank.

Start date

End date

User

 Export...

For detailed information about each analytic value, please refer to the [Ocean Data Dictionary](#).