

Managing eReferrals assigned for review

For all Ocean users

If you ever received a paper referral to review or have been tasked within your EMR to review a referral, Ocean offers a similar option. Users can assign eReferrals for your review within your Ocean site and notify you, via email.

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 reviewing multiple eReferrals, as the next eReferral will automatically populate instead of closing.
- Reviewed & Next should be used when reviewing 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 review eReferrals assigned to you

1. Log into Ocean and navigate to the For Me folder. *The eReferral can also be found in the Needs Review folder.*



2. Open the first eReferral from the patient list.
3. **Click Enable Review Mode.** If your review mode is already enabled, skip this step.
4. Review the eReferral. A yellow explanation mark will indicate a new notification.
 - a. Sent eReferrals may contain questions or declined reasons within Messaging area.
 - b. Received eReferrals may require prioritization or contain questions within the Notes and Messaging area.
5. Action the eReferral as necessary.
6. **Click Reviewed and Next.**



Clicking Reviewed & Next will remove the eReferral from your **For Me and Needs Review folders**. If an eReferral has been assigned to you in error and should be reviewed by another user, please refer to article *“Assigning eReferrals for Review”*.