

Daily Ocean site management

For receiving sites

1. Review incoming eReferrals

- a. Assign a priority using the Review note. A protocol can be assigned, if available.
- b. Add an Anticipated Wait Time.
- c. Click Accept.
- d. Decline, if appropriate.

2. Maintain eReferral appointment dates

- a. Add appointment details to accepted eReferrals
- b. Remove appointment details if an appointment is cancelled
- c. Update appointment dates if rescheduling occurs

3. Complete previous days eReferrals

- a. Select an outcome using the Review form
- b. Click Complete

4. Review “Needs Review” and “For Me” folders

- a. Respond to incoming communication
- b. Review eReferrals assigned to you, if necessary

Reminder: Apply filters as needed when reviewing communication on received eReferrals and sent eReferrals.

5. Follow-up in the Awaiting Reply folder

- a. Follow-up on outstanding requests