

EMR notifications - Received referrals

For Med Access users

Pre-Requisites

- Admin Access to Med Access and Ocean
- EMR Instance ID and EMR Secret

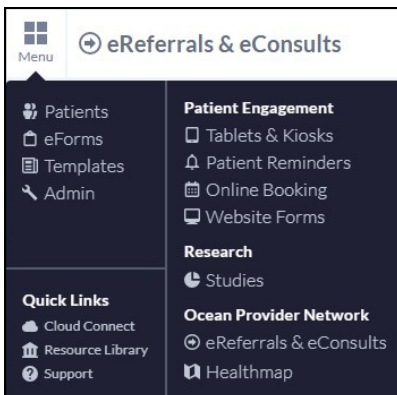
This tip sheet outlines the steps in configuring your Ocean settings, and how to best use this feature. Users can submit a ticket to: referralsns.ca/contact-us to begin the technical component of setup. Once completed, follow the steps below.

Ocean users can have their Ocean site configured to allow for notifications of New eReferrals, Cancelled eReferrals, and New messages on eReferrals to come directly into their EMR (Med Access) in the form of an active task within the patient's chart. This feature offers users the ability to be notified of important information quickly and in turn, actionable items can be managed in a timely manner to avoid delays in patient care.

For new incoming eReferrals, Ocean will automatically create a patient chart within the EMR if one does not already exist. If an eReferral is later declined rather than accepted, an additional declined notification will appear in the patient's chart task list instead of being assigned directly to a user.

Configuration

1. Launch into Ocean from Med Access
2. Click Menu → Admin



3. Click Directory Listings

Locations

Organization
Create an organization for use in the Ocean Healthmap or in Text Message Reminders.

Directory Listings
Create, update, or remove Directory Listings for use in the Ocean Healthmap, for eReferrals, Website Forms, or Online Booking.

4. Select “Manage EMR notifications”.

Directory Listings

Search Listing Name ⚙️ Manage EMR notifications ➕ Add new listing

5. Under New eRequests, select the user from the dropdown who should receive notifications for eReferrals you receive.

New eRequests

Listing	EMR User
> Dr. Nicoll Demo Clinic (MA)	None
> Med Access Test Site	None

Cancelled eRequests

Search Filter Options

None
Kanika Sood

6. Under Cancelled eRequests, select the user from the dropdown who should receive notifications for eReferrals that have been cancelled.

7. Under New eRequest messages, select the user from the dropdown who should receive notifications for eReferrals with new messaging.

Your changes are automatically saved.

Managing Notifications

1. Review the new communication as it appears in your Active Tasks list.

Due	Patient	Description	Reason	Recur
08Apr26	Test2, Plastics	Progress Note, Ocean eReferral - New Message - Pediatric Plastic Surgery	none	none
08Apr26	Test2, Plastics	Progress Note, Ocean eReferral - New eReferral - Pediatric Plastic Surgery	none	none

2. Click on the description to open the task in a new window.

3. Review the message. If you review the task as the admin, you may need to forward the task to your provider or vice versa.

Task

This appears to be an Ocean eReferral.
The Category has been updated automatically to 'Consult'.
The Type has been updated automatically to 'Plastic Surgery'.
Please review and Save.

Category: Consult Type: Plastic Surgery

Description: Ocean eReferral - New Message Reason:

Note / Instructions
Enter new note/instructions here

Assignee: Sood, Kanika Due: 08-Apr-2026

Last Update: CognisantMD ApiAgent

Update or Forward Complete this task Save Preview

Observations

08APR2026 12:20PM
Note
Ocean eReferral - New Message - Pediatric Plastic Surgery

Med Access Test Site has received a new message about an eReferral sent by Rachel Lively on 08-Apr-2026 at 09:45 AM (ADT).

Patient: Plastics Test2 (HN: 0011661100)
Description: Pediatric Plastic Surgery
Reason for referral: Polydactyly/Syndactyly

Message content: "Patient has moved - 123 Other St"

Ocean request URL: https://ocean.cognisantmd.com/ocean/portal.html?siteNum=7919#/referrals/80ef778a-4344-4254-9ee5-acd5a5f588d4/edit

4. Click the patient's name in the top left corner to navigate to their chart.

5. Click Launch.

6. In the Ocean Extension, click "View Patient"

7. Select the Received eReferral under Active Referrals.

8. Action as necessary and:

- a. Click Reviewed and Close for new eReferral messages or cancelled eReferrals in the Needs Review folder
- b. Click Accept or Decline for newly received eReferrals.

9. Complete the task in Med Access.

If an Ocean user is removed from your Ocean site, notifications will no longer be sent to your EMR.