

Completing a direct to endoscopy/procedure eReferral

For gastroenterologists & general surgeons who perform endoscopy

Purpose

For eReferrals that will be managed as a direct to endoscopy or direct to procedure, meaning no consultation appointment will be scheduled, eReferrals can now be completed without an appointment date and time added in Ocean.

eReferrals will continue to be managed within your EMR, all booking and referral management activities should continue using your usual processes.

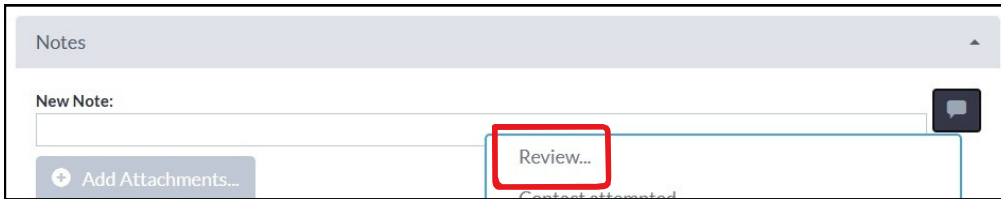
Key Considerations

- This process only changes the workflow for patients going direct to endoscopy or direct to procedure. Please continue to follow current workflow and add appointment details to Ocean eReferrals for patients seen for consultation
- Adding a booking comment closes the loop with the patient and referring provider about next steps for procedure. Please refer to tip sheet – *Adding Canned Responses*
- If you do not have the option to complete an eReferral that is direct to procedure or direct to endoscopy, please submit a ticket at [General Enquiry](#).
- If you cannot find a referral within Ocean, please submit a ticket at [General Enquiry](#).

Steps:

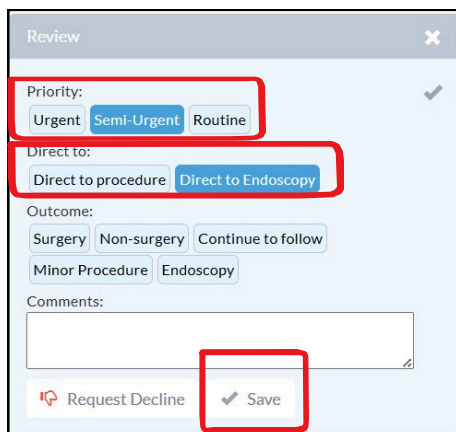
This workflow applies to eReferrals that are managed by a general surgeon or gastroenterologist within Ocean. If your physician manages referrals within the EMR, the eReferral will already be accepted. In this case, launch Ocean from the patient chart and proceed directly to Step 3 (note: Step 5 will be: Click 'Completed'):

1. Log into Ocean and navigate to the New folder
2. Open the eReferral and launch the review note:
 - Click the conversation bubble in the notes section
 - Click Review...

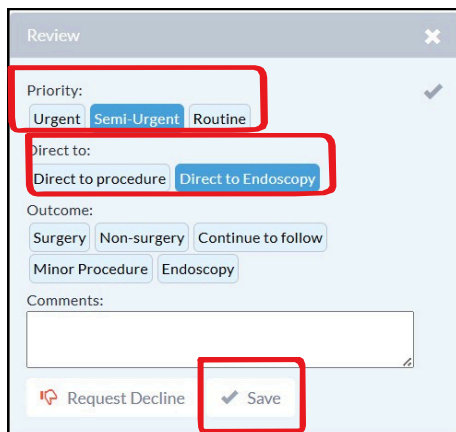


- Select Priority: 'Urgent', 'Semi-Urgent', or 'Routine'
- Select the 'Direct to procedure' or 'Direct to Endoscopy' button
- Click 'Save'

General Surgeons (that do Endoscopy) Review Note:



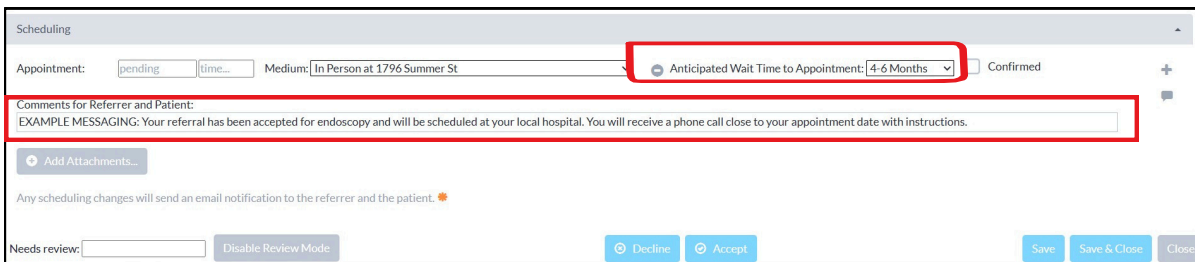
Gastroenterologist Review Note:



3. Add an Anticipated Wait Time (if known) and Booking Comment

- Scroll to the Scheduling section
- Click the dropdown next to ‘Anticipated Wait Time to Appointment:’ and select the timeline that best aligns with the expected timeframe to appointment. Leave blank if timeframe is unknown
- In ‘Comments for Referrer and Patient:’ add free-text messaging or canned messaging to inform the patient and referring provider that the referral will be directed to an alternate booking source

4. Click ‘Accept’



The screenshot shows a 'Scheduling' window with the following elements:

- Appointment: pending | time... Medium: In Person at 1796 Summer St
- Anticipated Wait Time to Appointment: 4-6 Months (dropdown menu)
- Confirmed
- Comments for Referrer and Patient: EXAMPLE MESSAGING: Your referral has been accepted for endoscopy and will be scheduled at your local hospital. You will receive a phone call close to your appointment date with instructions.
- Add Attachments...
- Any scheduling changes will send an email notification to the referrer and the patient.
- Needs review: [input field] Disable Review Mode
- Buttons: Decline, Accept, Save, Save & Close, Close

If the patient has consented to receive email communications, a notification will arrive via email:



The email notification contains the following text:

Your recent health referral has been updated
Dear Direct,
A referral for **General Surgery (Adult)** was sent for you by April McCabe on May 14, 2026.
Direct To
The referral has been marked as **Pending Booking**.
The anticipated wait time to your appointment is **4-6 Months**.
Important Information:
EXAMPLE MESSAGING: Your referral has been accepted for endoscopy and will be scheduled at your local hospital. You will receive a phone call close to your appointment date with instructions.

5. Locate the eReferral in the Pending Booking folder

6. Click the ‘Completed’ button

Scheduling

Appointment: Medium: Anticipated Wait Time to Appointment: Confirmed

Comments for Referrer and Patient:
 EXAMPLE MESSAGING: Your referral has been accepted for endoscopy and will be scheduled at your local hospital. You will receive a phone call close to your appointment date with instructions.

Any scheduling changes will send an email notification to the referrer and the patient.

Needs review:

A completed version of the eReferral will be imported into your EMR for continued management. You may choose to print or save the eReferral, see tip sheet – *Printing eReferrals*.

The eReferral will be in the Completed folder in Ocean.

eReferral Archival

eReferrals in a terminal state (completed, declined, or cancelled) will archive from Ocean, no less than 365 days after initially sent. If an eReferral has been completed in error, you can mark it 'Incomplete' to continue managing the eReferral within Ocean.

- Launch the patient portal from the EMR or find the eReferral in the Completed folder
- Click the 'Mark Incomplete' button in the footer
- The eReferral will move to the Pending Booking folder in Ocean

Scheduling

Appointment: Medium: Anticipated Wait Time to Appointment: Confirmed

Comments for Referrer and Patient:
 EXAMPLE MESSAGING: Your referral has been accepted for endoscopy and will be scheduled at your local hospital. You will receive a phone call close to your appointment date with instructions.

Any scheduling changes will send an email notification to the referrer and the patient.

Needs review: