

# Med Access User Guide

For Ocean Senders



June 12, 2026



## Med Access User Guide for Ocean Senders

This user guide supports your daily work with Ocean eReferral by providing clear, step-by-step instructions for navigating key features and workflows.

If you require additional support, please submit a ticket at [referralsns.ca/ask](https://referralsns.ca/ask) for assistance.

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## Sending an eReferral

Med Access users can send eReferrals by launching directly from a patient's chart into the Ocean Portal. When submitting an eReferral, patient demographics and some relevant clinical information (CPP – Cumulative Patient Profile) are populated from the patient's chart. Any supporting documentation can be attached from the patient's record. Once the referral form is completed and submitted, the eReferral is securely sent through Ocean to the appropriate Central Intake team for review and processing.

Please note, attaching supporting documents can be done at any step and more information on adding attachments can be found in article Adding Attachments – Med Access.

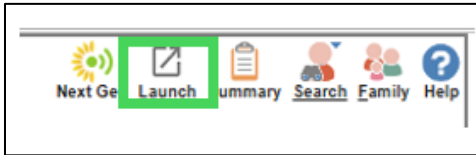
### Key Considerations

- Ensure there are no errors in the patient's Date-of-Birth (DOB) and Health Card Number (HN). These fields cannot be updated once the eReferral has been sent.
- If a patient does not have a health card, another identifying insurance number may be used (e.g., Military ID, Student Health ID such as BlueCross, Interim Federal Health Program (IFHP) Number, etc).
- Include all relevant clinical information and documentation when sending the eReferral, as eReferrals are prioritized based on the information provided.
- Patients do not receive email notifications for eReferrals sent to Diagnostic Imaging services.
- If you're unable to finish an eReferral you've started, you can "Save for Later". This option can be found at the bottom of the eReferral referral form. The eReferral will be found in the Incomplete folder of your eReferrals page in Ocean to finish later. Please note that incomplete eReferral will only be available to finish for 30 days.
- The first time that you send an eReferral you will need to accept the Regional Authority agreement located beside the "Send eReferral" button"

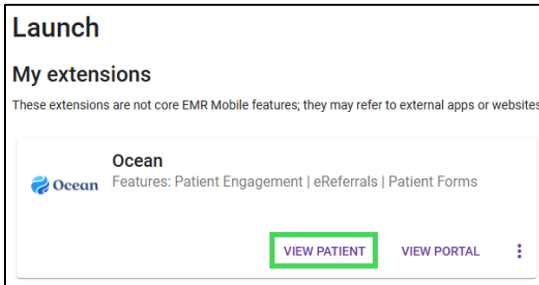
### Steps

1. Open the patient's chart in Med Access
2. Select relevant supporting documents to attach. Please see Adding Attachments – Med Access for more information.

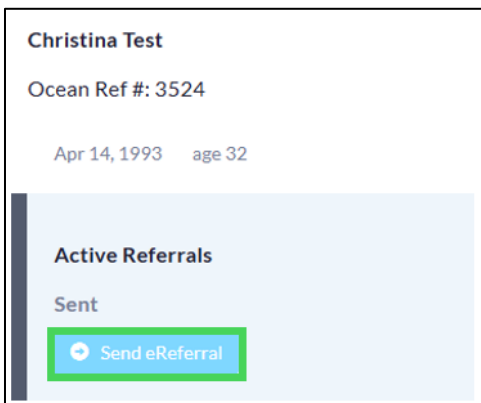
3. Click Launch from the patient's chart.



4. In the pop-up window, select View Patient.



5. Under Active Referrals, select Send eReferral

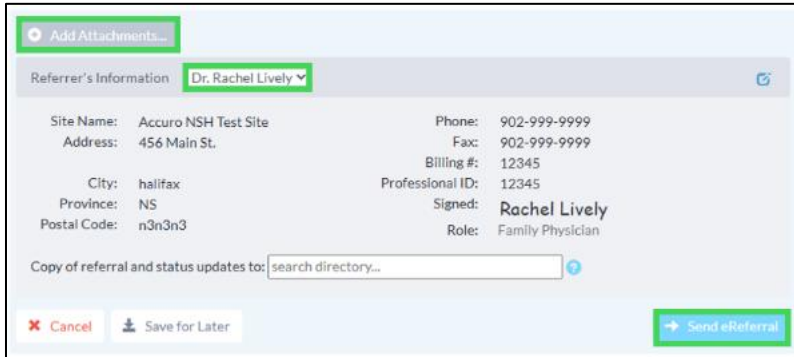


6. Search for or select a listing you wish to send the referral to (e.g., Central Intake – Surgery, NSH/IWK Diagnostic Imaging – Provincial Queue, or a specific provider).

7. Select the Health Service Offering of interest (e.g., CT) and click Send eReferral



8. Review the patient's demographic information to confirm you've selected the correct patient.
9. Complete the remainder of the eReferral form.
10. If using the delegate feature to send on behalf of your provider, select the appropriate provider from the dropdown list, if applicable.
11. Click Send eReferral.



**Add Attachments...**

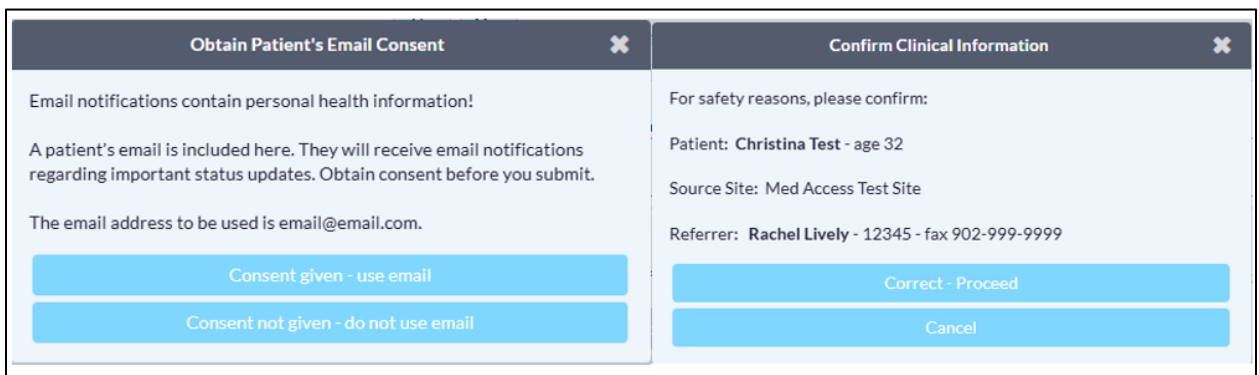
Referrer's Information: **Dr. Rachel Lively**

Site Name:	Accuro NSH Test Site	Phone:	902-999-9999
Address:	456 Main St.	Fax:	902-999-9999
City:	halifax	Billing #:	12345
Province:	NS	Professional ID:	12345
Postal Code:	n3n3n3	Signed:	<b>Rachel Lively</b>
		Role:	Family Physician

Copy of referral and status updates to:

**Cancel** **Save for Later** **Send eReferral**

12. A confirmation pop-up will appear. If an email address has been entered for the patient, you must acknowledge that the patient has consented to receiving notifications by email. You will then be prompted to confirm the clinical information before submitting the referral.



**Obtain Patient's Email Consent**

Email notifications contain personal health information!

A patient's email is included here. They will receive email notifications regarding important status updates. Obtain consent before you submit.

The email address to be used is email@email.com.

**Consent given - use email**

**Consent not given - do not use email**

**Confirm Clinical Information**

For safety reasons, please confirm:

Patient: **Christina Test** - age 32

Source Site: Med Access Test Site

Referrer: **Rachel Lively** - 12345 - fax 902-999-9999

**Correct - Proceed**

**Cancel**

Your sent eReferral will now appear as an active task in the patient's chart in Med Access.

## Adding Attachments

### Pre-Requisites

- Downloaded the Med Access Extension
- Reviewed Sending an eReferral – Med Access

Supporting documents can be attached to an eReferral in Ocean to provide additional clinical information that may assist the receiving provider in reviewing and prioritizing the eReferral. For Med Access users, attachments can be added directly from the patient’s chart when submitting the eReferral. Documents can also be attached to existing eReferrals.

Including appropriate documents can help support eReferral review and may reduce delays caused by requests for additional information. Please see Tests / Exams Required or Requested to Accompany Surgical eReferrals for more information.

### Common attachments include:

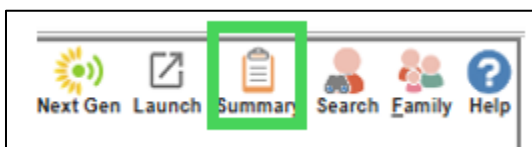
- Pathology reports
- Laboratory results
- Imaging reports

### Best Practices for Attachments

- Ensure that documents are clear and complete. Attach the most relevant clinical information to support eReferral review and prioritization.
- Combine related pages into a single PDF when possible, to keep attachments organized and easier to review.
- Attachment file types can be one of the following: jpg, jpeg, png, tiff, tif, mp3, mp4, txt, or pdf.

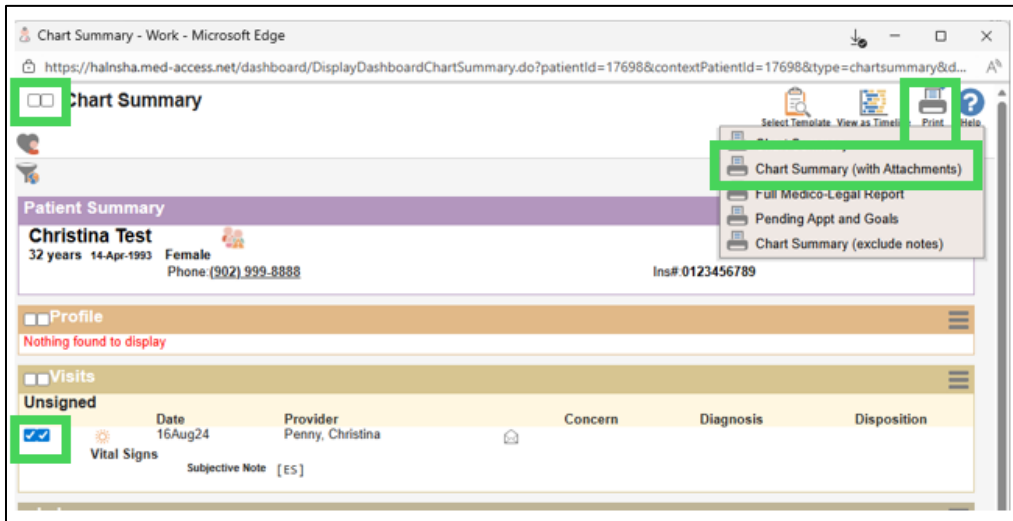
### Including Attachments When Sending an eReferral

1. Open the patient’s chart in Med Access.
2. Click Summary.



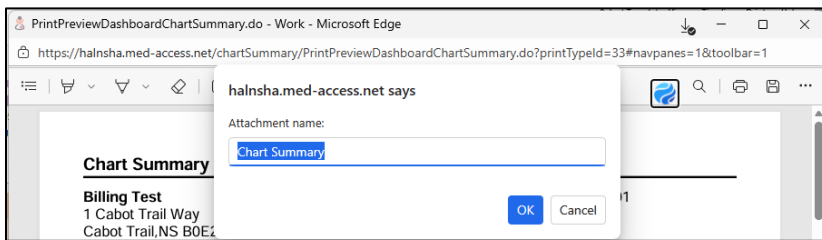
3. Deselect the checkbox next to Chart Summary.
4. Select the checkbox on the right next to the result or report you would like to attach.

5. Click Print à Chart Summary (With Attachments)



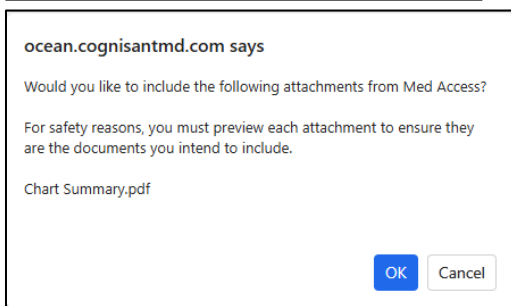
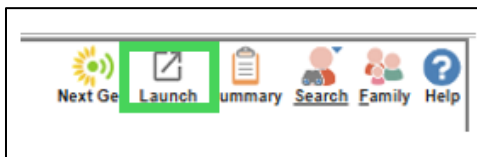
6. In the pop-up window, select the blue ball icon to Select for Ocean.

7. Review the attachment name and update it, if necessary, then click OK.



8. Close out of pop-up window and the Chart Summary.

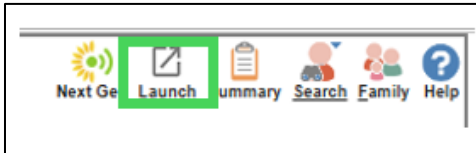
9. Click Launch from the patient's chart and continue the steps for sending an eReferral. Once an eReferral form opens, a pop up window will appear asking if you would like to include the attachment on the eReferral.



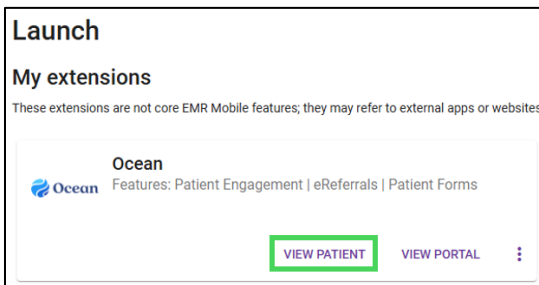
**Tip:** If you forgot to include an attachment before selecting a service to refer to, follow Steps 1-8 and then click Add Attachments on the eReferral form before submitting the eReferral.

## Adding Attachments to an eReferral That Has Already Been Sent

1. Follow Steps 1-8 above to prepare the attachment.
2. Click Launch from the patient's chart.



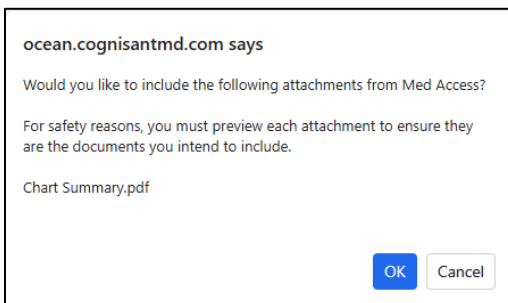
3. In the pop-up window, select View Patient.



4. Select the eReferral you previously sent.

Date Sent	Description	Referrer	Source Site	Provider
Feb 18, 2026 3:43 pm	Ultrasound	Rachel Lively	Med Access Test Site	TEST NSH/IWK Diagnostic In Queue

5. Click OK to the pop-up window that appears



6. Use the eye icon to preview the attachment if needed. The “x” icon can be used to remove the file if necessary.
7. Select the recipient from the dropdown list.
8. Click Sent to deliver the attachment.

Messaging

To:

## Importing eReferrals

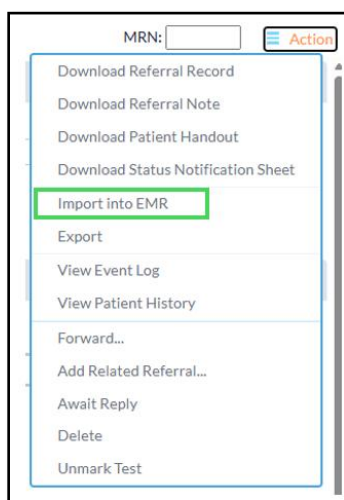
Med Access and Accuro users can expect their Electronic Medical Record (EMR) to automatically import eReferrals that are sent, received and accepted, or booked and completed. However, there may be situations where a manual import of an eReferral, at its current state, is required to ensure the most up-to-date documentation is reflected in the EMR. Common scenarios where users may manually import an eReferral are: Cancelled eReferrals, Declined eReferrals, updated eReferrals.

### Key Considerations

- Senders will only see the initially sent eReferrals in their EMR.
- eReferrals in Declined, Cancelled, or Completed state will archive from Ocean after one year. Archived eReferrals cannot be retrieved.
- If declining an eReferral rather than accepting it, copy the patient's health card number first so you can easily locate the eReferral after declining and import it into your EMR with the declined reason.

### How to Manually Import an eReferral in Ocean

1. Locate the eReferral that needs to be manually imported into the patient's chart and click it to open.
2. Once the eReferral opens, click the **Action menu** located in the top-right corner.
3. Select the **"Import into EMR"** option.



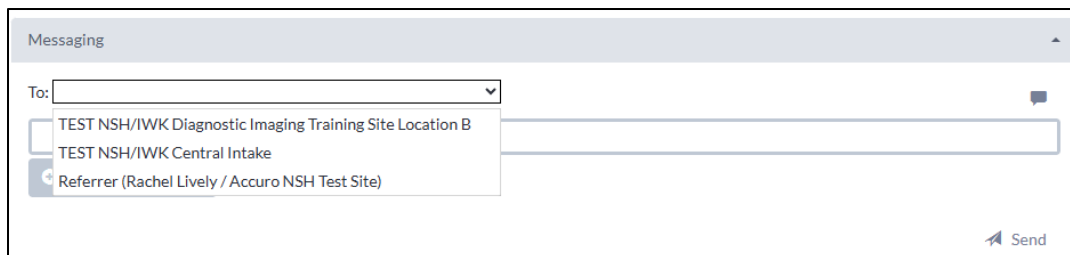
This action will trigger the entire eReferral to download into the patient's chart.

## Secure Messaging

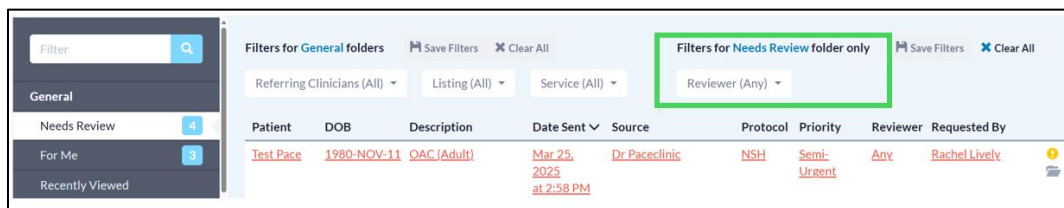
The messaging tool in Ocean allows users to securely communicate about specific eReferrals directly within the platform. It enables senders and receivers to share updates, clarify information, request additional details, and coordinate care without relying on external emails or phone calls, helping to streamline workflow, reduce errors, and maintain a record of communication tied to each eReferral.

### Sending a message:

1. Navigate to the patient's chart in Med Access
2. Click Launch
3. Select View Patient
4. Click to open the eReferral you wish to send a message on
5. Under the Messaging section, click **To:** to view a list of available recipients.
6. Select the recipient you want to send the message to.
7. Type your message into the **blank free-text field**. Attachments can also be included.
8. Click **Send** to deliver your message.



### Receiving a message:



Patient	DOB	Description	Date Sent	Source	Protocol	Priority	Reviewer	Requested By
Test Pace	1980-NOV-11	OAC (Adult)	Mar 25, 2025 at 2:58 PM	Dr Paceclinic	NSH	Semi-Urgent	Any	Rachel Lively

1. From Med Access, click Launch.
2. Select View Portal from the Ocean extension.
3. Navigate to the **Needs Review folder**.
4. In **"Filters for Needs Review folder only"**, set the Reviewer dropdown to **"Any"**.
5. Open first eReferral on the list.

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6. Review the message and complete the required task. (e.g. attach blood work, provide additional information)
7. Click **Reviewed and Next (Close)**.
8. Repeat Steps 4-6 for the next eReferral, if applicable.

**Please remember** to check the Needs Review folder regularly to stay up to date on messages. Timely responses help ensure patient care is not delayed.

## Cancelling eReferrals

If an eReferral is no longer needed, it can be cancelled in Ocean. Cancelling notifies the receiving site that the referral is no longer required and helps prevent unnecessary appointment bookings. Common cancellation reasons include patients seen privately, patients moving out of province, or cases where the service is no longer required, among other reasons.

### Key Considerations

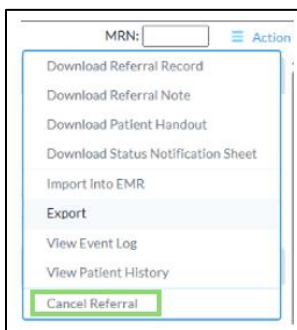
- eReferrals sent to diagnostic imaging cannot be cancelled. Instead, please use the **Messaging section** to manage any eReferrals requiring cancellation.
- eReferrals cancelled by diagnostic imaging will appear as declined.

### Steps

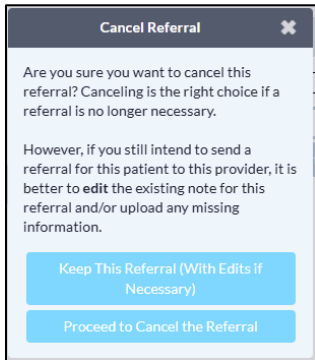
1. Navigate to the patient's chart in Med Access.
2. Click Launch
3. Select View Patient
4. Click to open the eReferral you wish to cancel.

Date Sent	Description	Referrer	Source Site	Provider
Apr 16, 2026 4:30 pm	General Surgery	April McCabe	Med Access Test Site	Accuro Specialists Test Site-Brenda Mosher

5. Click **Action** in the top-right corner.
6. Click **Cancel Referral**



7. A pop up will appear asking if you are sure you want to cancel the referral, click **Proceed to Cancel** the Referral.



**Cancel Referral** ✕

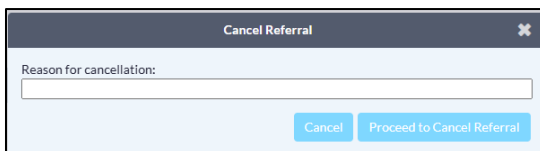
Are you sure you want to cancel this referral? Canceling is the right choice if a referral is no longer necessary.

However, if you still intend to send a referral for this patient to this provider, it is better to **edit** the existing note for this referral and/or upload any missing information.

[Keep This Referral \(With Edits if Necessary\)](#)

[Proceed to Cancel the Referral](#)

8. Enter a **Reason for Cancellation** in the blank field



**Cancel Referral** ✕

Reason for cancellation:

[Cancel](#) [Proceed to Cancel Referral](#)

9. Click **Proceed to Cancel Referral**.

A message will be sent to the receiving provider, notifying them of the cancellation.

## Modifying an eReferral

In some cases, patient information may change after an initial referral has been sent to a consulting provider or service. Instead of sending a new referral with the updated information, the existing eReferral can be updated to reflect the patient’s most current information. Common modifications are: Patient demographics, updates to patient condition, updates to travel locations, etc.

### Key Considerations

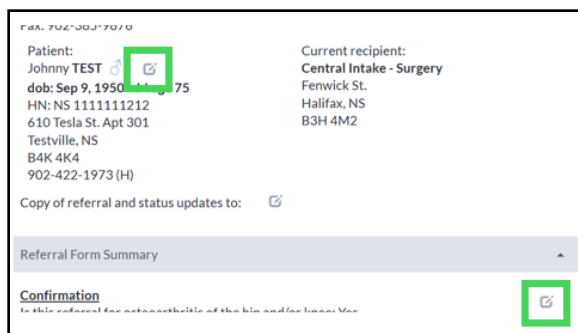
- Birthdates and health card numbers cannot be changed on eReferrals.
- eReferrals sent to Diagnostic Imaging cannot be modified; please use the Messaging area to notify Diagnostic Imaging staff of any updates.



### How to Modify an eReferral in Ocean

1. Navigate to the patient’s chart in Med Access.
2. Click Launch
3. Select View Patient
4. Click to open the eReferral you wish to modify.


Date Sent	Description	Referrer	Source Site	Provider
Apr 16, 2026 4:30 pm	General Surgery	April McCabe	Med Access Test Site	Accuro Specialists Test Site-Brenda Mosher


5. Select the Edit button next to the information you want to update.




Patient: Johnny TEST   
 dob: Sep 9, 1950   
 HN: NS 111111212  
 610 Tesla St. Apt 301  
 Testville, NS  
 B4K 4K4  
 902-422-1973 (H)

Current recipient:  
 Central Intake - Surgery  
 Fenwick St.  
 Halifax, NS  
 B3H 4M2

Copy of referral and status updates to: 

Referral Form Summary 

Confirmation 

6. Enter the updated information in the appropriate field of the pop up window.
7. Click OK to save your changes.
  - a. When updating the Referral Form Summary, the OK button is located at the top of the form.



Modifications made to sent eReferrals will flag the referral in the Needs Review folder for all stakeholders, except in cases where the eReferral has not yet been accepted.

## Locating eReferrals in Ocean

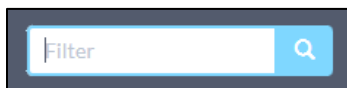
The Filter field in Ocean can be used to locate eReferrals for a specific patient. You can filter by the patient’s surname or Health Card Number (HN). Filtering by surname only searches the first three letters of the name, so common surnames (for example, MacDonald) may return multiple results and require additional filtering.

### Key Considerations

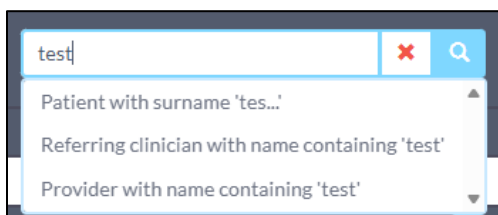
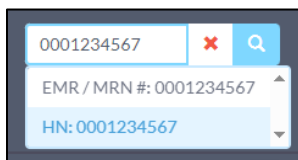
- If the eReferral only appears in Sent (All) or Received (All), filters applied in another folder may affect your search. Resetting your folder filters may be necessary.
- Health card numbers that include letters cannot be searched.
- Patients without a health card number can be searched using an alternate identifier, if one was entered on the referral. (e.g., Military ID, IHFP Number, Student ID)

### Steps to Filtering

1. Locate the Filter field.



2. Enter the patient’s full health card number or last name.



3. From the dropdown list that appears, select “HN:” or “Patient with surname”.



Awaiting Response	0
Accepted as Walk-In	0
Pending Booking	1
Booked Unconfirmed	0
Booked Confirmed	0

Most folder counts will reduce, except for the folders that containing the eReferral matching the entered health card number or surname.

## Definitions: Ocean Sent Folder

### Sent Folders

**Needs Review:** Similar to a fax machine or voicemail, this folder contains eReferrals with new messages or eReferrals that have been assigned to a specific user within your Ocean site.

**For Me:** Contains eReferrals that have been assigned specifically to you for review.

**Recently Viewed:** Contains eReferrals recently viewed within last 48 hours.

**Sent (All):** Contains all eReferrals sent from your Ocean site, excluding those that have archived.

**Incomplete:** Contains eReferrals that have been started but not yet completed or sent.

**Awaiting Response:** Contains eReferrals that have been sent but not yet accepted by the receiving site.

**Accepted as Walk-In:** Not currently used by Nova Scotia Health or IWK Health

**Pending Booking:** Contains eReferrals that have been accepted by a receiving site but have not yet been booked.

**Booked Unconfirmed:** Contains eReferrals that have been booked, but the appointment has not yet been confirmed. Patients receiving appointment letters by mail are generally considered unconfirmed.

**Booked Confirmed:** Contains eReferrals that have been booked and confirmed, typically after the patient has been notified by phone.

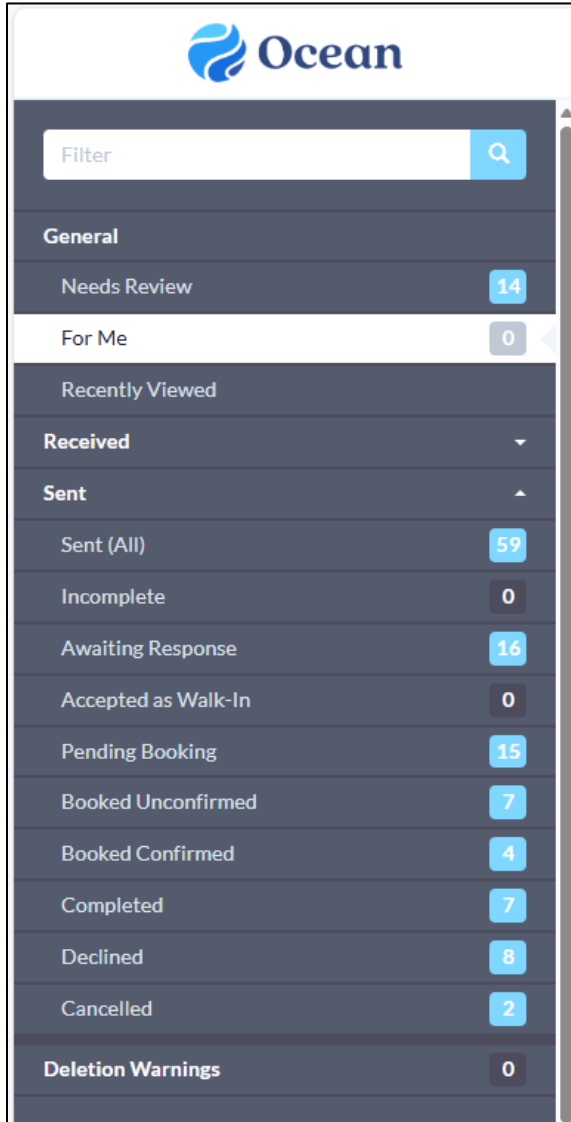
**Completed:** Contains completed eReferrals where the patient has already been seen by the consulting specialist.

**Declined:** Contains eReferrals that have been declined by a receiving site. When an eReferral is declined, a notification will appear in the Needs Review folder.

**Cancelled:** Contains eReferrals that have been cancelled.

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**Deletion Warnings:** Contains eReferrals that are nearing archival. eReferrals will only archive if they are in a Completed, Declined, or Cancelled state.



The screenshot shows the 'Ocean' eReferrals dashboard. At the top, there is a search bar labeled 'Filter' with a magnifying glass icon. Below the search bar, the dashboard is organized into sections: 'General', 'Needs Review' (14), 'For Me' (0), 'Recently Viewed', 'Received', and 'Sent'. The 'Sent' section is expanded, showing a list of referral statuses with their respective counts:

Status	Count
Sent (All)	59
Incomplete	0
Awaiting Response	16
Accepted as Walk-In	0
Pending Booking	15
Booked Unconfirmed	7
Booked Confirmed	4
Completed	7
Declined	8
Cancelled	2
<b>Deletion Warnings</b>	<b>0</b>