

# Non-Integrated User Guide

For Ocean Senders



June 15, 2026

## Non-Integrated 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

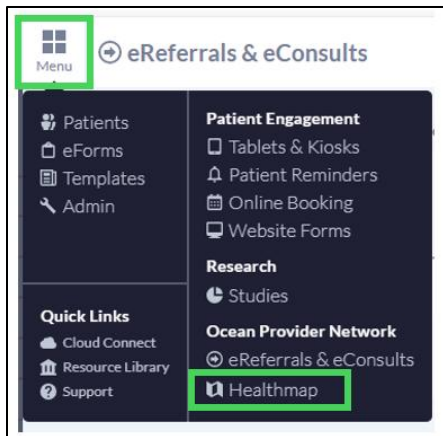
Users accessing Ocean through the Ocean Portal (non-integrated) can send eReferrals directly through the Ocean Healthmap. When submitting an eReferral, patient demographics and clinical information must be entered manually, and any supporting documentation should be uploaded as attachments. Once the referral form is completed and submitted, the eReferral will be securely sent to a Central Intake team for review and processing.

### Key Considerations

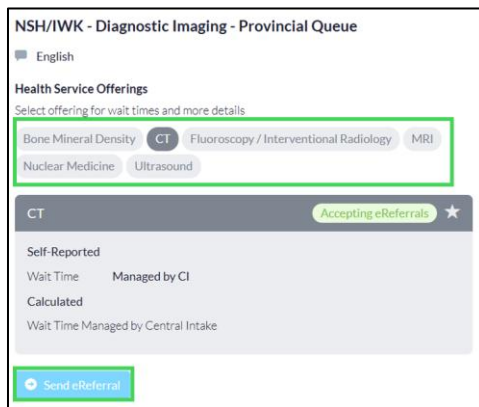
- Ensure there are no errors in the patient’s Date-of-Birth (DOB) and Health Card Number (HN). These fields cannot be updated once the eReferral has been sent.
- If a patient does not have a health card, another identifying insurance number may be used (e.g., Military ID, Student Health ID such as BlueCross, 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 left of the eReferral form. The eReferral will be found in the Incomplete folder of your eReferrals page in Ocean to finish later. Please note, incomplete eReferrals 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.
- eReferrals can be printed or saved after sending for documentation retention.

### Steps

1. Log into the Ocean portal. [Ocean Sign In](#)
2. Click Menu in the header and select Healthmap under Ocean Provider Network.



3. Search for or select a listing you wish to send the eReferral to (e.g., Central Intake – Surgery, NSH/IWK Diagnostic Imaging – Provincial Queue, or a specific provider).
4. Select the Health Service Offering of interest (e.g., CT) and click Send eReferral



5. Enter the patient’s demographic information in the required fields.
6. Complete the remainder of the eReferral form. More information about completing specific eReferrals forms can be found in Chapter 2 – Filling out an eReferral Form and Accompany Attachments.
7. Attach any relevant supporting documentation, if applicable. More information about adding attachments can be found in article, Adding Attachments – Med Access.
8. If using the delegate feature to send on behalf of your provider, select the appropriate provider from the dropdown list.
9. 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:

10. 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.

<p><b>Obtain Patient's Email Consent</b></p> <p>Email notifications contain personal health information!</p> <p>A patient's email is included here. They will receive email notifications regarding important status updates. Obtain consent before you submit.</p> <p>The email address to be used is email@email.com.</p> <p><input type="button" value="Consent given - use email"/></p> <p><input type="button" value="Consent not given - do not use email"/></p>	<p><b>Confirm Clinical Information</b></p> <p>For safety reasons, please confirm:</p> <p>Patient: <b>Christina Test</b> - age 32</p> <p>Source Site: Med Access Test Site</p> <p>Referrer: <b>Rachel Lively</b> - 12345 - fax 902-999-9999</p> <p><input type="button" value="Correct - Proceed"/></p> <p><input type="button" value="Cancel"/></p>
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**Optional but recommended for record keeping:**

11. In the next pop-up window, click the Print button.

**eReferral Sent**

The referral was sent successfully.

**Summary:**

Sent referral to TEST NSH/IWK Diagnostic Imaging Provincial Queue  
 1796 Summer St, Halifax, NS, B3H 3A7  
 This central intake listing may not always show updates to the referral status in Ocean. eReferral updates will appear for service providers that provide details on appointment dates and times.

Referral Generated Date/Time: Apr 24, 2026 - 12:18

**Exam(s) Requested**  
 US Thyroid

**Clinical Information**  
 Test

**Exam Timing**  
 Next Available

You may press Ctrl-C to copy this text and Ctrl-V to paste it into your EMR.

Include map

12. A new internet tab will open where you can save or print the PDF.



## Adding Attachments

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. Users without an integrated EMR can upload attachments directly through the Ocean Portal from their computer either when sending the eReferral or at any time afterward.

Including appropriate documents can help support eReferral review and may reduce delays caused by requests for additional information.

### Common attachments include:

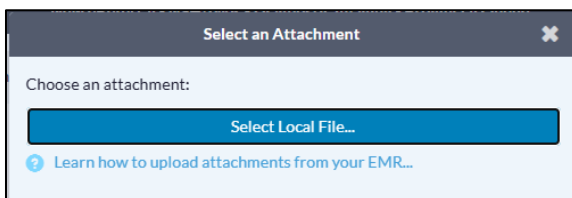
- Pathology reports
- Laboratory results
- Imaging reports

### Best Practices for Attachments

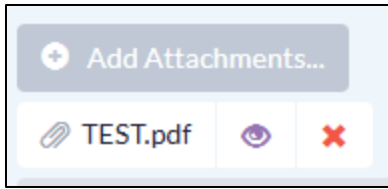
- Ensure that documents are clear and complete. Attach the most relevant clinical information to support eReferral review and prioritization.
- Combine related pages into a single PDF when possible, to keep attachments organized and easier to review.
- Attachment file types can be one of the following: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

### Including Attachments When Sending an eReferral

1. Save the document and store it in an easy-to-access folder on your computer.
2. Continue the steps for submitting an eReferral.
3. While in the eReferral form, click Add Attachments.
4. In the pop-up window, click Select Local File.



5. Choose the saved file from Step 1.
6. Use the eye icon to preview the attachment if needed. The “x” icon can be used to remove the file if necessary.
7. Once the eReferral is complete, click Send eReferral



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

1. Save the document and store it in an easy-to-access folder on your computer.
2. Sign into the Ocean Portal.
3. Locate the appropriate eReferral by entering the patient's Health Card Number (HN) in the Filter field.
4. Open the eReferral.
5. In the Messaging section, select the recipient from the dropdown list.
6. Click Add Attachments.
7. In the pop-up window, click Select Local File.
8. Choose the saved file from Step 1.
9. Use the eye icon to preview the attachment if needed. The "x" icon can be used to remove the file if necessary.
10. Click Send to deliver the attachment.



## 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

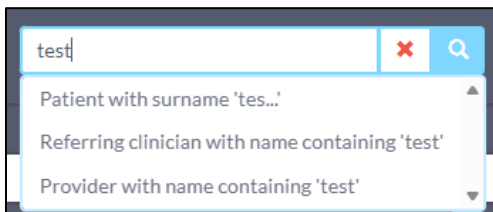
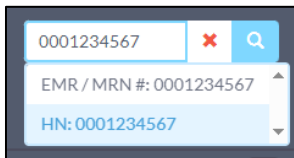
- If the eReferral only appears in Sent (All) or Received (All), filters applied in another folder may affect your search. Resetting your folder filters may be necessary.
- Health card numbers that include letters cannot be searched.
- Patients without a health card number can be searched using an alternate 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



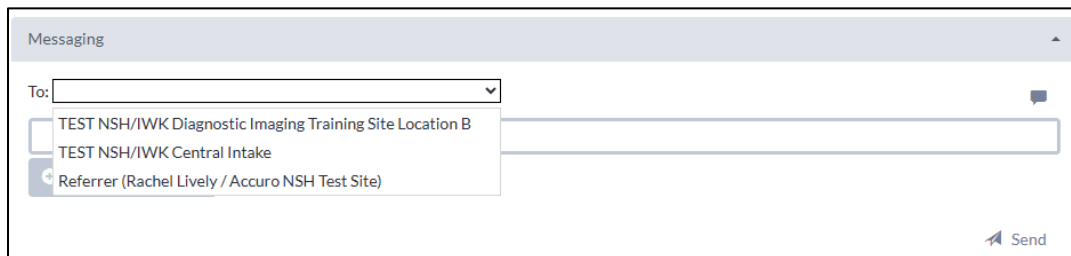
Most folder counts will reduce, except for the folders that containing the eReferral matching the entered health card number or surname.

## Secure Messaging

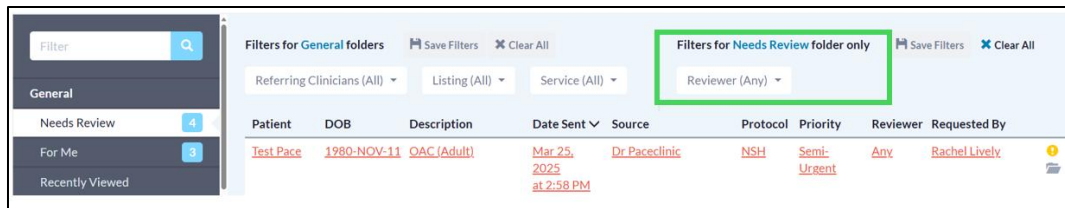
The messaging tool in Ocean allows users to securely communicate about specific eReferrals directly within the platform. It enables senders and receivers to share updates, clarify information, request additional details, and coordinate care without relying on external emails or phone calls, helping to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

### Sending a message:

1. Sign into Ocean at [ocean.cognisantmd.com](http://ocean.cognisantmd.com) and enter the patient’s health card number into the Filter field.
2. Locate and open eReferral of interest.
3. Under the Messaging section, click **To:** to view a list of available recipients.
4. Select the recipient you want to send the message to.
5. Type your message into the **blank free-text field**. Attachments can also be included.
6. Click **Send** to deliver your message.



### Receiving a message:



1. Sign into Ocean at [ocean.cognisantmd.com](http://ocean.cognisantmd.com)
2. Navigate to the **Needs Review folder**.
3. In **“Filters for Needs Review folder only”**, set the Reviewer dropdown to **“Any”**.
4. Open first eReferral on the list.
5. Review the message and complete the required task. (e.g. attach blood work, provide additional information)
6. Click **Reviewed and Next (Close)**.



7. 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

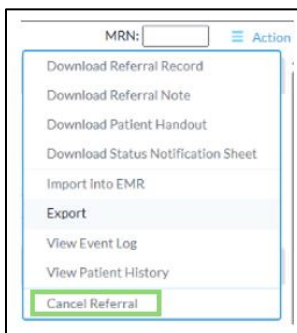
If an eReferral is no longer needed, it can be cancelled in Ocean. Cancelling notifies the receiving site that the referral is no longer required and helps prevent unnecessary appointment bookings. Common cancellation reasons include patients seen privately, patients moving out of province, or cases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

### Key Considerations

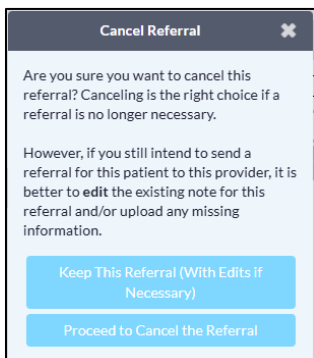
- eReferrals sent to diagnostic imaging cannot be cancelled. Instead, please use the **Messaging section** to manage any eReferrals requiring cancellation.
- eReferrals cancelled by diagnostic imaging will appear as declined.

### Steps

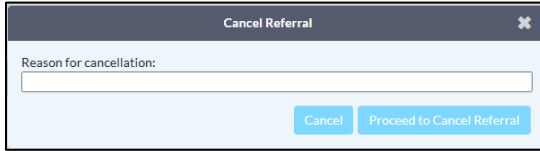
1. Sign into Ocean at **ocean.cognisantmd.com** and enter the patient's health card number into the **Filter field**.
2. Locate and open the eReferral you wish to cancel
3. Click **Action** in the top-right corner.
4. Click **Cancel Referral**



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



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



Cancel Referral

Reason for cancellation:

Cancel Proceed to Cancel Referral

7. Click **Proceed to Cancel Referral**.

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

## Modifying an eReferral

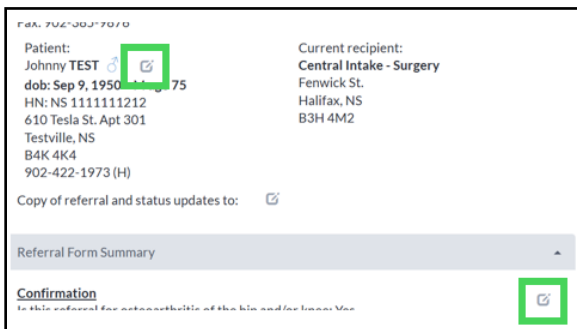
In some cases, patient information may change after an initial referral has been sent to a consulting provider or service. Instead of sending a new referral with the updated information, the existing eReferral can be updated to reflect the patient's most current information. Common modifications are: 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. Sign into Ocean at [ocean.cognisantmd.com](http://ocean.cognisantmd.com) and enter the patient's health card number into the Filter field.
2. Locate and open the eReferral you wish to modify.
3. Select the Edit button next to the information you want to update.




Ref: 7023027070

<b>Patient:</b> Johnny TEST  dob: Sep 9, 1950  HN: NS 111111212 610 Tesla St. Apt 301 Testville, NS B4K 4K4 902-422-1973 (H)	<b>Current recipient:</b> Central Intake - Surgery Fenwick St. Halifax, NS B3H 4M2
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Copy of referral and status updates to: 

Referral Form Summary

**Confirmation** 

In this referral for orthopedic of the hip and for lower leg

4. Enter the updated information in the appropriate field of the pop-up window.
5. 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.

## 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.

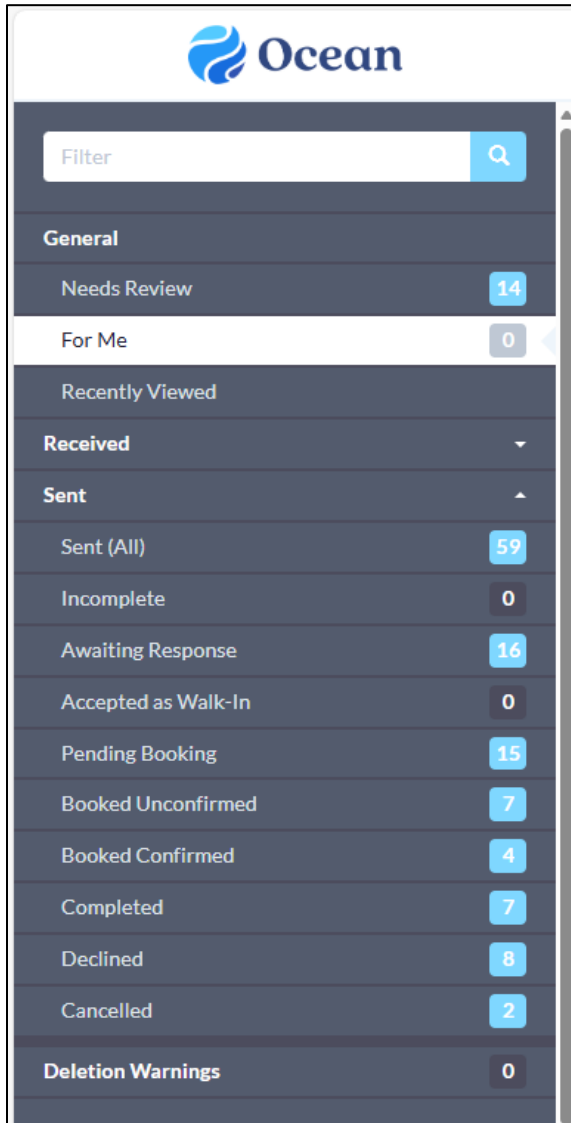
**Completed:** Contains completed eReferrals where the patient has already been seen by the consulting specialist.

**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.

# eServices

**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' eServices interface. At the top is the 'Ocean' logo. Below it is a search bar labeled 'Filter' with a magnifying glass icon. The main sidebar menu is divided into sections: 'General', 'For Me', 'Recently Viewed', 'Received', and 'Sent'. The 'Sent' section is expanded, showing a list of referral statuses with their respective counts in blue boxes. The 'Deletion Warnings' status is highlighted in a darker blue.

Category	Count
Needs Review	14
For Me	0
Received	-
Sent	-
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>