

Non-integrated User Guide

For Ocean Receivers



June 15, 2026



Non-Integrated User Guide for Ocean Receivers

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 for assistance.

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Receiving an eReferral

This document outlines the five key steps required for each received eReferral. Completing the five steps ensures full transparency for both the referring provider and the patient regarding appointment details, while also closing the loop on the eReferral lifecycle. In addition, the data collected supports resource allocation, system planning, and performance measurement by identifying bottlenecks and opportunity for improvement.

Five Key Steps

1. Accept or Decline Referral
2. Add Anticipated Wait Time to Appointment
3. Add Appointment
4. Complete Review Note
5. Complete Referral

Key Considerations:

- The steps within this document may differ depending on clinic workflow and user responsibility. This outlines the recommended workflow for receiving eReferrals
- If an eReferral is incomplete or requires more information, please use the messaging feature to contact the referrer/Central Intake. See resources *Secure Messaging* and *Awaiting Reply Folder* for further guidance
- Ocean sites should be reviewed daily for new referrals. Urgent and semi-urgent referrals are expected to be accepted within three business days, while routine referrals should be accepted within 14-21 days. An anticipated wait-time or appointment date is also required on the referral within this 14–21day timeframe.
- Review notes are customizable and may have multiple selectable options for priority, protocol, and outcome. If your Review note does not match your workflow, please submit a ticket at [Contact Us - ReferralsNS - eReferrals in Nova Scotia](#)
- Completing priority and protocol in Ocean is recommended, as it improves filtering within the system and enhances transparency for the referring provider
- You may choose to print individual referrals or batch print a daily list of referrals, for guidance, please see tip sheet *Printing eReferrals*
- Patients will only receive notifications if an email address is included in the patient information within the General section of the eReferral
- Ocean does not replace notifying patients of appointments. Please continue to contact patients according to your current practice

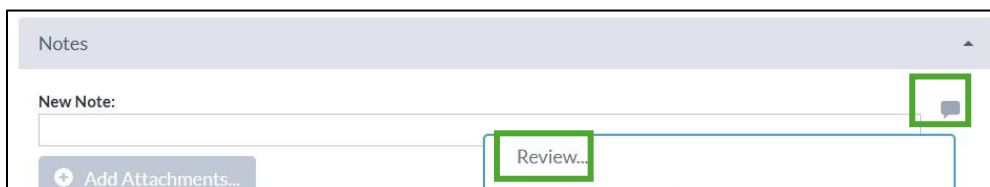
eservices

- Gastroenterologists and general surgeons who perform direct to endoscopy or direct to procedure without a consultation, please refer to tip sheet *Completing a direct to endoscopy/procedure eReferral*
- If the initial Ocean user to review and accept the eReferral is not the user that will be triaging the referral, please refer to tip sheet – *Assigning eReferrals for Review and Managing eReferrals Assigned for Review*

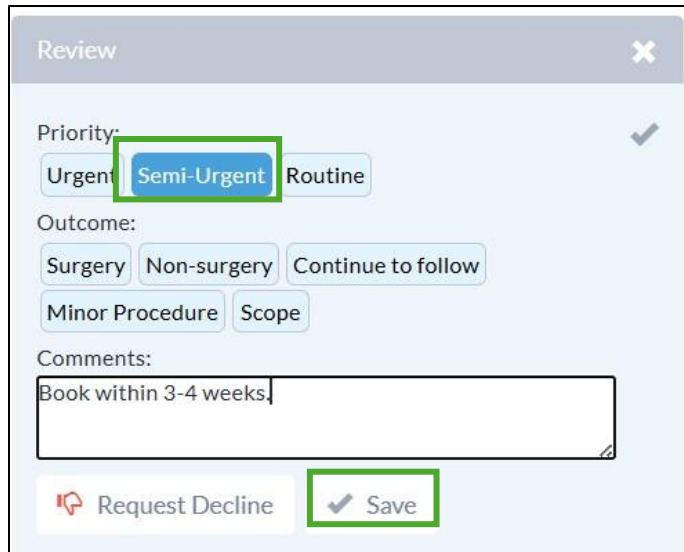
Step 1: Accept (or Decline) an eReferral

New eReferrals are routed through Central Intake – Surgery and then forwarded to the appropriate receiving Ocean site. When this occurs, email notifications are sent to both the referring provider and the patient (if email address is included) to indicate the current location of the referral.

1. Log into Ocean at ocean.cognisantmd.com
2. On the eReferrals and eConsults page, navigate to the ‘New’ status folder under the Received folder grouping. Open the first eReferral in the list and review content
 - a. If the eReferral will not be accepted by your clinic/surgeon, please decline the eReferral - see tip sheet *Declining an eReferral*
3. Complete priority (and protocol, if applicable) on the eReferral
 - a. Click the conversation bubble within the Notes section
 - b. Select ‘Review...’. A Review note will populate on the right of the eReferral



- c. Select priority ‘Urgent’, Semi-Urgent’, or ‘Routine’
- d. Booking comments can be added in the free-text field
- e. Click Save

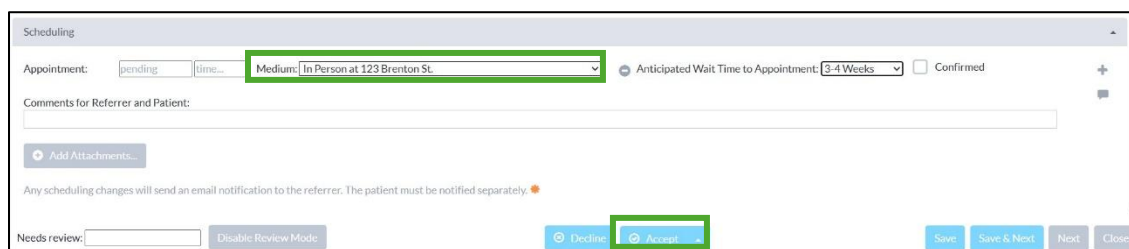


This does not send a notification to the referring provider, but the priority information will be visible within the Notes section of the eReferral.

Dr. April McCabe - Med Access Test Site (NonIntegrated Test Site)	May 21, 2026 at 10:00 AM
Priority: Semi-Urgent	
Comments: Book within 3-4 weeks.	

Step 2: Add an Anticipated Wait Time

4. Scroll to the Scheduling section at the bottom of the eReferral
5. Click the dropdown next to 'Anticipated Wait Time to Appointment:' and select the timeline that best aligns with the expected timeframe to appointment
6. Click the 'Accept' button in the footer of the referral



An email notification will be sent to the referring provider, and the patient, which includes the receiving provider's contact information and the anticipated wait time to the patient's appointment.



In Ocean, the eReferral will move to the ‘Pending Booking’ status folder.

Staff will continue to manage the referral workflow as per current practice, until an appointment is added.

Step 3: Add Appointment

Once the consultation is scheduled in the clinic, the appointment details must be added to the Ocean eReferral. An email notification will be generated to the referring provider and patient. The Ocean notification can include important scheduling information, clinic instructions, or attachments.

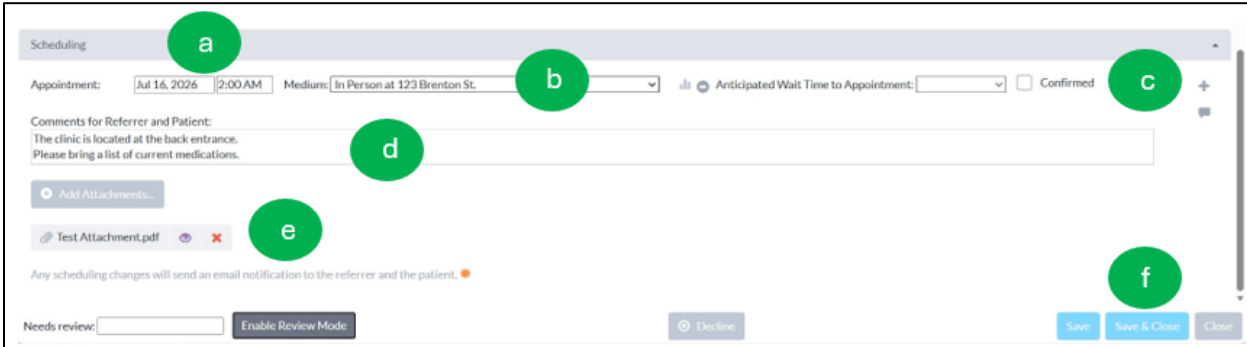
Steps:

1. Schedule the patient as per current practice
2. Login to Ocean and locate the eReferral in the Pending booking folder or search for patient using the filter field, see tip sheet *Locating eReferrals in Ocean*
3. In the Scheduling section of the eReferral:
 - a. Next to ‘Appointment’, click the ‘pending’ field and select the booked date from the calendar. In the ‘time...’ field, select the appointment time from the drop-down menu
 - b. The ‘Medium’ type may be changed to indicate appointment type or location
 - c. Click the ‘Confirmed’ box if you have notified the patient of their appointment. If the box is checked, the eReferral moves to the Booked Confirmed folder. If the box is left unchecked, the eReferral will move to the Booked Unconfirmed folder. Unconfirmed eReferrals can be confirmed by the referring provider in Ocean or by the patient through their email notification. Either of these actions will move the eReferral to the Booked Confirmed folder. Confirmation notifications are visible at the bottom of the referral.

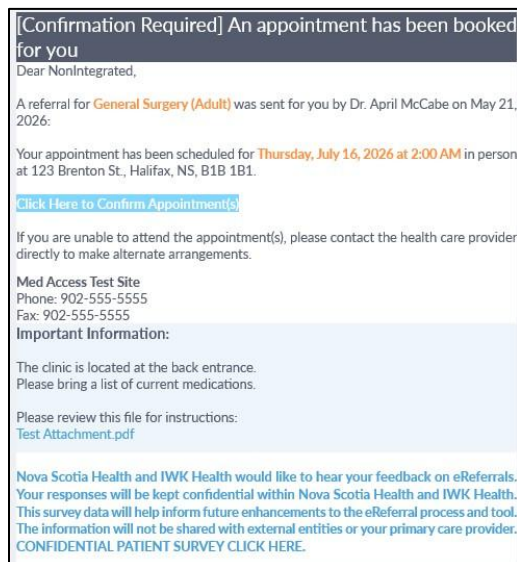
Any scheduling changes will send an email notification to the referrer and the patient.

- ✓ The patient was emailed this information.
- ✓ This appointment information was confirmed by April McCabe (Med Access Test Site) on behalf of the patient on May 8, 2026 at 2:02 PM.

- d. In the ‘Comments for Referrer and Patient’ free text field, you may add clinic information, patient instructions, preparations, etc. Ocean has a canned responses feature which allows sites to save pre-written, standardized responses. Please see tip sheet *Adding Canned Responses*
- e. ‘Add Attachments...’ will allow you to include patient handouts or information packets saved to your desktop
- f. Click ‘Save & Close’



The screenshot shows the 'Scheduling' interface. Callout 'a' points to the 'Appointment' header. Callout 'b' points to the 'Medium' dropdown menu. Callout 'c' points to the 'Confirmed' checkbox. Callout 'd' points to the 'Comments for Referrer and Patient' text area. Callout 'e' points to the 'Add Attachments...' button. Callout 'f' points to the 'Save & Close' button.



In Ocean, the eReferral will move to the Booked Confirmed or Booked Unconfirmed folder, dependent on patient confirmation.

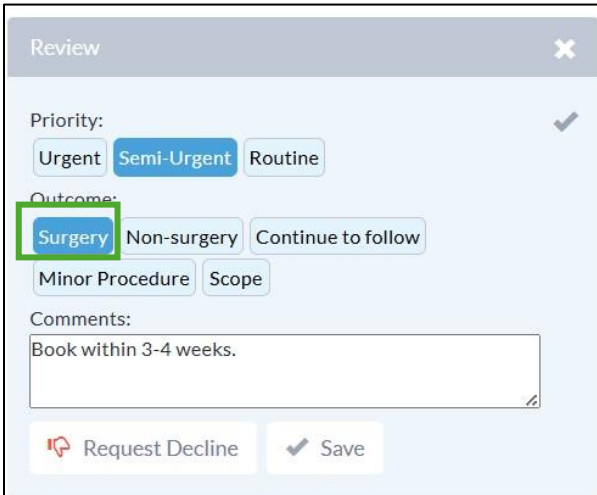
Step 4: Complete Review Note

Once the initial appointment is complete, an outcome must be added to the Ocean Review note and the eReferral must be manually completed. The outcome is an indication of the initial consultation, and choices, which are dependent on Health Service Offering, may include Surgery, Non-Surgery, Continue to Follow, Direct to Endoscopy, etc.

Completion can only be processed after the appointment date has passed.

Steps:

1. Login to Ocean
2. Open the eReferral from the Booked Confirmed or Booked Unconfirmed folder
3. Click the conversation bubble within the Notes section
4. Select 'Review...'
5. A Review note will populate on the right of the eReferral. The original priority and booking comments will remain selected. Click the button that corresponds to the appropriate outcome for the patient's consultation. You may add additional comments.



Step 5: Complete Referral

6. In the footer of the eReferral, click 'Completed'



The Notes section will hide the past review and update to include the outcome and any additional comments, if added.

Notes	
Dr. April McCabe - Med Access Test Site (NonIntegrated Test Site) Review form revised	May 21, 2026 at 10:00 AM
Dr. April McCabe - Med Access Test Site (NonIntegrated Test Site) Priority: Semi-Urgent Outcome: Surgery Comments: Book within 3-4 weeks.	May 21, 2026 at 10:15 AM

In Ocean, the eReferral will move to the Completed folder.

Definitions: Ocean Received 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 review or prioritizing.

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

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

New: Contains eReferrals newly received by your Ocean site for processing

Accepted as eConsult: Contains referrals that were accepted as an eConsult, rather than an eReferral (Available for providers accepting eConsults).

eConsult in Process: Contains eConsults currently in progress (Available for providers accepting eConsults).

Pending Booking: Contains eReferrals that have been accepted by your 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.

Awaiting Reply: Contains eReferrals a user has moved into this folder while awaiting response from a stakeholder.

Received (All): Contains all eReferrals Received by your Ocean site, excluding those that have archived.

Completed: Contains eReferrals completed by your Ocean site.

Forwarded (All): Contains a copy of any eReferrals forwarded from your Ocean site.

Declined: Contains eReferrals that have been declined by your Ocean site.

Cancelled: Contains eReferrals that have been cancelled. eReferrals can only be cancelled by the referring provider or Central Intake at the request of a referring provider.

eServices

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

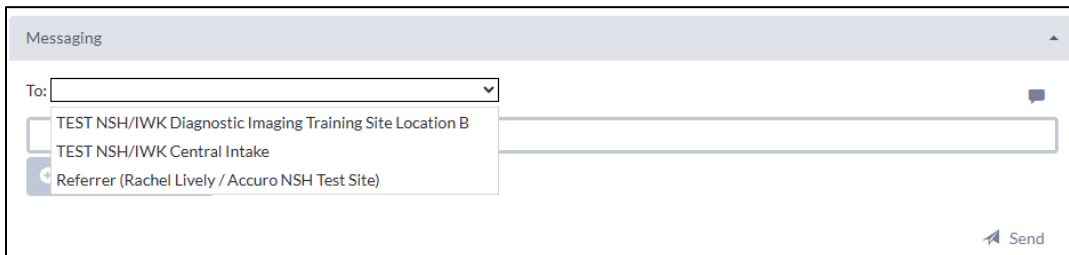
Ocean	
Filter	Q
General	
Needs Review	16
For Me	3
Recently Viewed	
Received ▲	
New	9
Accepted as eConsult	1
eConsult in Progress	0
Pending Booking	22
Booked Unconfirmed	20
Booked Confirmed	1
Awaiting Reply	7
Received (All)	109
Completed	37
Forwarded (All)	19
Declined	9
Cancelled	1
Sent ▼	
Deletion Warnings	0

Secure Messaging

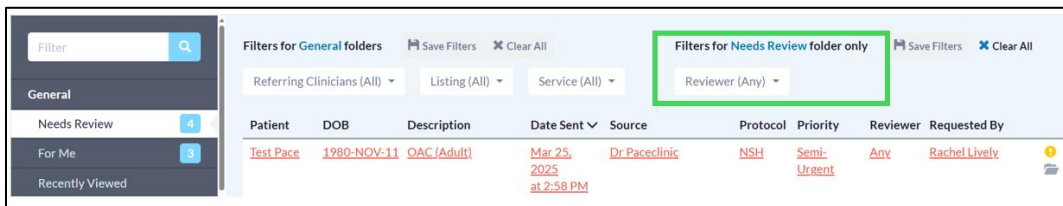
The messaging tool in Ocean allows users to securely communicate about specific eReferrals directly within the platform. It enables senders and receivers to share updates, clarify information, request additional details, and coordinate care without relying on external emails or phone calls, helping to 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 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:



Patient	DOB	Description	Date Sent	Source	Protocol	Priority	Reviewer	Requested By
Test Pace	1980-NOV-11	OAC (Adult)	Mar 25, 2023 at 2:58 PM	Dr Paceclinic	NSH	Semi-Urgent	Any	Rachel Lively

1. Sign into Ocean at 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.

Declining an eReferral

If you receive an eReferral that you are unable to accept or process, you can decline it. When an eReferral is declined, it is returned to the Central Intake team for further action. Central Intake may either redirect the eReferral to another provider or decline it back to the referring provider.

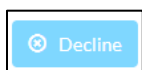
Providing a clear reason for declining is essential to ensure the eReferral is handled appropriately once it is returned to Central Intake.

Key Considerations

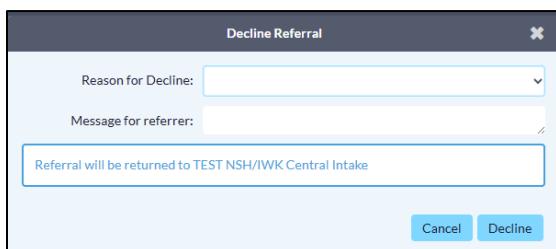
- The Decline button appears blue for new eReferrals and gray for accepted eReferrals
- Declined eReferrals may be hidden depending on your filters. Refer to the Filters tip sheet for more information
- eReferrals in Awaiting Reply status cannot be cancelled. Please refer to the Awaiting Reply tip sheet for more information.
- If additional information is needed, consider using the Messaging section to request details instead of declining the eReferral.
- If an eReferral can be processed **within your Ocean site** by a different provider, the Forwarding action may be of benefit. Please refer to Forwarding an eReferral for more information.

Steps

1. Locate and open the eReferral you wish to decline.
2. Click the Decline button at the bottom of the page



3. In the pop-up window:
 - Select a Reason for Decline from the drop-down list
 - Free text a detailed Message for Referrer. This allows Central Intake to determine how to further process the eReferral when it returns to them.



4. Click Decline to complete the action.

Declined eReferrals remain visible in your sites Declined folder:

- eReferrals shown in red text and underlined indicate they have been declined by both your Ocean site and the Central Intake team.
- Referrals shown in black text indicate they have been redirected by Central Intake to another provider. The new location is shown under the Provider column.

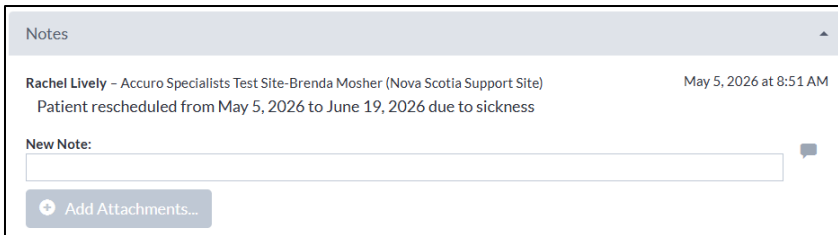
Patient	MRN	DOB	Description	Appointment Date	Date Sent	Source	Site	Provider	Protocol	Priority	Noted
<u>Filter</u> <u>Demo4</u>		<u>1955-JUL-07</u>	<u>Ultrasound</u>		<u>Nov 4, 2025</u> <u>at 8:03 AM</u>	<u>Rachel Lively</u>	<u>TEST NSH/IWK</u> <u>Diagnostic Imaging</u> <u>Sender Site</u>	<u>TEST NSH/IWK</u> <u>Diagnostic Imaging</u> <u>Provincial Queue</u>			
Filter Demo1		1990-FEB-02	Ultrasound		Nov 4, 2025 at 8:00 AM	Rachel Lively	TEST NSH/IWK Diagnostic Imaging Sender Site	Med Access Test Site	US Thyroid	P3	25/11/04 11:56 AM

Rescheduling an Appointment

Rescheduling appointments is a common practice in healthcare clinics. In Ocean, the process closely mirrors the initial steps of booking an appointment. It's important to ensure that appointment details in Ocean accurately reflect the patient's upcoming visit to avoid confusion for both patients and referring providers.

Key Considerations

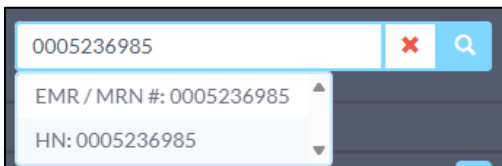
- Referring providers, and often patients, receive email notification when appointment details are added or updated on an eReferral.
- No-show appointments may occur if rescheduling updates are not properly recorded in Ocean.
- Documenting the original appointment details in the Notes section can be helpful for quick reference if questions arise.




Steps to Reschedule an Appointment

After rescheduling the appointment in your scheduling system:

1. Log into Ocean at **ocean.cognisantmd.com** and enter the patient's health card number or surname in the **Filter** field.



2. Locate and open the eReferral. It will typically be in the **Booked Unconfirmed** or **Booked Confirmed** folder.



3. In the **Scheduling** section:
 - a. Enter the new appointment date in the **Pending (date)** field.
 - b. Enter the new appointment time in the **Time** field.

- c. Select **Confirmed**, if appropriate.
- d. Add any additional **Comments for Referrer or Patient**, if appropriate.
- e. Click **Save & Next** (or **Save & Close**)

Scheduling

Appointment: Medium: Anticipated Wait Time to Appointment: Confirmed

Comments for Referrer and Patient:

Any scheduling changes will send an email notification to the referrer. The patient must be notified separately.

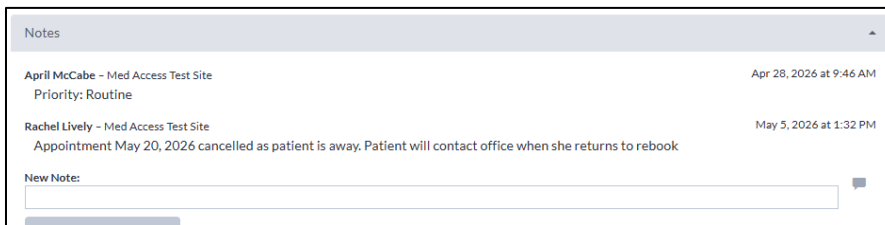
The new appointment will now be reflected in Ocean.

Cancelling an Appointment

Appointment cancellations are a routine part of clinic operations. In Ocean, when an appointment is cancelled, it's important to remove the associated appointment details from the eReferral. Keeping this information up to date helps prevent confusion for both patients and referring providers.

Key Considerations

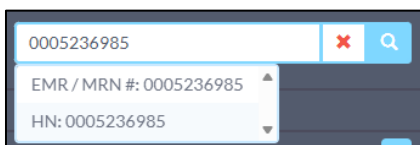
- Referring providers, and often patients, receive email notification when appointment details are removed from an eReferral.
- If appointment details are not removed, patients may still arrive for a cancelled appointment.
- If the appointment will not be rebooked, the eReferral can be declined. Refer to the Declining an eReferral tip sheet for more information
- Consider documenting the original appointment details in the Notes section for quick reference if questions arise.



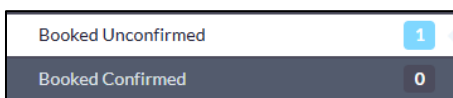
Steps to Cancel an Appointment

After cancelling the appointment in your scheduling system:

1. Log into Ocean at **ocean.cognisantmd.com** and enter the patient's health card number or surname in the Filter field.

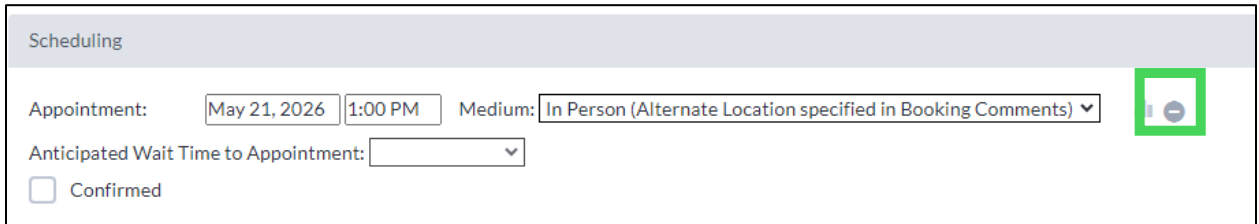


2. Locate and open the eReferral. It will typically be found in the **Booked Unconfirmed** or **Booked Confirmed** folder.




3. In the **Scheduling** section:

- a. Select the **Delete** button found between the Medium and Anticipated Wait Time to Appointment dropdowns.



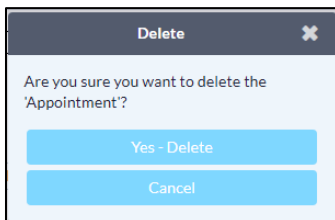
Scheduling

Appointment: Medium: 

Anticipated Wait Time to Appointment:

Confirmed

4. In the pop up window, click **Yes - Delete**.



Delete ✕

Are you sure you want to delete the Appointment?

5. Click **Save & Next** (or **Save & Close**).

The eReferral will return to the Pending Booking folder to await rescheduling.

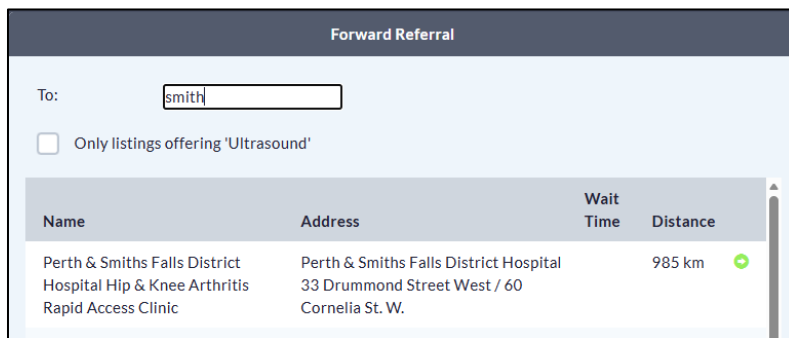
If the appointment will not be rebooked, you may need to decline the eReferral. Refer to the Declining an eReferral tip sheet for additional guidance.

Forwarding an eReferral

The Forward action allows receiving sites to redirect an eReferral to another Directory Listing within their Ocean site when another provider is better suited to manage the eReferral. Using Forward helps ensure the eReferral reaches the appropriate provider quickly, reducing delays in review and supporting timely patient care.

Key Considerations

- Best Practice:** Type the provider’s full name into the search bar when forwarding an eReferral. This helps prevent misdirecting the eReferral, as it is easy to accidentally send it to the wrong recipient, including providers outside of your site or province. If an eReferral mistakenly gets misdirected, please submit a ticket at referralsns.ca/ask



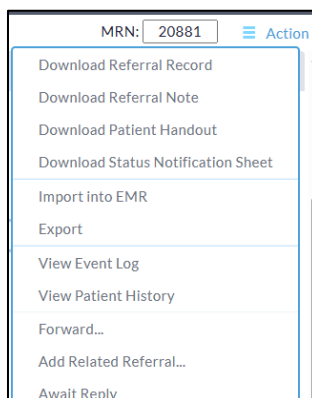
The screenshot shows a 'Forward Referral' window. At the top, there is a 'To:' search bar containing the text 'smith'. Below the search bar is a checkbox labeled 'Only listings offering 'Ultrasound''. Below this is a table with the following columns: Name, Address, Wait Time, and Distance.

Name	Address	Wait Time	Distance
Perth & Smiths Falls District Hospital Hip & Knee Arthritis Rapid Access Clinic	Perth & Smiths Falls District Hospital 33 Drummond Street West / 60 Cornelia St. W.		985 km

- If no provider within your Ocean site can process the eReferral, it should be declined instead of forwarded. Please refer to Declining an eReferral for more information. *Some exceptions do apply.*

Steps

1. Locate and open the eReferral you wish to forward
2. Click Action, then Forward...



The screenshot shows an 'Action' menu for an eReferral with MRN: 20881. The menu items are:

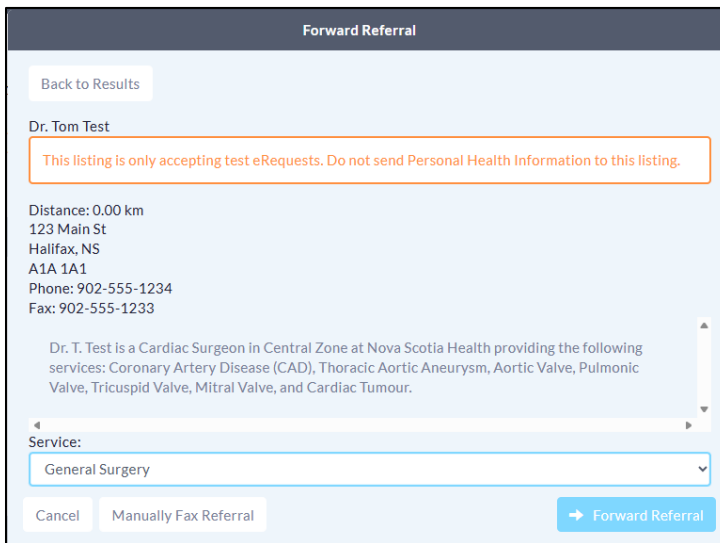
- Download Referral Record
- Download Referral Note
- Download Patient Handout
- Download Status Notification Sheet
- Import into EMR
- Export
- View Event Log
- View Patient History
- Forward...
- Add Related Referral...
- Await Reply

- In the pop-up window, type the full name of the provider within your Ocean site who is better suited to manage the eReferral. Occasionally, users may need to select “Back to Results” in order to initiate a search.



Name	Address	Wait Time	Distance
Dr. Tom Test (test listing)	123 Main St		0.00 km

- The pop-up window will update and automatically populate the Directory Listing information for that provider.
 - If the wrong provider was entered, click Back to Results and search again.



- Click Forward Referral.

The eReferral will move into the Forwarded folder of your Directory Listing and will appear in the New folder of the Directory Listing you forwarded it to.

Printing eReferrals

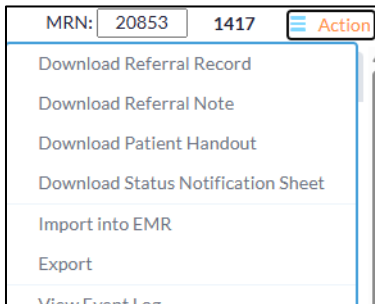
When a physical copy of an eReferral is required, users can easily print individual eReferrals or multiple eReferrals in batches, depending on their workflow needs. Printing may be necessary for a variety of reasons, including providing a copy to the patient, supporting internal record-keeping processes, or preparing for upcoming appointments.

Key Considerations

- eReferrals can have additional information added at any time. As a result, a printed copy may no longer reflect the most current version of the eReferral as time passes.
- Batch printing is limited to a maximum of 100 eReferrals at one time. Filtering may be necessary.
- Booked eReferrals can be printed by appointment date from both the Booked Unconfirmed and Booked Confirmed folders.

Printing a Single eReferral

1. Open the eReferral you wish to print.
2. Click **Action**, then select **Download Referral Record**.



3. In the new browser tab that opens, click the **Print** button



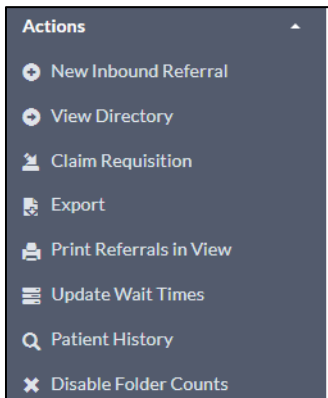
Batch Printing Booked eReferrals

1. Open Ocean and navigate to the **Booked Confirmed** folder.
2. Under **Filters for Booked Unconfirmed folder only:**
 - a. In **Appt Date – Start**, select the calendar date that matches the first date you wish to print.
 - b. In **Appt Date – End**, select the calendar date immediately following the last date in the batch of eReferrals you wish to print.

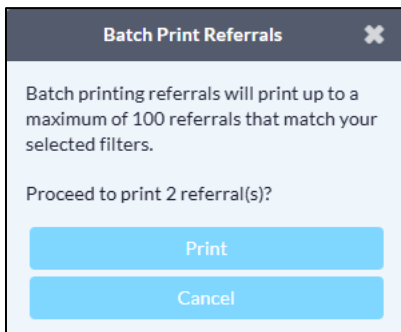
Filters for **Booked Confirmed** folder only Save Filters Clear All

Appt Date - Start (Apr 29, 2026) Appt Date - End (Apr 30, 2026) Patient Email (All) ▾

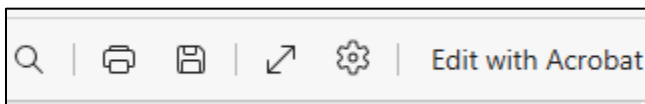
- On the left side of the screen, where the status folders are listed, scroll down to **Actions**.
- Click **Print Referrals in View**.



- In the pop-up window, select **Print**



- A new browser tab will open containing PDF copies of all eReferrals in your filtered list. Click the **Print** button to sent them to your printer.



- Repeat Steps 2-6 in the **Booked Unconfirmed** folder.