

# Accuro Onboarding Guide

For Ocean Senders



June 15, 2026



## **Accuro Onboarding Guide for Ocean Senders**

This user guide is designed to support you as you get started with Ocean eReferral, providing clear, step-by-step instructions to help you navigate 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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## Getting Set Up

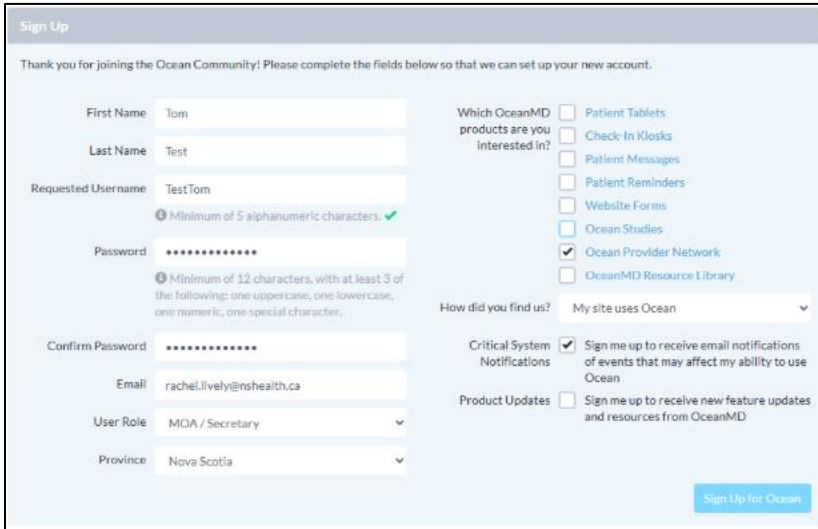
Follow this document to learn how to set up your Ocean account, configure your user preferences, and enter your Encryption Key. This is a one-time set up.

### Sign up & account creation

1. Click “Join Ocean” or “Accept Invitation” from the email you receive which will open a web browser to the Ocean Sign-In window.
2. Next to “New to Ocean?” click “Sign up here!”

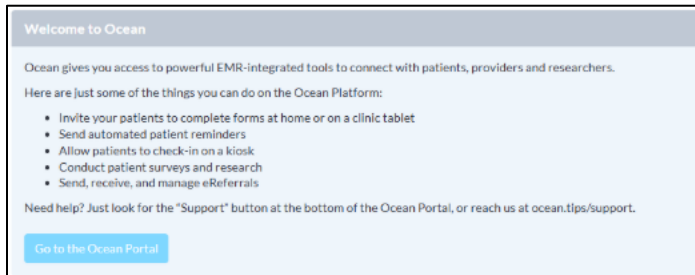


3. Enter your information in the required fields and click “Sign Up for Ocean”



4. Your Ocean Account has now been created. Navigate to Accuro and click the Ocean Portal button. If this button is not available, please install it using the steps found in Ocean Friendly Buttons tip sheet.

5. Agree to the End-User License Agreement (EULA)
6. Click “Go to the Ocean Portal”.

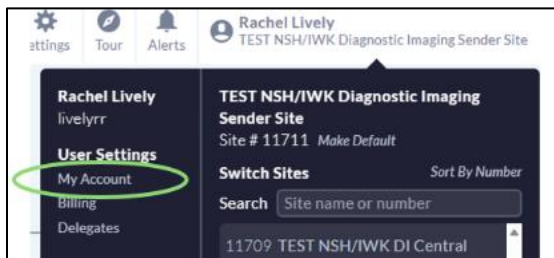


### Account configuration

Ocean user preferences are unique to each user on the Ocean site. Please configure as below to ensure you are set up to manage your sites eReferrals efficiently.

### Referring providers (Physicians, Nurse Practitioners, Health Care Providers)

1. Click on your name in the top right corner of the Ocean Site.
2. Under User Settings, click My Account.



3. Insert a Referral Notification Email. (This may be you, your admin, clinic, etc)
4. Set the Default Home Page as eReferrals.

Edit Billing Settings | Edit Delegates | Edit Clinical Contact Information | Edit EMR Notifications for Se

**Account Information**

User Name: livelyrr  
 Password: ●●●●●●●●  
 Two Factor Authentication: Disabled  
 Email Address: Rachel.Lively@nshealth.ca  
 First Name: Rachel  
 Surname: Lively  
 User Role: MOA / Secretary  
 Province: Nova Scotia  
 Clinical Delegate Emails:

Referral Notification Email:

Referral Email Language: English only  
 ONE ID User ID:  
 Subscriptions:  Weekly usage report  
 Default Home Page: eReferrals  
 Autofill templates: Enabled  
 NSHA eConsult PoC Application: Submit Application to Regional Authority

5. Click Save.
6. Click Edit Clinical Contact Information at the top.
7. Enter your Billing Number (MSI Provider Number), Professional ID (License Number or if at a secondary location, your PMB Number), and your signature (First and last name).
8. Click Save.

**Clinical Contact Information**

These details automatically populate the Patient's information section of any eRequests (diagnostics, eConsults, etc) sent by you or your delegates.

**Clinician Information**

**Billing #**  
Provider's assigned Number  
 12345

**Professional ID**  
Professional License Number  
 12345

**Signature**  
Provider's legal formal name (signing digital signature)  
 Rachel Lively

**Clinic Locations**  
Clinic Locations allow you to store address and contact information that can be easily applied to any eRequest you or your delegates send. You can specify a default Clinic Location for every eRequest you are a user of, allowing the details to auto-fill early populate in your requests.

[Add Location](#)

9. Add your Clinic Location
  - a. If a generic default location is already present, click Edit
  - b. If no location is present, click Add Location.

10. Under location Type, select Enter manually

**Location Type**

You may manually create one Clinic Location. Any additional Clinic Locations must be created using the details from the Ocean Site's Directory Listings.

If the Directory Listing information requires updating, contact the respective Ocean Site administrator.

Select from Directory Listing(s)
  Enter manually

11. Fill out the required fields about the location you're sending from.

<b>Location Name</b>
Test Location
<b>Address Line</b>
123 Main St
<b>Address Line 2</b>
<b>City</b>
Halifax
<b>Province</b>
Nova Scotia
<b>Postal Code</b>
B3B 3B3
<b>Phone</b>
<small>Extension can be included (eg 888-123-4567 x890)</small>
902-999-9999
<b>Fax</b>
<small>Extension can be included (eg 888-123-4567 x890)</small>
902-999-9990

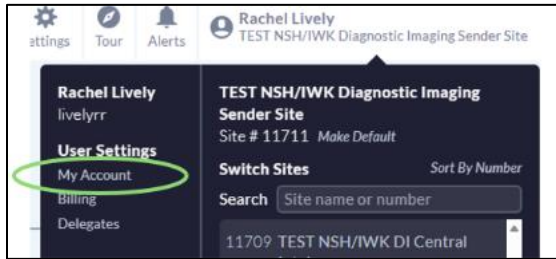
12. Click Save.

13. Close Ocean window to retain entered details.

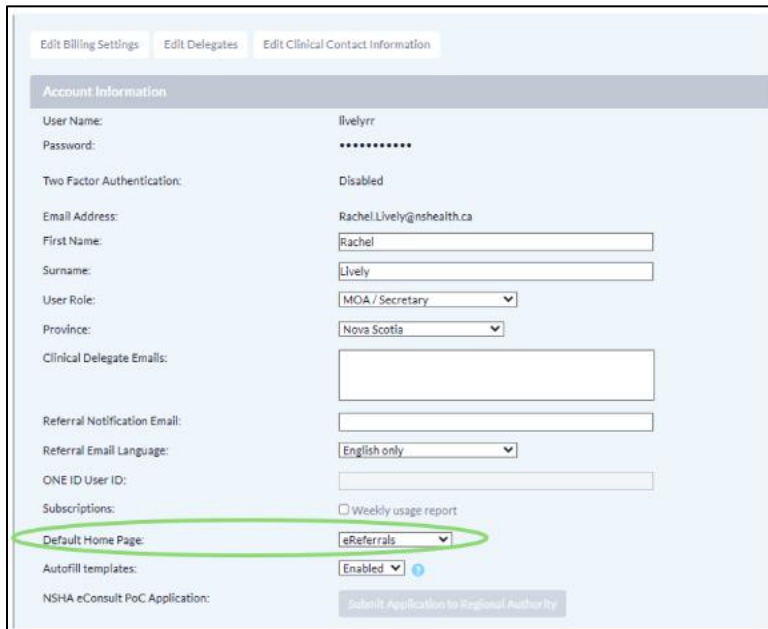
14. Navigate back to Accuro and click the Ocean Portal button. If this button is not available, please install it using the steps found in Ocean Friendly Buttons tip sheet.

**For Clinic Staff (Admin, Nurses)**

1. Click on your name in the top right corner of the Ocean Site.
2. Under User Settings, click My Account.



3. Set the Default Home Page as eReferrals.



4. Click Save.

5. Click Edit Clinical Contact Information.

6. Enter your first and last name into the signature field.



7. Click Save.

8. Add your Clinic Location

- a. If a generic default location is already present, click Edit
- b. If no location is present, click Add Location.

9. Under location Type, select Enter manually

**Location Type**

You may manually create one Clinic Location. Any additional Clinic Locations must be created using the details from the Ocean Site's Directory Listings.

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  Enter manually

10. Fill out the required fields about the location you're sending from.

<b>Location Name</b>
Test Location
<b>Address Line</b>
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<b>Address Line 2</b>
<b>City</b>
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<b>Province</b>
Nova Scotia
<b>Postal Code</b>
B3B 3B3
<b>Phone</b>
Extension can be included (eg 888-123-4567 x890)
902-999-9999
<b>Fax</b>
Extension can be included (eg 888-123-4567 x890)
902-999-9990

11. Click Save.

12. Close Ocean window to retain entered details.

13. Navigate back to Accuro and click the Ocean Portal button. If this button is not available, please install it using the steps found in Ocean Friendly Buttons tip sheet.

**Key Considerations**

- Folder groups may need to be expanded or collapsed on the eReferrals and eConsults page.

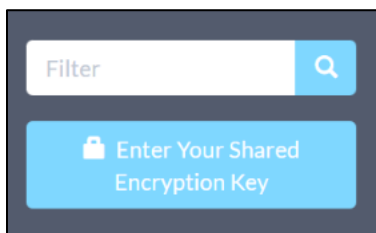
- Providers sending eReferrals should collapse their Received folder group and expand their Sent folder group.
- Providers sending and receiving eReferrals will need both their Received folder group and Sent folder group expanded.
- Once completed, it's best to close the Ocean platform to save your changes and launch back into Ocean from your EMR or sign in at [ocean.cognisantmd.com](http://ocean.cognisantmd.com)
- Some Ocean sites may include multiple providers within the same clinic. Applying filters can make it easier to manage eReferrals and avoid confusion when multiple providers are linked to the same Ocean site. More information about using filters can be found on the tip sheet – Ocean Filters.

### Encryption Key

The Ocean Encryption Key provides an added level of protection for Personal Health Information (PHI). Each Encryption Key is unique to its Ocean site and each user at your clinic will need to enter this key to access patient information and action the referrals in your Ocean site. Once entered, the key will be saved in your account and will not need to be entered again if you log in onto the same computer unless your computer automatically clears its browser history.

Accuro users joining an established Ocean site may not require an Encryption Key.

1. Retrieve your Ocean Encryption key.
2. Navigate back to Accuro and click the Ocean Portal button. If this button is not available, please install it using the steps found in Ocean Friendly Buttons tip sheet.
3. Click Enter Your Shared Encryption Key.



4. Insert the Encryption Key in the pop-up window.



Site Encryption

Enter Your Shared Encryption Key:  
This web browser is not yet authorized to decrypt personal health information:  
To authorize this browser, you must enter your site's shared encryption key:

Your shared encryption key is shared among the Ocean users at your site.  
If you are not sure what your key is, please check with your Ocean site administrator.

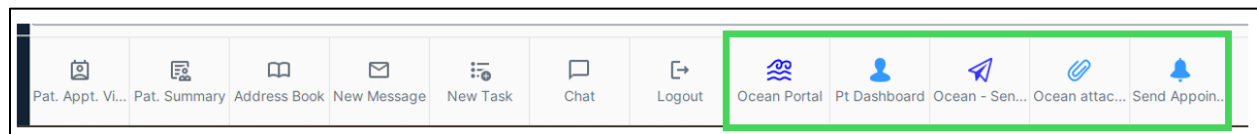
5. Click Enter.

You are now set up to send and/or receive eReferrals.

## Ocean Friendly Buttons

Clinics using Accuro as their EMR can add Ocean Friendly Buttons to their main Accuro dashboard for quick and easy access to Ocean. This one-time setup allows providers and office staff to efficiently send, receive, and manage eReferrals directly from Accuro.

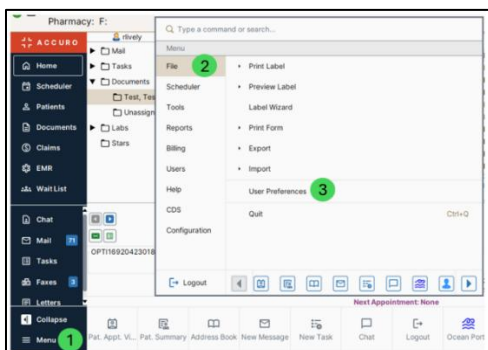
### Buttons



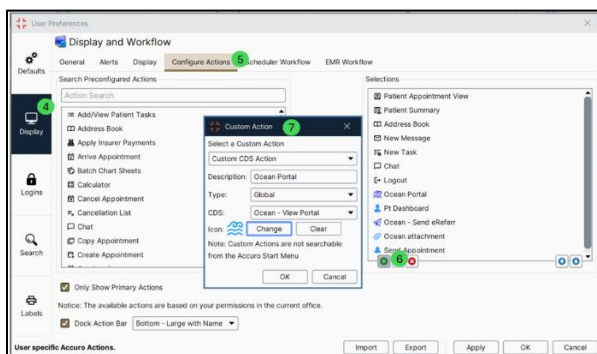
- Ocean Portal
  - Opens the Ocean portal.
- Patient Dashboard
  - Displays an overview for eReferrals that have been sent and received for the selected patient directly from your EMR.
- Send eReferral
  - Launches the Ocean Healthmap, allowing you to search for and select a service to refer to.
- Attachments
  - Allows you to add supporting documents to an eReferral.
- Send Appointment - For receiving providers only
  - Applies the appointment date and time from Accuro to Ocean.

### Steps to add friendly buttons

1. Click **Menu** in the bottom-left corner
2. Select **File**
3. Select **User Preferences**



4. Select **Display**
5. Click **Configure Actions**.
6. Under **Selections**, click green plus (+) button.
7. In the pop-up window:
  - a. **Select a Custom Action** → Custom CDS Action
  - b. **Description** → Ocean Portal (Icon image: water element)
  - c. **CDS** → Ocean – View Portal
  - d. **Icon** → Click **Change**
    - i. It may take a few moments for the first icon list to populate.
  - e. Search for icon image.
  - f. Change the colour, if preferred.
  - g. Click **OK**.
8. Repeat step 7 to add the following buttons:
  - a. **Patient Dashboard** (Icon: contacts)
  - b. **Send eReferral** (Icon: paper\_plane)
  - c. **Send Appointment Notification** - required for offices that receive eReferrals (Icon: appointment\_reminder)
9. Adding the Attachment button is slightly different. In the pop-up window:
  - a. **Select a Custom Action** → Custom Letter Action
  - b. **Description** → Ocean Attachment
  - c. **CDS** → Ocean Attachment
  - d. **Icon** → Click **Change**.
  - e. Search for icon image. (Icon: attach)
  - f. Change the colour, if preferred.
  - g. Click **OK**.
10. Lastly, click Apply and OK.



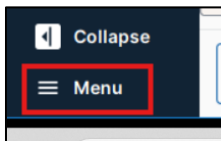
## Accuro Security Settings

When new users are added to an established Accuro EMR that is integrated with Ocean, their security settings may not automatically allow attachments to be included on their eReferral. It's important to review and update these permissions to ensure users can successfully send complete referrals with supporting documentation.

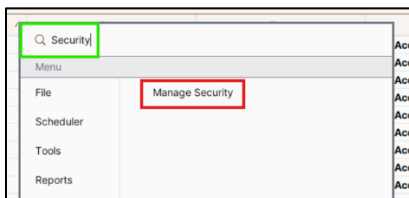
This tip sheet outlines the steps required to modify Accuro security settings. **Please note that these changes must be completed by a user with Accuro Admin privileges.**

### Steps

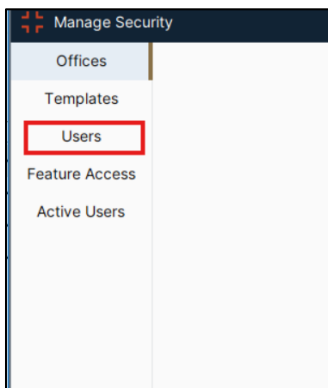
1. Open Accuro and click Menu



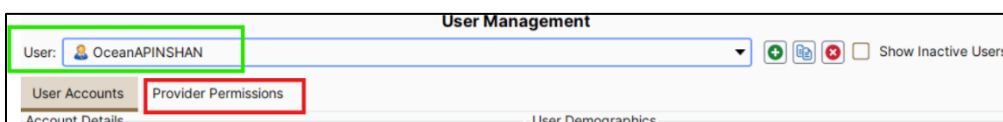
2. In the Search bar, type "Security" and select "Manage Security"



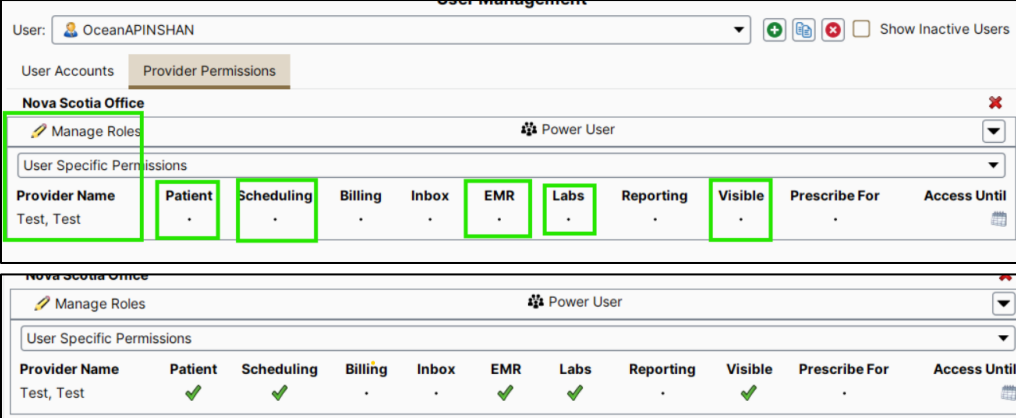
3. In the next window, click "Users"



4. In the search bar next to "User" type OceanAPINSHAN and select "Provider Permissions"

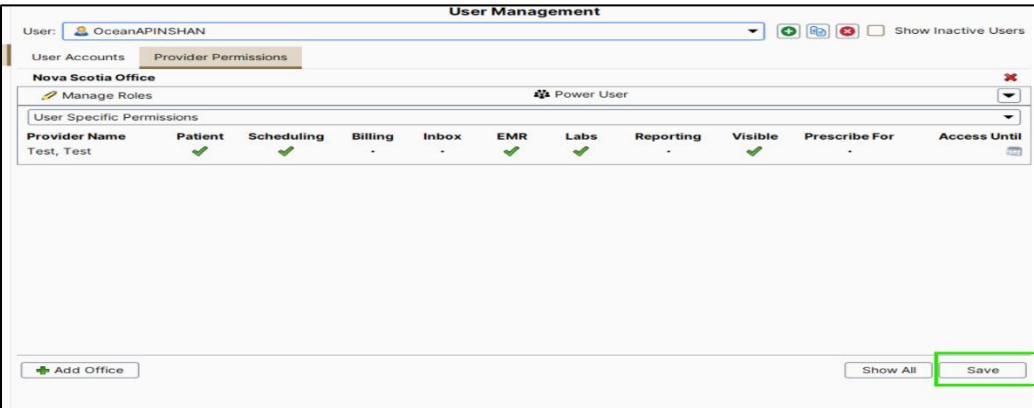


- In the list of providers, locate the new provider. Select the dots found under columns: Patient, Scheduling, EMR, Labs, and Visible. The dots will now appear as checkmarks.



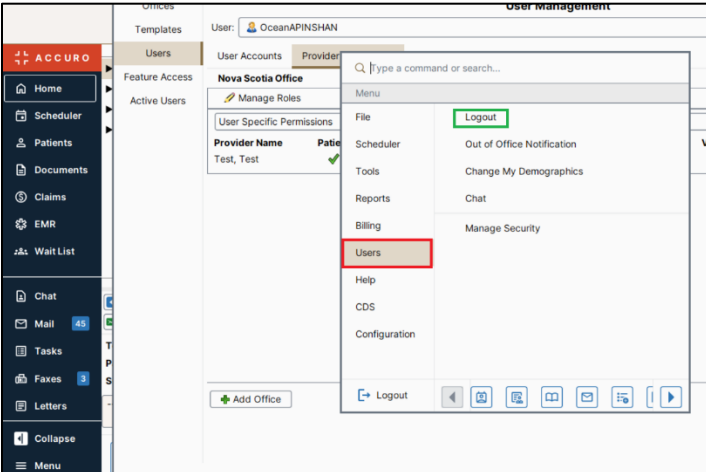
The screenshot shows the 'User Management' interface for user 'OceanAPINSHAN'. The 'Provider Permissions' tab is active. Under the 'Nova Scotia Office' section, the 'Test, Test' provider is listed. The columns 'Patient', 'Scheduling', 'EMR', 'Labs', and 'Visible' have dots under them, indicating that permissions are being assigned. These dots are highlighted with green boxes in the image.

- Click Save.



The screenshot shows the 'User Management' interface for user 'OceanAPINSHAN'. The 'Provider Permissions' tab is active. Under the 'Nova Scotia Office' section, the 'Test, Test' provider is listed. The columns 'Patient', 'Scheduling', 'EMR', 'Labs', and 'Visible' now have green checkmarks under them, indicating that permissions have been successfully assigned. The 'Save' button at the bottom right is highlighted with a green box.

It is recommended that you manually log out of Accuro to save your changes.



The screenshot shows the Accuro interface for user 'OceanAPINSHAN'. The 'Users' menu option is highlighted in red, indicating that the user is logging out. The 'Logout' button is also highlighted with a green box.

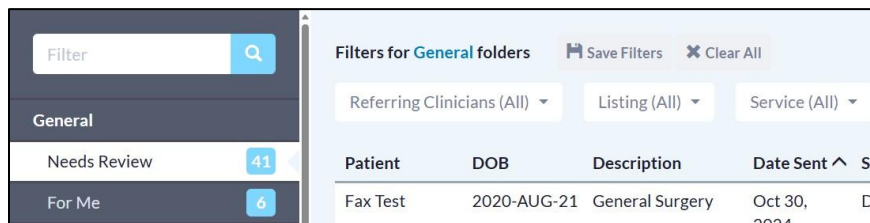
## Ocean filters

Filters in Ocean are a great tool to help you organize and manage eReferrals efficiently. They allow you to quickly sort through large volumes of requests and focus only on the eReferrals most relevant to you. Filters can be saved, cleared, adjusted, and re-saved as needed. Group-level filters can be saved within the General, Received, and Sent folders. Once saved, these filters will be retained across all status folders within each group.

Please note that Ocean sites with a combination of sending and receiving providers may experience additional complexities with filters. Please submit a ticket at [referralsns.ca/contact-us](https://referralsns.ca/contact-us) if you experience any filtering challenges.

Filters for General Folders (Needs Review, For Me, Recently Viewed)

- **Referring Clinicians (All):** Filters for eReferrals with messages to view that were **sent by your provider**.
- **Listings (All):** Filters for active eReferrals with messages to view that were **received by your provider**.
- **Service (All):** Filters for eReferrals with messages to view that were **initially received by your provider and eReferrals that have since been declined or redirected** to another provider.



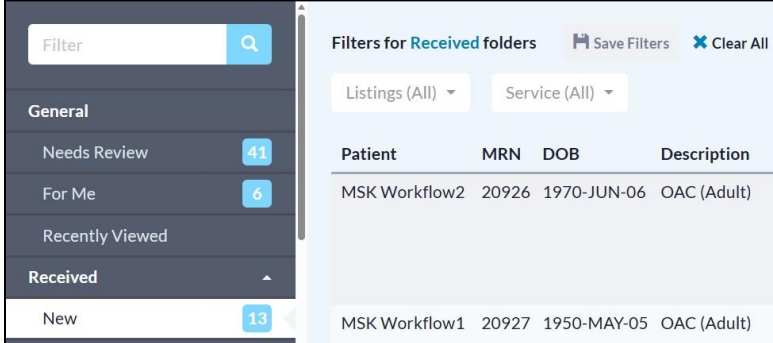
We recommend filtering each field separately, to ensure all data is viewed, while working in the Needs Review folder.

*Additionally, you can use “**Filter for Needs Review folder only**” to display eReferrals assigned to a specific user.*

Filters for Received folders (New, Pending Booking, etc.)

- **Listings (All):** Filters for eReferrals received by a specific provider.

- **Service (All):** Filters for eReferrals received by a specific Health Service Offering (e.g., Gastroenterology, Colon Cancer Screening).



Patient	MRN	DOB	Description
MSK Workflow2	20926	1970-JUN-06	OAC (Adult)
MSK Workflow1	20927	1950-MAY-05	OAC (Adult)

### ***Declined eReferrals can be viewed by using the Service (All) filter***

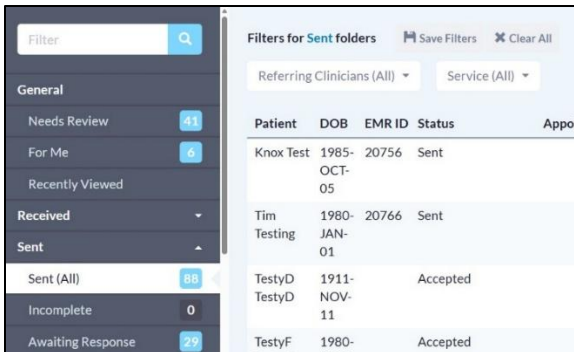
It is possible to use these filters together but recommended to use the Listing (All) filter unless reviewing Declined eReferrals.

In addition, some **Received folders** include their own folder-specific filters:

- **Pending Booking:** Can be filtered by priority and protocol.
- **Booked (Confirmed and Unconfirmed):** Can be filtered by appointment date and by eReferrals that include emails.

Filters for Sent folders (Incomplete, Awaiting Response, Cancelled, etc.)

- **Referring Clinician (All):** Filters for eReferrals submitted by a specific provider.
- **Service (All):** Filters for eReferrals submitted to a specific specialty or imaging modality.



Patient	DOB	EMR ID	Status	Appo
Knox Test	1985-	20756	Sent	OCT-05
Tim Testing	1980-	20766	Sent	JAN-01
TestyD	1911-		Accepted	NOV-11
TestyF	1980-		Accepted	

*Filters in the **Sent folders** can also be used together.*

## Ocean Admin Setting

The Ocean Admin setting provides users with enhanced permissions to manage and configure their Ocean site, beyond simple sending and receiving eReferrals. By default, the user who initiates the Ocean site setup is granted admin privileges.

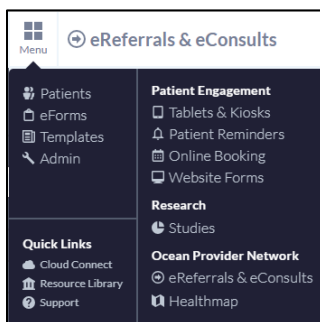
### Key Capabilities of Ocean Admin Users

- **User Management**
  - Add new users to the Ocean site
  - Remove users from the Ocean site
  - Utilize the Delegate feature
  - Add or modify EMR notifications
- **Site Configuration**
  - Update site-level settings and preferences
  - Add and modify Canned Responses
- **Directory Listing Management** *(For Receiving Providers Only)*
  - Modify Listing name
  - Update contact information
  - Edit Service Description
- **Data Extraction**
  - Generate analytic reports for individual users
  - Generate analytic reports for all received eReferrals

### Granting Admin Access to Another Users

Multiple users can be assigned Ocean Admin access. To grant Admin privileges:

1. Open Ocean and click Menu → Admin



2. Under Site Settings, select Users

**Site Settings**

**Site Account**  
View and configure basic information about your account such as site name, number, notification emails and timezone.

**Encryption**  
Set up or view your site's shared encryption key.

**Users**  
Invite and manage users at your site.

3. Locate user you wish to update

almccabe	April McCabe	Administrator	<input type="checkbox"/>	<a href="#">Manage User</a>	<a href="#">Remove User</a>
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4. Select the checkbox under Site Admin

Site Admin
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Changes are saved automatically.

Once enabled, the user will see Templates and Admin options added under the Menu.

## Inviting Others to your Ocean Site

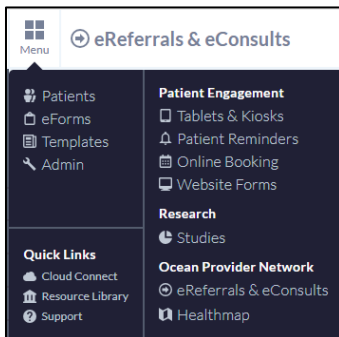
Adding new users to your Ocean site can be done easily by a user with Admin privileges. Please ensure you have the email address for the new users available, as this is how you will invite them to your Ocean site.

### Key considerations

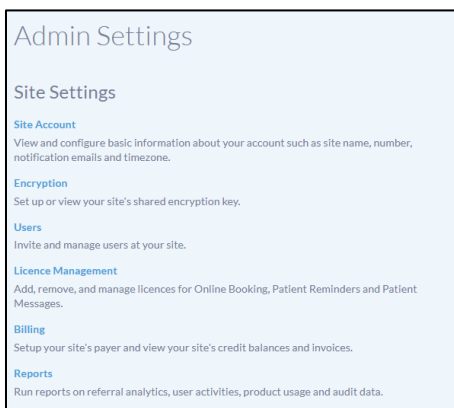
- Ocean invites are only valid for a short time. An additional invite may be required if a user's invitation link has expired.
- Users added to an existing Ocean site integrated with Accuro may require additional security configurations to enable attachments. Refer to the Accuro Security Settings tip sheet for more information.

### Steps

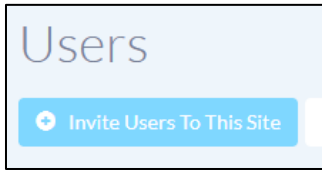
1. Open Ocean
2. Click **Menu** → **Admin**



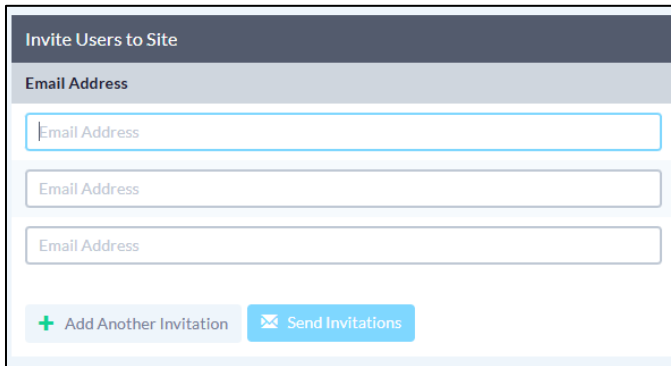
3. Click on **Users** under Site Settings



4. On Users page, click **Invite Users To This Site**.



5. Enter an email address for the new users



6. Click Send Invitation

The new user will receive their invitation through email sent from OceanMD. Please see tip sheet for Getting Set Up for more information on account creation and configuration.

To remove a user, follow Steps 1-3 to get to the Users page. Locate the user and select “Remove User”.

almccabe	April McCabe	Administrator	<input checked="" type="checkbox"/>	<a href="#">Manage User</a>	<a href="#">Remove User</a>
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## Best Practice: Multiple Ocean Sites

### For providers sending referrals from more than one Ocean site and/or EMR

It's common for providers to deliver patient care across multiple clinics. When practicing in a secondary or tertiary location, it's important to ensure the correct sending location is specified on each eReferral so that reports and results are routed to the appropriate clinic. When a location and/or PMB number is not properly indicated on an eReferral, it can lead to a privacy breach as reports and results may be misdirected. It could also cause delays and gaps in patient care, and an increase in administrative burden.

This document outlines best practices for providers who work in more than one clinic using Ocean.

#### **1:1 – One Ocean Account per Location**

It is recommended that providers maintain a separate Ocean account for each clinic location they send referrals from. This approach:

- Ensures clinic-specific contact details are accurately reflected on each eReferral.
- Allow the correct Professional ID to be entered for each location.
- Supports appropriate routing of reports and results back to the correct clinic.
- Lessens the risk of Personal Health Information (PHI) being shared among clinics.

In many cases, a provider's Professional ID is their license number at their primary clinic. However, secondary or tertiary locations may assign a PMB number, which should be entered in the Professional ID field for that specific Ocean account.

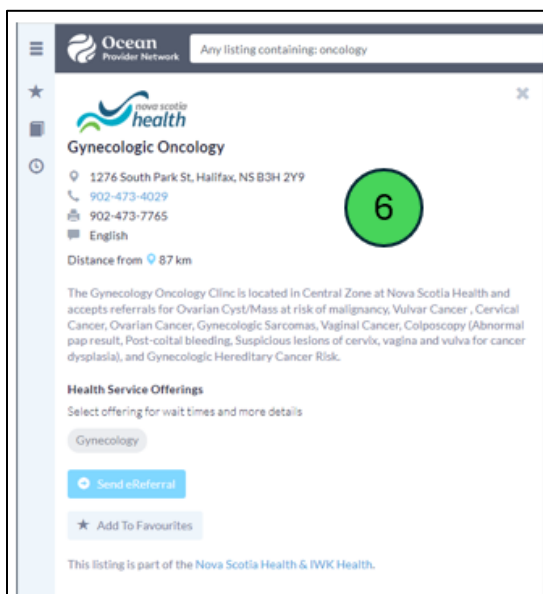
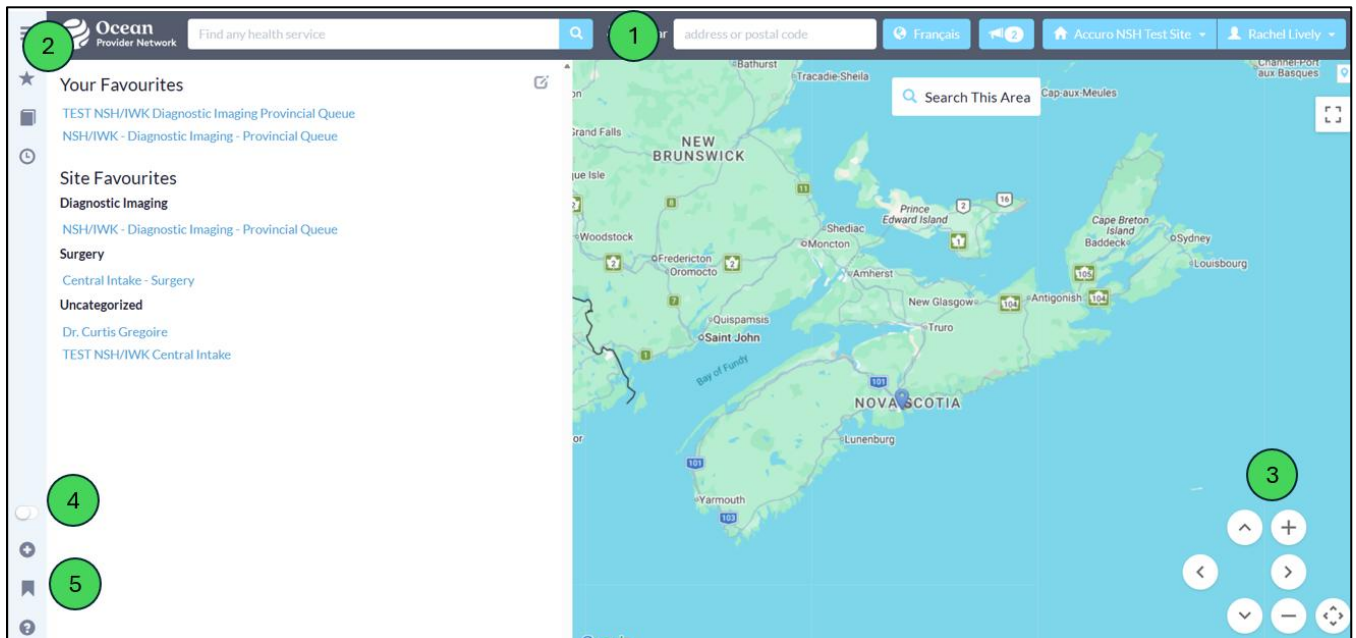
When creating a new Ocean account, you may find it helpful to use the same email address and password as your primary account and add a digit to your username to keep things consistent and easy to recognize.

Please refer to the tip sheet, *Getting Set Up - Providers* for step-by-step instructions on how to create an additional Ocean account.

## The Ocean Healthmap

The Ocean Healthmap includes several features designed to help users efficiently locate services, manage frequently used listings, and streamline the eReferral process.

Services within the Healthmap are managed through various Central Intakes, where referrals are received before being distributed to the most appropriate provider or site. Please refer to the *Central Intake - Introduction* tip sheet for more information.



## 1. Search Fields

There are two search fields that can be used to identify specific services or providers.

The first search field filters results by keywords entered, such as a specialty, service, or provider name (e.g., *Surgery, Gastroenterology*, or a provider's last name). This will generate a list of relevant options to choose from.

The second search field narrows results by geographic location when an address or postal code is entered. When launching the Healthmap from a patient's chart within an EMR, the patient's address will automatically populate in this field.

Locations that match your search criteria will appear as stars on the interactive map, allowing you to easily identify where services and providers are located.

## 2. Site & Personal Favourites

If you frequently send eReferrals to a particular service or provider, adding the listing to your Favourites can improve efficiency.

There are two types of favourites available:

- Personal Favourites – Saved for your individual user profile
- Site Favourites – Shared across users at your clinic or site

Both lists appear on the left side of the screen when launching the Healthmap. You can also access them by selecting the star icon in the navigation panel on the far left. Personal favourites are listed first, followed by site favourites. Some Central Intake listings may already be included in your Site Favourites.

### To add a Favourite:

- a) Search for the listing of interest
- b) Select the listing
- c) Click Add to Favourites under the *Send eReferral* button
- d) Choose whether to save the listing to Personal or Site Favourites

## 3. Interactive Map



The interactive map allows users to visually navigate different areas of Nova Scotia to identify nearby services and providers.

Users can navigate the health map by moving across different areas of the province or zooming in and out using their mouse scroll wheel or the direction and zoom controls on the bottom-right corner. Search results will generate based on the current field of view, ensuring that only services within the visible map area are displayed.

#### **4. Test Mode Switch**

Users who want to practice sending eReferrals can do so by enabling the Test Mode switch.

When Test Mode is activated, the Healthmap will display a list of test listings that can be used to practice sending eReferrals in a safe environment. To send a test eReferral, users must search for and select the test Central Intake listing within the Healthmap. While closely mirroring the live environment, Test Mode can be easily identified by an orange banner at the top of the screen indicating you are in test mode.

Before sending any legitimate eReferrals, users must ensure that the switch has been toggled back to live mode to prevent eReferrals being sent to test listings.

#### **5. Auto-Fill Template Management**

This feature will only be visible for users who have enabled their auto-fill templates. Auto-fill templates help save time when submitting referrals for common indications by automatically populating frequently used information within referral forms.

Templates can be added, modified, or removed through the Auto-Fill Template Management feature.

#### **6. Listing Descriptions**

After selecting a provider or service listing, a listing description will appear with additional details about that service.

Information within a listing may include:

- Address
- Phone number
- Fax number



- Service description
- Health Service Offering

These details help ensure users select the most appropriate provider or service when submitting an eReferral.

## Central Intake – Introduction

Central Intake is an eReferral management model used to help streamline the Ocean eReferral process. Instead of eReferrals being sent directly to an individual provider or service, eReferrals are first received by a Central Intake team who review before routing them to the most appropriate provider or service.

This process helps ensure eReferrals are directed to the right location, improves distribution of eReferrals across available providers, and supports more efficient management of wait times. Central Intake teams may also review eReferral information to confirm that required documentation is included before forwarding the eReferral.

### **Currently, there are three Central Intake teams:**

- Central Intake Surgery (Adult)
- Central Intake Surgery (Pediatric & Gynecology)
- Nova Scotia Health /IWK Health Diagnostic Imaging - Provincial Queue

All surgical and gastroenterology eReferrals are sent using the same Healthmap listing (Central Intake – Surgery) and are managed by two teams, as outlined above. The Diagnostic Imaging – Provincial Queue consists of one team that manages eReferrals for both Nova Scotia Health and the IWK Health.

Each Central Intake team is interdisciplinary and includes referral officers, nurses, and medical radiation technologists (MRTs) - fostering a collective skill set of both administrative and clinical expertise.

Ocean users can send eReferrals directly to a Central Intake team by selecting the appropriate listing on the Healthmap and then choosing the specific Health Service Offering of interest (e.g., Cardiac Surgery, Colon Cancer Screening, MRI, Ultrasound).

<b>Diagnostic Imaging</b>
<a href="#">NSH/IWK - Diagnostic Imaging - Provincial Queue</a>
<b>Surgery</b>
<a href="#">Central Intake - Surgery</a>