

Med Access User Guide

For Ocean Receivers



June 15, 2026

Med Access 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/contact-us 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:

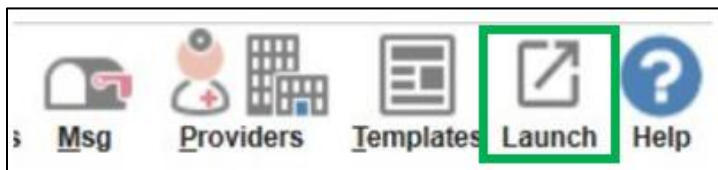
- The steps within this document may differ depending on clinic workflow and user responsibility. This outlines the recommended workflow for receiving eReferrals
- If an eReferral is incomplete or requires more information, please use the messaging feature to contact the referrer/Central Intake. See resources *Secure Messaging* and *Awaiting Reply Folder* for further guidance
- Ocean sites should be reviewed daily for new referrals. Urgent referrals are expected to be accepted within three business days, while semi-urgent and routine referrals should be accepted within 14-21 days. An anticipated wait-time or appointment date is also required on the referral within this 14-21 day 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 referralsns.ca/contact-us
- Completing priority and protocol in Ocean is recommended, as it improves filtering within the system and enhances transparency for the referring provider
- 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

- 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*

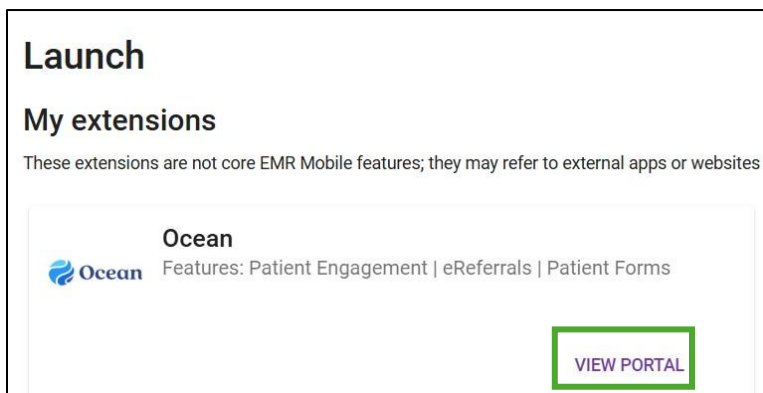
Step 1: Accept (or Decline) an eReferral

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 Med Access
2. Click the 'Launch' button

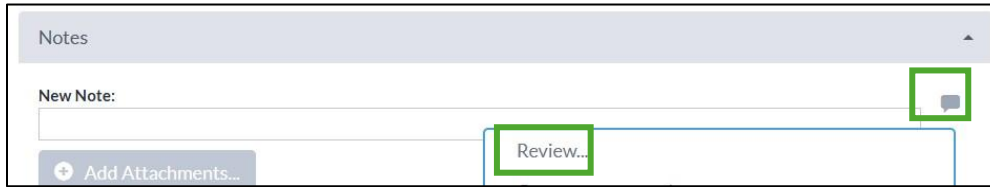


3. Locate the Ocean extension and click 'View Portal'



4. On the eReferrals and eConsults page in Ocean, navigate to the 'New' status folder under the Received folder grouping
5. 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*
6. 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. You can add comments in the free-text field regarding the appointment
- e. Click Save



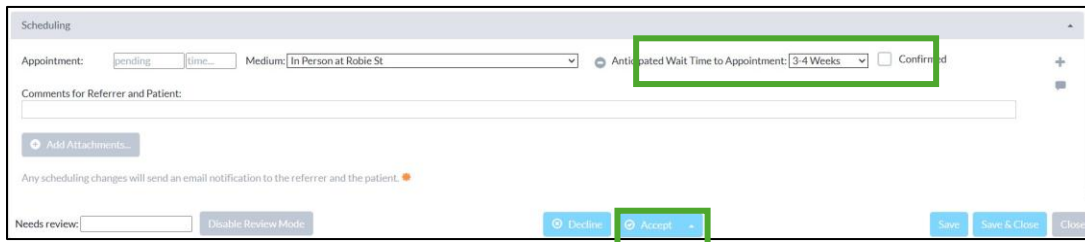
This does not send a notification to the referring provider, but the priority information will be visible within the Notes section of the eReferral.



Step 2: Add an Anticipated Wait Time

7. Scroll to the Scheduling section at the bottom of the eReferral
8. Click the dropdown next to 'Anticipated Wait Time to Appointment:' and select the timeline that best aligns with the expected timeframe to appointment

9. Click the 'Accept' button in the footer of the referral

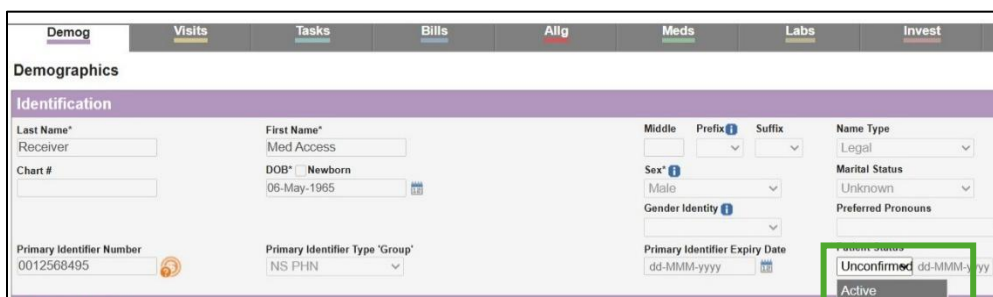


An email notification will be sent to the referring provider, and the patient, which includes the receiving provider's contact information and the anticipated wait time to the patient's appointment.



The referral information will automatically be imported into the Med Access EMR as a new 'Active Task' in the patient's chart with the matching health card number and date of birth. If a matching chart cannot be found, a new patient chart will be generated, and the referral notes will be imported into it.

The 'Patient Status' field in new charts generated by Ocean will need to be updated to 'Active' (or your preferred status) after accepting the referral.



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

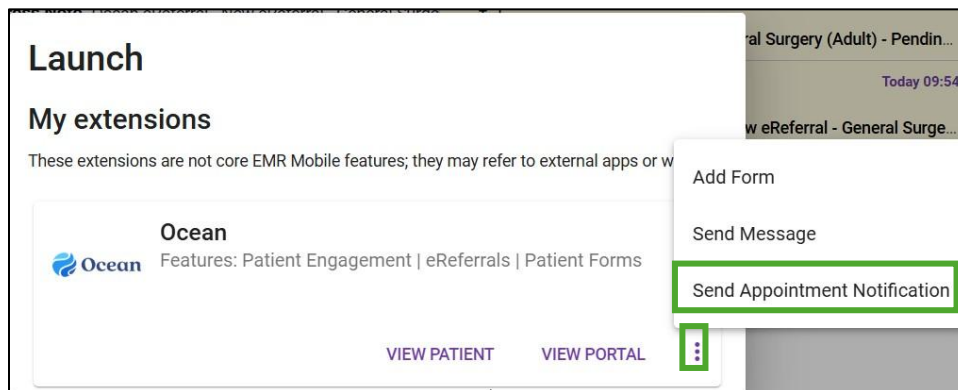
Staff will continue to manage the referral workflow within Med Access until an appointment is added.

Step 3: Add Appointment

Once the consultation is scheduled in Med Access, the appointment details can be sent and available for selection on 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 your patient in Med Access
2. Click on patient name to open the patient's chart
3. Click 'Launch'
4. Locate the Ocean extension and click the vertical ellipsis
5. Select 'Send Appointment Notification'



6. Select the eReferral from the list of Received eReferrals – the status will be 'Pending Booking'

Choose a referral from the following list to update its information with this patient's EMR appointment:						
Active Referrals						
Received						
Date Sent	Description	Referrer	Source Site	Provider	Status	Booked Date
May 8, 2026 9:48 am	General Surgery (Adult)	April McCabe	TEST NSH/IWK Central Intake	Med Access Test Site	Pending Booking	

7. In the Scheduling section of the eReferral:
 - a. The appointment details will be available for selection. Click on the appointment date and time, it will populate into the appointment fields

Scheduling

Click an option below to update the referral:

+ Sep 16 2026 10:00 AM

- 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 Messages 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'

a scheduling

Appointment: Sep 16, 2026 10:00 AM Medium: In Person at 123 Brenton St. b

Anticipated Wait Time to Appointment: ☐ Confirmed c

Comments for Referrer and Patient:

The clinic is located at the back entrance.
 Please bring a list of current medications. d

e Add Attachments...

Test Attachment.pdf ✕

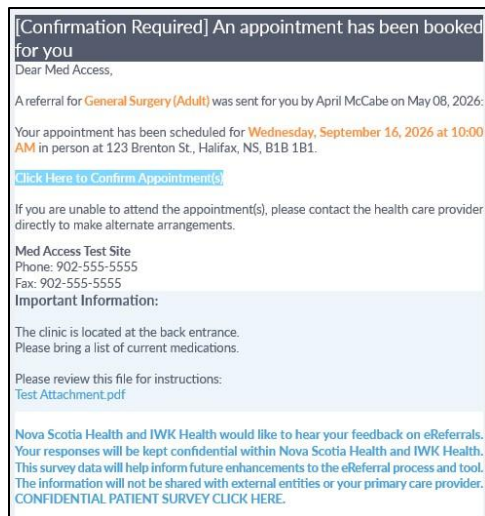
Any scheduling changes will send an email notification to the referrer and the patient. 🟡

Needs review:

f

Save
Save & Close
Close

Decline



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.

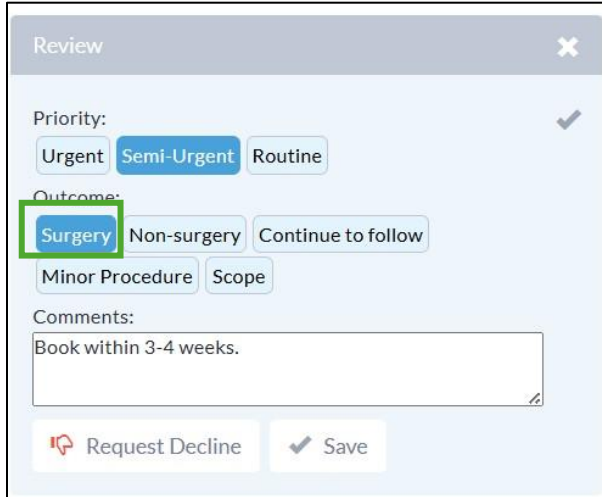
Steps:

1. Log into Med Access
2. Open the patient's chart
3. Click the 'Launch' button
4. Locate the Ocean extension and click 'View Patient'
5. From the list of Received eReferrals, click on the eReferral – the status will be 'Booked'

Active Referrals						
Received						
Date Sent	Description	Referrer	Source Site	Provider	Status	Booked Date
May 8, 2026 9:48 am	General Surgery (Adult)	April McCabe	TEST NSH/IWK Central Intake	Med Access Test Site	E-forwarded to Med Access Test Site: Booked	May 8, 2026 10:00 AM

6. Click the conversation bubble within the Notes section
7. Select 'Review...'

8. 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

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



A final copy of the eReferral will be downloaded into the patient's chart in Med Access.

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.

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.

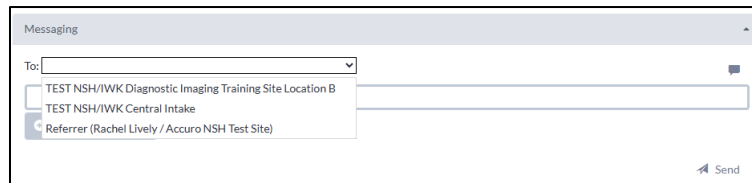
Ocean	
Filter	Q
General	
Needs Review	16
For Me	3
Recently Viewed	
Received ▲	
New	9
Accepted as eConsult	1
eConsult in Progress	0
Pending Booking	22
Booked Unconfirmed	20
Booked Confirmed	1
Awaiting Reply	7
Received (All)	109
Completed	37
Forwarded (All)	19
Declined	9
Cancelled	1
Sent ▼	
Deletion Warnings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

Secure Messaging

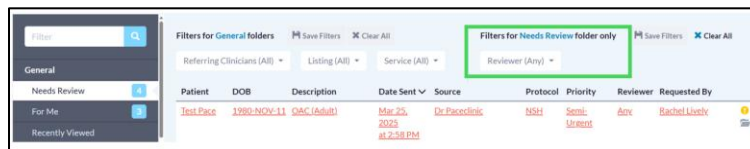
The messaging tool in Ocean allows users to securely communicate about specific eReferrals directly within the platform. It enables senders and receivers to share updates, clarify information, request additional details, and coordinate care without relying on external emails or phone calls, helping to 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 Place	1980-NOV-11	OMC (Adult)	Mar 25, 2025 at 2:58 PM	Dr. Paediatric	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

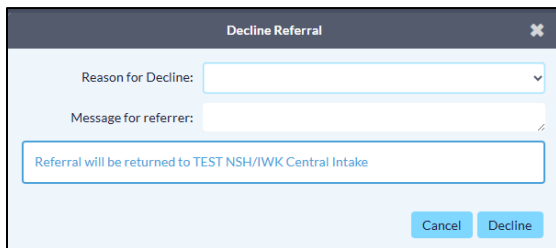
- The Decline button appears blue for new eReferrals and gray for accepted eReferrals
- Declined eReferrals may be hidden depending on your filters. Refer to the Filters tip sheet for more information
- eReferrals in Awaiting Reply status cannot be cancelled. Please refer to the Awaiting Reply tip sheet 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

 Decline

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.

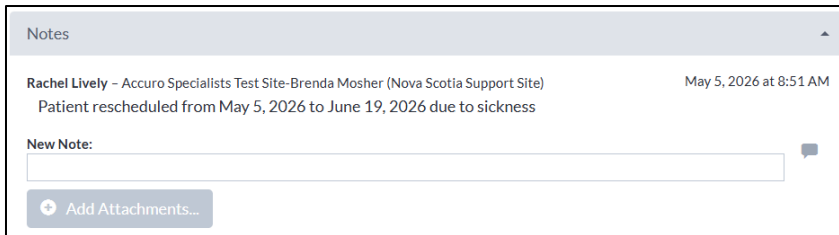
Patient	MRN	DOB	Description	Appointment Date	Date Sent	Source	Site	Provider	Protocol	Priority	Noted
<u>Filter</u> <u>Demo4</u>		<u>1955-JUL-07</u>	<u>Ultrasound</u>		<u>Nov 4, 2025</u> <u>at 8:03 AM</u>	<u>Rachel Lively</u>	<u>TEST NSH/IWK</u> <u>Diagnostic Imaging</u> <u>Sender Site</u>	<u>TEST NSH/IWK</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

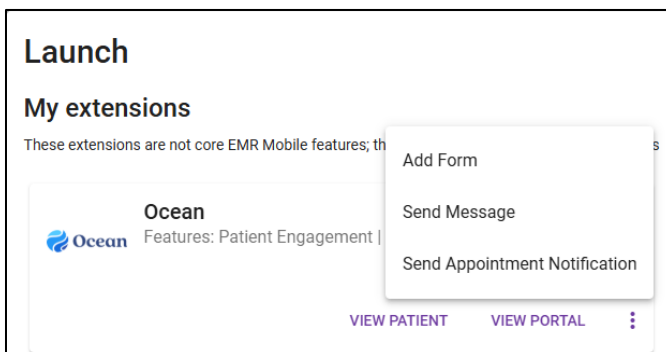
- Referring providers, and often patients, receive email notification when appointment details are added or updated on an eReferral.
- No-show appointments may occur if rescheduling updates are not properly recorded in Ocean.
- Documenting the original appointment details in the Notes section can be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



Steps to Reschedule an Appointment

After rescheduling the appointment in Med Access:

1. Open the patient's chart in Med Access.
2. Click **Launch**.
3. In the Ocean extension, click the **ellipsis (three vertical dots)** and select **Send Appointment Notification**.



4. From the patient dashboard, select the eReferral that corresponds to the rescheduled appointment.

Choose a referral from the following list to update its information with this patient's EMR appointment:

Active Referrals

Received

Date Sent	Description	Referrer	Source Site	Provider	Status	Booked Date
Apr 9, 2026 9:16 am	General Surgery	Rachel Lively	TEST NSH/IWK Diagnostic Imaging Sender Site	Med Access Test Site	E-forwarded to Med Access Test Site: Booked	May 5, 2026 10:00 AM

5. In the **Scheduling** section:
 - a. Select the option to **(X) Cancel** the initial appointment.
 - b. Select the option to **add (+)** the new appointment.

Scheduling

Click an option below to update the referral:

✖ Cancel appointment on May 5 2026 10:00 AM

+ May 20 2026 1:00 PM

Appointment: May 5, 2026 10:00 AM Medium: In Person at 123 Brenton St. Anticipated Wait Time to Appointment: Confirmed

Comments for Referrer and Patient:
Details about your virtual appointment include:
Please ensure you have adequate wifi to support a virtual call.

Add Attachments...

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

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

Scheduling

Appointment: May 20, 2026 1:00 PM Medium: In Person at 123 Brenton St. Anticipated Wait Time to Appointment: Confirmed

Comments for Referrer and Patient:
[This is a rescheduled appointment]
Details about your virtual appointment include:
Please ensure you have adequate wifi to support a virtual call.

Add Attachments...

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

Needs review: Decline Completed Save Save & Close Close

6. Close the patient dashboard.

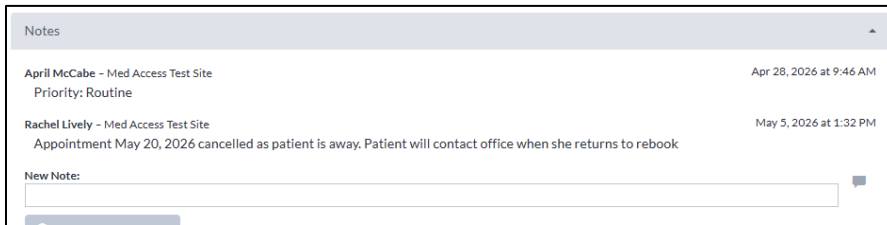
The new appointment will now be reflected in both Med Access and Ocean.

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

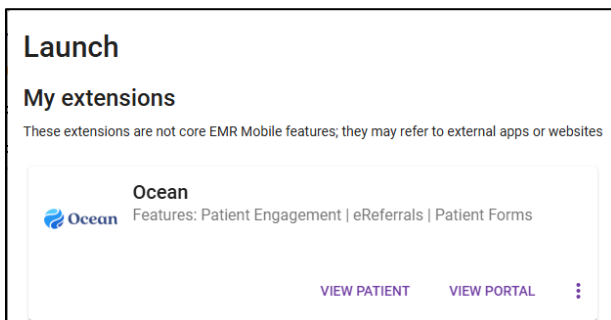
- Referring providers, and often patients, receive email notification when appointment details are removed from an eReferral.
- If appointment details are not removed, patients may still arrive for a cancelled appointment.
- If the appointment will not be rebooked, the eReferral can be declined. Refer 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 Med Access:

7. Open the patient's chart in Med Access.
8. Click **Launch**.
9. In the Ocean extension, click **View Patient**.



10. From the patient dashboard, select the eReferral associated with the cancelled appointment.

Active Referrals						
Received						
Date Sent	Description	Referrer	Source Site	Provider	Status	Booked Date
Apr 9, 2026 9:16 am	General Surgery	Rachel Lively	TEST NSH/IWK Diagnostic Imaging Sender Site	Med Access Test Site	E-forwarded to Med Access Test Site: Booked	May 20, 2026 1:00 PM

11. In the **Scheduling** section:

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

Scheduling

Appointment:

May 21, 2026

1:00 PM

Medium:

In Person (Alternate Location specified in Booking Comments) ▼



Anticipated Wait Time to Appointment:

▼

☐ Confirmed

12. In the pop up window, click Yes – Delete.

Delete

Are you sure you want to delete the
'Appointment'?

Yes - Delete

Cancel

13. Click Save & Close.

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

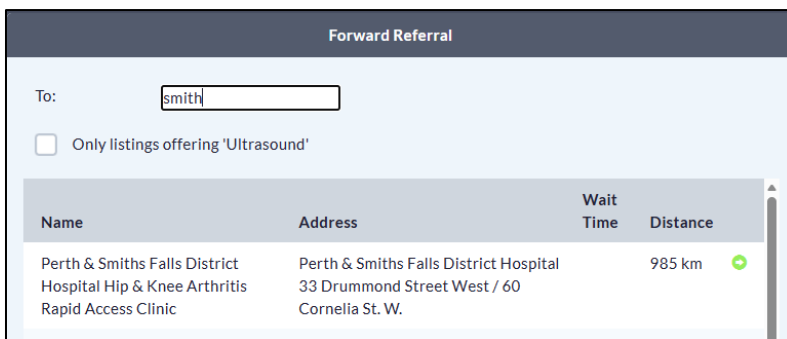
If the appointment will not be rebooked, you may need to decline the eReferral. Refer to the Declining an eReferral tip sheet for additional guidance.

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/contact-us

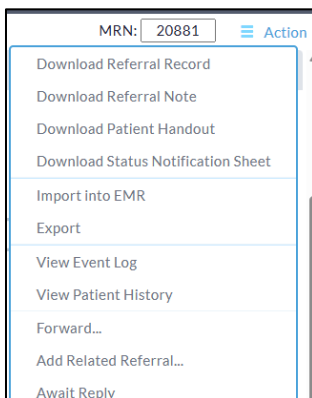


Name	Address	Wait Time	Distance
Perth & Smiths Falls District Hospital Hip & Knee Arthritis Rapid Access Clinic	33 Drummond Street West / 60 Cornelia St. W.		985 km

- 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

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



3. 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.



Forward Referral

To:

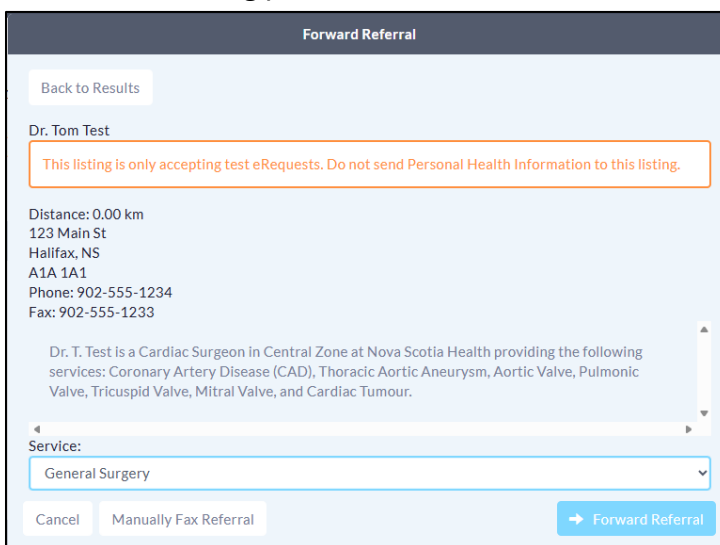
☐ Only listings offering 'General Surgery'

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

Matching Listings (1)

[Cancel](#)

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



Forward Referral

[Back to Results](#)

Dr. Tom Test

This listing is only accepting test eRequests. Do not send Personal Health Information to this listing.

Distance: 0.00 km
 123 Main St
 Halifax, NS
 A1A 1A1
 Phone: 902-555-1234
 Fax: 902-555-1233

Dr. T. Test is a Cardiac Surgeon in Central Zone at Nova Scotia Health providing the following services: Coronary Artery Disease (CAD), Thoracic Aortic Aneurysm, Aortic Valve, Pulmonic Valve, Tricuspid Valve, Mitral Valve, and Cardiac Tumour.

Service:

[Cancel](#) [Manually Fax Referral](#) [→ Forward Referral](#)

5. 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

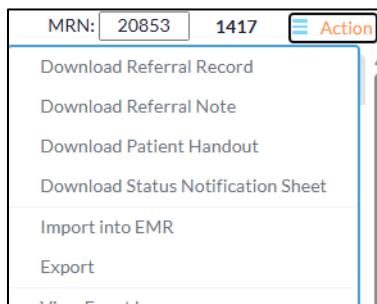
When a physical copy of an eReferral is required, users can easily print individual eReferrals or multiple eReferrals in batches, depending on their workflow needs. Printing may be necessary for a variety of reasons, including providing a copy to the patient, supporting internal record-keeping processes,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

Key Considerations

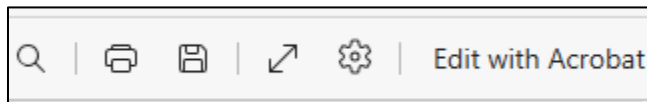
- eReferrals can have additional information added at any time. As a result, a printed copy may no longer reflect the most current version of the eReferral as time passes.
- Batch printing is limited to a maximum of 100 eReferrals at one time. Filtering may be necessary.
- Booked eReferrals can be printed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

Actions

- New Inbound Referral
- View Directory
- Claim Requisition
- Export
- Print Referrals in View
- Update Wait Times
- Patient History
- Disable Folder Counts

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

Batch Print Referrals

Batch printing referrals will print up to a maximum of 100 referrals that match your selected filters.

Proceed to print 2 referral(s)?

Print

Cancel

- 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.

Search | Print | Save | Share | Settings | **Edit with Acrobat**

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