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# eReferral via eFax

## Sending an eReferral via eFax

1. Choose a service and/or search for a specific site in the [Ocean Healthmap](#). Sites that are using eFax are identified by having “eFax” in their name.



2. Once you find the service and/or site that you're looking for, select it and click "Send eReferral via eFax".



# eReferral via eFax

- Complete the eReferral form, as required. If you initiated the referral from an integrated EMR, patient contact information and other required details will be automatically pre-populated.  
\*Note – Some sites may have a specific referral form required for submission. This will be noted when you open the eReferral form. In this case you will need to add their preferred form as an attachment. When steps are done click the “Send eReferral via eFax” Button

**Patient Information:**  
Surname: \_\_\_\_\_ Mobile #: \_\_\_\_\_  
First: \_\_\_\_\_ Home #: \_\_\_\_\_  
DOB: \_\_\_\_\_ Business #: \_\_\_\_\_  
Gender:  Male  Female  Other  
A/N:  Province  Health number  CC  Email: \_\_\_\_\_  
Address: Street \_\_\_\_\_ City \_\_\_\_\_  
Postal \_\_\_\_\_

Service:  Breast Clinic  eFax Template (Onc Specific Referral Form - Prescribed 2/24/11 108 2001)

**\*Indicates a required field**  
In Onc you will not attach General Referral  
 ONS Specific Referral Form Attached  
Referrals without a response will be moved to your "Needs Review" folder after:  
• Routine: 30 days  
• Urgent: 7 days  
Urgency:

**Consent to Receive Results**  
 Off Attached Separately  
 Do not send CRP  
Current Medications: \_\_\_\_\_  
Current Problems: \_\_\_\_\_  
Past Medical History: \_\_\_\_\_  
Allergies: \_\_\_\_\_

**Supporting Documentation**  
Please attach all relevant laboratory and diagnostic investigations from last 6 months

Personal Health Information that is medically relevant has not been disclosed at the request of the patient.

**Referring Information:**

- If an email address was included on the eReferral form you will see the reminder below, by choosing Consent Given the patient will receive email notifications.

**Obtain Patient's Email Consent**

Email notifications contain personal health information!

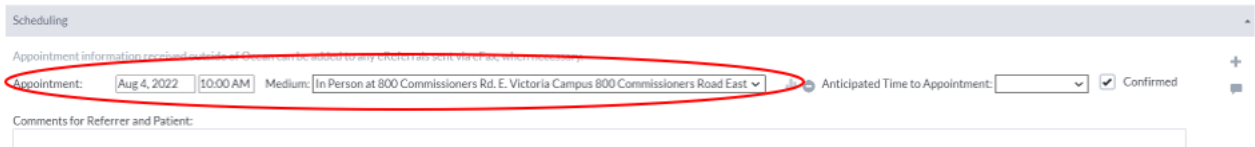
A patient's email is included here. They will receive email notifications regarding important status updates. Obtain consent before you submit.

The email address to be used is joethepatient43@outlook.com.

## Receiving Appointment Details – Updating eReferral

eFax recipients are not Ocean active participants so the sending site must make any updates to the eReferral record, this includes appointment details. If a patient email was included in the eReferral they will receive an email notification with appointment details.

1. Once you have been notified of the appointment details find the eReferral in the Ocean, open the form and navigate to the scheduling pane and add appointment information. If the appointment has been confirmed, check the confirmed box and you may also add comments for the patient if applicable.



2. Email Notification to patient:

**[Confirmation Required] An appointment has been booked for you**

Dear Harry,

A referral for **Surgery: Colorectal** was sent for you by Dr. Eric Tian on May 27, 2022:

Your referral has been received by Dr. Eric Tian (eFax) and this appointment information has been provided by their office.

Your appointment has been scheduled for **Friday, June 03, 2022 at 8:55 PM** in person at 235 The Boardwalk, Waterloo, ON, N2J 3Z4.

[Click Here to Confirm Appointment\(s\)](#)

If these appointment details are different in any way from any direct communication you may have had with, or received from Dr. Eric Tian (eFax), please contact Dr. Eric Tian at 519-555-0000 so we can update your record accordingly.

You will also need to confirm with Dr. Eric Tian (eFax), if you have not done so. If you have to change or cancel your appointment, please contact them directly.

Dr. Eric Tian (eFax)  
Fax: 519-579-0809

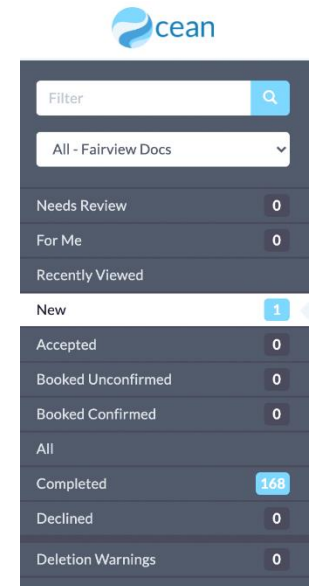
[Please click HERE to participate in a short, 2-minute survey to let us know about your referral experience. Your feedback is greatly appreciated!](#)

# eReferral via eFax

## Smart Logic

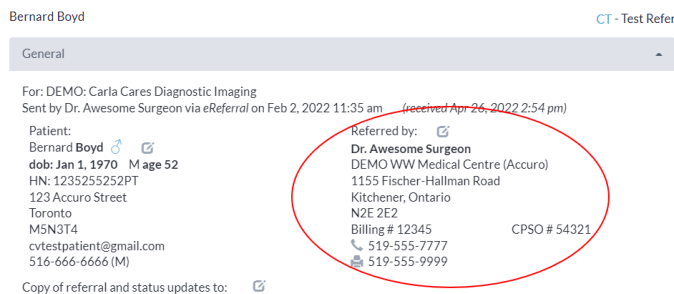
BPM automation has retry and reminder logic for unactioned referrals:

Folder Logic	Fax Code	BPM Automation
Needs Review	Fax failure Or appt info has not been received in time	Retry Logic: Tries 10 times within 12 hours (routine) or 2 hours (urgent), if still fail, then a message will be created  Reminder Logic: if no appt is booked after 30 days (routine) or 7 days (urgent), new message will be created
Accepted Pending booking	Fax transmission successful	
Booked unconfirmed	Appt info received directly from the specialists following current process	Senders will move referral from Awaiting response folder to booked unconfirmed folder
Booked Confirmed		Senders will confirm on behalf of the receiver or patient can confirm from email links



## eFax Cancellation

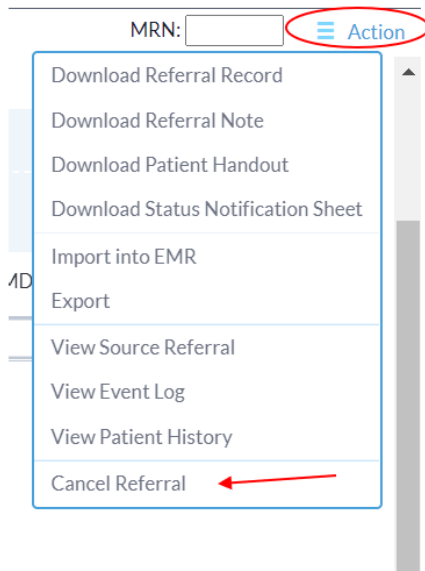
1. Locate the referral in Ocean
2. Identify who the eFax recipient is on the referral form



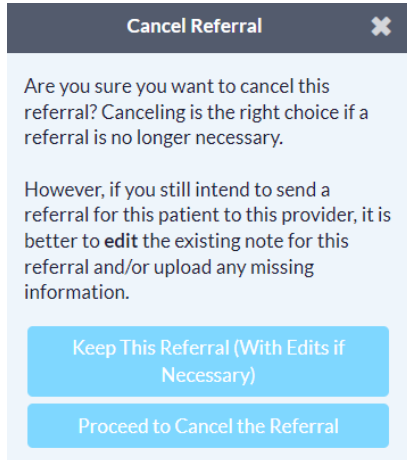
3. If cancellation is initiated on the sending side, call the receiving site and advise them of the cancellation. If cancellation is due to the receiver declining the referral skip to step 4.

# eReferral via eFax

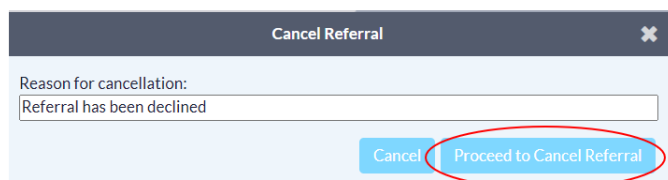
4. Update the referral status in Ocean to cancelled by clicking on the action menus in the top right corner and selecting “Cancel Referral”



5. Click on the option to Proceed to Cancel the Referral

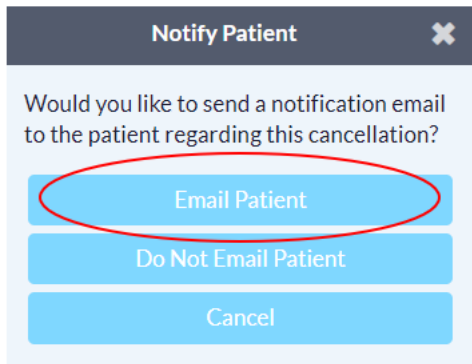


6. Type the reason for cancellation, for example “Referral has been declined” and click on “Proceed to Cancel Referral”



# eReferral via eFax

- Once cancellation reason has been added you may notify the patient of the cancellation if they have provided consent to use their email. To do this, click on the “Email Patient” button.



- The referral has now been cancelled and can be found in the Cancelled folder in Ocean



Status	Count
Sent (All)	
Incomplete	4
Awaiting Response	22
Accepted as Walk-In	0
Accepted as eConsult	2
eConsult in Progress	1
Pending Booking	25
Booked Unconfirmed	2
Booked Confirmed	5
Completed	33
Declined	5
Cancelled	7

## Notes:

- \* Forward functionality is currently not supported for eFax. You will not be able to forward an eReferral to a fax receiver.