



Creating Canned Responses for eReferral Bookings

On the receiving end of an eReferral, when booking appointments for patients using the Ocean eReferral Network, you have the ability to add canned comments that can be sent to the patient in advance of their appointment.

The screenshot displays the Ocean eReferral Network interface for a patient named 'ptFirstName lastName'. The interface is divided into several sections:

- General:** Patient information including name, date of birth (Jan 1, 1990), age (27), and address (3335 Yonge Street, Unit 304, Toronto, ON M4N2M1). Contact information includes phone numbers (888-888-8888) and email (blai@cognisantmd.com). Referral details include 'Referred by: clSigned' and 'Demo Site Medical'.
- Notes:** A note from 'Jeff Kavanagh' dated Nov 7, 2017, 12:13 pm, with a priority of P2. A 'New Note' field is available.
- Patient's Note:** A field for the patient's note, currently empty.
- Referral Note:** A note stating 'Consult Only' and 'Languages Spoken: English. Mobility issues: None'.
- Scheduling:** A section for booking an appointment. It includes a 'Book' button, a 'time...' field, an 'Estm. Wait:' dropdown, and a 'Confirmed' checkbox. A red box highlights the 'Comments for Referrer and Patient:' field, which is currently empty. A dropdown menu is open, showing canned responses: 'Please bring a pair of shorts', 'Please bring a CD or DVD with your imaging results.', 'Bring shorts', 'May 29 Canned Response', and 'Test'.
- Messaging:** A section for sending messages, currently showing 'Choose Files' and 'No file chosen'.
- Needs review:** A field for indicating if the referral needs review.

To create your own canned comments:

1. Log in to the [Ocean portal](#).
2. Go to the **Admin** tab and select **eRequest Management** (from the menu along the left).
3. From the eRequest Management screen, select the "**New Canned Response**", found in the bottom right corner of the screen.

- Site Account
- Site Features
- Users
- Encryption
- Directory Listings
- eRequest Links
- eRequest Management**
- Ocean Reminders
- Reports
- EMR Field Mapping
- Billing
- Support

The following **canned responses** are accessible when responding to eRequests.
No canned responses currently exist for this site.

[+ New Canned Response](#)

4. Give your response a **title** and add the **text** into the text field.

Add a title here ← ⊖ Delete

Body: ←

Prompt for appointment date and details

When prompting, prepopulate with date/time

5. Now, next time you are processing a referral, you can select one of your canned responses using the **dialogue bubble in the "Scheduling" section** of the referral.

Test Patient ✕

Test Patient Orthopedics MRN: ☰ Action

General ▾

Sent via *Other Source* on Jun 14, 2017 11:53 am

<p>Patient: Test Patient ♀ </p> <p>dob: Oct 10, 1980 age 36 90 St. Patrick Street Toronto, on M5T1V2 416-665-4323 (M)</p>	<p>Referred by: Heather Thomson Pseudo Diabetes Central Intake hthomson@cognisantmd.com Billing # 294857 Professional ID 573759</p> <p>☎ 416-782-4447 416-782-1284</p>
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Notes ▾

New Note:

Referral Note ▾

Referral edit...

Patient Information
 BMI: 0

Patient Symptoms and History

Scheduling ▾

	Booking 1: <input type="text"/> time...	Estm. Wait 1: <input type="text"/>	<input type="checkbox"/> Confirmed
	Booking 2: <input type="text"/> time...	Estm. Wait 2: <input type="text"/>	

Comments for Referrer and Patient:

Messaging ▾

No file chosen Send Message to Referrer (Pseud...

Needs review:

- Untitled
- Referral responses
- Xray
- Xray
- Untitled

Note: Canned responses are selected from the speech bubble icon in the "Scheduling" section, **NOT** the "Notes" section. Notes recorded in the "Notes" section in the top right corner of an eReferral are internal notes that indicate the status of the referral request.