OceanMD
A WELL Health Company

2024

# Provider Network Playbook

## EXTERNAL INTEGRATION PLAYBOOK

OCEAN MD

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# About Playbook

At Ocean, our vision is to enable different systems connect to our services to facilitate better provider and patient care. We aim to simplify the work to connect by using interoperability standards, a solution that is beneficial to both us and implementors. The HL7 FHIR API standards are a foundation of interoperability which improve continuation of care and collaboration. The Ocean team aims to provide new integrators with the option of connecting to Ocean as an integrated EMR/EHR/RIS (healthcare system) using a single, well-defined FHIR API protocol.

## About Ocean Provider Network

The Ocean Provider Network consists of products which help providers provide better care to patients in addition to helping healthcare work better for everyone by coordinating care among clinician and systems. These products include any type of eRequests, including eReferrals, eConsults, eOrders and eSubmissions. More information can be found here.

To support interoperability, Ocean utilizes FHIR APIs to enable connection with different health systems. These FHIR APIs allow for both the sending and receiving of eConsults, eReferrals, and eReferral updates to and from healthcare POS systems in real time. This integration enables staff to manage referrals within their healthcare POS systems, as well as eliminating manual entry and transcription errors. An additional benefit of the FHIR eReferral-eConsult API integration is that it allows a scalable approach to building an integrated health system; where aspects of a sending workflow can be built first and scaled to encompass more integrations and more workflows like the receiving workflow, and vice versa.

The APIs follow the HL7 FHIR Release 4 standard, as profiled in the Ontario eReferral-eConsult HL7 FHIR Implementation Guide (iGuide). There are multiple versions of the iGuide. All implementers are strongly encouraged to utilize the v0.11.1 version of the iGuide for net new integrations; only vendors with existing v0.10.0 APIs should refer to the v0.10.0 guidance. Additionally, as the messages Ocean sends and receives are outlined by the iGuides, anything present in Ocean shouldn't supersede the iGuide.

As the APIs have already been built and configured in Ocean, the work required to implement the integration between Ocean and healthcare systems will typically be on the implementor with little assistance required from Ocean support. The advantage of this is that you can proceed with your project independently without advanced coordination with the OceanMD team.

## Purpose

The purpose of this playbook is to have all the information required to successfully integrate with Ocean's Provider Network APIs in one easily accessible document, and to facilitate easier and seamless integration with Ocean's FHIR APIs. Additionally, there are links present which will redirect to articles and provide more information about certain topics. This playbook is an additional and cohesive documentation to help vendors implement the Ocean FHIR Integrations in combination with the eReferral implementation guide as we recommend referring to the iGuide for more extensive explanation and information on the eReferral FHIR APIs, message events, and FHIR resources. This playbook is your starting point for integrating with Ocean by providing the following information:

- Recommended Ocean integration instructions and workflows.
- Sharing information from other integrators that illustrate how best to use the Ocean APIs to achieve integration goals.

- Highlight integration nuances, tips and tricks, and FAQs to reduce implementation kinks and further allow seamless integration.

## Overview

The playbook covers integration with Ocean's FHIR APIs to receive eReferrals as both a sender and receiver. It includes the following topics:

- *Setting up your FHIR API Integration* – how to set up your eReferrals integration with Ocean
- *Payloads* – following the setup of the integration, this section reviews the payloads used by Ocean
- *User Workflows* – highlighting the sending, receiving, and special eReferral workflows used in Ocean
- *Best Practices* – best practices on testing and deploying your integration
- *Tips and Tricks* – tips and tricks to consider when implementing your integration
- *FAQs* – on the most common error messages you might encounter with your integration

# Setting Up your FHIR API Integration

To set up your FHIR API integration in Ocean, you'll need to follow the steps outlined in this article: HL7 FHIR eReferral Integration Setup Guide. The following sections will explain at a high level what is required to set up your sending and receiving work, and future sections will go into the Payload structures.

## Sending an eReferral

To send an eReferral using the FHIR API Integrations, there are two workflows that are supported; (1) logging into Ocean, sending an eReferral from the Ocean portal and receiving updates on that eReferral via the FHIR APIs, (2) launching from your healthcare system into Ocean using the SMART on FHIR launch and sending an eReferral from Ocean. The latter approach could also include receiving updates on the sent eReferral via the FHIR APIs. However, it's important to note that the SMART on FHIR launch utilizes different APIs than the eReferral FHIR APIs. More information on setting up both of these approaches is present in the upcoming sections.

### Receiving Updates on Sent eReferrals

Ocean can send a copy of the initially sent referral and updates made to the sent eReferral in Ocean to your healthcare system in a payload using the FHIR APIs. This feature is currently available to the FHIR APIs on the v0.11.1 version. Once an integration has been set up using the ***HL7 FHIR eReferral Integration Setup Guide*** (Steps 1- 6), the option to '*Post a copy of the referral (all integrations) and all subsequent status updates (FHIR v0.11 only) to this endpoint when a new referral is sent from this site*' should be enabled. This will subsequently allow all updates made on an eReferral sent in Ocean to be sent to the listed endpoint and subsequent healthcare system.

### SMART on FHIR

The SMART on FHIR contextual launch workflow uses the SMART App Launch to support single-sign-on and patient contextual launch from a health system into Ocean. It eliminates the need for an additional login into Ocean, expedites referral generation by pre-populating patient demographics, medical information, and other relevant data. Additionally, the SMART on FHIR implementation can be used with other SMART apps, allowing versatility and providing more use cases for your integration implementation.

This integration follows a different Implementation Guide and has additional requirements than the previously mentioned FHIR eReferral API Integration. Therefore, here are some helpful resources to assist with the implementation of the SMART on FHIR workflow:

- Ocean SMART App Launch Overview: This article provides an overview of the SMART on FHIR EHR Contextual launch including highlighting the requirements and providing information on the patient contextual launch, sequence, etc.
- SMART on FHIR Implementation Guidance: This article provides information and tips for getting started on a SMART server implementation including setup considerations, guidance for different operations, launch action parameters, etc.

To expedite the referral generation by pre-populating patient demographics and other relevant information, the SMART on FHIR integration uses Profiles with information mapped to Ocean eForm keywords, eliminating manual entry and the associated errors. An extensive list of the

profiles and what information which can be integrated with Ocean during the SMART on FHIR launch can be found in the Ocean SMART on FHIR Profiles iGuide. This article describes the profiles expected by Ocean during the SMART on FHIR contextual launch, highlighting the elements that are must support and have required cardinalities. Additionally, a list of all the Ocean keywords and corresponding profile names are present in this *Appendix A*.

## Receiving an eReferral

Using the FHIR APIs, Ocean sends payloads of message events with the required information and updates made on an eReferral to an integrated eReferral receiving system. To receive an eReferral using the FHIR API Integration, your system will be required to be able to receive and process FHIR API messages. The articles outlined in the ***Setting Up your FHIR API Integration*** section should be used to assist in setting up an integration to receive an eReferral from Ocean. Additionally, your system can also send messages to Ocean, updating Ocean on a specific eReferral using the FHIR APIs.

# Payloads

Ocean generates payloads using the FHIR APIs to transmit messages to healthcare systems. The messages are typically sent whenever a new referral event occurs (e.g. upon new referral creation, status/eReferral updates, attachment addition, message communication, appointment additions, referral splitting, etc.). Ocean also receives messages regarding updates to the referral from a healthcare POS system and performs actions on the eReferral on the Ocean platform based on those messages.

It's important to note that Ocean accumulates resources in each payload bundle which may not be relevant for certain message events and actions. Additionally, Ocean will send an update back to the receiving EMR for any update made in Ocean, even when these updates are made by the receiving EMR. Therefore, Ocean is considered very 'chatty' and 'verbose', providing frequent message updates with all the accumulated resources and information present in the payloads.

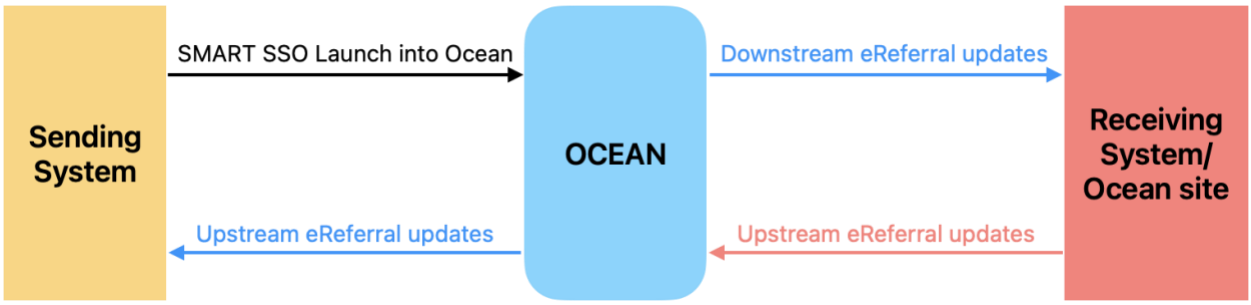



*Image depicting upstream and downstream updates from and to Ocean*

Additionally, referrals in Ocean are typically managed in folders located in the eReferrals & eConsults section. These folders are used to manage and process the site's sent and/or received eReferrals by sorting them in one of the following folders, based on their current status: New, Pending Booking, Booking Unconfirmed, Booking Confirmed, Awaiting Reply, Awaiting Response, Received (All), Sent (All), Completed, Declined, Forwarded (All), Cancelled, Externally Managed, Incomplete. This article provides additional information on what the different folders mean and their uses.

*The table below highlights the v0.11.1 message events, their focus (`MessageHeader.focus`), and the appropriate folder and action that each message event pertains to in Ocean for the receiver flow.*

| Ocean to EMR – Receiver Workflow (Received Folder) | | | |
|---|---|---|---|
| v0.11.1 | Description | Focus | Ocean Folder |
| `add-service-request` | Send a new eReferral | `ServiceRequest` | New |
| `notify-update-service-request` | Send an update on an eReferral | `ServiceRequest` | *this depends on the specific action taken. |
| `send-communication-from-requester` | Sender sends a message to the receiver | `Communication` | The referral will remain in the previous folder it was and will also be added to the *Needs Review* folder. |
| `revoke-service-request` | Cancel an eReferral | `ServiceRequest` | Cancelled |

| EMR to Ocean – Receiver Workflow (Received Folder) | | | |
|---|---|---|---|
| v0.11.1 | Description | Focus | Ocean Folder |
| `notify-data-correction` | Send an update on an eReferral, either for the eReferral itself or demographics | `ServiceRequest/ Patient` | *this depends on the previous actions taken |
| `notify-add-process-request` | Update the status of the eReferral | `Task` | *this depends on the specific action taken. See image for what each status actions. |
| `notify-add-appointment` | Add an appointment to the eReferral | `Appointment` | Booking Unconfirmed/ Booking Confirmed |
| `notify-update-process-request` | Update an appointment on the eReferral (including cancel) | `Appointment` | Booking Unconfirmed/ Booking Confirmed |
| `send-communication-from-provider` | Receiver sends a message to the sender | `Communication` | *this depends on the previous actions taken (Needs Review) |

*The table below highlights the v0.11.1 message events, their focus (`MessageHeader.focus`), and the appropriate folder and action that each message event pertains to in Ocean for the sender flow.*

| Ocean to EMR – Sender Workflow (Sent Folder) | | | |
|---|---|---|---|
| v0.11.1 | Description | Focus | Ocean Folder |
| `notify-add-service-request` | Send a copy of the new eReferral | `ServiceRequest` | New |
| `notify-update-service-request` | Send any update made on the eReferral including demographic changes, communication, appointment additions, etc. | `ServiceRequest` | *this depends on the specific action taken. See image for what each status actions. |

This article contains examples of the v0.11.1 payloads. However, as previously mentioned, we recommend using this as a guide and not an exact copy, as the Implementation Guides should ultimately be used to frame your integration. **Appendix B** highlights the sending and receiving provider task.status actions that affect the eReferral lifecycle. of the Appendix **C** contains a comparison between v0.10.0 and v0.11.1 message events.

## Nuances of each message event

The message events are unique in their focuses, therefore, the focus(es) of each message event is the optimal way to highlight what each payload refers to. Additionally, a bundled message event may have more than one focus, and there is an importance in highlighting additional nuances which may be outside the obvious behaviour of the message events.

### `add-service-request`

This message event is used in both v0.10.0 and v0.11.1 to send a new eReferral from Ocean to the receiving RMS target.

- Referral summaries and the original attachments sent when the eReferral is created can be retrieved from this bundle using the following methods:
    - The referral summary can be retrieved the endpoint described below: https://ocean.cognisantmd.com/public/fhirApiDocs.html#operation/referralReferenceLetter_1 and individual attachments can be retrieved from the endpoint described below: https://ocean.cognisantmd.com/public/fhirApiDocs.html#operation/DocumentReferenceBinary_1
    - A consolidated PDF with the referral summary and all attachments can be retrieved by appending *?attachments=true* to the referral summary endpoint https://ocean.cognisantmd.com/public/fhirApiDocs.html#operation/referralReferenceLetter_1

### `notify-update-service-request`

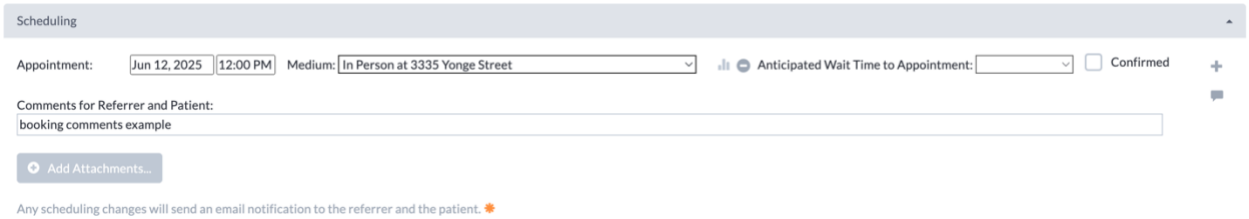
As previously indicated, this message event is used to communicate updates made on the eReferral. It typically relays updates from the RMS Source (Ocean) to the RMS Target (HIS/EMR). Here are some additional nuances to be aware of with this message event:

- Most actions except for creating an eReferral, sending a `Communication`, and cancelling an eReferral will send a `notify-update-service-request` message event to the receiving system.
- Any action taken on the eReferral either via the UI or the API and either by the sending provider or receiving provider/system will send a `notify-update-service-request` message event to the receiving system.

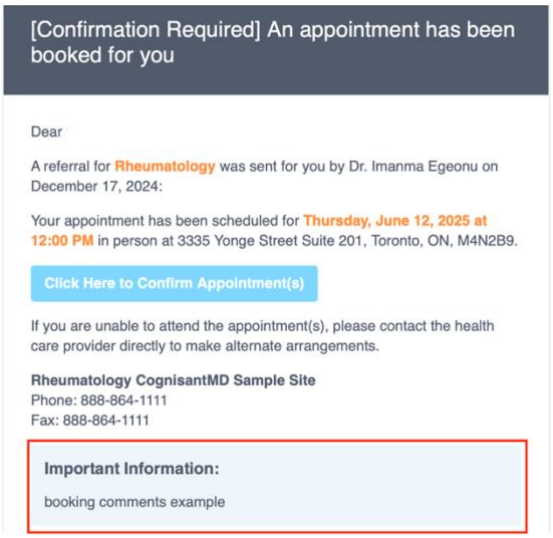
### `notify-add-appointment`

This message event is used by the referral receiver to add appointments to eReferrals in Ocean using the FHIR APIs.

- This message event cannot be used to update appointments on an eReferral.
- It can be used to add multiple appointments on an eReferral by including multiple `Appointment` resources; and booking comments using the *`Appointment.Patientinstruction`* field.




*Booking comments in the eReferral pane in Ocean*




*Booking comments in the Patient's email from Ocean*

- When multiple appointments are added on the eReferral, there should be multiple focuses relative to the `Appointment` resources present.
- The eReferral can be moved directly into 'Confirmed' status in Ocean and put into the 'Booking Confirmed' folder in the Ocean portal if a `Patient` resource is referenced in the *`Appointment.participant.actor`* field **and** the *`Appointment.participant.status`* is set to **accepted**.
- The appointment medium (video, phone) can be specified in the *`Location.type`* field that is referenced by the *`Appointment.participant.actor`* field.
    - *If the medium is unknown/unspecified or known to be in-person:* Include a participant containing an actor with code "LOC", display "Clinic Location" and a reference to the listing's Location resource.
    - *If the* appointment *is phone-based:* Include a participant containing an actor with code "LOC", display "Phone Visit" and a reference "Location/X" to a Location with ID X in the Bundle. Set the Location's telecom to match the listing's phone number.
    - *If the* appointment *is a home visit*: Include a participant containing an actor with code "HH", display "Patient Location" and a reference "Location/X" to a Location with ID X in the Bundle. Set the Location's address to match the Patient's address if it is available.
    - *If the* appointment *is at an alternate location*: Include a participant containing an actor with code "LOC", display "Alternate Clinic Location" and a reference "Location/X" to a Location with ID X in the Bundle. The Location resource must contain an address, and its description should match the description of the alternate location e.g., "Alternate Clinic Visit Location: ___"

### `notify-update-process-request`

This message event was introduced in v0.11.1 and can be used similarly to how the `notify-update-appointment` message event is used in v0.10.0.

- This can be used to update a `Task` or an `Appointment`.
- This is used to update the status and/or information on appointments with the *`MessageHeader.focus`* as the `Appointment` resource and not `Task`.

### `send-communication-from-requester` and `send-communication-from-provider`

This message event is used in both v0.10.0 and v0.11.1 to send messages using the FHIR APIs on eReferrals.

- You should look for documents in the `Communication` resource rather than the `DocumentReference` when a message is sent via Ocean with an attachment.
- Messages sent from the receiving system to the referral sender via Ocean using the FHIR APIs will be presented in the Ocean UI as being from the receiver's listing. i.e. if Dr. Jane Smith of ABC Medical Clinic is the referral recipient and sends a message from their EMR to the original referral sender via Ocean, the Messaging pane will display the message as simply being from ABC Medical Clinic.
- Ocean's APIs accept attachment/file sizes of up to 10 MB per file and up to a maximum of 50 MB of attachments to a referral. If the file size is too big, Ocean will return an error message and not process the entire payload.
- Messages can only be sent from the receiver through to APIs to the original sender of the referral.

# User Workflows

As highlighted in the previous sections, Ocean supports multiple eReferral flows which includes the Sender flow and the Receiver flow. The sender flow can include the SMART Launch into Ocean (SSO) integration and/or the ability to receive updates on sent eReferrals into the sending EMR. While the receiver flow can include the ability to receive eReferrals using the FHIR APIs into your EMR and the ability to send updates back from your EMR into Ocean for the received eReferrals.

## Sending Workflows

The SMART on FHIR Launch into Ocean which is a SSO launch into Ocean can be implemented with or without the updates to the EMR workflow and vice versa.

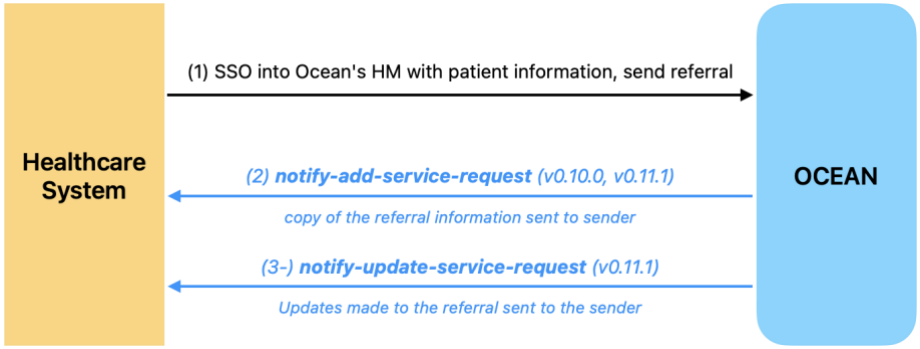



*Image depicting sending workflow from and to a Healthcare System in Ocean*

Ocean supports the following features in the sending workflow:

- Patient demographics integration (*using SMART on FHIR*)
- CPP fields integration – `Medication, Allergies, Conditions, Observations` (*using SMART on FHIR*)
- Attachments integration (*using SMART on FHIR*)
- Receiving a copy of sent referral (*upstream updates*)
- Receiving status updates for sent referral (*upstream updates*)
- Receiving Appointment information (*upstream updates*)

### Upstream Updates

As indicated in the previous section, Ocean supports the ability to send referral senders a copy of their sent referral and status updates on those eReferrals. At this time, this information is sent upstream using the `notify-add-service-request` (for the initial copy of the referral), and the `notify-update-service-request` (for status/appointment updates on the referral) message events. As all updates are sent upstream using the `notify-update-service-request` message event, the focus of the message event is the `ServiceRequest`. To determine the status and/or information changes in this payload, the following can be implemented:

- To determine if the patient's information has been **updated** – A communication resource will be present outlining the change. i.e. *`Communication.payload.contentString`* = *"The patient's information was updated:\nSex was changed from 'F' to 'M'."*
- To determine when an **appointment** has been added to the referral and the status – the *`Appointment.start`*,*`Appointment.end`*, and *`Appointment.minutesDuration`* elements will be present in the `Appointment` resource. Additionally,

the `Appointment.participant.status`, where '*tentative*' would indicate that the appointment is unconfirmed, and '*accepted*' indicates that the appointment is confirmed.

- To determine if the referral is **completed** (which may be completed, declined or canceled in Ocean) – the `ServiceRequest.status` = '*completed*'.
    - If **cancelled**: the `Communication.payload.contentString` element will be prefaced with *"Cancelled"*.
    - If **declined**: the `Communication.payload.contentString` element will be prefaced with : *"This referral was declined…"*

All updates are sent in individual update message, i.e. if a referral is declined AND an appointment was removed from it, those will be 2 separate messages reflecting the individual changes.

## Receiver Workflows

Ocean sends eReferrals using the FHIR APIs and supports the ability to receive updates on those eReferrals. It's important to note that while we send updates on all changes made the referrals, not all information included in the payloads may be required to provide care in your system. Therefore, you can process the information that pertains to your system and disregard the others.

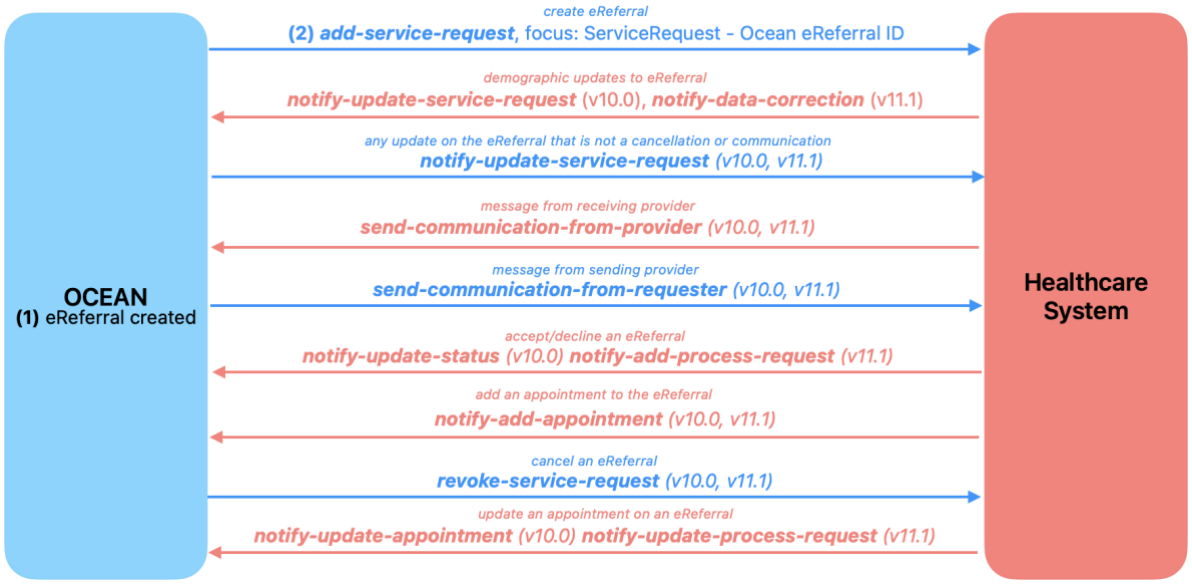



*Image depicting receiving workflow to and from a Healthcare System in Ocean*

Ocean supports the following features in the receiving workflow:

- Receive referral in EMR
- Retrieve attachments and referral pdf
- Send demographic updates to Ocean
- Receive message/Communication from Ocean in EMR
- Send message/Communication with attachment to Ocean from EMR
- Send accept referral status update to Ocean
- Send referral Appointment information to Ocean
- Send referral Appointment booking comments to Ocean
- Send updated Appointment information to Ocean including Appointment cancellation
- Send decline referral status update to Ocean
- Send declined reason update to Ocean

## Special Workflows

Ocean also supports some special workflows which assist in providing better care to the Patients and increases the ease of eReferral management for the providers. This article contains the example payloads for each of the special workflows highlighted in this section.

### Accept as an eConsult

In Ocean, eReferrals can be accepted as eConsults in the Ocean portal UI. This article describes the workflow of how to accept an eReferral as an eConsult and the actions that can be performed on it. Subsequently, the ability to accept an eReferral as an eConsult and add communication to it is also supported via the referral APIs. To accept an eReferral as an eConsult you'll need to perform the following in the `Task` resource:

- Include a Boolean extension (*`Task.extension`*) with the following extension url: *http://ehealthontario.ca/fhir/StructureDefinition/ca-on-eConsult-ext-patient-needs-to-be-seen*
- Set the Boolean value to: **false**
- Ensure the *`Task.code.coding.code`* is set to ***process-request***
- Set the *`Task.status`* to **accepted**

Additionally, an eReferral that has been accepted as an eConsult can also be switched back to an eReferral by doing the following:

- Include a Boolean extension (*`Task.extension`*) with the following extension url: *http://ehealthontario.ca/fhir/StructureDefinition/ca-on-eConsult-ext-patient-needs-to-be-seen*
- Set the Boolean value to: **true**
- Ensure the *`Task.code.coding.code`* is set to ***process-request-consult***
- Set the *`Task.status`* to **accepted**

### Referral Splitting

With some referral pathways, Patients may be referred to a listing and with more than one Health Service Category requested e.g. CT and MRI. In these cases, depending on the receiving site's workflow, the referral could be split into 2 or more referrals – depending on the number of HSCs selected. Depending on the site's configuration, the referrals can be split automatically or manually. More information on referral splitting can be found in this article.

Ocean FHIR APIs also support the referral splitting workflows and it is reflected in the payloads which are sent to the receiving system. Typically, 2+ sets of payloads are generated upon the eReferral splitting creation which is described below.

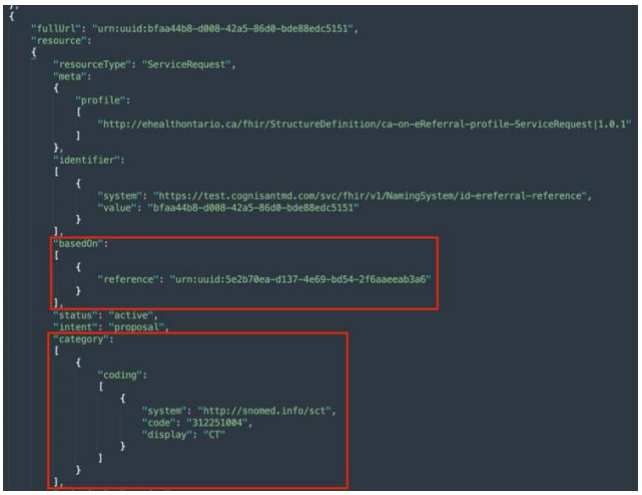
#### *Automatic Splitting*

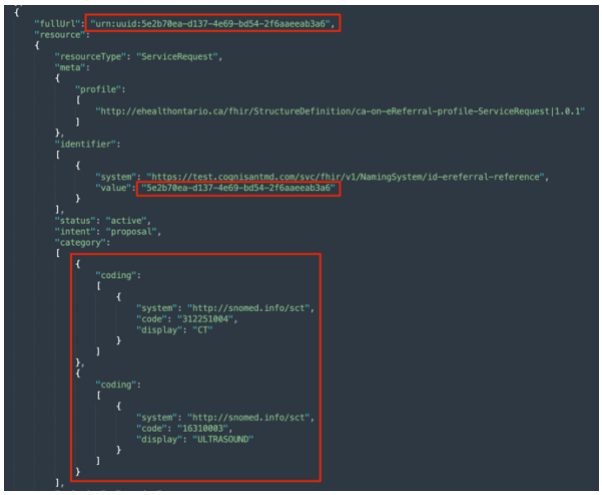
- **Source referral** will have all the Patient's requested HSC's i.e. CT, US
    - Payload is not sent for source referral only child referrals
    - Adding a note on the source referral doesn't get sent in any payloads in Ocean
    - Demographic updates made on the source referral gets sent for each child referral
- **Child referral** will have the Patient's HSC's broken down e.g. 2 child referrals: 1 CT, 1 US
    - Payload is sent for each child referrals

- Payload will only include service request of child referral it's sent for AND service request for source referral. Therefore, you wouldn't be able to find the service request for other child referrals in another child referral's payload.
- The service request of the child referral will be '*basedOn*' the service request of the source referral
- When a note is added on the child referral, previous notes added on the source referral and/or other child referrals don't get sent upstream
- Demographic updates added on child referrals gets reflected in other child referrals and sent in the payloads

*Manual Splitting*

- **Source referral**
  - Payload is sent for source referral
  - Adding a note on source referral prior to the split gets sent in the source referral payloads
  - Following split, previous source referral note gets removed from the payload
  - Subsequent behaviour mimics Automatic splitting




Figures are obtained from the same eReferral payload. **Figure a (left)** shows a child referral's `ServiceRequest` resource with a "basedOn" element referring to the parent referral's `ServiceRequest` in addition to highlighting the HSC for the child referral. **Figure b (right)** shows the parent referral's `ServiceRequest` resource, highlighting the two child referrals HSC's which were generated.

### Referral Forwarding in Ocean

eReferrals which are created in Ocean can be forwarded to another Ocean listing (and/or site) that is more appropriate for administering care. This forwarding takes place in Ocean using the "forward" button on an eReferral and is typically common with the Central Intake listings in Ocean – more information on the Central Intake Listings and Ocean forwarding can be found in this article. Additionally, this workflow is supported by the FHIR APIs and is a form of routing, which is outlined in the Pan-Canadian eReferral iGuide.

With this workflow, when an eReferral is forwarded from Listing A to Listing B, if Listing B is a FHIR integrated site, it receives an `add-service-request` payload informing its system of a new eReferral creation. Additionally, the *`MessageHeader.destination`* in this payload will pertain

to Listing B. Furthermore, there will be two `ServiceRequest` resources present in the payload; where one pertains to the forwarded site with its *`ServiceRequest.performer`* present as Listing B, and the other pertains to the forwarding site with a '*replaces*' element present and it's *`ServiceRequest.performer`* present as Listing A.


*Figure highlighting the "replaces" element in the `ServiceRequest` resource for the forwarding listing.*

### Referral Forwarding via RMS Target

Similar to the referral forwarding in Ocean workflow described in the section above, eReferrals which are created in Ocean can be forwarded to a listing in Ocean via the APIs. i.e. A receiving system (RMS Target) can forward an eReferral which it received from Ocean to another listing in Ocean by sending Ocean an API message. Similar to the workflow which is performed in Ocean, this is also a form of routing outlined in the Pan-Canadian eReferral iGuide.

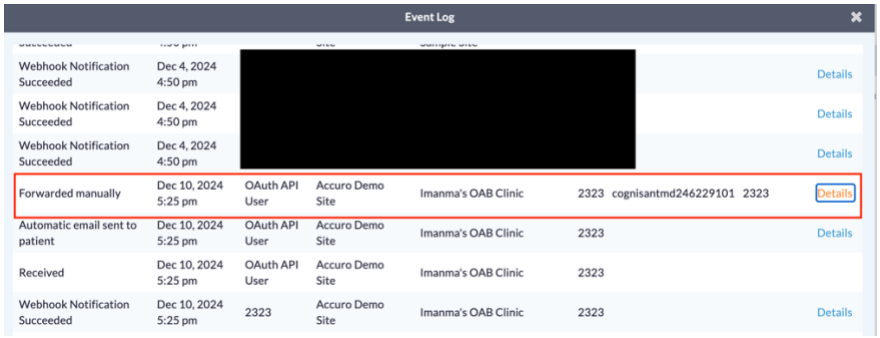
A few things to note is that this forwarding can only be successfully completed to an existing listing in Ocean, with its corresponding HSC. Additionally, each listing in Ocean has a unique listingRef, which must be highlighted in the payload for this to be successful. At this time, this information must be obtained from an Ocean Support resource.

The requirements of this workflow are outlined below:

- In v0.10.0, this forwarding must be completed with a `notify-update-service-request` message event, while in v0.11.1, it must be completed with a `notify-update-process-request` message event.
- The request should have two `ServiceRequest` resources that look similar - one of those is for the forwarding listing/referral target (Listing A) and the other is for the forwarded/new listing (Listing B).
    - The `ServiceRequest` for Listing A should be unchanged and the same as was previously present
    - The `ServiceRequest` for Listing B should contain a '*replaces*' element which references the referral ID for Listing A. Additionally, it should include a '*category*' element which properly highlights the listing's HSC – more information on supported HSCs are found here, and a '*performer*' element referring to the Listing's `PractitionerRole`.

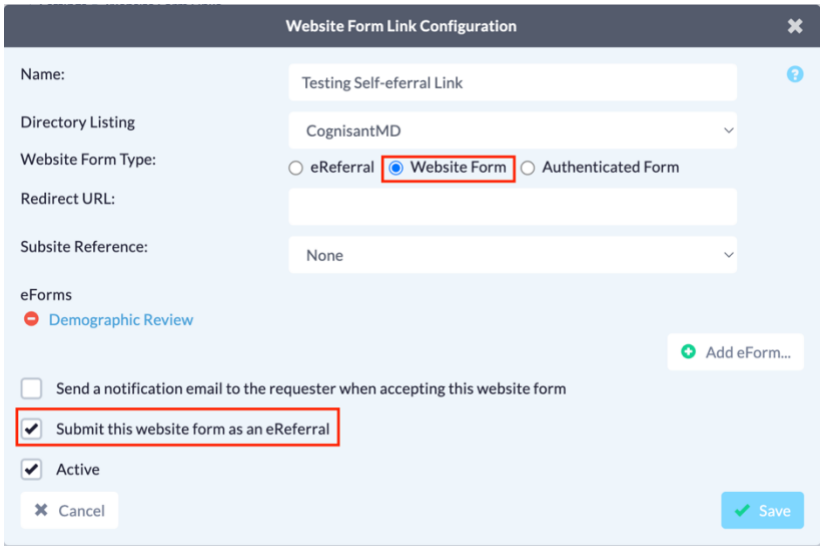
- The *MessageHeader.destination* and subsequently the *MessageHeader.receiver* should refer to Listing B's `PractitionerRole`.

Once the payload has been properly set up and send to Ocean, the referral would be forwarded to the new target listing, and the event log will reflect this forward.




## Self eReferral

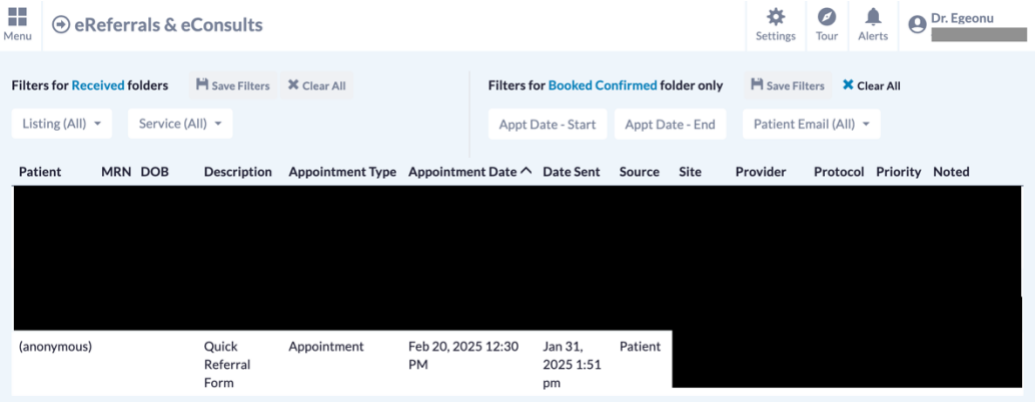
Self-referrals are an effective way for patients to submit referrals to participating clinics and physicians. This is typically done in Ocean through Website Forms which can be hosted on a clinic website or sent to a patient via email. These website forms are typically associated with an eReferral listing that is also associated with a FHIR API integration. While this is using the Website Forms, this doesn't require the Patient Engagement FHIR API integration, as this is solely reliant on the patient's ability to access the form and send an eReferral. However, in the case of using Patient Authenticated Website Forms, this will require the Patient Engagement FHIR API integration. The image below shows the settings required for the Self-referral process.




Once this is enabled and a self-referral sent, a FHIR payload will be sent to the associated endpoint, however, this payload will differ from other payloads which are sent by a referring provider. They can be distinguished from service provider-initiated referrals because *`ServiceRequest.requester`* will reference the `PractitionerRole` resource of the receiving clinic, and the *`QuestionnaireResponse.author`* will reference the `Patient` resource instead of the sending `Practitioner`.

A few important pieces to note:

- It's important to ensure that the form being used for the Self-referrals has a patient demographic section present to collect the patient demographic information as the forms don't include a demographic pane. Omitting these form questions will cause the `Patient` resource to be sent in the payload without any associated patient information leading to an "anonymous" referral on the Ocean portal and potentially the EMR.




- Additionally, implementors should confirm with the sites' business stakeholders whether they want patient self-referrals to be processed in the same way as service provider-initiated referrals (e.g. can they create a new referral in the RMS Target/POS or should they only once they have been 'accepted' within the Ocean Portal).

### Referral Delegation

Some Ocean referrals and consults involve another actor (e.g. medical secretary, resident) that submits the request on behalf of the clinician. In this case, there is a request authorizer and a request submitter. To highlight this, the FHIR payload will include a `Practitioner` and `PractitionerRole` resource into the bundle for the referral submitter, along with information for the authorizer and the referral receiver. Below are some examples of how the submitter and authorizer information will be populated in the payload:

| | *MessageHeader.sender* | *ServiceRequest.requester* | *MessageHeader.author* |
|---|---|---|---|
| Physician Assistant (PA) sending referral under physician Dr. D | PA | Dr. D | Dr. D |
| Nurse Practitioner (NP) sending referral (ordering an MRI) under authorizing physician Dr. D | NP | Dr. D | Dr. D |
| Medical Secretary (MOA) sending referral as a delegate under Dr. D | MOA | Dr. D | Dr. D |

### Copy-to provider

Ocean referral senders have the ability to 'carbon copy' (or 'copy-to') other providers on the referrals they are sending so that they are informed of the progress and outcome of the referral. The sender selects within the HealthMap UI one or more listings that represent the providers that will receive a carbon copy. Subsequently, the providers and/or listings which have been copied on a referral will be present in the payload which is sent to the referral receiver, informing the referral receiver of the copied providers. Additionally, if the listings are also integrated with Ocean via the FHIR APIs, the copied providers/listings will also receive a copy of the referral via the FHIR API integration, in addition to any updates made on that referral.

In the payload that is sent to the main referral receiver, an extension is present in the `ServiceRequest` resource to highlight that there are copied providers on the referral and indicate who the copied providers are. The extension includes a reference to the `PractitionerRole` which would reference the Practitioner resource and Location resource of the copied provider. It's important to note that the Practitioner resource will only be included when the clinician information is present in the listing. The image below shows an example of the extension in the `ServiceRequest` resource

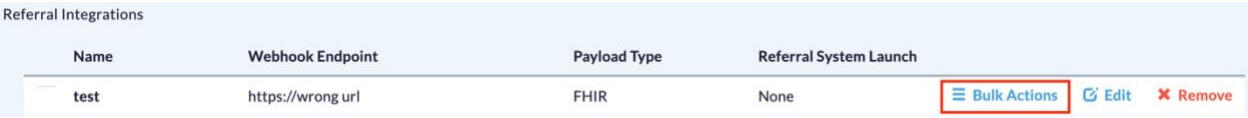
```
"extension":
[
  {
    "url": "http://ehealthontario.ca/fhir/StructureDenition/ca-on-lab-ext-cc-list",
    "valueReference":
    {
      "reference": "urn:uuid:{{CCed_PractitionerRoleResourceID}}"
    }
  }
],
```

### Retry Action

The bulk retry action allows users the ability to resend referrals to their endpoint either as a new referral (`add-service-request`) or as an updated referral (`notify-update-service-request`). This feature is especially useful in the case where a directory listing was already accepting eReferrals prior to an integration being added to that listing. In this scenario, the previously sent eReferrals can be sent to the newly integrated listing's endpoint and subsequently the EMR by using this bulk retry action.

Additionally, this feature can also be used in cases where an EMR integration is down for more than 4 days – surpassing the retry framework period. In this case, once the integration gets back up and running, the eReferrals which have completed their retry period can still be resent to the endpoint, preserving the eReferral information and preventing the data from being lost. Here's some additional information on this feature:

- It can be found in the *Admin* > *Integration* > *On the integration endpoint (**Bulk Actions**)*




- To use this feature, a csv file containing a list of all the affected eReferrals' *referral reference ID* needs to be uploaded.
    - This list can be obtained from the referral analytics report
- There is currently a limit of 1000 referralRefs per csv file (per one time).

- The referrals are sent sequentially to the endpoint and spread out by 15s.
- The `add-service-request` `ServiceRequest` will contain the original date that the referral was received so that the chronological order is maintained.
- Any information sent on the referral prior to the message being sent via the integration will be included in the `add-service-request` and `notify-update-service-request` messages.
- A report is generated at the end of the upload, indicating which referrals were successfully processed.

# Tips and Tricks

## Relationship between Referral Form and QuestionnaireResponse Resource

The Ocean eReferral forms (eForms) are used to collect and transmit Patient's health information to the appropriate recipient. They can be assigned to a directory listing to be used to collect information that a referral receiver might need, and once these form answers are collected in Ocean, they are sent to the receiving EMR system via the FHIR APIs in the payloads. The section of the payload which typically contains the collected form data is the *QuestionnaireResponse* resource. Every question-and-answer present in the eForm is found in this section, regardless of if it was answered or not. Each form item ID is presented as the *linkID* element which is related to the *itemreference* value assigned to the eForm question/section during the form building process. More information on building out eForms can be found in this article. The text of the question is presented as a *text* element, and the response to the question is presented as an *answer.valueString* element in the payload. Questions that have not been answered will be typically missing an answer element id, and questions which are hidden are presented with an extension which is explained in the next section.

Therefore, with this structure, it is possible to map the eForm itemreferences (*linkIDs*) as discrete data elements to sections in your EMRs to better populate the answers provided by the sending physician in your EMR and reduce the manual entry time and errors.

## Hidden Fields

As previously stated, during the referral sending process, listings typically have forms that they require the referral sender to complete before sending the referral to the destination listing. These forms questions and answers are presented in the QuestionnaireResponse resource in the payload, with each form item ID presented as the *linkID* element, the text of the question presented as a *text* element, and the response to the question presented as an *answer.valueString* element.

In some cases, there are collapsible form sections which are hidden but then unhidden by the answering of another form question; and senders might have initially responded to a hidden form item and subsequently retracted this answer by hiding the section again without clearing out their answers. In such cases, Ocean will not with-hold the initial answer from the QuestionnaireResponse resource. However, we will present an extension in the QuestionnaireResponse element that will indicate each form item response that has been hidden, including the retracted responses. The *valueString* property will always be set to "'*hidden*" for this extension. Below is an example:

### Response Handling

When Ocean sends payload messages to an endpoint, Ocean is expecting to receive a 20X-class (i.e. 200, 201) status response code for that message that was sent. It's important to note that Ocean is "chatty", therefore, Ocean will send messages for every action that is taken on a referral. Additionally, even when the receiving system sends updates to Ocean on a referral, Ocean will also send a message (`notify-update-service-request`) to that receiving system's endpoint informing them of the change that was just made to the referral. Therefore, while most of these messages can be ignored, Ocean still expected a 20X-class message response for each message event sent. Any other message response sent will trigger a "failed message delivery" in Ocean which will start the retry framework process.

### Retry Framework

When the API messages fail to send from Ocean to the integrated endpoint, Ocean embarks on a process to retry the messages for a period of time which is referred to as the Retry Framework. The retry framework consists of Ocean attempting to retry the message sent once per hour for up to 96hours. Additionally, during this time, Ocean will send daily emails to the Site's Clinical Administrator/Ocean Support Contact informing them of this message failure. More information can be found in this article.

### External Service ID

When vendors are using a single endpoint to route referrals for multiple sites/listings (multi-tenant approach), the External Service ID can be utilized to differentiate and identify which listing the payloads are being sent to, regardless of endpoints. This will be identified as the following extension in the payload: https://test.cognisantmd.com/svc/fhir/v1/NamingSystem/id-referral-target-external-service and present in the receiving *`PractitionerRole.identifier.value`* and *`MessageHeader.destination.receiver.value`*.

```
"identifier":
{
    "system": "https://test.cognisantmd.com/svc/fhir/v1/NamingSystem/id-referral-target-external-service",
    "value": "external service ID name"
}
```

### The Event Log

The event log for each referral is an important tool that enables users confirm and understand if and when the referral was updated. This can be accessed by opening the referral record and selecting 'View Event Log' from the top right 'Action' menu.

# FAQs

### How do eReferral Payments work?

In Ocean, eReferral senders are currently not required to pay to send eReferrals. However, as an eReferral receiver, there might be some payments required. Additionally, you might be eligible to receive eReferrals for free through your provincial program. More information can be found here.

### How long does the integration process typically take?

This is typically dependent on the EMR vendors capabilities and capacity. However, we do recommend estimating approximately 3-4months for the integration implementation and UAT process.

### Where can I find payload examples?

Payload examples for the v0.11.1 implementation can be found in this link. However, we strongly advise that the examples presented here should not be strictly copied, but should rather be used as a reference, with the information in the Ontario v0.11.1 eReferral iGuide being used as a framework.

### Paying for integration support

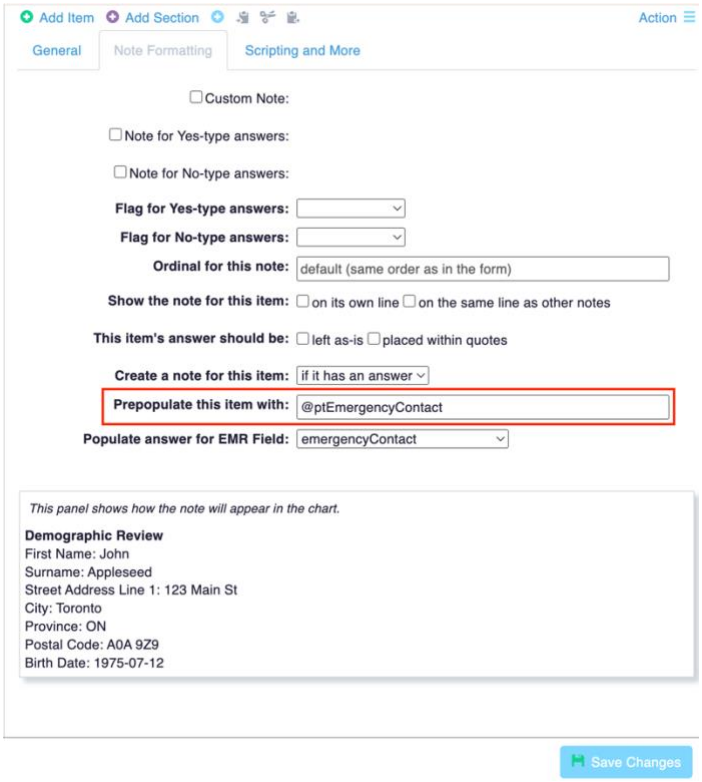
The integration implementation can be typically completed by the EMR vendors with support from our documentation and articles and/or support from the provincial program. However, in the case that additional support is required, Ocean is happy to support through a direct invoicing to the project. We generally recommend that a bundle of 15 – 25 hours be purchased, depending on the complexity of the project and FHIR expertise of the project's technical team. The scope of the services includes meeting participation, technical support (Q & A), troubleshooting and UAT for a duration of 4 months. For more information regarding this, please reach out to support@oceanmd.com to inquire.

### Who do I reach out to for assistance with my integration?

Our support team is happy to assist with any questions or issues you might experience during the implementation of your integration, UAT, go-live, or simply any stage you are with your integration. Please reach out to our team at support@oceanmd.com or through the Ocean support portal.

# Appendix A – SMART on FHIR highlights

During the SMART launch into Ocean, discrete data elements sent via resources through the patient$everything operation can be mapped into the Ocean eForm sections. This will require the Ocean eForms to be configured with keywords that map to elements values in the desired resource. The resources profile structures can be found in this article.




*Keyword configuration section in the eForm configuration window*

*Table highlighting list of all the Ocean keywords and corresponding profile names used during the SMART on FHIR Launch*

| Description | Profile | eForm keyword | Format | Notes |
|---|---|---|---|---|
| Allergies | `AllergyIntolerance` | @ptCpp.allg | String | - |
| Problems List | `Condition` | @ptCpp.prob | String | If `Condition.clinicalStatus` is resolved, remission, or inactive then Condition populates '@ptCpp.pmhx'; otherwise, it populates '@ptCpp.prob' |
| Past Medical History | `Condition` | @ptCpp.pmhx | String | If `Condition.clinicalStatus` is resolved, remission, or inactive then Condition populates '@ptCpp.pmhx'; |

| | | | | |
|---|---|---|---|---|
| | | | | otherwise, it populates '@ptCpp.prob' |
| Attachments | DocumentReference | - | See article for file type and size restriction | Document(s) are attached to referral and sent. |
| Immunization | Immunization | @ptCpp.Immu | String | - |
| Medications | MedicationStatement | @ptCpp.rx | String | - |
| Patient's First Name | Patient | @ptFirstName | Discrete Data | Demographic Pane of form |
| Patient's Middle Name | Patient | @ptSecondName | Discrete Data | - |
| Patient's Last Name | Patient | @ptSurname | Discrete Data | Demographic Pane of form |
| Patient's Suffix | Patient | @ptSuffix | Discrete Data | - |
| Patient's DOB | Patient | @ptBirthDate | Discrete Data | Demographic Pane of form |
| Patient's Gender | Patient | @ptSex | Discrete Data | Demographic Pane of form |
| Patient's HN | Patient | @ptHn | Discrete Data | Demographic Pane of form |
| Patient's Address (Line 1) | Patient | @ptAddress1 | Discrete Data | Demographic Pane of form |
| Patient's Address (Line 2) | Patient | @ptAddress2 | Discrete Data | Demographic Pane of form |
| Patient's City | Patient | @ptCity | Discrete Data | Demographic Pane of form |
| Patient's Province | Patient | @ptProvince | Discrete Data | Demographic Pane of form |
| Patient's Postal Code | Patient | @ptPostalCode | Discrete Data | Demographic Pane of form |
| Patient's Mobile # | Patient | @ptMobilePhone | Discrete Data | Demographic Pane of form |
| Patient's Home # | Patient | @ptHomePhone | Discrete Data | Demographic Pane of form |

| | | | | |
|---|---|---|---|---|
| Patient's Business # | Patient | @ptBusinessPhone | Discrete Data | Demographic Pane of form |
| Patient's email | Patient | @ptEmail | Discrete Data | Demographic Pane of form |
| Patient's Emergency Contact Name | Patient | @ptEmergencyContact | Discrete Data | - |
| Patient's Emergency Contact Phone | Patient | @ptEmergencyContactPhone | Discrete Data | - |
| Patient's Language | Patient | @ptLanguage | String | The preferred language is currently not pulled and the "language.text" value of the first language in the bundle is displayed |
| Height | Observation | @ptLatestVal.ht, @ptLatestDate.ht | String | Observation.code.coding.code: 8302-2, only latest observation is imported |
| Weight | Observation | @ptLatestVal.wt, @ptLatestDate.wt | String | Observation.code.coding.code: 29463-7, only latest observation is imported |
| Blood pressure | Observation | @ptLatestVal.bp, @ptLatestDate.bp | String | Observation.code.coding.code: 35094-2, only latest observation is imported |
| Creatinine | Observation | @ptLatestVal.cr, @ptLatestDate.cr | String | Observation.code.coding.code: 38483-4, only latest observation is imported |
| Estimated GFR | Observation | @ptLatestVal.egfr, @ptLatestDate.egfr | String | Observation.code.coding.code: 45066-8, only latest observation is imported |
| A1C | Observation | @ptLatestVal.a1c, @ptLatestDate.a1c | String | Observation.code.coding.code: 59261-8, only latest observation is imported |
| Albumin to creatinine | Observation | @ptLatestVal.acr, @ptLatestDate.acr | String | Observation.code.coding.code: 32294-1, only latest observation is imported |
| Fasting blood sugar | Observation | @ptLatestVal.fbs, | String | Observation.code.coding.code: 76629-5, only |

| | | | | |
|---|---|---|---|---|
| | | @ptLatestDate.fbs | | latest observation is imported |
| Triglycerides | `Observation` | @ptLatestVal.tg, @ptLatestDate.tg | String | `Observation.code.coding.code`: 12228-3, only latest observation is imported |
| HDL | `Observation` | @ptLatestVal.hdl, @ptLatestDate.hdl | String | `Observation.code.coding.code`: 2085-9, only latest observation is imported |
| LDL | `Observation` | @ptLatestVal.ldl, @ptLatestDate.ldl | String | `Observation.code.coding.code`: 2089-1, only latest observation is imported |
| Total cholesterol/ HDL | `Observation` | @ptLatestVal.chol_hdl, @ptLatestDate.chol_hdl | String | `Observation.code.coding.code`: 96589-7, only latest observation is imported |
| Glucose tolerance test | `Observation` | @ptLatestVal.gtt, @ptLatestDate.gtt | String | `Observation.code.coding.code`: 72171-2, only latest observation is imported |
| Serum ketones | `Observation` | @ptLatestVal.s_ketones, @ptLatestDate.s_ketones | String | `Observation.code.coding.code`: 33058-9, only latest observation is imported |
| Urine ketones | `Observation` | @ptLatestVal.u_ketones, @ptLatestDate.u_ketones | String | `Observation.code.coding.code`: 22702-5, only latest observation is imported |
| Sodium | `Observation` | @ptLatestVal.na, @ptLatestDate.na | String | `Observation.code.coding.code`: 2947-0, only latest observation is imported |
| Potassium | `Observation` | @ptLatestVal.k, @ptLatestDate.k | String | `Observation.code.coding.code`: 6298-4, only latest observation is imported |
| Carbon dioxide | `Observation` | @ptLatestVal.co2, @ptLatestDate.co2 | String | `Observation.code.coding.code`: 20565-8, only latest observation is imported |
| Non-Legacy Observations | `Observation` | @ptLatestVal.loinc1234_5, @ptLatestDate.loinc1234_5 | String | these include any Observations that have a LOINC code associated. You can use a LOINC code finder to find and specify |

| | | | | |
|---|---|---|---|---|
| | | | | loinc codes. e.g. Hemoglobin has a LOINC code of 59261-8, therefore, it would be presented as @ptLatestVal.loinc59261_8, @ptLatestDate.loinc59261_8 |

## Appendix B – task.status eReferral Lifecycle

| Sent Folders | Received Folders | task.status | Notes |
|---|---|---|---|
| Sent (All) | New | requested | When a referral is sent, it's automatically in the Sent/New folders, if any of these statuses are sent on it, no action will be taken, and it will remain in this folder. |
| | | received | |
| Pending Booking | Pending Booking | accepted | Ocean stores referrals in any of these statuses in the Pending Booking folders. |
| | | in-progress | |
| | | on-hold | |
| | | ready | |
| Booking Unconfirmed | Booking Unconfirmed | N/A | Ocean will be receiving an Appointment specific message event instead of a status specific message event, which will have an `Appointment` resource with a valid date to update the eReferral and put it in the 'Booking Unconfirmed' folder. |
| Booking Confirmed | Booking Confirmed | N/A | Ocean will be receiving an Appointment specific message event instead of a status specific message event, which will have an `Appointment` resource with a valid date to update the eReferral and put it in the 'Booking Confirmed' folder. |
| Awaiting Response | Awaiting Reply | N/A | A referral is only moved into this folder if a `send-Communication` message event is sent from the downstream system. A task specific message event will not update this folder. |
| Declined | Declined | rejected | Declined referrals can be re-opened by sending the appropriate status and/or message event |
| | | cancelled | |
| Cancelled | Cancelled | N/A | Referrals can only be cancelled by the referral sender via Ocean and not a receiver. Therefore, no status update can be sent by the receiver for this action. |

| | | | |
|---|---|---|---|
| Completed | Completed | completed | Completed referrals can be re-opened by sending the appropriate status and/or message event |
| | | failed | |

**Note**: Referral statuses can only be updated by the referral receiver and cannot be updated by the sender. Additionally, Ocean doesn't support other statuses listed in the `Task` ValueSet outlined in the FHIR iGuide except those present in the table above.

# Appendix C – v0.10.0 highlights

This Appendix section will provide some additional highlights on the v0.10.0 message events and payloads.

- In v0.10.0, the RMS Target can send updates to the eReferral and patient demographic using the `notify-update-service-request` message event.
    - This message event can be used to update patient demographics but cannot update other information such as location or appointment. Additionally, Ocean will ignore any empty demographic fields sent in the `'notify-update-service-request'` message from the RMS Target (rather than overwriting/deleting the existing value).

*Table highlighting differences between v0.10.0 and v0.11.1 payloads for the Received folder workflow.*

| Ocean to EMR | | | |
|---|---|---|---|
| v0.10.0 | v0.11.1 | Focus | Description |
| add-service-request | add-service-request | ServiceRequest | Send a new eReferral |
| notify-update-service-request | notify-update-service-request | ServiceRequest | Send an update on an eReferral |
| send-communication-from-requester | send-communication-from-requester | Communication | Sender sends a message to the receiver |
| revoke-service-request | revoke-service-request | ServiceRequest | Cancel an eReferral |

| EMR to Ocean | | | |
|---|---|---|---|
| v0.10.0 | v0.11.1 | Focus | Description |
| notify-update-service-request | notify-data-correction | ServiceRequest/ Patient | Send an update on an eReferral, either for the eReferral itself or demographics |
| notify-update-status | notify-add-process-request | Task | Update the status of the eReferral |
| notify-add-appointment | notify-add-appointment | Appointment | Add an appointment to the eReferral |
| notify-update-appointment | notify-update-process-request | Appointment | Update an appointment on the eReferral (including cancel) |

| | | | |
|---|---|---|---|
| send-communication-from-provider | send-communication-from-provider | Communication | Receiver sends a message to the sender |

This article contains examples of the v0.10.0 payloads.

# Appendix D – Article links

List of all the links present in article.

- Ocean Provider Network: Article providing an overview of the Ocean Provider Network.
- HL7 FHIR eReferral Integration Setup Guide: This article provides step by step guidance on how to configure your account in Ocean to set up your integration to receive referrals from Ocean, in addition to sending referrals.
- HL7 FHIR eReferral API Implementation Guidance: This article provides the required guidances to implement your API integration with Ocean including information on authentication, data mapping, and technical consideration.
- Ontario eReferral-eConsult v0.11.1 Implementation Guide: This guide provides detailed instructions to support implementers in using the HL7 FHIR messaging for eReferrals, with information on the expected message events, resources, and profiles – including payload examples. This guide is not just applicable to Ocean integrations, but also other FHIR-compatible systems.
- Ocean v0.11.1 payload examples: Article providing examples for the v0.11.1 payloads, strictly to be used as a reference.
- What do the different folders mean in the eReferrals & eConsults page?: This article provides additional information on the folders located in the eReferrals & eConsults section.
- Ocean SMART App Launch Overview: This article provides an overview of the SMART on FHIR EHR Contextual launch including highlighting the requirements and providing information on the `Patient` contextual launch, sequence, etc.
- SMART on FHIR Implementation Guidance: This article provides information and tips for getting started on a SMART server implementation including setup considerations, guidance for different operations, launch action parameters, etc.
- Ocean SMART on FHIR Profiles iGuide: This article describes the profiles expected by Ocean during the SMART on FHIR contextual launch, highlighting the elements that are must support and have required cardinalities.
- Ocean eReferral Form library: This link provides a current library of secure healthcare forms that may be used by your clinic, as desired.
- Ocean eForm building guide: Article showing how to build your eForm and assign to an eReferral target directory listing.
- eConsult Workflow: This article outlines how to accept an eReferral as an eConsult in Ocean.