

# DRO Integration Resources Overview

## Overview

This document provides guidelines to help you meet the Program requirements. For more details, visit the Program website at <http://www.phsa.ca/health-professionals/professional-resources/digital-health/digital-health-initiatives/digital-referrals-orders>.

This document is available online at: <http://www.phsa.ca/dro-integration>. The website is your main resource for updates, documentation, and support throughout the process.

### Current Integration Scope

<b>eReferral</b> <ul style="list-style-type: none"><li>eOrder (Direct MI/DI), Community</li></ul>	This function facilitates electronic referrals to assure better continuity of care between providers Current use cases include request for service and direct referrals to diagnostic imaging (DI), medical imaging (MI), and community services
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### Future Integration Scope

<b>Patient Engagement</b>	Patient Engagement combines your existing Patient Engagement POS functionality to integrate with the ecosystem (such as standard Forms) as well as tools like online booking, secure messaging, and patient notifications
<b>eConsult</b>	eConsult will enable virtual consultation requests and responses between primary care providers and specialists
<b>eOrder (Lab)</b>	Building on the recent launch of direct eOrder for imaging and community services, plans include expanding to support lab requisition orders such as the BC Standard Outpatient Laboratory Requisition
<b>eReferral</b> <ul style="list-style-type: none"><li>Consult Reports</li><li>Client Registry Data Sync</li></ul>	Upcoming eReferral enhancements aim to include Consult reports and client registry data synchronization
<b>eSubmission</b>	Future eSubmission functionality will provide a standardized way to submit forms and documentation electronically

## Additional Resources and References

- [Digital Referrals & Orders Program](#)
- [DRO Current Product Offerings](#)
- [Introducing eReferrals](#)
- [PHSA Connected Health Journey \(Video\)](#)
- [DRO Referral Demo \(Video\)](#)
- [Doctors of BC Advocacy & Initiatives Article](#)
- [DRO Family Practice Overview \(Infosheet\)](#)
- [DRO Specialist Overview \(Infosheet\)](#)

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# Build The Integration

## eReferral DRO Common Use Cases

This section outlines common DRO Use Cases for Point of Service (POS) systems acting as “Senders” and “Receivers”. Sender use cases focus on initiating and sending patient information, while receiver use cases focus on processing it. Use cases are prioritized as Required, Strongly recommended, or Desirable.

### “Sender” eReferrals Use Cases

When acting as the “Sending POS”, your POS is responsible for initiating referrals and sending to Ocean. This includes providing details on the patient, Service Request, responding to requests for additional information, and any supporting documents that the “Receiving POS” may need to make informed care decisions.

	Use Case	Description	Incidence	Exclusion Implications
Required	Contextual Launch into Ocean	Ability to launch into Ocean for the following scenarios, as applicable: <ul style="list-style-type: none"> <li>A New eRequest, with patient details, request information, and practitioner data context and User Authentication</li> <li>An Existing eRequest, with patient details, request information, and practitioner data context and User Authentication</li> <li>Without a patient in context to review the site’s dashboards</li> </ul>		
	Initiate New Service Request	Creating a Service Request with patient details, request information, and practitioner data for transmission to Ocean	N/A	N/A
	Update Existing Service Request	Making updates to the referral request, such as changes in urgency or referral notes, attachments, and notifying the request recipients This integration is currently <b>not supported</b> as a “Sending POS”. User actions would originate from Ocean Web Portal, preferably through a Contextual Launch.	N/A	N/A
	Receive and Process Status Updates Existing Service Requests	Receive and process provided status updates for the Service Request (e.g., In Progress, Completed)	N/A	N/A
	Confirm completion of the Service Request	Finalize the referral as complete (e.g. Completed task), once confirmed by the “Receiving POS” This integration is currently <b>not supported</b> as a “Sending POS”. User actions would originate from Ocean Web Portal, preferably through a Contextual Launch.	N/A	N/A
Strongly Recommended	Send Supporting Information and attachments	Attaching clinical information and files to the Service Request	Common	<ul style="list-style-type: none"> <li>Manual workaround to save and upload</li> <li>Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	Receive and Process Appointment Details (New)	Receive and process provided Notification of Appointments created in response to the Service Request	Always	<ul style="list-style-type: none"> <li>Lack of transparency into the status of a request increasing</li> </ul>

				<p>administrative time to follow up</p> <ul style="list-style-type: none"> <li>Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	<p><b>Receive and Process Appointment Details (Updates)</b></p>	<p>Receive and process provided Notification of Appointments updated in response to the Service Request</p>	<p>Always</p>	<ul style="list-style-type: none"> <li>Lack of transparency into the status of a request increasing administrative time to follow up</li> <li>Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	<p><b>Cancel the Service Request</b></p>	<p>Cancel an active Service Request This integration is currently <b>not supported</b> as a "Sending POS". User actions would originate from Ocean Web Portal.</p>	<p>Usual</p>	<ul style="list-style-type: none"> <li>Patient Safety Risk - Manually update request in POS with cancellation</li> <li>Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	<p><b>Receive Data Corrections Notifications</b></p>	<p>Receive and process notifications for any data corrections This integration is currently <b>not supported</b> as a "Sending POS"</p>	<p>Usual</p>	<ul style="list-style-type: none"> <li>Patient Safety Risk - Manually update POS with newest information</li> </ul>
<p><b>Desirable</b></p>	<p><b>Exchange Communications</b></p>	<p>Receiving Communications from the "Receiving POS" Sending Communications via integration is currently <b>not supported</b> as a "Sending POS". User actions would originate from Ocean Web Portal.</p>	<p>Usual</p>	<ul style="list-style-type: none"> <li>Patient safety risks with missing information or delayed access to care</li> <li>Using unencrypted methods increase risk of patient information data breach</li> <li>Manual transcription of requests risk of inconsistencies and omissions</li> <li>Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>

**“Receiver” eReferrals Use Cases**

When acting as the “Receiving POS”, your POS, must be able to receive and process referrals and consultations, acknowledge receipt, and update the request status. This role involves both parsing incoming data and sending Service Request updates back to the “Sending POS”, via Ocean as the request progresses.

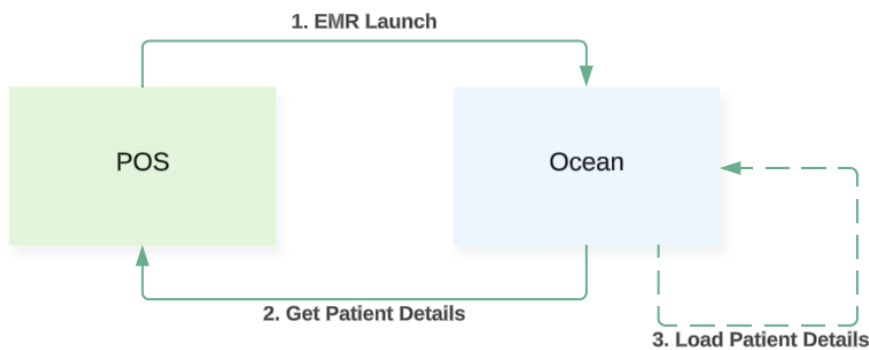
	Use Case	Description	Incidence	Exclusion Implications
<b>Required</b>	<b>Contextual Launch into Ocean</b>	Ability to launch into Ocean for the following scenarios, as applicable: <ul style="list-style-type: none"> <li>• An New eRequest, with patient details, request information, and practitioner data context and User Authentication</li> <li>• An Existing eRequest, with patient details, request information, and practitioner data context and User Authentication</li> <li>• Without a patient in context to review the site’s dashboards</li> </ul>	N/A	N/A
	<b>Receive New Service Request</b>	Accepts any incoming Service Requests received from Ocean, including patient details, form data, request information, and practitioner data	N/A	N/A
	<b>Send Service Request Status</b>	Send updates to the “Sending POS” as updates are made to the Service Request (e.g., Received, In Progress, Completed)	N/A	N/A
	<b>Receive Service Request Cancellation</b>	Receiving POS processes a cancellation request received from the “Sending POS”	N/A	N/A
<b>Strongly Recommend</b>	<b>Receive and attach supporting documentation to a referral</b>	Attaching clinical information and files to the Service Request	Common	<ul style="list-style-type: none"> <li>• Manual workaround to save and upload</li> <li>• Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	<b>Send Appointment Details (New)</b>	Sends appointments to the “Sending POS” of new appointments	Always	<ul style="list-style-type: none"> <li>• Using unencrypted methods to communicate increase risk of patient information data breach</li> <li>• Manual transcription of requests risk of inconsistencies and omissions</li> <li>• Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>
	<b>Send Appointment Details (Updates)</b>	Sends updated appointments to the “Sending POS”	Always	<ul style="list-style-type: none"> <li>• Using unencrypted methods to communicate increase risk of patient information data breach</li> <li>• Manual transcription of requests risk of inconsistencies and omissions</li> <li>• Decreased usability, acceptance, and uptake due to cumbersome or</li> </ul>

				time intensive work arounds
	<b>Send Data Correction Notification</b>	Sends a notification to the "Sending POS" if any data corrections are made to the Service Request	Usual	<ul style="list-style-type: none"> <li>• Patient Safety Risk - Manually update POS with newest information</li> </ul>
<b>Desirable</b>	<b>Exchange Communications</b>	Exchange communications with the "Sending POS"	Usual	<ul style="list-style-type: none"> <li>• Patient safety risks with missing information or delayed access to care</li> <li>• Using unencrypted methods increase risk of patient information data breach</li> <li>• Manual transcription of requests risk of inconsistencies and omissions</li> <li>• Decreased usability, acceptance, and uptake due to cumbersome or time intensive work arounds</li> </ul>

**General Use Cases**

	<b>Use Case</b>	<b>Description</b>
<b>Strongly Recommend</b>	Auto-Match Patient to Received eRequest in "Receiving POS"	POS Auto-Matches (or attempts to) Match based on received Patient Demographics information. Auto-creation of New Patients is optional.
<b>Desirable</b>	Support Multiple Ocean Sites (per POS Account)	POS can support multiple configurations to more than one Ocean Site and/or Listing

## Practical Guide to SMART Launch and FHIR IG

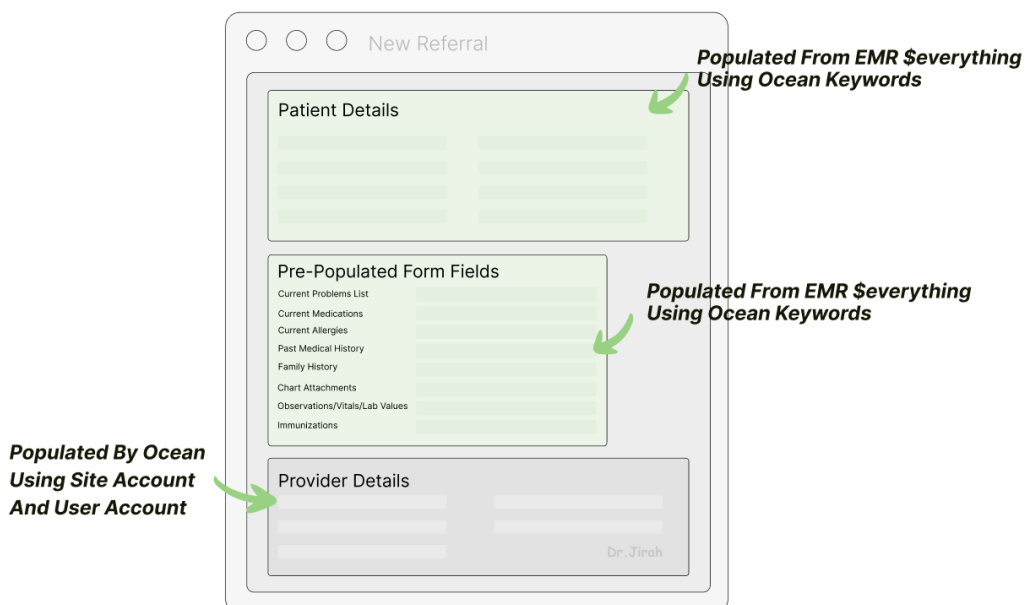


The SMART on FHIR Launch relies on OAuth protocols to manage secure, session-based access to patient data. For your POS, this means configuring OAuth to issue access tokens when a user launches Ocean, allowing the Ocean to retrieve only the data needed for the referral process. Set up token expiration to automatically limit session duration, and if supported, enable token refresh to allow Ocean to request a new token for extended access without requiring the user to log in again.

**UI Considerations:** The SMART Launch button should be agnostic and simply say “Launch Ocean”

The SMART on FHIR Launch process allows your users to login to the Ocean app without having to login to Ocean. An Ocean Account or Site, will be needed for this to work. This launch provides secure, context-specific access to patient summary data, likely based on the patient chart it is launched on, for example.

1. To start, register Ocean as an authorized client within your POS to establish a trusted connection. At minimum, “**patient.read**” access is required. Next, configure a launch URL in the POS so users can open Ocean directly from a patient record. After OAuth authorization, the launch button passes Patient Context (and other FHIR Context) allowing Ocean to request specific data when launched, such as patient demographics or service requests. The recommended method is the FHIR **\$everything** operation.
2. After a Listing is selected on the Ocean Healthmap, Ocean uses the retrieved data to pre-populate referral forms. This can include medications, allergies, problem lists, past medical history, family history, chart attachments, observations, vitals, lab values, and immunizations.



## A Word on Data: Keyword Population

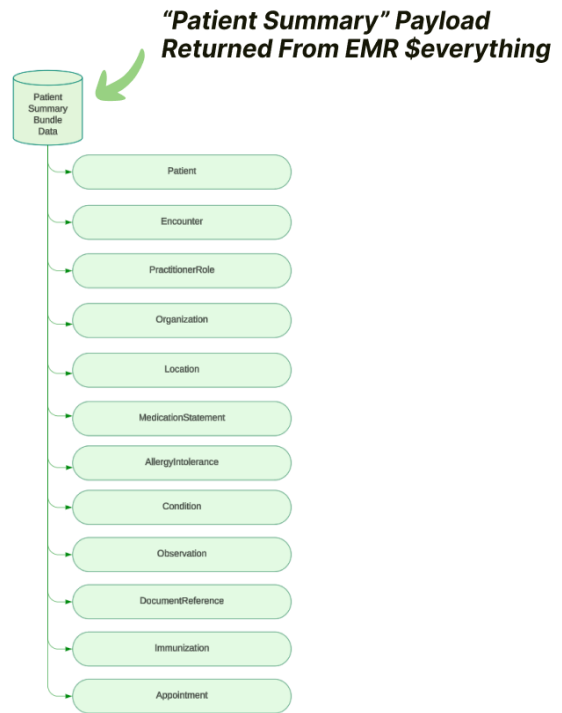
To enable the population of these forms to be successfully transferred from the POS and subsequently transformed and populated by Ocean, the operational Patient “\$everything” operation call from Ocean must be supported. This operation ideally retrieves all information available in the POS for a single patient. It can include large amounts of data, so optimization for payload size and performance is important. In your integration configuration with Ocean, you choose to implement a dedicated \$everything endpoint configured specifically for this integration to ensure the data request is efficient and contains the required data.

The \$everything operation allows Ocean to read the following patient information for the sake of pre-populating Ocean forms:

- Medications
- Allergies
- Problem list
- Past Medical History
- Family History
- Chart Attachments (pre-selected)
- Observations/Vitals/Lab Values
- Immunizations

Ocean will process the following FHIR resources when they are included in the \$everything bundle:

- MedicationStatement
- AllergyIntolerance
- Conditions (for vitals and lab values)
- Appointment
- Observation
- DocumentReference (for pre-selected chart attachments)
- Immunization
- Please refer to this [guide](#) for additional information.



### Ocean Keywords

This table highlights the list of all the Ocean keywords and corresponding FHIR profile names used during the SMART on FHIR Launch.

	Description	Profile	Ocean eForm Keyword	Format	Notes
<b>Required</b>	Allergies	AllergyIntolerance	@ptCpp.allg	String	
<b>Required</b>	Problems List	Condition	@ptCpp.prob	String	If Condition.clinicalStatus is resolved, remission, or inactive then Condition populates '@ptCpp.pmhx'; otherwise, it populates '@ptCpp.prob'
<b>Required</b>	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'
<b>Required</b>	Attachments	DocumentReference		See article for file type and size restriction	Document(s) are attached to referral and sent.
<b>Required</b>	Immunization	Immunization	@ptCpp.immu	String	
<b>Required</b>	Medications	MedicationStatement	@ptCpp.rx	String	
<b>Required</b>	Patient's Name	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Patient's DOB	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Patient's Gender	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Patient's HN	Patient		Discrete Data	Demographic Pane of form



<b>Required</b>	Patient's Address	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Patient's Mobile, Home, Business #	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Patient's email	Patient		Discrete Data	Demographic Pane of form
<b>Required</b>	Height	Observation	@ptLatestVal.ht, @ptLatestDate.ht	String	Observation.code.coding.code: 8302-2, only latest observation is imported
<b>Required</b>	Weight	Observation	@ptLatestVal.wt, @ptLatestDate.wt	String	Observation.code.coding.code: 29463-7, only latest observation is imported
<b>Required</b>	Blood pressure	Observation	@ptLatestVal.bp, @ptLatestDate.bp	String	Observation.code.coding.code: 35094-2, only latest observation is imported
<b>Required</b>	Creatinine	Observation	@ptLatestVal.cr, @ptLatestDate.cr	String	Observation.code.coding.code: 38483-4, only latest observation is imported
<b>Required</b>	Estimated GFR	Observation	@ptLatestVal.egfr, @ptLatestDate.egfr	String	Observation.code.coding.code: 45066-8, only latest observation is imported
<b>Required</b>	A1C	Observation	@ptLatestVal.a1c, @ptLatestDate.a1c	String	Observation.code.coding.code: 59261-8, only latest observation is imported
<b>Required</b>	Albumin to creatinine	Observation	@ptLatestVal.acr, @ptLatestDate.acr	String	Observation.code.coding.code: 32294-1, only latest observation is imported
<b>Required</b>	Fasting blood sugar	Observation	@ptLatestVal.fbs, @ptLatestDate.fbs	String	Observation.code.coding.code: 76629-5, only latest observation is imported
<b>Required</b>	Triglycerides	Observation	@ptLatestVal.tg, @ptLatestDate.tg	String	Observation.code.coding.code: 12228-3, only latest observation is imported
<b>Required</b>	HDL	Observation	@ptLatestVal.hdl, @ptLatestDate.hdl	String	Observation.code.coding.code: 2085-9, only latest observation is imported
<b>Required</b>	LDL	Observation	@ptLatestVal.lldl, @ptLatestDate.lldl	String	Observation.code.coding.code: 2089-1, only latest observation is imported
<b>Required</b>	Total cholesterol/ HDL	Observation	@ptLatestVal.chol_hdl, @ptLatestDate.chol_hdl	String	Observation.code.coding.code: 96589-7, only latest observation is imported
<b>Required</b>	Glucose tolerance test	Observation	@ptLatestVal.gtt, @ptLatestDate.gtt	String	Observation.code.coding.code: 72171-2, only latest observation is imported
<b>Required</b>	Serum ketones	Observation	@ptLatestVal.s_ketones, @ptLatestDate.s_ketones	String	Observation.code.coding.code: 33058-9, only latest observation is imported
<b>Required</b>	Urine ketones	Observation	@ptLatestVal.u_ketones, @ptLatestDate.u_ketones	String	Observation.code.coding.code: 22702-5, only latest observation is imported
<b>Required</b>	Sodium	Observation	@ptLatestVal.na, @ptLatestDate.na	String	Observation.code.coding.code: 2947-0, only latest observation is imported
<b>Required</b>	Potassium	Observation	@ptLatestVal.k, @ptLatestDate.k	String	Observation.code.coding.code: 6298-4, only latest observation is imported
<b>Required</b>	Carbon dioxide	Observation	@ptLatestVal.co2, @ptLatestDate.co2	String	Observation.code.coding.code: 20565-8, only latest observation is imported

### Patient Summary (Cumulative Patient Profile)

The Everything operation provides all available patient information from your system. This data can be used to populate eForms, like a Patient Summary, with details such as demographics, conditions, and recent observations, making the process more efficient for users.

Below is an example from the PHSA Standard Patient Summary section that is included on [BC Provincial eReferral Forms](#)

#### Example:

**Patient Summary**

Please delete any sensitive Patient Summary information you do not intend to share

Include Patient Summary:  No  Yes  Attached Separately

Current Problem List:

Current Medications:

Allergies:

Example from the BC Provincial eReferral Form

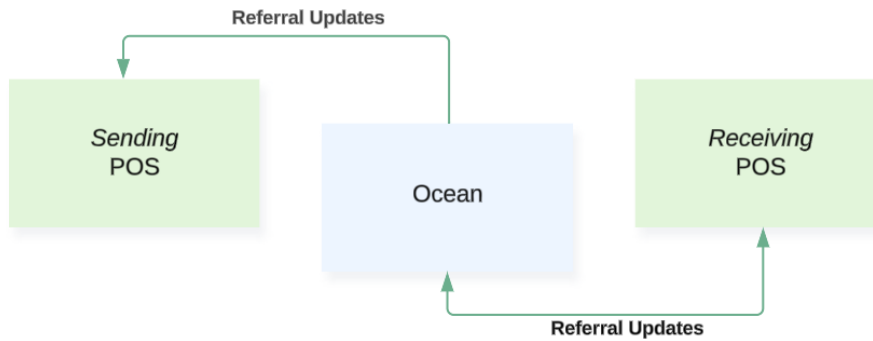
See an example of this in the [BC Standard Referral](#) eForm

**Find the eForm in Ocean Forms Library:**  
PHSA Standard Referral

**Keywords used:**

- Current Problem List: @ptCpp.prob
- Current Medications: @ptCpp.rx
- Allergies: @ptCpp.allg

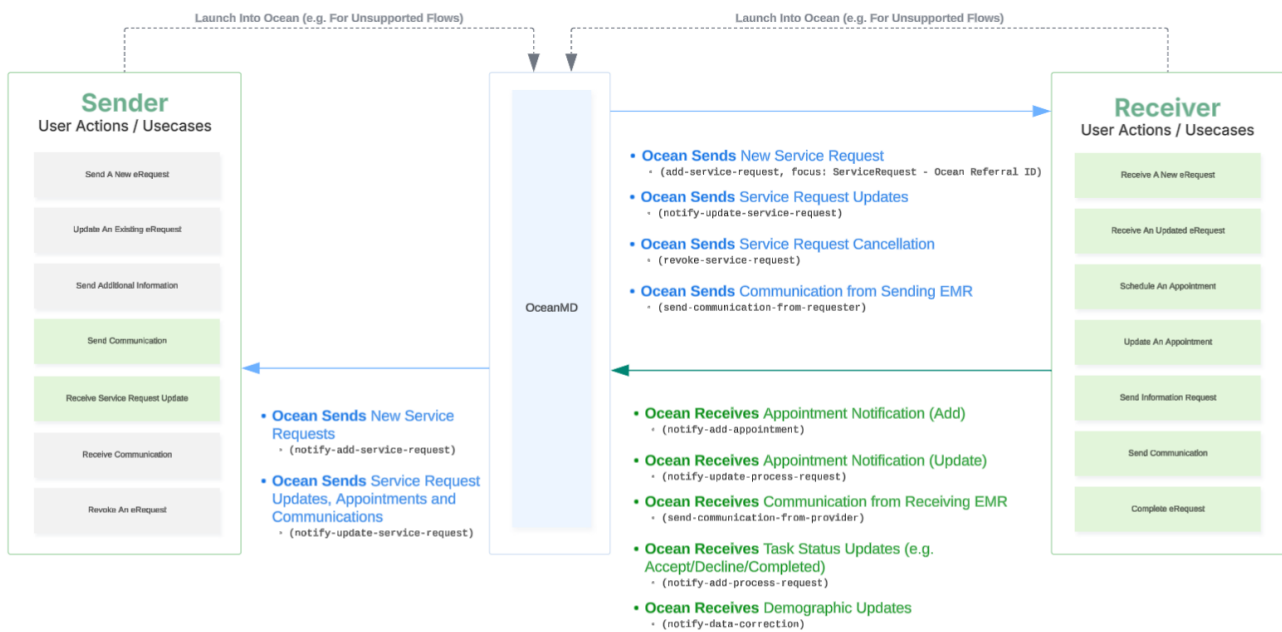
## FHIR Message Exchanges



For eRequests, the program requires that patient and referral data be exchanged seamlessly for the most common DRO Usecases, using the [BC Provincial Forms](#) where applicable. Your POS plays a critical role in ensuring that data flows securely and accurately through Ocean, optionally supporting both the sending POS or receiving POS roles within the referral process.

FHIR-based integration enables secure, standardized data exchange, supporting workflows for:

- Creating and submitting referrals (ServiceRequest)
- Managing referral statuses and outcomes (Task)
- Exchanging clinical data and attachments (e.g., Observation, DocumentReference)
- Querying service directories (HealthcareService)



### **IMPORTANT:** Implementing the v11 IG with The Ocean FHIR APIs:

The following provides high-level guidance for your implementation. Ocean support and consulting will be available to you during your implementation to provide detailed implementation guidance.

#### Supported Event Codes:

The following FHIR message codes will be processed by the Ocean FHIR API (Incoming from Receiver POS)

- notify-add-appointment – sending new appointments
- notify-update-process-request – sending updates on tasks or appointments
- send-communication-from-provider - sending a message to the referring practitioner
- notify-add-process-request - updating task status
- notify-data-correction - updating demographic data

The following FHIR message codes will be sent by the Ocean FHIR API (Outgoing to Receiver POS)

- `add-service-request` - a new referral is being sent
- `notify-update-service-request` - updating the referral data
- `revoke-service-request` - the referral has been cancelled by the referrer
- `send-communication-from-requester` - sending a message from the receiver

The following FHIR message codes will be sent by the Ocean FHIR API (Outgoing to Sending POS)

- `notify-add-service-request` - a copy of the recently sent referral for the sending POS records
- `notify-update-service-request` - updating core referral data and status, appointments and communications

**Unsupported Event Codes:**

Ocean does not currently support receiving event messages from the Sending POS

**Statuses**


Using the Release Information Worksheet, complete and include this map in the Release Information to indicate to the DRO team each of the supported Task Statuses in your implementation and how they map to the Location in your POS.

A Sample is provided here:

To Move a Referral into This Folder in the Ocean "Sent" Folders	To Move a Referral into This Folder in the Ocean "Received" Folders	Send the Following Value in the Task.Status	Notes	POS Folder Location	Is POS Location Configurable?
SENT (All)	NEW	REQUESTED	When a referral is sent, it's automatically moved to the Sent/New folders, if any of these statuses are sent, no action will be taken and it will remain in this folder.	e.g. Sent Referrals, Not Applicable, etc	Yes/No
		RECEIVED		e.g. Received Referrals, Not Applicable, etc	Yes/No
PENDING BOOKING	PENDING BOOKING	ACCEPTED	Ocean stores referrals in any of these statuses in the Pending Booking folders.	e.g. Pending Referrals, Not Applicable, etc	Yes/No
		IN PROGRESS		e.g. Under Review, Not Applicable, etc	Yes/No
		ON HOLD		e.g. On Hold, Not Applicable, etc	Yes/No
		READY		e.g. Ready for Booking, Not Applicable, etc	Yes/No
BOOKING UNCONFIRMED	BOOKING UNCONFIRMED	not applicable - see Notes	When Ocean receives an Appointment specific Message Event with an Appointment resource and a valid date, it will automatically convert to "Booking Unconfirmed".	e.g. Unconfirmed Bookings, Not Applicable, etc	Yes/No
BOOKING CONFIRMED	BOOKING CONFIRMED	not applicable - see Notes	When Ocean receives an Appointment specific Message Event with an Appointment resource and a valid date, it will automatically convert to "Booking Confirmed".	e.g. Confirmed Bookings, Not Applicable, etc	Yes/No
AWAITING RESPONSE	AWAITING REPLY	not applicable - see Notes	Moves into this folder if a send-communication message event is sent by the downstream system. A task specific message event will not update this folder.	e.g. Awaiting Patient Response, Not Applicable, etc	Yes/No
DECLINED	DECLINED	REJECTED	Declined referrals can be re-opened by sending the appropriate status and/or 65 message event	e.g. Rejected Referrals, Not Applicable, etc	Yes/No
				e.g. Declined Referrals, Not Applicable, etc	Yes/No
CANCELLED	CANCELLED	not applicable - see Notes	Referrals can only be cancelled by the referral sender (POS) via Ocean and not a receiver (POS). Therefore, no status update can be sent by the receiver for this action.	Not Applicable	Not Applicable
COMPLETED	COMPLETED	COMPLETED	Completed referrals can be re-opened by sending the appropriate status and/or message event	e.g. Completed Referrals, Not Applicable, etc	Yes/No
		FAILED		e.g. Failed Referrals, Not Applicable, etc	Yes/No

## Unsupported Ocean Features

The following Ocean Features are currently only supported in the Web Portal and not through integration

Feature	Workarounds
“Save As Draft”	<ul style="list-style-type: none"> <li>A manual workaround is available by logging into the Ocean Portal to access Drafts in “Incomplete” Folder</li> </ul> 

### Download

**Download** the Ocean Provider Network API documentation to integrate eReferrals, eSubmissions, eConsults, eOrders, and more using HL7 FHIR R4 standards. This provides detailed technical guidance for interoperability with Ocean. This Playbook is useful for your development and testing teams



[Ocean FHIR Provider Network Playbook](#)

### Additional Resources and References

- [Ontario eReferral iGuide – SMART on FHIR Specifications](#)
- [Ocean SMART on FHIR Implementation Guidance](#)
- [Ocean SMART App Launch Overview](#)
- [Ocean HL7 FHIR Implementation Guidance](#)
- [Ocean FHIR API](#)
- [Ocean API Retry Framework](#)
- [Ontario v11 Implementation Guide](#)
- Ocean SMART on FHIR Profiles: [Ocean SMART on FHIR Profiles - SIMPLIFIER.NET](#)
- Smart Health IT: [SMART on FHIR -- Tutorials -- Server Quick-start](#)
- [Using Keywords to Automatically Insert Content](#) (Tentatively confirming FHIR supported keywords)
- Sample Ocean to POS Data and Keyword Mapping Templates [[Accuro](#), [Med Access](#), [OSCAR PRO](#)]

# Release and Evaluation

## Demo

Demo Day is your chance to show the Program team how your POS works. Use the agenda template to plan your presentation. Highlight key workflows and features, adjusting it to fit your setup.

Agenda	Topics Covered	Timeframe
Introductions	Round Table Introductions <ul style="list-style-type: none"> <li>• POS Team</li> <li>• DRO Teams</li> </ul>	5 Minutes
Overview	Discuss Project scope and current milestones Discuss supported features and release information <ul style="list-style-type: none"> <li>• Basic Features</li> <li>• Additional Features</li> <li>• Gaps and Omissions</li> </ul>	10 Minutes
Experiences	Discuss Approach, Known Issues, Bugs or Workarounds (in POS, in Ocean)	5 Minutes
Demo	Demonstrate: <ol style="list-style-type: none"> <li>1. Introduction to the POS (Deployment Model, Plugins and Orientation of Key areas of the POS UI)</li> <li>2. Demonstrate Sending Integration (if not implemented, create an "Inbound Referral" in Ocean and skip this step)               <ol style="list-style-type: none"> <li>a. Demonstrate User Login to Sending POS Instance</li> <li>b. Navigate to Test Patient, Describe usecase</li> <li>c. Indicate the button used to Launch into Ocean from Patient profile or Menu</li> <li>d. In the Ocean HealthMap Search and Navigation to a Listing using a <a href="#">BC Provincial Form</a></li> <li>e. Demonstrate the Test Patient data displayed in the "Patient Information"</li> <li>f. Demonstrate the Test Provider data displayed in the "Referrer's Information"</li> <li>g. Demonstrate the discrete data pre-populated into the referral</li> <li>h. Complete the Referral form fields as required, add attachments if supported and Send</li> <li>i. Display Sent Referral in "Sent" Inbox</li> <li>j. Navigate to the Ocean Referral Page, Display the Sent Referral</li> <li>k. Display the Ocean Referral Event Log</li> </ol> </li> <li>3. Demonstrate Receiving Integration (if not implemented, display using Ocean Dashboard and skip this step)               <ol style="list-style-type: none"> <li>a. (if not already completed) Send a referral to the receiving Site</li> <li>b. Navigate to the Receiving POS</li> <li>c. Display the Received Information in the receiving POS</li> <li>d. Display any notifications to the Patient or Sending POS</li> <li>e. Navigate to the Ocean Referral Page, Display the Received Referral</li> <li>f. Update the Referral in the receiving POS (e.g. by accepting and/or setting an Appointment if applicable)</li> <li>g. Navigate to Ocean <i>Sending Site's</i> Referral Dashboard, display the Inbox showing the Updated Referral</li> <li>a. Navigate to the Ocean Referral Page, Display the Sent Referral indicate any any appointment information</li> <li>b. Display the Ocean Referral Event Log</li> </ol> </li> </ol>	25 Minutes
Questions	Questions and Open Discussion	10 Minutes
Go-Live and Marketing	Discuss any Go-Live and Marketing plans as well as User Engagement	5 Minutes
Release and End-User Support	<ul style="list-style-type: none"> <li>• Walkthrough Deployment Package               <ul style="list-style-type: none"> <li>○ Discuss Test Instances available and Release Notes</li> </ul> </li> <li>• Discuss End-User Configuration Process</li> </ul>	5 Minutes

## Release

Using the DRO Integration Worksheet, provide technical configurations, test case results, and production readiness details using the Excel worksheet. Ensure all required release information, such as supported browsers, deployment models, and version numbers, is complete and accurate. Also prepare and supply a training schedule for the new integration and features. This ensures the Program team can evaluate your system for approval.

The Program team will review the details provided in your Excel worksheet. This includes your test case results, FHIR configurations, and production readiness. They will evaluate your system's features, integration setup, and support model. A demo of your system is also required to showcase key workflows and readiness. Approval is needed to move to onboarding.

### Additional Resources and References

- Fill in and return the [DRO Integration Resource – Release Information Worksheet](#)

# Onboarding

## Support Model

DRO Site Support is a key feature of the Program, providing end users from Participating Clinics with hands-on technical support. Typically acting as the first point of contact, our Site Support Help Desk handles routine or basic issues, ensuring that common challenges are resolved quickly and efficiently. Complex cases are routed to Tier 2 support, which involves either the Ocean Help Desk or your POS Help Desk, depending on the issue.

This 'hybrid' support model ensures smooth collaboration between Site Support, the Ocean Help Desk, and your POS Help Desk. This approach provides end users with a seamless support experience, from resolving routine issues to addressing more complex challenges.

Using the provided Knowledgebase articles you provide in your Release Package, Site Support can also route Users to the available articles, troubleshooting guides, and ticket submission process (for instance, during initial POS configuration).

**IMPORTANT:** Please schedule a call with our Site Support and Site Lead Team to schedule a discovery call to discuss how the shared model will work.

DHI Support is available Monday to Friday (excluding mandatory holidays) from 8AM to 5PM PST, our toll free Support Number and Support Email are as follows:

- **Phone:** 1-833-297-8107
- **Email:** [DHSupport@phsa.ca](mailto:DHSupport@phsa.ca)





## Hybrid Model in Action:

### Scenario 1: Site Support Resolves the Issue

**Issue:** A clinic user reports difficulty accessing the Ocean integration dashboard

- **Action:** The user submits a ticket through the Support Site
- **Resolution:** Site Support identifies that the user's login account was not granted the correct permissions within Ocean Web Portal and the POS. They provide step-by-step instructions to the clinic administrator to adjust the permissions
- **Outcome:** The issue is resolved at the Site Support level without requiring escalation

### Scenario 2: Issue Escalated to Ocean or POS

**Issue:** A clinic reports that appointment data is not syncing correctly between the POS and the Ocean system

- **Action:** The user contacts Site Support, who conducts an initial review. They confirm that the issue is not related to basic settings or permissions
- **Escalation:** Site Support escalates the ticket to Ocean Help Desk. The Ocean Help Desk engages their Tier 2 to investigate the API integration, and the POS Help Desk is involved as well to confirm configuration settings and API interoperability capabilities
- **Resolution:** The combined efforts of Ocean and the POS Technical teams identify and resolve a misconfiguration in the integration settings, restoring proper appointment syncing
- **Outcome:** Collaboration between Ocean and the POS teams resolves the issue, ensuring accurate appointment syncing

### Scenario 3: User is Routed to Site Support

**Issue:** A clinic contacts the Ocean Help Desk to request information about the Program's onboarding process for new users

- **Action:** The Ocean Help Desk identifies that this request pertains to Program-specific details rather than a technical issue with the Ocean product
- **Routing:** The Help Desk informs the user that Site Support handles Program-related inquiries and directs them to contact their assigned Site Support representative through the Support Site
- **Resolution:** Site Support provides the clinic with detailed onboarding information, including timelines, required steps, and resources available through the Program
- **Outcome:** The user receives the necessary Program details and further program Onboarding support

## Additional Resources and References

- [What Is an Ocean Site Support?](#)
- [PHSA DHI Support Services Overview](#)
- [Ocean Critical Updates](#)