Directory Listing Set Up - PHSA Standards

Guiding Principles
- Users can be associated with many sites.
- Multiple Directory Listing can be associated to a single site.
- Use this instruction to create the directory listing.
- Create a directory listing for each location, provider, or service entity.

Organization

Menu > Admin > Organization

An organization is entered from the Admin > Organization screen. When associated to a Directory Listing, the Organization Title and Logo fields will appear above the listing name in Ocean HealthMap search results. The Organization Title field will also be used to populate the name of your clinic when using text messages for Patient Reminders.
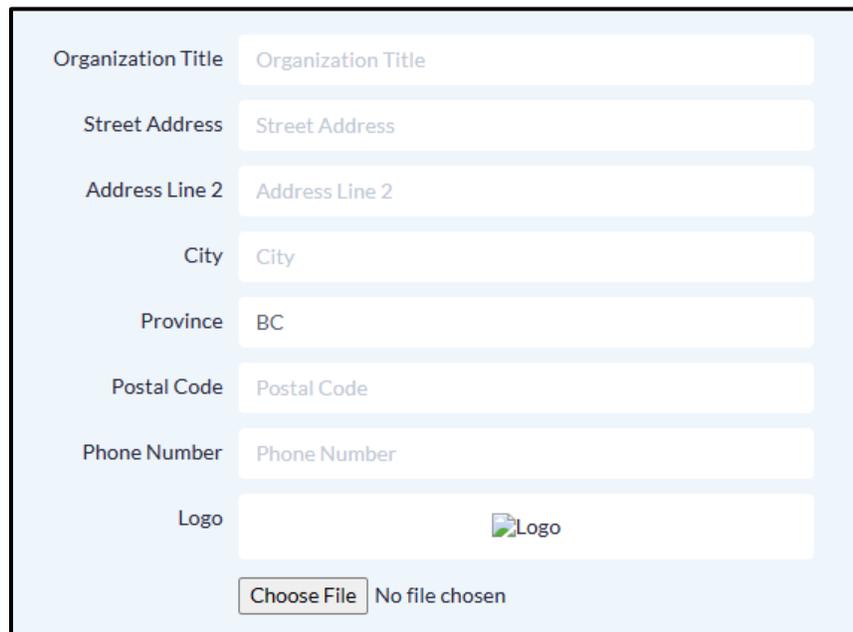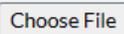

An organization is <u>required</u> when the Ocean Listing is affiliated to a:
- Public organization, either
  - Affiliated to an organization or other entity within the MoH PLR. In this case, the organization field should reflect the provider's associated organization name as stated in the PLR.
  - A Ministry of Health Facility (across multiple Ocean Sites): In these cases, the same organization information should be applied to each listing. The onboarding team can provide this Information.
- Associated with other private or community listings
  - Each Listing can be associated to the Organization.

Directory Listing Configuration Standards

Please Note: Organizations are created for each Directory Listing, there is the potential for unintended variation. Standard Organization configuration should be maintained and referenced.

Public Organizations

Field	Required/Optional	Description	Example
Organization Title	Required	The Legal name of the Organization	St. Paul's Hospital
Street Address (including Street Address, Address Line 2, City, Province, Postal Code)	Required	The corresponding street address, secondary address line, city, province, postal code for the Organization.	1081 Burrard St Vancouver, British Columbia V6Z 1Y6
Phone Number	Required	The phone number for the Organization.	(604) 806-9090
Logo	Optional (Recommended)	A logo for the Organization. Logos are limited to 10 MB in size.	Providence Health Care

Private and Other Community-based Organizations

Field	Required/Optional	Description	Example
Organization Title	Required	The Legal name of the Organization	Medicenter
Street Address (including Street Address, Address Line 2, City, Province, Postal Code)	Required	The corresponding street address, secondary address line, city, province, postal code for the Organization.	123 Main Street Vancouver, British Columbia V7T 3N4
Phone Number	Required	The phone number for the Organization.	(604) 456-7890
Logo	Optional (Recommended)	A logo for the Organization. Logos are limited to 10 MB in size.	medicenter

Providence Health Care — How you want to be treated.   Vancouver CoastalHealth   Provincial Health Services Authority   Ocean

Directory Listing Configuration Standards

Directory Listings

Menu > Admin > Directory Listings

Directory Listing are the front facing information about your clinic that displays in the Ocean Healthmap. All clinic who receive eReferrals require a Directory Listing.

Contact Information

In location-based directory listings, listing identification must be structured to include the facility type, official name, and any pertinent descriptors or geographical identifiers, enhancing the distinctiveness and accessibility of each location. Therefore, using the combination of **Listing Name**, **Organization** and **Address Line 2** is critical to locate the clinic while reflecting other industry records.

The following are the recommendations for Listing entities: Blue GRIDS represent data fields within the Listing; purple GRIDS represent data fields that are highly contextual to the listing or provider in the onboarding process.

Directory Listing Configuration Standards

ID	Required/ Optional	Description	Reference / Guidance
Listing Name	Required	The "Title" of your Directory Listing. Listing Name is visible on the Healthmap.	For complete details on Directory Listing Naming Conventions please refer to [Health Map / Directory Listing - Naming Conventions](#)
Street Address	Required	The corresponding street address	Healthmap addresses are validated using Canada Post API.
Address Line 2	Optional If listing is located within a larger care centre or hospital, here, required.	Corresponding address information that is not automatically captured and validated within Street Address field. This Field may be used for unit, building, wing, or associated health centre/hospital name.	When the listing is associated within a larger care centre or hospital, ensure that the care centre or hospital name is included here. On listings that operate within a larger organization entity (a hospital, urgent care centre), indicate the larger organization within the Address Line 2.
City	Required	City corresponding to the listing's geographic location. City is system generated and validated through Ocean's use of an embedded address query.	Logged and validated through Ocean's address query.
Province	Required	Province corresponding to the listing's geographic location. Province is system generated and validated through Ocean's use of an embedded address query.	Logged and validated through Ocean's address query.
Postal Code	Required	Postal Code corresponding to the listing's geographic location. Postal Code is system generated and validated through Ocean's use of an embedded address query.	Logged and validated through Ocean's address query.

Directory Listing Configuration Standards

Public Facing Phone	Required	The phone number for the listing.	
Fax	Optional (Recommended)	The fax number for the listing.	
Public Facing Email	Optional	An email address for the listing.	
Website	Optional	A website address for the listing.	
Logo	Optional	A logo for the listing. Logos are limited to 10 MB in size.	If the listing is affiliated with an Organization, HealthMap will display the Organization's Logo.

Service Details

Directory Listing Configuration Standards

Field	Required/ Optional	Description	Reference / Guidance
Description	Optional (Recommended)	Provide general descriptive information about the listing. Include information about provisioned services, serviced population(s), urgency definitions, and relevant service restrictions.	• Include those keywords that are relevant to searching for the provider(s) services. • Description should include any restrictions, exclusions or service limitations that are relevant to the clinic. • Include (bolded and italicized) the definition for "Urgent" Referrals • Include the names of the specific providers working at the clinic.
Offers	Required	The health service categories and/or health service offerings by the listing. Note: General HSOs can be updated to include specific sub-services, eg., Audiology can be edited to Cochlear Implant.	• Offers are the clinical services the provider(s) at the clinic are authorized to provide. • Offers serve as a service categories that users can search by, either through the HealthMap search query or when adding a provider as a CC recipient to an outbound referral. • Refer to [Difference between a Health Service Category and a Health Service Offering](#) to ensure appropriate representation. ❗ Some sub-sets of HSOs can be offered by a Specialist or a Family Physician with additional certifications. For appropriate transparency and use of protected titles, Family Practice providers should offer detailed HSOs rather than the high-level options available by default. (eg. "Acne Treatment" instead of "Dermatology")

Directory Listing Configuration Standards

Wait Time	Optional	Wait times for new referrals based either on the calculation of incoming referrals within Ocean, or from user-input estimates.	• Ocean / HealthMap cannot calculate/generate a wait time estimate until the listings referrals are incoming through Ocean or reflected in the HealthMap (through Ocean)/. • To update manually enter the clinic's estimated wait time, navigate to eReferrals & eConsults and select Update Wait Times from the left-hand navigation. • [Managing Calculated and Self-Reported Wait Times](#)
Appointment Labels	Optional	Select and display the appointment labels that are applicable for incoming referrals.	• Enter the appointment labels that correspond to the clinic's operations for incoming referrals. • Consideration needs to be taken to match EMR/CIS and Ocean appointment types. (important for integration and information mapping) • Options include: Appointment, Appointment #, Consultation, Initial Appointment, Follow-Up Date, Procedure Date, Surgery Date
Languages	Optional (Recommended)	The languages that services are offered in by the listing.	
Clinician Information	Optional (Recommended)	Only applicable if this Directory Listing is specific to a single healthcare provider. Include provider-specific details including name, professional and billing IDs, and User Role. This information is stored and maintained independently from any Clinician Information stored within individual Ocean user accounts.	Do not complete this section UNLESS: the clinic utilizes an integrated Accuro EMR instance AND they want to use auto-selection/assignment. • **Professional ID:** Reference PLR, include provider's college ID# from respective accrediting college. • **Billing #:** Provider's MSP • **Role:** Ensure the selected role matches the provider's accredited college.

Directory Listing Configuration Standards

Referral Form	Required	Select an Ocean eForm to be used as the referral form for the listing. The referral form contains the questions that a referring provider fills out when submitting an eReferral to the listing.	This is only required for listings that will receive referrals. As a default, receiving listings can select the
Catchment Area	Optional (Recommended)	Specify a [geographic region](#) for which the listing accepts eReferrals from.	• Determine what service area boundaries the clinic may utilize. • The Ocean service boundaries will not differentiate if the patient or submitting clinic is within the establish boundaries. It will not enforce/limit referral submissions to the catchment area.

Regional Authority
Listings will only complete the Regional Authority selection IF they receive (or send and receive) referrals, per Ocean Policy. The following section guides a listing that will utilize the Ocean product licensing associated with PHSA's Regional Authority governance process.

Please Note: New Directory Listings will need to be saved before the **Regional Authority** section is visible.

Field	Required/Optional	Description	Guidance
Regional Authority	Required (for Receivers)	Before Approval: Apply by clicking **Apply to Regional Authority**. and select the **BC Regional Authority** option. After Approval: The name of the Regional Authority that has approved your Directory Listing.	Completing the Regional Authority is only required for listings that will receive referrals through PHSA's DRO licensing with Ocean.

Directory Listing Configuration Standards

Number of Clinicians	Required	List the number of **clinicians** represented by this Directory Listing. This **excludes administrative** and allied health staff.	[How do I determine the 'Number of Clinicians' for my Directory Listing?](#)
Service Request Repository	Required	Approve the contribution of your referral data to the B.C. eRequest Repository.	

eReferral Policy

Field	Required/Optional	Description
Accept eReferrals	Optional (Required for sites to receive referrals)	Determines whether eReferrals can currently be sent to the listing. This is selected to providers that will *receive* referrals and should correspond to those listings that will apply to the BC Regional Authority for license approval.
Splitting Policy	Optional	Choose the behaviour for eReferrals which have more than one health service specified. Enable this checkbox if you would like eReferrals with multiple health services to be automatically split into separate referrals.
Authentication	N/A	Outdated functionality – not applicable
Referrer Restrictions	Optional	Enforces that referrers must be one of the following User Roles: Family Physician, Specialist, Nurse Practitioner
Manual Forward Policy	Optional	Specify the default behaviour for determining communication responsibilities for referrals which are forwarded* to an offline recipient which is not using Ocean.

Directory Listing Configuration Standards

Advanced

Field	Required/Optional	Description	Guidance
eReferral Test Mode	Required on first creation of the listing	This is a toggle-measure that directs the listing to Operations (with patient data in production) vs in a test mode that restricts visibility of the listing (on GIS) and use for referrals. When enabled, only test eReferrals can be sent to the listing.	Apply eReferral Test Mode upon creating the listing the listing's users are trained and confirmed ready to receive eReferrals.
Mark as Demo Listing	Required on first creation of the listing	When enabled, the listing will only appear to Ocean Healthmap users who are in test mode. This setting is only present when eReferral Test Mode is also enabled.	Apply the Demo Listing toggle ON until the clinic is trained and confirmed ready to active eReferrals.
Encryption	N/A	Displays the date that the Ocean Site's Public/Private Key Pair was last updated.	
Referral Notification Email	Optional	Any notifications regarding eReferrals sent to this specific listing will be directed to this email, overriding the notification email set at the Site-Wide level.	More information on email notifications for received referrals can be found in Set Up Receiver Email Notifications.
Referral Subscription	Required (If not assigned to a Regional Authority)	Select your preferred billing model.	

Directory Listing Configuration Standards

Integration	N/A	If your Ocean Site has a custom referral integration configured, it can be selected using the dropdown menu.	
External Service ID	Optional	Specify an ID value to be used by integrated systems to identify the listing. The ID can be alphanumeric.	
Resubmission Restrictions	Optional	When enabled, referrers cannot resubmit a referral that has been declined by the listing.	