

Ocean eReferral Dashboard User Reference Guide

Purpose

This document provides an overview of the Ocean eReferral Dashboard by outlining its data sources, KPI definitions, methodology, and the purpose of each visual.

Data Sources

The Ocean eReferral Dashboard is derived from four OceanMD Regional Authority export files. The Referral Analytics file is the primary source used to calculate referral-activity metrics; the other files enrich the data with listing, site, and user details.

Input file	Purpose in the dashboard
Referral Analytics Extract	Lookup for referral activity and trends details
Listings Extract	Lookup for listing title and health region
Sites Extract	Lookup for site name and EMR
Users Extract	Lookup for sender details

Refresh cadence: Referral-activity KPIs are updated based on weekly exports from OceanMD. For the latest refresh date, refer to the dashboard’s “Data Updated” indicator.

Key Terms

Key terms	Definition
Regional Authority (RA)	OceanMD administrative region.
Sender	The user who created and sent the referral.
Receiver / Target listing	The intended destination listing or recipient for the referral.
Source site	The site from which the referral originated.
Target site	The site associated with the destination listing.
Referral Category (Health Service)	The health service specified at the time the referral is sent (ex. Orthopaedics)

Dashboard Visual Guide

Referral Activity KPIs

KPI card row: A set of summary cards providing an overview of key metrics (e.g., total referrals, unique senders/receivers/sites, current month volume, MoM change).

KPI	Definition	Methodology
Total Referrals (All Time)	Number of unique referrals within scope.	Distinct count of unique referral reference values in the filtered dataset.
Unique Senders	Number of unique sending users who created referrals.	Distinct count of sender user identifiers.
Unique Receivers	Number of unique receiving destinations in scope.	Distinct count of target listing identifiers.
Unique Sending Sites	Number of distinct sites originating referrals.	Distinct count of source site numbers.
Current Month Volume	Total referral volume in the current month (based on the dashboard end date).	Count of referrals with referral creation date in the same month as the end date.
Month-over-Month Change (1 Month, 3 Month, 12 Month)	Change in referral volume compared to the prior indicated month.	Compares the last completed month to month prior as indicated. (Current Month Volume – Prior Month Volume/Prior Month) x 100

Volume Breakdowns – Charts

Trend visual(s): Line/Column chart(s) showing referral volume over time (monthly or weekly), used to identify growth/seasonality and recent changes.

Distribution / breakdown visuals: Pie/Column charts that show how volume splits by region, health service category, referrer clinician type, and/or EMR.

Chart visual	What it shows
Cumulative referral volume	Running total of referrals over time based on referral creation date.
Monthly referral volume	Total referrals per month based on referral creation date.
Weekly referral volume	Total referrals per week based on referral creation date.

Weekly unique Sender	Total unique senders per week based on distinct professional ID.
Weekly Receiver volume	Total unique receiver volume per week.
Referral volume by EMR	Referral counts grouped by EMR.
Referral volume by Target Region	Referral counts grouped by the region associated with the destination listing.
Referral volume by Referral Category / Health Service	Referral counts grouped by health service/category values from the Referral Analytics extract.
Referral volume by Referrer Clinician Type	Referral counts grouped by clinician type.

Referral Activity – Drilldown Tab

The Referral Activity – Drilldown tab provides detailed, table-level views of referral activity. Use the **All Targets** filter to focus on specific target organizations/listings and select rows within the tables to cross-filter the page for a more detailed view.

Detailed Breakdowns (Drill-Down Tables)

- **Referral Activity by Target Site:** Summarizes referral activity by target site, including site number, site name, total referrals, unique senders, and counts by status (accepted, booked, initial referral, completed, declined, cancelled).
- **Referral Activity by Target Ref:** Summarizes referral activity by target listing reference, including target site number, listing ref, listing name, and total referrals.
- **Referral Activity by Source Site:** Summarizes referral activity by sending (source) site, including site number, site name, total referrals sent, count of target sites and unique users.
- **Referral Activity by Sender:** Summarizes referral activity by sending user, including sender name/username, clinician type, professional ID, total referrals sent, and count of target sites and listings.
- **Referral Activity by Sender Site #:** Summarizes referral activity by sender site number, including user name, sender site #, and total referrals.

Change Log

Date	Version	Change description
2026-05-07	1	Initial draft