Admin Guide:
Preparing Your Clinic for Online Booking

Ocean's Online Booking provides a simple way for patients to book directly into your EMR schedule. With Ocean, you get all the benefits of online booking together with secure messaging, automated appointment reminders, and patient forms in a single solution that is:

- **Easy for patients** to book with no passwords or logins;
- **Highly customizable** with restrictions by appointment type, registered patients, and more;
- **Simple to incorporate forms** to capture patient details and update the chart in real time.

This guide walks through the steps required to get a provider's schedule set up with Ocean Online Booking. Completing these basic steps will take 30 mins to 45 mins per schedule. Prior to completing this guide, please ensure that you have completed the *Ocean Basic Set-up & Integration*.

Step 1: Enabling a Provider License

This step will enable a $27.50/month provider license. You'll want to [enable all providers](#) that you would like to be able to send messages, eForms, online booking and/or have reminders sent for that schedule. You'll only need to complete Step A & B at this time.

Step 2: Complete your [schedule worksheet(s)](#)

In order to get started you will need to determine which schedules you want to make available online. For each schedule that you plan to enable, you will need to complete a schedule worksheet to ensure you have the necessary information available prior to configuring.

Step 3: Create your directory listing(s) in Ocean

Ocean requires your site to have a validated directory listing to enable an online booking schedule and will pull the address from this listing for in-person appointments. You can [follow the instructions here](#) to create your listing.

Step 4: Review "What you need to know"

The article found [here](#) provides some helpful information about what Ocean can read in your EMR, and how to ensure your providers are properly configured in your EMR to allow Primary Provider restrictions.

Step 5: Add appointment types that will be available for online booking

You will need to [add](#) any appointment types that will be available for patients to book online. There will be an opportunity to choose which are available for each individual schedule in a later step.

Step 6: Enable appointment type mapping

You will need to [enable EMR appointment type mapping](#) in the Ocean portal. This allows Ocean to book specific appointment types within your EMR and will allow for custom restrictions in a later step.

Step 7: Set-up the Providers' Schedules

You will need to set-up each provider's schedule individually. We recommend that you view the [tutorial videos online](#) that walk through the steps below.

- Create a patient friendly name for the schedule
- Select the time intervals that are currently set within the provider's EMR schedule
- Add the appointment types you'd like to be made available to patients for booking
- Choose who can book into the schedule (all patients or only patients of selected providers)
- Choose how far in advance a patient can book online by creating booking windows

- Set restrictions in the provider's schedule that aren't available for online booking.

Step 8: Create your Online Booking Link(s)

In this step you will create a booking link to share with your patients and/or post on your website.

- Name your booking link for your own internal use only
- Select the Directory Listing associated with the booking link (the listing address will be automatically included in appointment reminders for in-person appointment types).
- Select whether you want only patients with a chart in your EMR to be able to book or if you'd like to allow new patients to be able to book.
- Choose which providers' schedules you want to make available in this booking link for patients.
- Create an introductory message that will appear on your Online Booking landing page.

Step 9: Test your Online Booking set-up

Use a test patient in your EMR to ensure your online booking set-up looks how you would like it to appear for patients.

- ✓ Are the right appointment types available?
- ✓ Are the right appointment time slots appearing?