



Admin Guide: Preparing Your Clinic for Patient Messaging & Reminders

This quick guide gives new users the first steps to get started with Ocean Patient Messaging & Reminders.

Step 1: Invite clinic staff to join your Ocean Site as an Ocean User

[Invite users](#) to your Ocean site and send them the “Basic User Set-up Guide”.

Step 2: Assigning Licenses

This step will map your Provider License to your Ocean User Account. You’ve already enabled all your providers that you’re using for Online Booking now you’ll need to do [Step C where you assign the licenses](#).

With each provider license you can allow an administrator to send messages on behalf of any provider within your EMR by assigning them as a **Primary Delegate**.

Step 3: Set the Email Friendly Name

You’ll want to choose an [email friendly name](#) for your site so patients easily recognize the email sender.

Step 4: Review your Default Templates

Ocean has created two pre-made templates ("Default - Secure Message" and "Default - Appointment Reminder"). The first step is reviewing these [Default Templates](#).

Step 5: Customize your Templates

You’ll want to think about commonly sent messages to patients and create these as [Templates](#). These will be used for both one off messages to your patients as well as used in your Patient Reminders.

Step 6: Patient Reminders Settings

Configure your [Patient Reminders](#) to send from your EMR and select a time of day when you want reminders to begin processing these reminders. You can also choose to send reminders by text message by acknowledging the additional fee on this page. You can set which reminders are sent via text message in the next step.

Step 7: Create your Reminder Rules

This step will allow you to [choose when and how](#) the reminder is sent out and link the templates you created in Step 3 to the specific Reminder configuration. You can choose how many days in advance or before an appointment you’d like a reminder to go out, if you’d like it to go out by email or text message and for which appointment type(s). All appointment types are pulled directly from your EMR.