



Admin Guide:

Ocean Basic Set-up & Integration with PS Suite

This guide provides the basic steps to get your clinic connected to the Ocean Platform, including creating your Ocean site, and integrating your EMR. These steps should take 30-45 mins and should be completed by your clinic's Ocean administrator.

Step 1: Complete the Getting Started Guide

To begin, you will need to follow the three steps outlined in the [Ocean Getting Started Guide](#). This includes creating a free Ocean user account, creating your Ocean site and submitting your Ocean connection request form.

Step 2: Integrate your EMR

Once you've received confirmation from an OceanMD practice consultant, you can continue with this step. You will need to integrate your Ocean site (created in Step 1) with your Telus PS Suite EMR by completing the following steps (to access detailed instructions for each step, please click on the links):

- [Download & install](#) the Ocean Custom Form, Toolbar and Attachment Exporter in your EMR (these are .cfm/Telus custom form files).
- [Create a reminder trigger](#) to ensure the Ocean Toolbar is visible when you open a patient chart.
- [Update the settings on your Ocean Custom Form](#) with your Ocean site number.
- [Enable Cloud Connect](#) on your Ocean Custom Form.
- [Configure the Ocean integration module](#) in PS Suite.
- [Set-up Ocean Cloud Connect](#), a secure, web-based portal that allows you to manage and configure your Ocean integration with the Telus API.

Step 3: Provide a list of your users to your Ocean Practice Consultant

Compile a list of clinic staff (including their names and email addresses) who will be added to your site as Ocean users. You may have already completed this step with your Ocean sales account manager.

Step 4: Configure your Individual Ocean Products

You are now ready to configure specific Ocean solutions including Ocean Patient Messages and Reminders and Ocean Online Booking.

Basic Set-up: Quick Start Checklist

- Create your Ocean User Account
- Create your Ocean Site
- Submit your Ocean request form

- Sign and return your TELUS connection request
- Download & install the Ocean Custom Form, Toolbar and Attachment Exporter
- Create a reminder trigger in PS Suite
- Update the settings on your Ocean Custom Form with your Ocean site number
- Enable Cloud Connect on your Ocean Custom Form
- Configure the Ocean integration module in PS Suite
- Set-up Ocean Cloud Connect
- Create a list of clinic staff that will be using Ocean

Frequently Asked Questions

- **What if I already have an Ocean user account?**
If you have an Ocean user account associated with an Ocean site, there is no need to create a new one. However, you will need to ensure that you are enabled as an administrator on that site.
- **What if I already have an Ocean site?**
If you already have an Ocean site created that has not been integrated with an EMR, you may use that site or create a new one. Please ensure that you have administrative privileges on the site.
- **Do all my staff need an Ocean user account?**
Yes, all staff that are using Ocean should have an Ocean User account linked to their EMR user for security and auditing purposes.