Ocean Admin Package

Quickstart Guide to Preparing Your Clinic For Ocean Online Booking, Patient Messaging & Reminders

OceanMD
A WELL Health Company

Support Questions:
ocean.tips/support

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.

Support Questions:
ocean.tips/support

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

Support Questions:
ocean.tips/support

- 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.

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.*

OceanMD
A WELL Health Company

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?

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.

Support Questions:
ocean.tips/support

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.