



## Get Started with Ocean - Basic User Set-up

The Ocean Platform is a simple, customizable suite of tools that connects to your EMR to allow patients to book directly into your schedule, complete forms, and share patient health information. With Ocean, you get the benefits of a secure messaging solution, automated appointment reminders, and online booking in a single tool.

- **Easy for patients** to access with no passwords or logins
- **Highly customizable** with restrictions by appointment type, registered patients, & more
- **Incorporate forms** to collect patient details and update the chart in real time

This quick guide gives new users the first steps to get started with Ocean. Completing these basic steps will take no more than 20 minutes (including the demo videos). Additional configuration will be completed by your clinic's Ocean administrator.

## Step 1: Watch the Ocean Demo Videos

If you have not viewed a demo of Ocean technology, you can view the recorded demo videos [here](#) to see how online booking, patient messages, and reminders work.

## Step 2: Sign up for your Ocean User Account

After your Ocean administrator has completed your clinic's basic set up and integration, you will receive an email from Ocean inviting you to create your Ocean User Account. Follow the link to create your account, and review and agree to the Ocean License agreement. You will then receive an email to verify your account; please click on the link provided (check your junk mail).

## Step 3: Set your Clinical Delegate Email Address

Enter the [email addresses](#) where you'd like any Patient Messaging alerts to be sent.

## Step 4: Install the Ocean eForm shortcut on the day sheet

This is an optional but recommended step of setting up the integration between OSCAR Pro and Ocean. [Adding the Ocean eForm shortcut](#) allows you to access certain Ocean actions from the schedule view. This must be done on a user level.

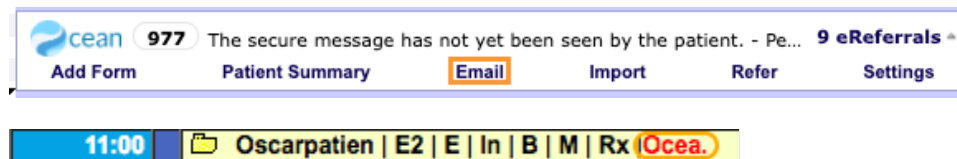


eForms for this Patient:

## Step 5: Connect your EMR user to your Ocean user using the Ocean Toolbar or eForm shortcut on the schedule

Select "Email Patient" from the Ocean eForm shortcut or toolbar in OSCAR Pro to [link your EMR user to your Ocean user](#). This will open the Patient Messages window in an internet browser.

At the top of the Patient Messages editor, you will see a banner that says: "Hello [your EMR username]. Click here to link to your Ocean account." Click this banner and sign in to Ocean with your Ocean username and password. Your EMR username will now be linked to your Ocean user account.



## Quick Start User Checklist

- Watch the Ocean demo videos [here](#)
- Create your Ocean User Account using the link in the email you received. If you don't have an email invitation, please check your spam or check with your clinic's Ocean Admin. See below for guidance on how to respond to sign up questions:
  - **Role:** choose a role most suited to the role in your office
  - **Why are you signing up for Ocean:** Select "I want to join an existing site"
  - **Clinic/Organization Name:** Enter the name found on your emailed invitation
- Review and agree to the Ocean License agreement
- Confirm your account by clicking on "Verify your Account" in the email sent to you from [no-reply@cognisantmd.com](mailto:reply@cognisantmd.com) (check your junk mail)
- Install the Ocean eForm shortcut to your OSCAR Pro schedule
- Connect your EMR User to your Ocean User using the Ocean Toolbar

## Frequently Asked Questions

- **How does Ocean's Online Booking work?**  
Patients can easily book appointments online and complete forms at the time of booking without logging into a Patient Portal. Ocean books directly into your EMR schedule.
- **How will this affect my workflow?**  
You'll be able to reduce call volume, improve patient satisfaction and collect important patient details upfront to better prepare for a visit. Ocean only shows the appointment types and times you've approved in your schedule.
- **What if I already have an Ocean account?**  
If you have an account that's linked to your EMR user, you can start sending messages now, and you're all set to configure your booking links and reminders.
- **Does everyone need an Ocean Account?**  
Yes, all staff that are using Ocean should have an Ocean User account linked to their EMR user for security and auditing purposes.
- **How can I ensure patients don't overbook?**  
Ocean allows you the ability to restrict the number of appointments booked in a day, the number of consecutive appointments booked by a single patient, as well as individual patient level restrictions.
- **What does it cost?**  
There are numerous funding options available to cover the costs of secure messaging and online booking. A basic licence for these services is \$55/month per provider.