

# Ocean User Package

Quickstart Guide to Using  
Ocean Online Booking



Support Questions:  
[ocean.tips/support](https://ocean.tips/support)



## 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.

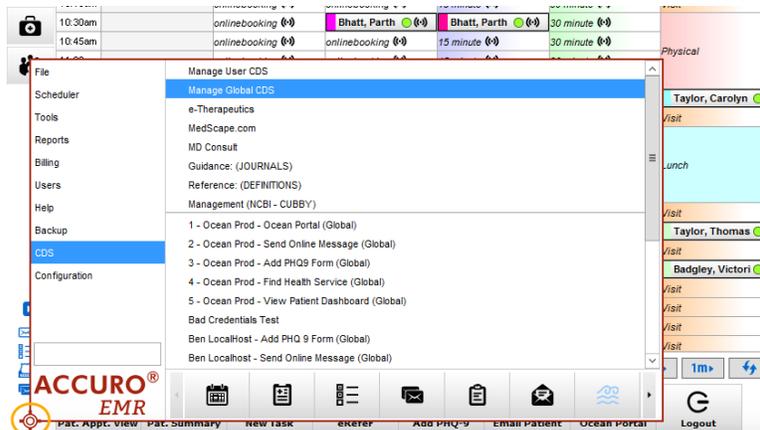
## Step 4: Add User-Friendly Buttons to CDS Links

This is an optional but recommended step of setting up the integration between Accuro and Ocean. [Adding the user-friendly buttons](#) creates shortcuts for you to easily access Ocean from your EMR.

## Step 5: Connect your EMR user to your Ocean user using CDS links

Open a test patient's chart in Accuro and select the CDS link configured for "Send Online Message" or "Ocean Portal" (see image below) to [link your EMR user to your Ocean user](#). Initiating an email 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.



## Schedule Worksheet: Preparing for Online Booking

To enable Ocean Online Booking for a QHR Accuro schedule, you will first need to know how the provider schedule is set up in the EMR, and which appointments should be made available to book online. This worksheet is designed to help you identify the details needed before starting to configure a schedule in Ocean. You will need to complete this for every schedule you plan to make available online.

<b>1. Name of Provider Booking Schedule</b> What is the name of the schedule in Accuro?	
<b>2. Schedule Time Slot Intervals</b> What is the default length of time for each appointment (eg. every 5 mins, every 15)?	
<b>3. Appointment Type Suggestions</b> Ocean can <b>only</b> book appointments into <a href="#">predetermined Appointment Type Suggestions</a> slots in your EMR. Which appointment type suggestions would you like patients to be able to book into?	
<b>4. Appointment Cancellation Policy</b> How far in advance do you want patients to be able to cancel their appointments?	

### Appointment Details: Type, Length & Medium

List all appointment types that you want to make available for Online Booking using the columns below.

Appointment Type	Appointment Length	Appointment Medium (In-clinic, phone, video and/or, both)	Restrictions