



**OceanMD**

**A WELLSTAR Company**

FALL 2025 EDITION

# Patient Communication Starter Kit

Tips, tricks and templates to simply and securely engage with your patients in the digital age

# Simple and secure communication still isn't easy

While digital engagement tools are on the rise, striking the right balance between security and accessibility for your patients remains a significant challenge

How can we **protect sensitive information** without creating digital barriers?



What tools can **empower our patients** while reducing the burden on our staff?

Do secure messaging solutions exist that **integrate with our existing tools**?



BEFORE YOU START

# Common communication struggles

Are you experiencing any of the following?

- Staff are overwhelmed by phone calls
- Too much time is being spent on paperwork and manual data entry
- Missed appointments and no-shows are too common and costly
- Important tasks are slipping through the cracks
- Forced to rely on insecure email for sharing important patient information



**If you checked one or more boxes, it's time to streamline your communication workflow with Ocean!**

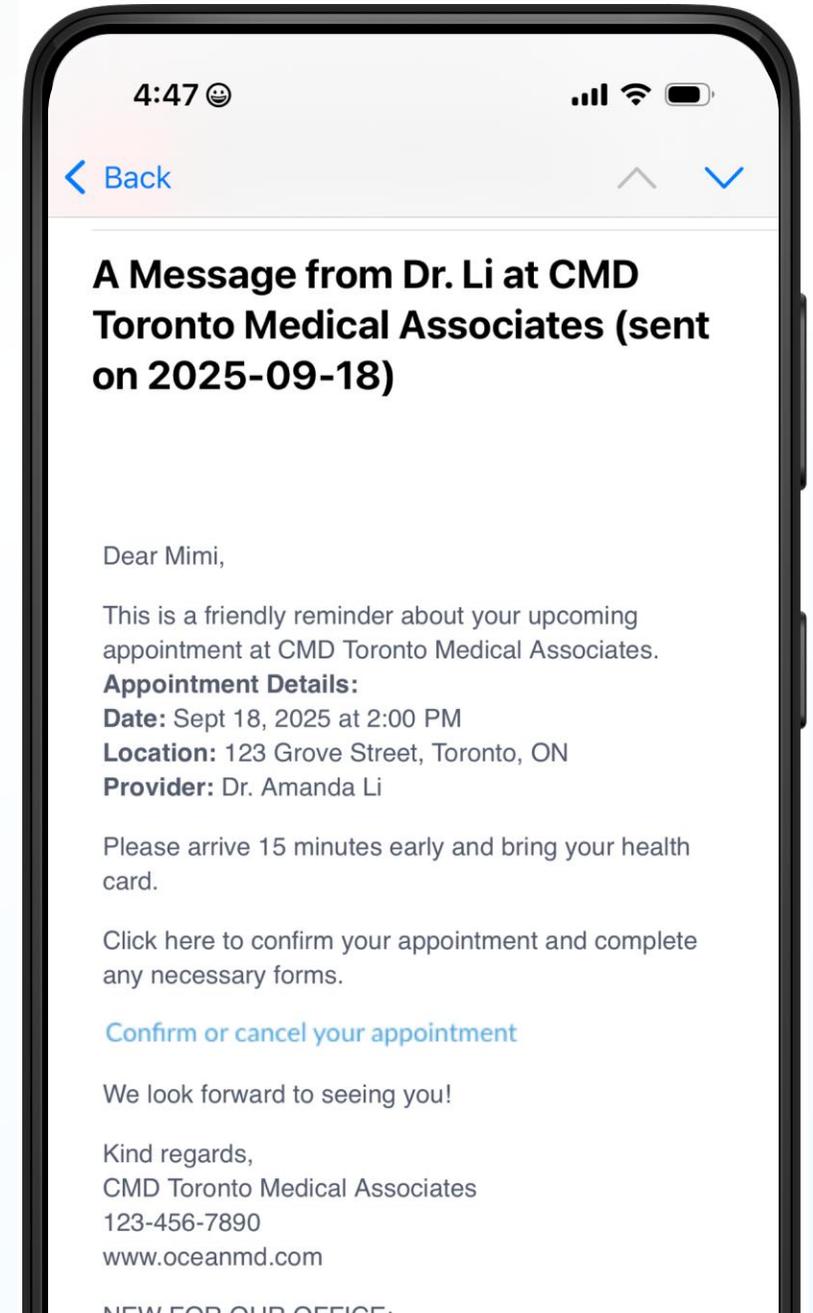
## INTRODUCTION

# Ocean's Simple and Secure Patient Messaging Experience

# Introducing Patient Messages and Reminders

A secure solution for communicating with patients, including the sending and receiving of files and forms

- Securely send test results, forms, and instructions
- Automate reminders before and after a visit
- Reduce phone volume and no-shows
- Simply deliver messages with no logins or apps required using Health Messenger



## CLOSER LOOK

# Clinic-friendly flows

### Secure experience designed for senders:

- **Integrated:** Launch right from the EMR
- **Visual:** Supports HTML for rich formatting
- **Secure:** Secure messages and attachments are available in Health Messenger (no logins!)
- **Flexible:** Enable if-and-when patients can reply
- **Powerful:** Include Ocean eForms to collect responses that flow directly into the EMR

### Send Email to Martha Gibbs

Dr. Clark New Patient Visit Appointment Reminder\* Templates

To: mgibbs@oceanmd.com Martha Gibbs

Subject: REMINDER: Appointment with CMD Dermatology Clinic

Email: Dear Martha,

This is a reminder for your upcoming healthcare appointment:

<b>Date</b>: @apptDate  
<b>Time</b>: @apptTime  
<b>Provider</b>: @providerName

Secure Message:

Arrive to your appointment in loose fitting clothes so we can run the biopsy.

If you notice any changes to the affected area, please send a photo. You can attach it to this email and I'll review before your next appointment.

+ Add Attachments...

CMD\_TorontoMA.png

Allow patient to reply  Notify me when viewed

Allow patient to send attachments

Reply window: 14 days

eForms:

+ Dermatology Photograph Consent Form

+ Add eForm...  Notify me when complete

Advanced

## CLOSER LOOK

# Portal-free patient experience

### 1. Patient receives email

*The message contains the basic information (unsecure) and a special link to open the secure Health Messenger*

### 2. Open Health Messenger

*Once patient passes verification, they can access test results, forms, and other secure content*

1

Dear Martha,

Your healthcare provider would like you to complete a secure online questionnaire related to your health. Please click on the following link to complete it.

[View Secure Message and Complete Questionnaire](#)

Note: This is an outgoing email only. Please do not reply to this email. If you have any questions or concerns, please contact the office in the usual manner.

This secure message was sent by your healthcare provider using the Ocean Platform.

Ocean Site # 3000

2

### Verify your identity

Hello, your healthcare provider has sent you a secure message that may include forms to complete. To view the message, please verify the information below.

**Birth Date**

YYYY

MM

DD

Verify and Continue

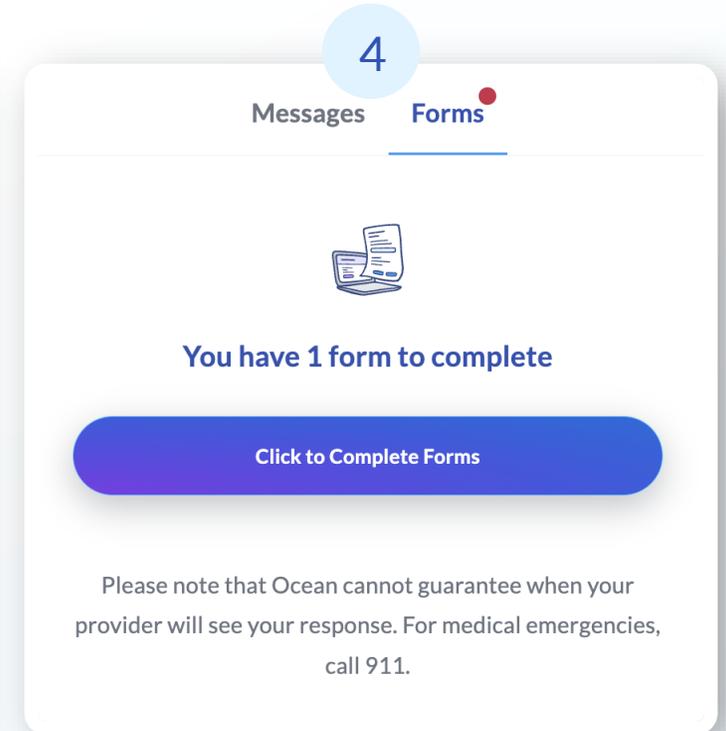
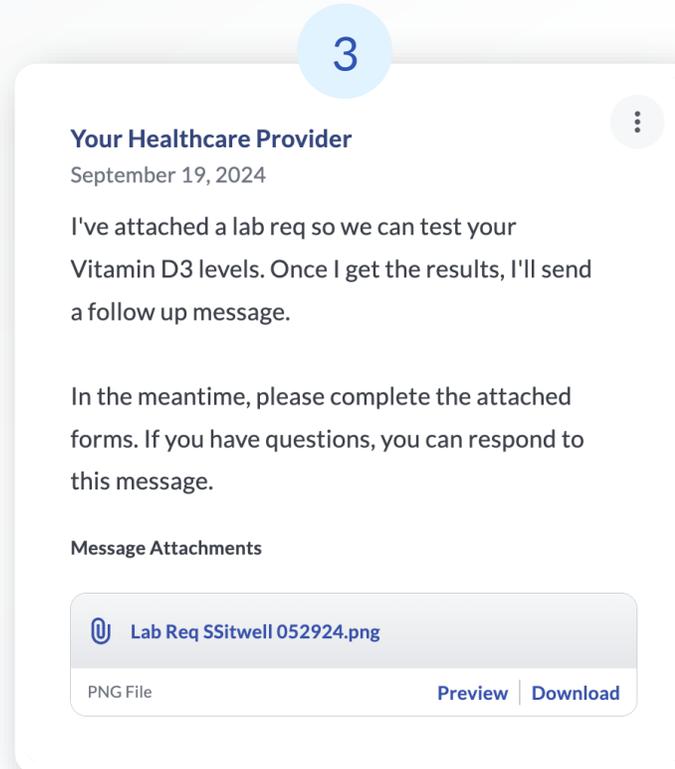
# Health Messenger is Ocean's patient-facing experience for messaging, designed to make it easy for you and your patients

## 3+4 Patient reviews, replies and completes forms

*View message, complete forms and send replies with attachments all in one mobile-friendly place*

## Voila!

*Upon completion, responses are immediately sent to the patient's chart, ready for you to review*





# What clinics and patients think

## Real clinic quotes:

- The fact that we can now have clients send photos, immunization records, forms and so forth has **changed the way we will be able to practice** while also saving time at check in.
- It's an easy way to make sure patients receive information in a timely manner.
- We are a research facility and Ocean is **invaluable to our data collection.**
- One-stop shop for all your EMR add-on needs and the customer service is by far the best!

## Real patient quotes:

- Easy experience, enjoying the ability for quick responses to results and communication
- **Nice and easy, no complicated passwords.** A quick response without the need for a follow up is great.
- I really appreciate having this option, **eases my mind.** Always a very prompt response. So glad this option is available!
- I can't always answer the phone when at work so this is excellent

BEST PRACTICES

# Tried-and-True Tips With Real Clinic Impact

## BEST PRACTICES

# Communicate clearly

When sending secure messages or reminders, make it easy for patients to recognize your clinic.

- Include your clinic name in the email or subject line
- Upload your organization's logo to build trust
- Keep messages clear and avoid acronyms

Want to cut down on repeat questions from patients? Direct them to the [Patient's Guide to Ocean](#), where they'll find how-to videos, answers to common questions.



## CMD Toronto Medical Associates

This message was sent to you by CMD Toronto Medical Associates, located at **123 Avenue Street, Toronto, Ontario.**

Our team uses secure messaging to:

- Communicate important updates
- Request appointment confirmations
- Ask you to complete forms
- Follow-up with patients

If you have questions or need assistance, please respond to this message, call us at 1-888-888-8888 or visit [oceanmd.com](http://oceanmd.com).

Clinic hours are Monday to Friday, 9:00am to 5:00pm.

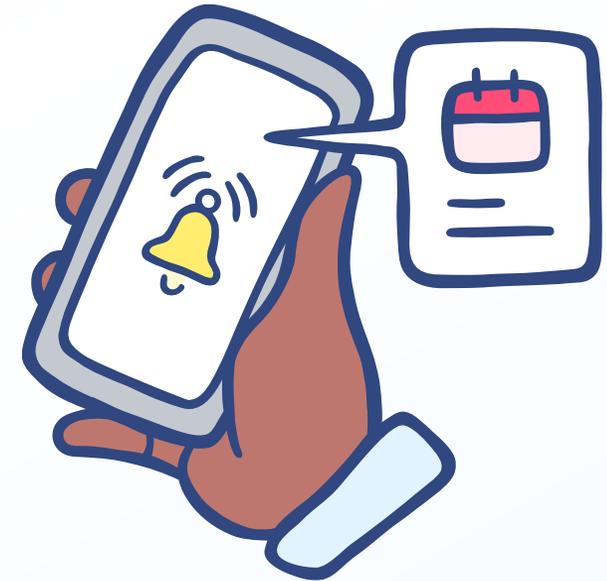
## BEST PRACTICES

# Timing is important

After analyzing over 1 million sent patient reminders, our team determined that the best cadence for ensuring confirmation is:

- Send the **1st reminder** 7 days in advance
- Send a **2nd reminder** 2 days before the appointment

For maximum impact, send both email + SMS reminder:  
Clinics using both saw a **10% boost** in confirmation rates



## BEST PRACTICES

# Get staff up to speed

Sending a Patient Message through Ocean takes seconds, meaning tons of time savings for your team. Keep staff up-to-date on the latest workflows so you can maximize efficiency.

- Use Ocean Forms to collect information that goes straight into the EMR
- Sign up for Ocean Academy, a free, self-paced learning resource available to all users



**Welcome to Ocean Academy**

Get onboard and explore your new digital possibilities with Ocean!

02:38

TEMPLATES

# Ready-to-Use Messages for Clinic Efficiency

## OCEAN EXAMPLES

# Basic reminders

This is a great basic template to use because it includes all the necessary details:

- **Appointment details**
- **Link to Health Messenger**
- **Clinic contact information**

By default, reminders are sent by a no-reply email address, so providing your contact information makes it easier for patients to reach out if there are any issues.

Dear Mimi,

This is a friendly reminder about your upcoming appointment at CMD Toronto Medical Associates.

**Appointment Details:**

**Date:** Sept 18, 2025 at 2:00 PM

**Location:** 123 Grove Street, Toronto, ON

**Provider:** Dr. Amanda Li

Please arrive 15 minutes early and bring your health card.

Click here to confirm your appointment and complete any necessary forms.

[Confirm or cancel your appointment](#)

We look forward to seeing you!

Kind regards,  
CMD Toronto Medical Associates  
123-456-7890  
[www.oceanmd.com](http://www.oceanmd.com)

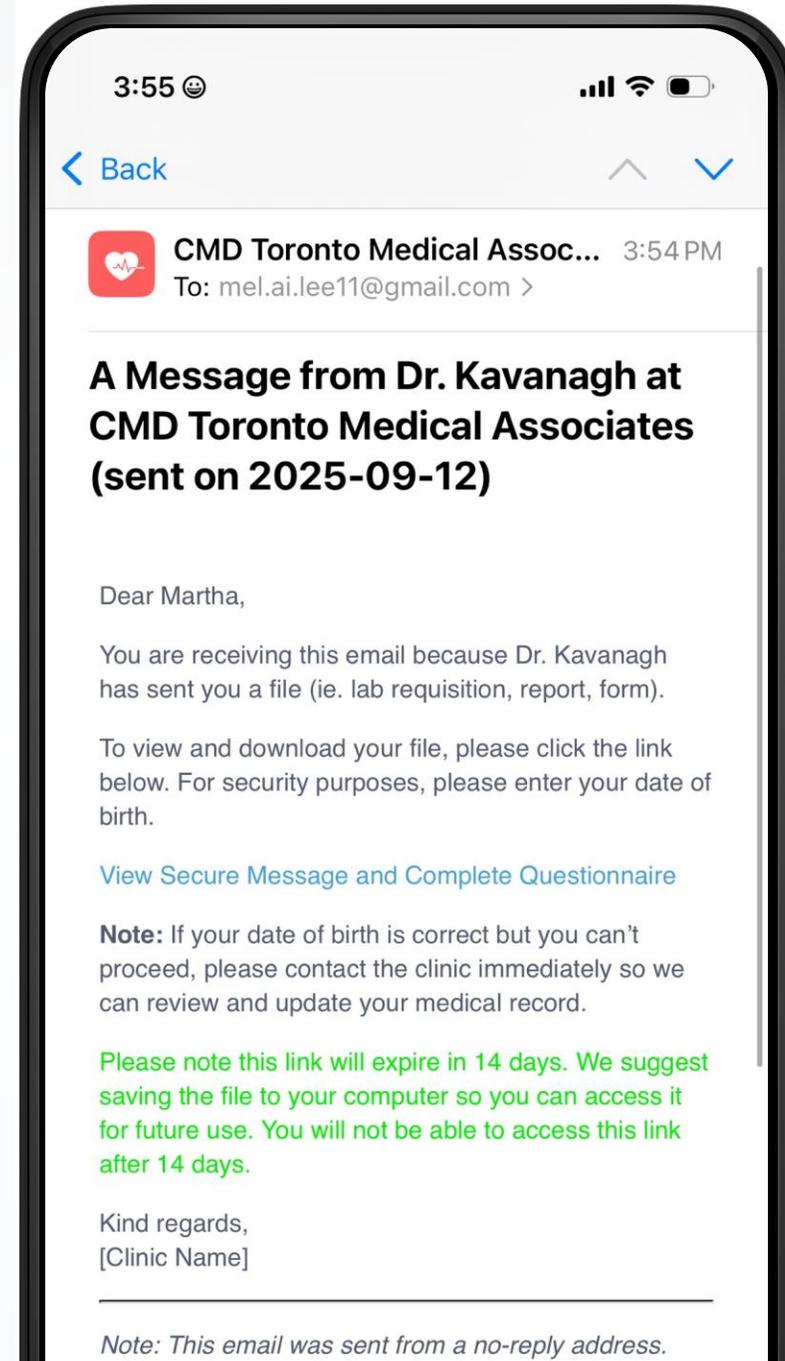
## OCEAN EXAMPLES

# Messages with attachments

If you're sending an attachment or the patient is expecting something, it's worth mentioning it in the email template.

Many patients are rightly cautious when it comes to clicking links or downloading files from the internet, so providing more context can help address any concerns.

By using HTML, you can write important messages in different colours, or add section breaks to improve readability.



## OCEAN EXAMPLES

# Patient experience surveys

Messages and reminders aren't just for pre-visit communication. We've seen a huge increase in clinics reaching out to patients after the visit, particularly for experience surveys.

Configure these reminders to automatically send after a visit and you can effortlessly collect information for quality improvement!

Dear Martha,

You are receiving this email because you have a new patient feedback survey from your healthcare provider at OceanMD Medical Associates related to your recent healthcare visit.

We continuously looking to improve the quality of the care we provide. The survey linked below will help us to better understand your patient experience.

This information is collected for quality improvement purposes only. The survey is entirely voluntary, and your feedback is anonymous. The survey is short and will take less than 5 minutes to complete.

Please access the patient feedback survey by clicking the link below:

[Complete Questionnaire](#)

Thank you for your participation!

Sincerely,  
OceanMD Medical Associates

## OCEAN EXAMPLES

# Specialist appointment confirmations

Since specialist appointments are often booked far in advance, turn the message into a useful patient resource by including all the necessary instructions and information in one place.

If you use Ocean eReferrals, these solutions work together for a cohesive patient journey.

**Want to use any of these templates?**

[Click here](#) to find copy/paste text and html

Dear Martha,

A sleep study has been scheduled for you.

### Appointment Details:

**Date:** Nov 25, 2024 at 2:00 PM

**Location:** 4040 Yonge Street, Toronto ON

**Provider:** Dr. Amanda Li

[oceanmd.com]Click here to download the pre-visit instructions. Please follow the overnight sleep study instructions carefully including what to bring and any preparation that is required.

You will need to complete some forms before your appointment. Please click the link below to access the forms. We will automatically receive your responses once you submit.

[Complete Questionnaire](#)

Kind regards,  
OceanMD Sleep Disorders Clinic  
888-864-8655  
reception@oceanmd.com  
www.oceanmd.com

### Important Notes:

1. By attending the sleep study, you consent to video recording as part of the overnight sleep study as per regulations. The recording is part of your medical record.
2. If you are more than 15 minutes late for your appointment and you have not notified the office that you are running late your appointment may be taken by another patient as reception staff will begin calling other patients to replace you.
3. If you need to cancel or reschedule your appointment, please call the clinic as soon as possible (Monday to Friday, 9am to 5pm). Please note that we require 24 hour notice for cancellation of this appointment to avoid a fee.

*Note: This is an outgoing email only. Please do not reply to this email. If you have any questions or concerns, please contact our office directly by phone at 888-864-8655.*

OCEAN FORMS LIBRARY

# Supercharge Messages with Digital Forms

# Administrative forms for an efficient clinic

Influenza ("the flu") is a common viral respiratory illness that often presents as a bad cough, fever, muscle and joint pains. It can cause severe symptoms which may lead to hospitalization or even death.

Since the virus is constantly changing, you need a new flu shot each year to protect yourself.

Have you had the flu shot this season?

The flu shot is known to be very safe and effective for almost everyone to receive. Although it doesn't always succeed in preventing the flu, it does provide you with additional protection.

The flu shot NEVER causes the flu, or any other infectious illnesses.

**Occasional (usually very minor) side effects of the flu shot do include:**

- soreness, redness, or swelling in the area where the shot is given
- fever (uncommon)
- short-term muscle aches

As your healthcare providers, we recommend that you consider receiving the flu shot.

[Flu Shot Invite](#)

First Name:

Preferred Name:

Middle Name:

Surname:

Street Address Line 1:

Line 2:

City:

Province:

Postal Code:

Birth Date:

Home Phone #:

Business Phone #:

Mobile Phone #:

[Demographic Reviews](#)

I agree not to use email to communicate emergency or urgent information about myself and understand that the clinic does not guarantee the receipt or review of any email messages that I may send to the clinic.

I understand and agree that individual care providers may make decisions about my treatment based on information I provide through email and that this information may form part of my health record.

I understand that I may stop using email for clinical communication purposes at any time, at which point I will notify the clinic in writing of my decision to stop using email for these purposes. I understand that this consent remains effective unless and until it is withdrawn.

I understand that individual care providers may stop using email for clinical communication purposes at any time, at which point s/he will inform me in writing or notify me about this decision at the time of my next appointment.

**Consent for Patients Over Age 14**

I, Alex Appleseed, confirm that I have read and agree to these terms and I wish to communicate with the clinic via email for the purposes of my clinical care.

The email address to use is:

[Email Consent](#)

# Clinical forms for better patient care

What is your child's date of birth?

According to your answer, your child is 2 years old. If that is incorrect, please correct the birthdate field above.

[Next](#)

### Get Started

**1 Choose the nearest age**  
Choose the checklist that matches your child's age. If your child falls between two ages, use the earlier age (if child is 4½ years old, use the 4 year checklist).

**2 Answer the questions**  
Answer the questions to the best of your ability. If you are not sure, try the question with your child. Any examples are only suggestions. You may use similar examples from your family experience. Language and communication items can be asked in the child's first language. Items marked with "\*" may not be common to all cultures.

**3 Follow-up with a professional**  
If you answer "no" to any question or have any concerns about your child's development, follow-up with a health care and/or child care professional.

### When you're done

Follow the parenting tips beside the checklist to help your child grow. These tips may be a bit more challenging than the checklist. If you have questions, contact a professional. The tips are organized into the following developmental areas:

- Emotional
- Fine Motor
- Gross Motor
- Social
- Self-Help
- Communication
- Learning & Thinking

[LookSee](#)

### Patient Health Questionnaire (PHQ-9)

Over the last two weeks, how often have you been bothered by any of the following symptoms?

- Little interest or pleasure in doing things
- Feeling down, depressed, or hopeless
- Trouble falling or staying asleep, or sleeping too much
- Feeling tired or having little energy
- Poor appetite or overeating
- Feeling bad about yourself - or that you are a failure or have let yourself or your family down
- Trouble concentrating on things, such as reading the newspaper or watching television
- Moving or speaking so slowly that other people could have noticed. Or the opposite - being so fidgety or restless that you have been moving around a lot more than usual
- Thoughts that you would be better off dead, or of hurting yourself in some way

If you checked off any problems, how difficult have these problems made it for you to do your work, take care of things at home, or get along with other people?

In the past 2 years have you felt depressed or sad most days, even if you felt okay sometimes?

Have you had any thoughts of harming yourself lately?

[PHQ-9](#)

### Medications

We do not have any medications currently listed on your file.

Are you taking any other prescription medications?

Other Prescription Medications:

Are you taking any other medications bought over-the-counter (ie. without a prescription)?

Which over-the-counter medications do you take?

Are you taking any herbal supplements, naturopathic medicines, or homeopathic medications?

[Medication Reconciliation](#)

For more top forms, [check the OceanMD blog](#)

# Ready to get started?

Book a demo today and explore how Ocean can make your patient communication easier than ever!

[oceanmd.com/demo-request](https://oceanmd.com/demo-request)