

OCEAN IMPLEMENTATION GUIDE

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PURPOSE

This SOP is designed to walk a user through how to set up Ocean for RAC purposes.

SCOPE

This SOP is designed for the Rapid Access Clinic Program.

OVERVIEW

Ocean is a patient services platform that facilitates patient messaging directly from the EMR Scheduler and allows survey collection that is directly integrated into patient charts. RACs are required enroll with Ocean for survey collection. In this guide we will teach you the basics to get you started with Ocean.

PROCEDURES

1) Step 1 (Registration)

To begin this process, register for Ocean on the [Ocean Sign Up Page \(cognisantmd.com\)](https://cognisantmd.com).

- You will see a page like the image below.



Sign Up

Thank you for joining the Ocean Community! Please complete the fields below so that we can set up your new account.

First Name	<input type="text"/>	Why are you signing up for Ocean?	Please choose one <input type="text"/>
Last Name	<input type="text"/>	Clinic/Organization Name	<input type="text"/>
Requested Username	<input type="text"/>	Which OceanMD products are you interested in?	<input checked="" type="checkbox"/> Patient Tablets <input type="checkbox"/> Check-In Kiosks <input checked="" type="checkbox"/> Patient Messages <input type="checkbox"/> Patient Reminders <input checked="" type="checkbox"/> Website Forms <input checked="" type="checkbox"/> Ocean Studies <input type="checkbox"/> Ocean eReferral Network <input type="checkbox"/> OceanMD Resource Library
Password <small>Minimum of 5 alphanumeric characters.</small>	<input type="password"/>	How did you find us?	Please choose one <input type="text"/>
Confirm Password <small>Minimum of 12 characters, with at least 3 of the following: one uppercase, one lowercase, one numeric, one special character.</small>	<input type="password"/>	What EMR are you using?	Please select your EMR <input type="text"/>
Email	<input type="text"/>	Critical System Notifications	<input checked="" type="checkbox"/> Sign me up to receive email notifications of events that may affect my ability to use Ocean
Role	Please choose one <input type="text"/>	Product Updates	<input type="checkbox"/> Sign me up to receive new feature updates and resources from OceanMD
Province	Please choose one <input type="text"/>	<input type="button" value="Sign Up for Ocean"/>	

- Initially, you will register one Primary User.
- You can add Additional Users (including delegates such as MOA, Nurses, Physios, etc.) later.
- Fill out the applicable fields specific to the clinic.
- For the services provided, ensure to select.
- “Patient messages”
- “Webforms”
- “Ocean Studies.”
- Select the EMR that will be used.
- Click the “Sign Up for Ocean” button at the bottom of the page.

Step 2 (Setting up your Ocean Site)

After signing up, you will receive an email from OceanMD with instructions on setting up the OceanMD Site specific to your clinic.

- At this stage, you can add other users to the account. To do this, select “Menu” > “Admin” (image 1)> “User” (image 2) > and “Invite users to this site” (image 3).

The screenshot displays the Ocean software interface. At the top left is the Ocean logo. To its right is a 'Menu' icon (a 2x2 grid) and a 'Patients' icon (two people). The 'Menu' icon is highlighted with a red box. Below the 'Menu' icon is a dark blue dropdown menu. The menu is divided into three sections: 'Main Navigation', 'Patient Engagement', and 'Quick Links'. The 'Admin' option, represented by a key icon, is highlighted with a red box in the 'Main Navigation' section. The 'Patient Engagement' section includes 'Tablets & Kiosks', 'Patient Reminders', 'Online Booking', and 'Website Forms'. The 'Quick Links' section includes 'Cloud Connect', 'Resource Library', and 'Support'. The background shows a 'Find Patients' search bar with the text 'With a message' and a search icon, a 'Provider' dropdown menu set to 'All', and a 'Day Sheet' section with an 'Upload from EMR' button and a file name 'HN...'.

The screenshot shows the 'Admin Settings' page in the Ocean system. The 'Users' section is highlighted with a red box. Below this, the 'Users' page is shown, with the 'Invite Users To This Site' button also highlighted with a red box.

Admin Settings

Site Settings

Site Account
View and configure basic information about your account such as site name, number, notification emails and timezone.

Encryption
Set up or view your site's shared encryption key.

Users
Invite and manage users at your site.

Licence Management
Add, remove, and manage licences for Online Booking, Patient Reminders and Patient Messages.

Billing
Setup your site's payer and view your site's credit balances and invoices.

Reports
Run reports on referral analytics, user activities, product usage and audit data.

Users

Invite Users To This Site **Export Users**

- Invite users via email address. Select the level of access that the user will have.

Step 3 (Integrating Support Site)

To add Alberta Bone and Joint Health Institute' as a Support Site, please refer to [Adding a Support Site to Your Site – OceanMD \(cognisantmd.com\)](#).

- Navigate to “Menu” > “Admin” (like above)> “Site Account” (image 1 bellow) > “Support Sites” > “add” > type in “Alberta Bone and Joint Health Institute.” (image 2 Bellow)
- Note: Alberta Bone and Joint Health Institute is Site #5028

The screenshot shows the OceanMD Admin Settings interface. At the top, there is a navigation bar with the Ocean logo, a Menu icon, an Admin Settings icon, and user information for Max Cleary. Below the navigation bar, the main content area is titled 'Admin Settings' and is divided into two columns. The left column contains 'Site Settings' with sub-sections: Site Account (highlighted with a red box), Encryption, Users, Licence Management, Billing, and Reports. The right column contains 'Additional Functionality' with sub-sections: Site Features, Website Form Links, Canned Responses, Integrations (with sub-sections: EMR Field Mapping, Manage Credentials, and Integrations), and Locations.

Ocean Menu **Admin** Settings ▶ Site Account Tour Alerts Max Cleary Alberta Bone and Joint Health

Site Account

Site Name

Site Number 5028

Finance Administrator Email (gets copies of invoices)

Clinical Administrator / Ocean Support Contact (gets miscellaneous Ocean system messages)

Website Form Notification Email (notified of new website form submissions)

Email 'From' Address ⓘ (appears as the sender address for Ocean emails)

Email Friendly Name ⓘ (appears as the sender name for Ocean emails)

Province/State ▼

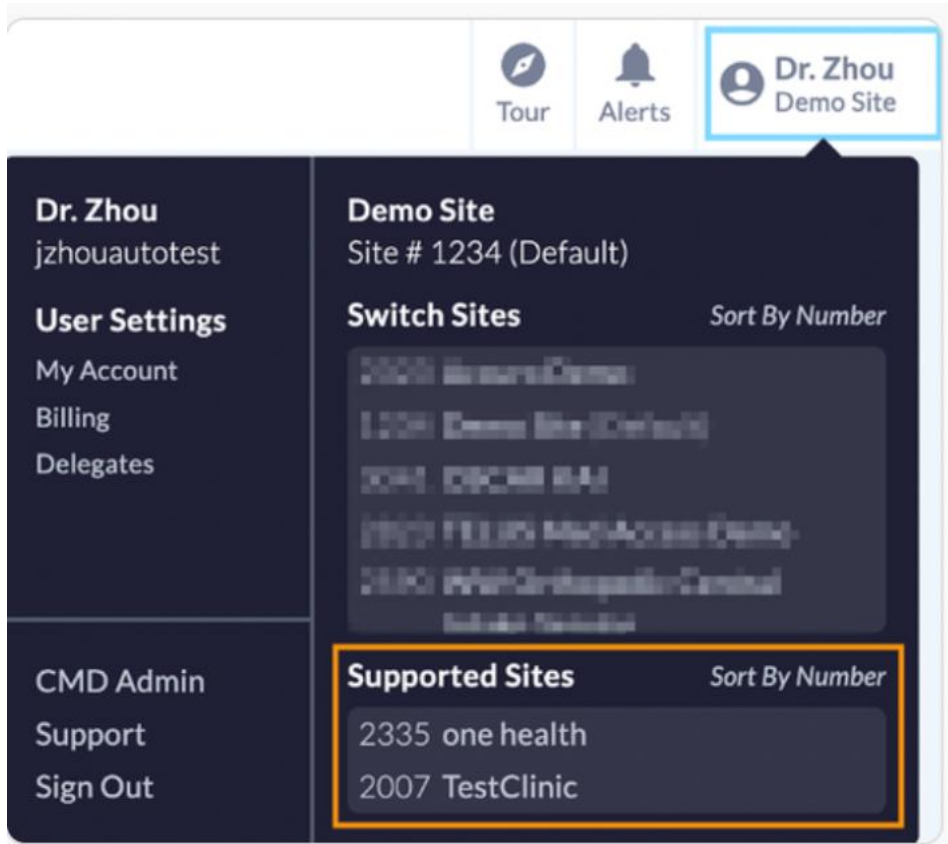
Time Zone ▼

EMR Instance ID: Unknown

Support Sites

(support site users can act as site admins)

You can view your support sites by clicking on your name at the top right in ocean.



Step 4 (Ocean Request)

- Complete the Ocean Request form.
- Upon selecting your EMR, complete the request form (You will need your Ocean I.D for this).
- You can find your Ocean I.D by selecting your name and the clinic in top right corner. It is listed under Site #.
- A member of the Ocean team will contact your clinic within two business days to initiate support.

Please note that **only** expenses for the services selected in sign-up (Patient messages, and Ocean Studies) will be covered by ABIHI, as these are a requirement for RACs. Any additional services can be used by the clinic but will be at the expense of the clinic.

Step 5 (What to expect?)

After the contracting is complete, a member of the OCEAN team will reach out to your clinic to assist in setting up the integration, onboarding, troubleshooting, and best practices. This will be done over screen sharing. At the clinic, you will be required to inform your EMR vendor of the change, and Ocean will set up the integration into the EMR.

- **Integration Timeframes:** The expected turnaround time for Ocean to be integrated into the EMR depends on the EMR the clinic uses:
 - o Accuro (10-15 days)

- o MedAccess (5-10 days)
- o PS Suite (5-10 days)
- o OSCAR Pro (~ 24 hours)
- During the set-up period, collaborate with IIHO to set up the required eForms, study databases, and templates within the Ocean Portal.

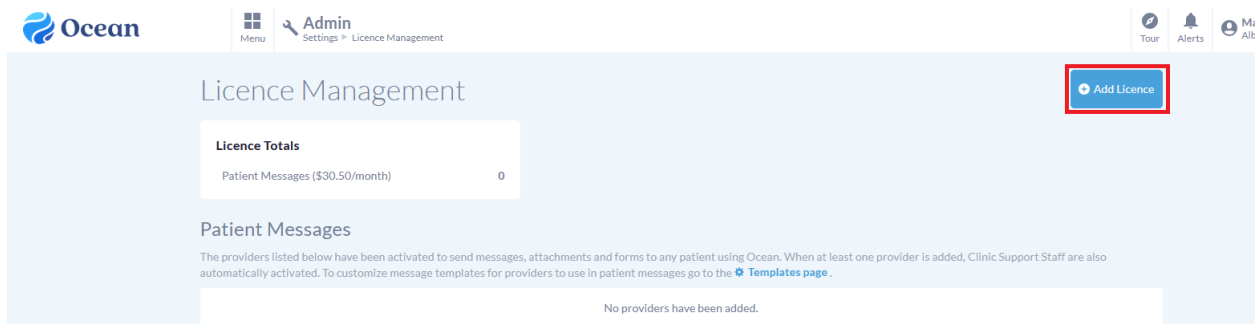
Note:

1. There is no need to create forms as this has been done for you. IIHO will share the necessary forms with your clinic and the sequence in which they should be used.
2. The email templates that will have the forms attached can be customized by you.
3. You may choose to use Ocean to send out email reminders on behalf of your clinic beyond the scope of RAC.
4. For Ocean to be optimally effective, during referrals or appointment booking, **an email for the patient must be collected** and entered in the patient chart.
5. A detailed guide from Ocean can be found [here](#).

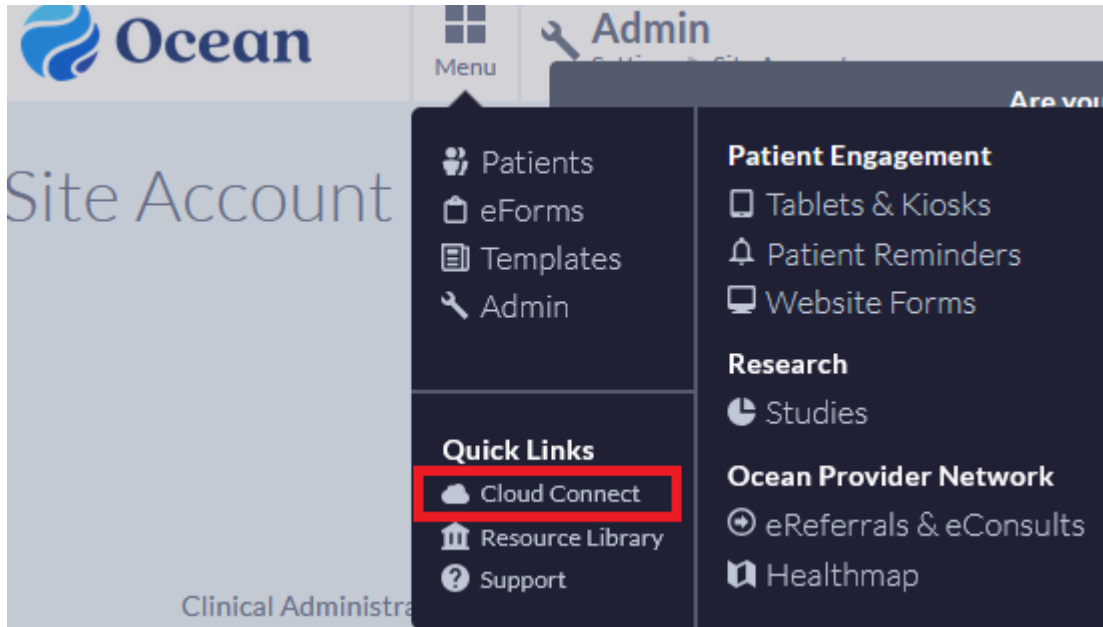
Step 6 (Activating doctors and linking users to doctors)

We need to activate doctors to allow us to Email patients. To do this:

- Menu>Admin>Licence Management>Add Licence (a pop-up message will appear to confirm the activation (Doctors associated with the RAC program will be covered by IIHO)).



- Menu>Licence Management>under the EMR provider column use the drop down to assign an EMR provider to the users. Those users will have the ability to email after this is done.
- ***Important Note*** If a doctor does not appear on the “add license list they will need to be added in “Ocean Cloud connect” to do this: Menu >Cloud connect> sign in edit settings> Sunc appointments for Provider(s)> check off correct doctors. (Not all accounts have access to cloud connect, please contact OceanMD if any difficulties arise with Cloud Connect)



RESOURCES

Other Resources

<https://www.oceanmd.com/getting-started/>