# OCEAN IMPLEMENTATION GUIDE

## 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.

## Implementation

### Step 1 (Registration)

To begin this process, register for Ocean on the Ocean Sign Up Page (cognisantmd.com).
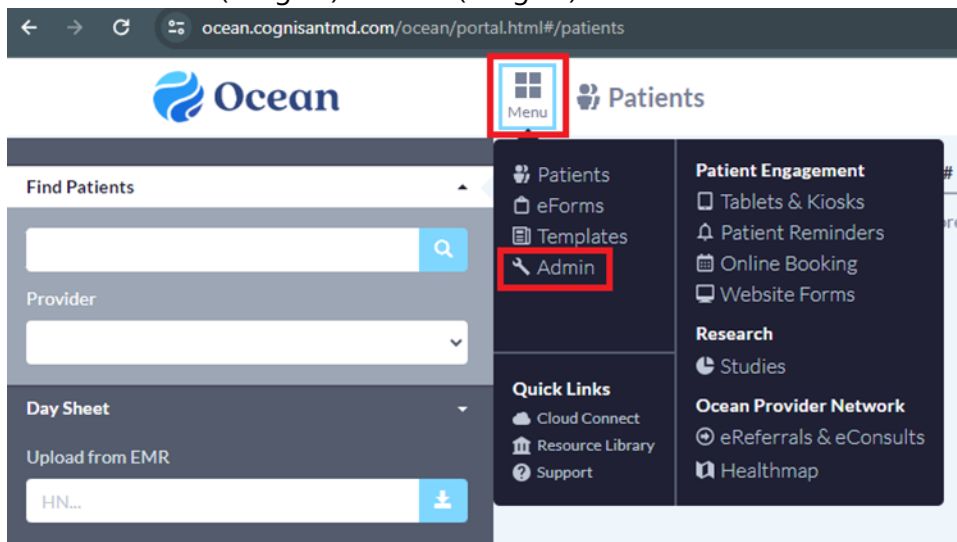
You will see a page like the image below.



- Initially, you will register with one Primary User.
- You can add Additional Users (including delegates such as MOA, Nurses, Physio etc.) later.

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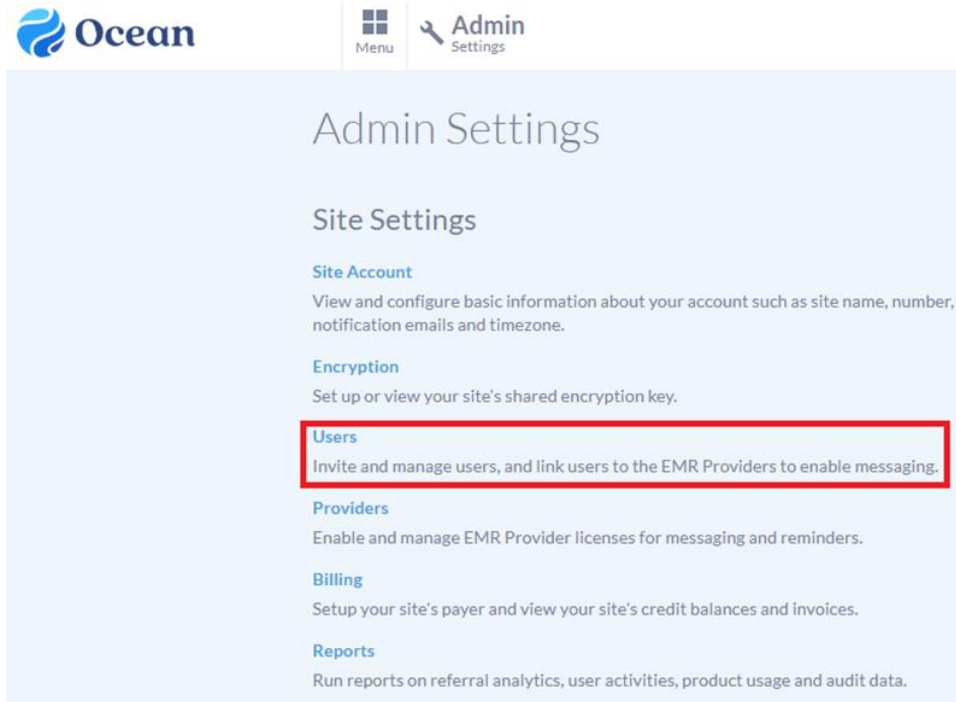BONE & JOINT
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- Fill out the applicable fields specific to the clinic.
- For the services provided, ensure to select.
    - "Patient messages"
    - "Webforms"
    - "Ocean Studies".
- Select the EMR that will be used.
- Click the "Sign Up for Ocean" button at the bottom of the page.

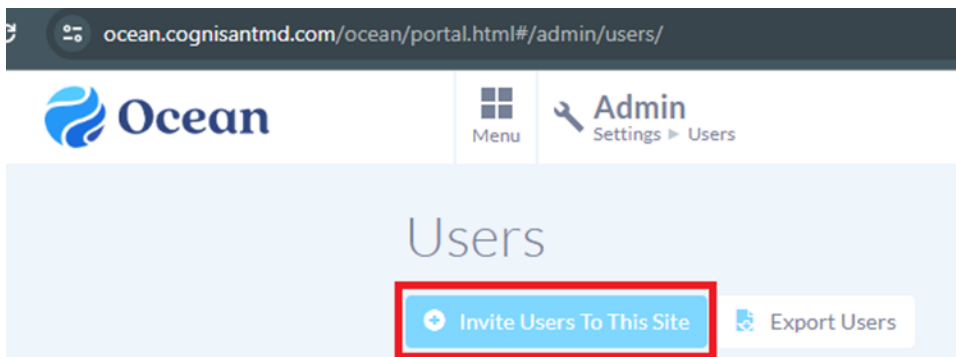## Step 2 (Setting up your Ocean Site)

After signing up, you'll 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).

- 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" > "Support Sites" > "add" > type in "Alberta Bone and Joint Health Institute".

- Note: Alberta Bone and Joint Health Institute is Site #**5028**





## 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).

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- 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, Webforms, and Ocean Studies) will be <u>covered by ABJHI,</u> 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?)

A member of the Ocean team will reach out to your clinic to assist in onboarding, troubleshooting, and best practices. This is done by a combination of email support or virtual trainings. 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 on the back end.

- **Integration Timeframes:** The expected turnaround time for Ocean to be integrated into the EMR depends on the EMR the clinic uses:
  - Accuro (10-15 days)
  - MedAccess (5-10 days)
  - PS Suite (5-10 days)
  - OSCAR Pro (~ 24 hours)
- During the set-up period, collaborate with ABJHI to set up the required eForms, study databases, and templates within the Ocean Portal.
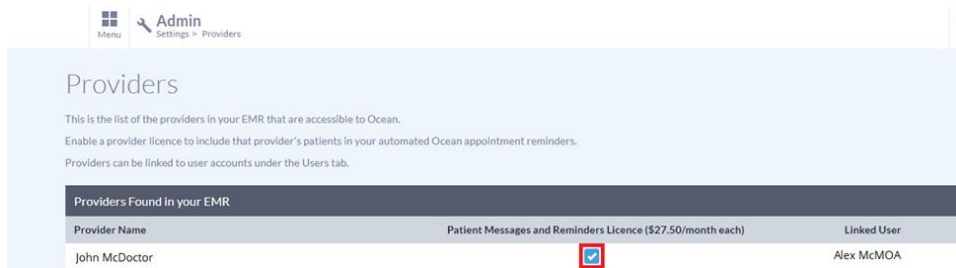
*Note:*

1. There is no need to create forms as this has been done for you. ABJHI 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 **<u>email for the patient must be collected</u>** and entered into the patient chart.

## 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>Providers>Check off all participating providers.

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- Menu>Admin>Users>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.
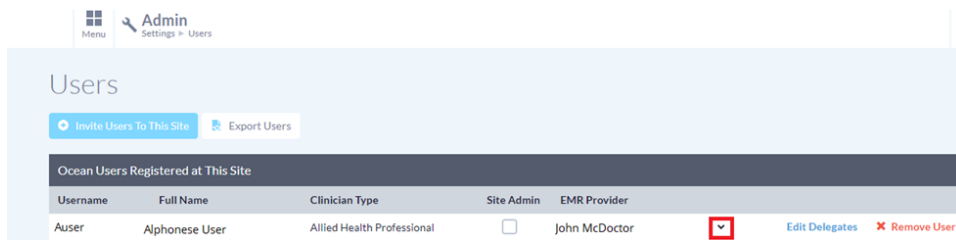


# Support and Troubleshooting

## Technical Issues

For challenges regarding subscription and errors within Ocean, please contact Ocean directly. Either here or at 1-(888)-864-8655.

## Content Queries

If you have content questions about the surveys – please contact Max Cleary or Rukhsar Jetha at ABJHI.