OCEAN & PSS: THE BASICS & BEYOND

Thank you for participating in our Ocean & PSS Introductory Webinar. This handout was designed to accompany the presentation and provide a quick, step-by-step guide to the topics covered.

How do I add forms to an Ocean Tablet from PSS?

1. From the patient's chart, click on the Ocean logo in the toolbar to insert the custom form
2. Select the "add forms" button.
3. Search for a form using keywords or form names and select the form you want the patient to complete.
4. Search again to add additional forms if required.
5. Once the forms are added, locate the 3-digit code on the toolbar in the patient chart, and enter it into the tablet from the home screen.*
6. Once the patient has completed the forms, the results will appear automatically in the patient chart.

* Note – the tablet must be configured for "Staff-initiated" form entry.

How do I search the forms in the library?

1. Login to the Ocean portal at ocean.cognisantmd.com.
2. From the portal, select the eForms tab.
3. Search for forms in the core library by typing in the search box.
4. To search through the forms in the shared library, select "More" click on "View Shared Forms".
5. If you see one that you would like to use, click on the form name and select "import".
6. Forms that have been imported from another site or edited will appear in blue.

How do I create a list of my favourite forms?

1. To create a favourite, click on the form name.
2. Click on the "Favourite" button.
3. The form will now appear in your favourites list. (To check this, click on "Favourites" on the left menu)

How do I group multiple forms to appear together?

1. You can use favourites to group multiple forms together so they appear to a patient sequentially. To do this, start by selecting "Favourites" on the left menu in the eForms tab.
2. Click on "Add Favourite".
3. Search for the first form you want to appear and select the form name to make it a favourite.
4. Select that form from your list of favourites , and select "rename" to create your Group Favourite name.
5. Select "Add Form" and search for the additional form(s) you want to group together.

How do I create a rule to automatically trigger certain forms for a patient?

1. Select the Tablets tab in the Ocean Portal.
2. Find the tablet group you want to add a rule to and click on "edit".
3. Select "Rules" from the tabbed menu.
4. Click on the "Create Rule" button.
5. Search for the form you want to create a rule for, click on the form name, and select the "Choose" button.
6. This will automatically create a default rule for this form. Default rules are always set to "true", which means it will be displayed to every patient every time that they use the tablet.
7. You can create your own rules using javascript expressions. A list of some basic examples can be found at the bottom of the Rules window. Typing into the rules field will also enable a list of "quick add" rules that can be selected for easy entry.
8. More information on scripting and creating rules can be found in the Ocean support portal by searching in eForms & Scripting.

What are some examples of commonly used rules?

Clinic Example	Form to Use	Rule Script
Ask about smoking status for all patients over the age of 14	Smoking screen	pt.getAge() > 14
Collect email consent from all patients one time.	Email Consent Long Form	firstTime
Conduct a PHQ9 for all of Dr. Smith's patients	PHQ-9	ScriptUtil.getKeyword('@ptClinicDoc') == 'John Smith'
Assess falls risk for all patients over the age of 65 once per year	Canadian Staying Independent Checklist - Falls Prevention	pt.getAge() > 65 && daysSinceLastCompleted > 365
Ask female patients aged 50 and older if they would like a mammogram	Mammogram invitation	pt.isFemale() && pt.getAge() >= 50

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Key points to remember when creating rules:

- Forms appear to patients in the same order as the rules. By default, 'On-Demand' (manually added) forms appear last. You can change this order by dragging-and-dropping the rows in the Rules window.
- Scripting is always case sensitive (follow the examples closely!)
- Form memory may be required for certain forms. Form memory allows Ocean to recall forms that were completed in the past.

How can I customize my basic tablet settings?

1. To change your tablet settings, start by going to the Tablets tab in the Ocean Portal and click on the "Edit" option for the tablet grouping you want to edit.
2. **TABLET MODE:** To set the tablet mode, use the drop-down menu found at the top of the editing dialog box. You can select between staff-initiated (staff enters a three-digit code in the tablet to unlock the correct forms for the patient); Kiosk mode (patients enter their health card number or swipe their health card to unlock their forms); or anonymous survey mode (single-purpose setting that allows patients to launch an anonymous survey by clicking "begin").
3. **INTRODUCTION PAGE:** The next tab allows you to customize the Introduction screen for your patients, including adding a clinic logo, a general welcome or clinic announcements, and a privacy notification.
4. **DEMOGRAPHIC REVIEW:** The next tab allows you to automatically display a demographic review to all patients. You can easily customize which fields are included on your demographic review by selecting the checkboxes.
5. **eFORM DISPLAY:** The eForm Display tab allows you to optionally display a quit button that allows patients to quit completing forms without completing all the required fields. By default, tablets are set to hide the quit button (we recommend leaving this in the default setting).
6. **LANGUAGES:** If you are using multi-lingual forms, you will want to ensure that you have selected the appropriate supported languages.
7. **COMPLETION:** This tab can generally be left as-is; however, some clinics have a form that they want all patients to complete after all other forms. This is an easy way to customize this. This tab also allows you to optionally display any demographic changes on the thank you page to make it easy for staff to quickly review the changes and ensure there are no errors.

How do I edit a form?

1. To create or edit a form, open the eForms tab in the Ocean Portal and search for a form to edit.
2. Click on the form name to expand the form options. Click Preview if you want to "demo" the form. Click edit when you are ready to start editing.
3. Click to agree to the terms. The form editor will open in a new tab.
4. Click on the question you want to edit. This will open the editing options on the right side.
5. To add a new item or question, select the "Add Item" button at the top.
6. To move a question around, drag and drop the selected item.
7. For more advanced form-building instructions, view our Guide to Building eForms.

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How do I update my Ocean site settings?

1. Start by accessing Ocean administration features from the Ocean portal under the admin tab. This section will review the most commonly accessed account settings.
2. **SITE ACCOUNT**: This page allows you to select your email delegates for invoicing and miscellaneous messages. This is also where youc an access your site number which you will need for any support requests.
3. **USERS:** This page allows you to see all of the users associated with your site. Administrative users can also provide admin access to other users by checking the box next to their names (admin users can access all functions under the admin tab). Administrative users have access to all At the bottom of the page, we can invite other Ocean users to join our site using their Ocean user name or their email address.
4. **REPORTS**: Reports allow you to export site-specific data. The top section allows you to export e-referrals for e-referral users. The bottom section allows you to export tablet data as well as form related data. Reports are exported as a csv file, which can be opened with a standard spreadsheet program (eg. Excel or Google Sheets).
5. **BILLING**: The billing tab provides option to change the payer. The payer will receive monthly invoices and is responsible for payment for all site activities and subscriptions. The billing page can also be used to create subsites for more complex billing requirements. Contact CognisantMD support for details on subsites if needed.

How do I update my Ocean user account settings?

1. You can access your Ocean user account settings by clicking on your user name in the top right corner of the Ocean Portal and selecting "View My Account".
2. **ACCOUNT TAB:**
    *   From the Account tab, you can subscribe to daily or weekly usage reports.
    *   To set the email address that should receive clinical notifications such as referral updates, patient message read recipts, or form submissions , update the default clinical delegate email field.
    *   Confirm that your EMR user name matches the user name you use to log into PS Suite.
3. **BILLING TAB:**
    *   From the Billing tab you can add or update your credit card (ensure you are set as the payer in the site settings).
    *   To view, download, email, or regenerate an invoice, click on the View Action for the invoice you want and use the options provided in the pop-up window.

How can I send a secure message or form to a patient and create email templates?

1. From the patient's chart in PS Suite, click on the Ocean logo in the toolbar to insert the custom form.

2. If you would like to send the patient a form to complete, add the form using the "Add Form" or "Favourites" option.

3. Select "Email Patient". This will open the email dialogue box.

4. To edit the content of the email body, type directly into the large text box.

5. To add a secure message and/or an attachment, select "Include Secure Message" and type in the field that appears. To allow the patient to reply or receive a notification when the patient views the message, use the checkboxes available.

6. To add or remove eForms, use the "Include eForms" window. You can also opt to receive a notification when forms are completed by a patient from this section.

7. To save the message as a template for future, click on the "Templates" option at the top right. "Save as Default" will set the message to appear by default when the email dialogue first opens. "Save Template" will create a template that can be accessed and selected from the Templates menu in the future.

How can I create an attachment from PSS to add to a secure message?

1. Find the note in the file that you want to generate as a pdf attachment (eg. Requisition form).

2. Check the box next to the note to enable the "green bar".

3. Click on the paperclip attachment icon on the Ocean custom form (next to "Email Patient").

4. This will generate a temporary pdf file on the desktop (the file will be removed when PSS exits).

5. The pdf file can now be opened, printed, and/or attached to a secure Ocean message or an Ocean eReferral.

If you have any questions or comments, please feel free to contact us at support@cognisantmd.com.