



Configuring your EMR and Ocean Account for Telus PSS

WHAT YOU WILL LEARN: This reference guide will walk you through the steps to configure your Telus Practice Solutions Suite (PSS) Electronic Medical Record (EMR) and Ocean account.

TARGET AUDIENCE: The reference guide is intended for eReferral senders and receivers currently using Telus PSS EMR.

PREREQUISITE: Prior to configuring your Telus PSS EMR and Ocean account, please ensure to set up your Ocean account (see the *Setting up your Ocean Account* reference guide for instructions).

TIME: These steps will take approximately ten minutes to complete.

! NOTE

Ocean portal layout may appear slightly different from your current view in reference guide screenshots, however general steps remain applicable. Reference guide content is subject to change.

— Step 1 —

As a first step, go to <https://www.cognisantmd.com/ereferral-guide/>

Download the Ocean custom form files and the Ocean toolbar file available from the *Resources for TELUS PS Suite Users* sections of the webpage.

Save these files in your computer's downloads folder.

! NOTE

If the files do not save as .cfm files, right-click each link and select *Save As* to manually save it as .cfm files.



The Ocean eReferral Network allows healthcare providers to securely send electronic referrals in real-time while keeping patients informed.

On this page, you will find everything you need to start sending or receiving eReferrals today.



For Referral Senders

If you are a healthcare provider interested in sending eReferrals in the Waterloo-Wellington LHIIN, click here to get all the details you need to get started.

[Learn More & Get Started](#)



For Referral Recipients

Are you a specialist or healthcare provider that is ready to start receiving eReferrals? Sign up for your Ocean eReferral account and get started using our support guides here.

[Learn More & Get Started](#)



For Patients

Are you a patient? Did you receive an email update about the status of your referral? Click here to learn more about the Ocean eReferral Network and how we keep your information secure.

[Learn More](#)

Quick Access to Downloadable Resources

Required Resources for TELUS PS Suite Users	+
Optional Resources for TELUS PS Suite Users	+
Resources for OSCAR EMR Users	+

[Support](#)

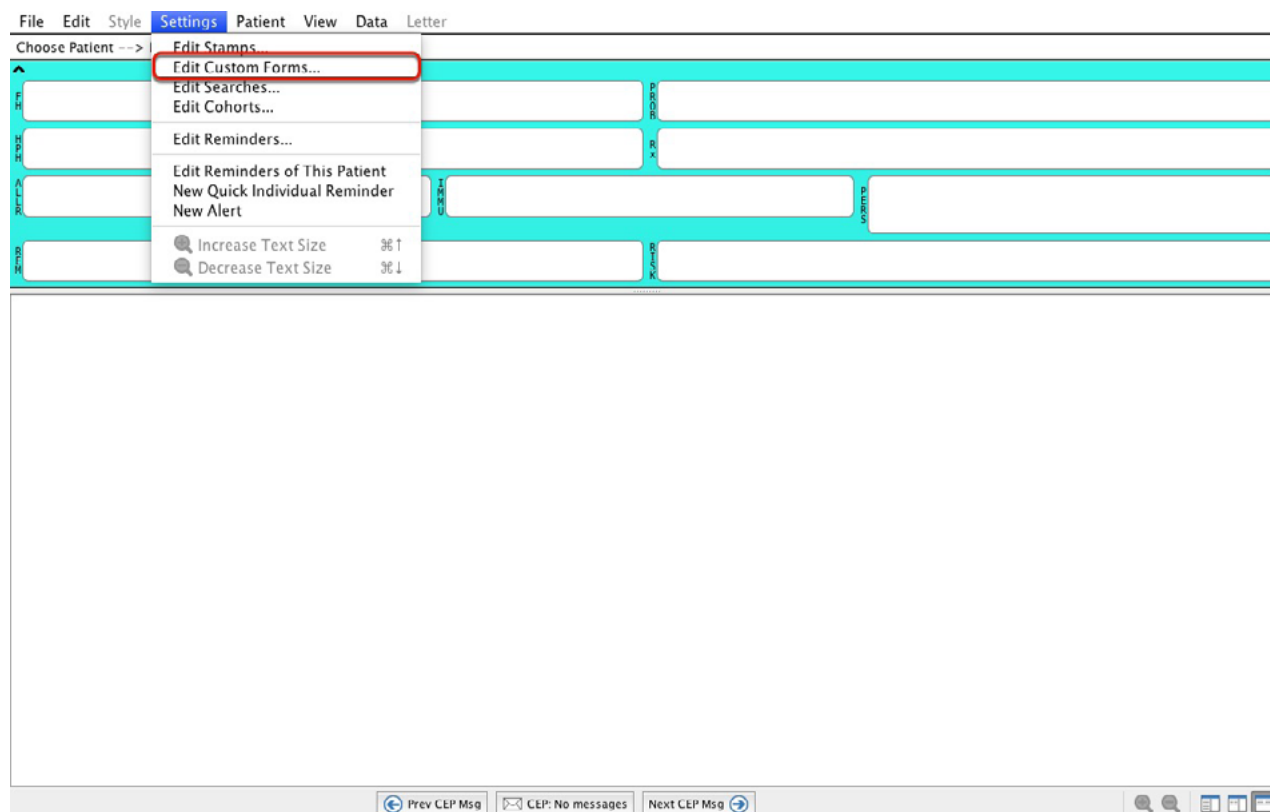
— Step 2 —

You will be importing the Ocean custom forms and toolbar files the same way Telus PSS custom forms are installed.

Open your Telus PSS EMR, and click the *Records* button.

Click the *Settings* drop-down menu, and select *Edit Custom Forms*.

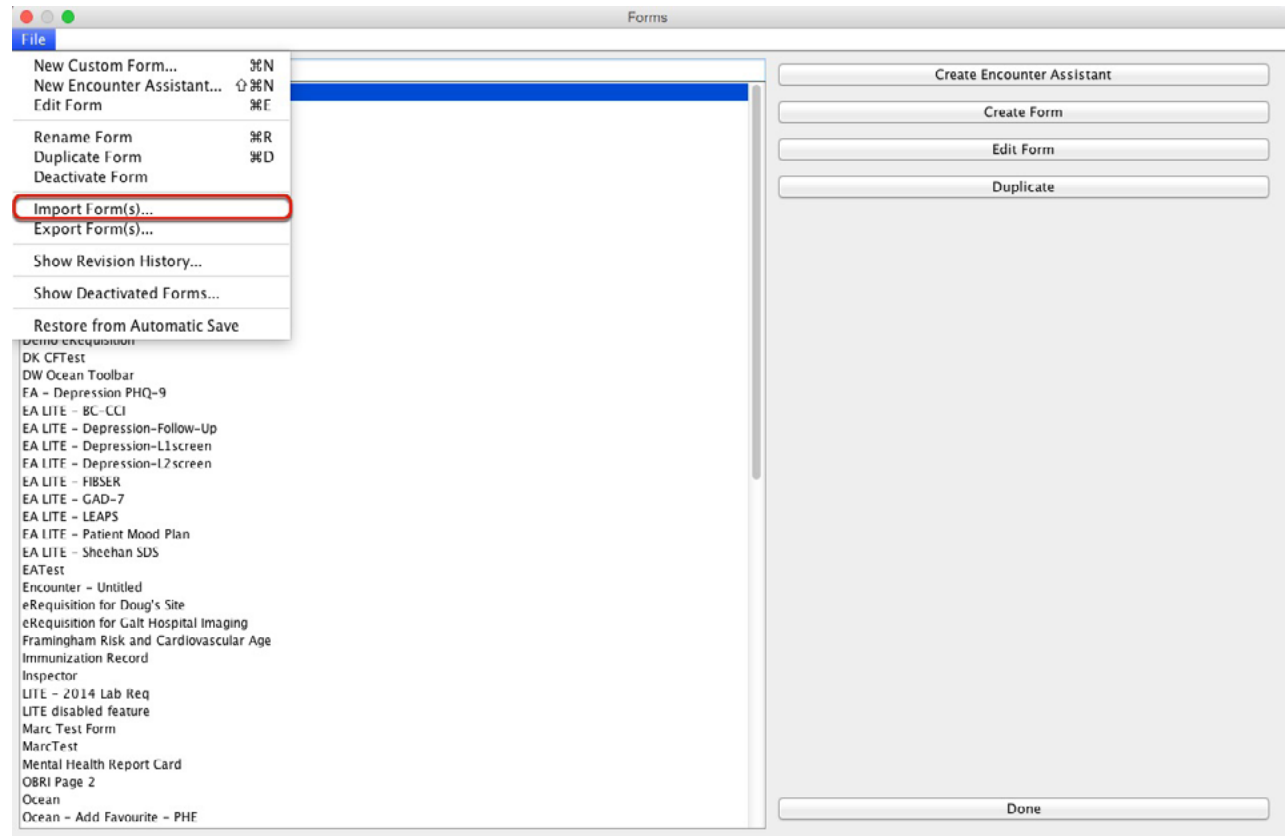
This will open the *Forms* window.



— Step 3 —

From the *Forms* window, click the **File** drop-down menu, and select **Import Form(s)**.

This will open the *Choose Custom Form File* window.



— Step 4 —

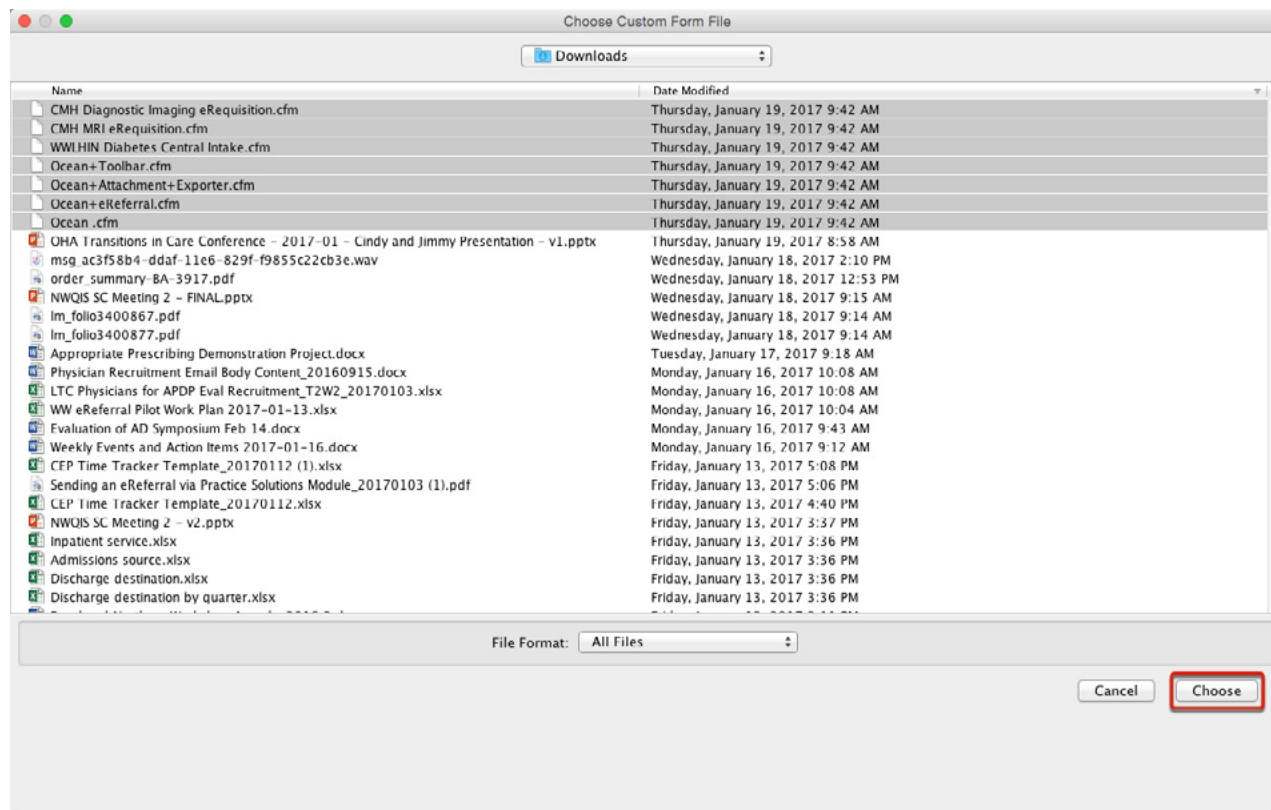
Within the *Choose Custom Form File* window, **navigate to your computer's downloads folder, and select the seven Ocean custom form and toolbar files** (i.e. *CMH Diagnostic Imaging eRequisition.cfm*, *CMH MRI eRequisition.cfm*, *WWLHIN Diabetes Central Intake.cfm*, *Ocean+Toolbar.cfm*, *Ocean+Attachment+Exporter.cfm*, *Ocean+eReferral.cfm* and *Ocean.cfm*).

Click the Choose button.

Once all Ocean custom form files are imported, click the *Done* button to close the *Forms* window.

! NOTE

If you receive notification that any of the forms and/or toolbar already exist in your system, you can skip installing that specific form by deselecting it in the *Choose Custom Form File* window.

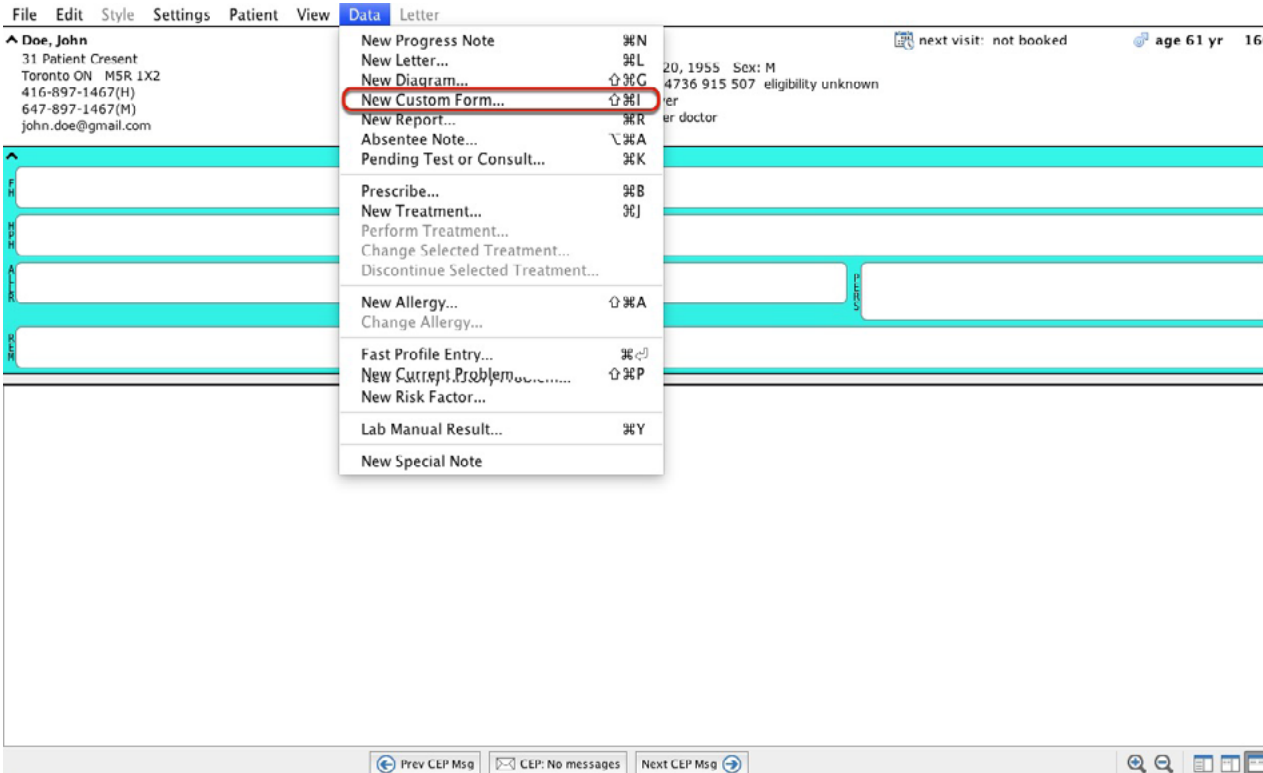


— Step 5 —

To configure the Ocean custom form, **open a dummy patient record.**

To insert the Ocean custom form into the record, click the **Data** drop-down menu, then select **New Custom Form**.

This will open the *Select a Form* window.

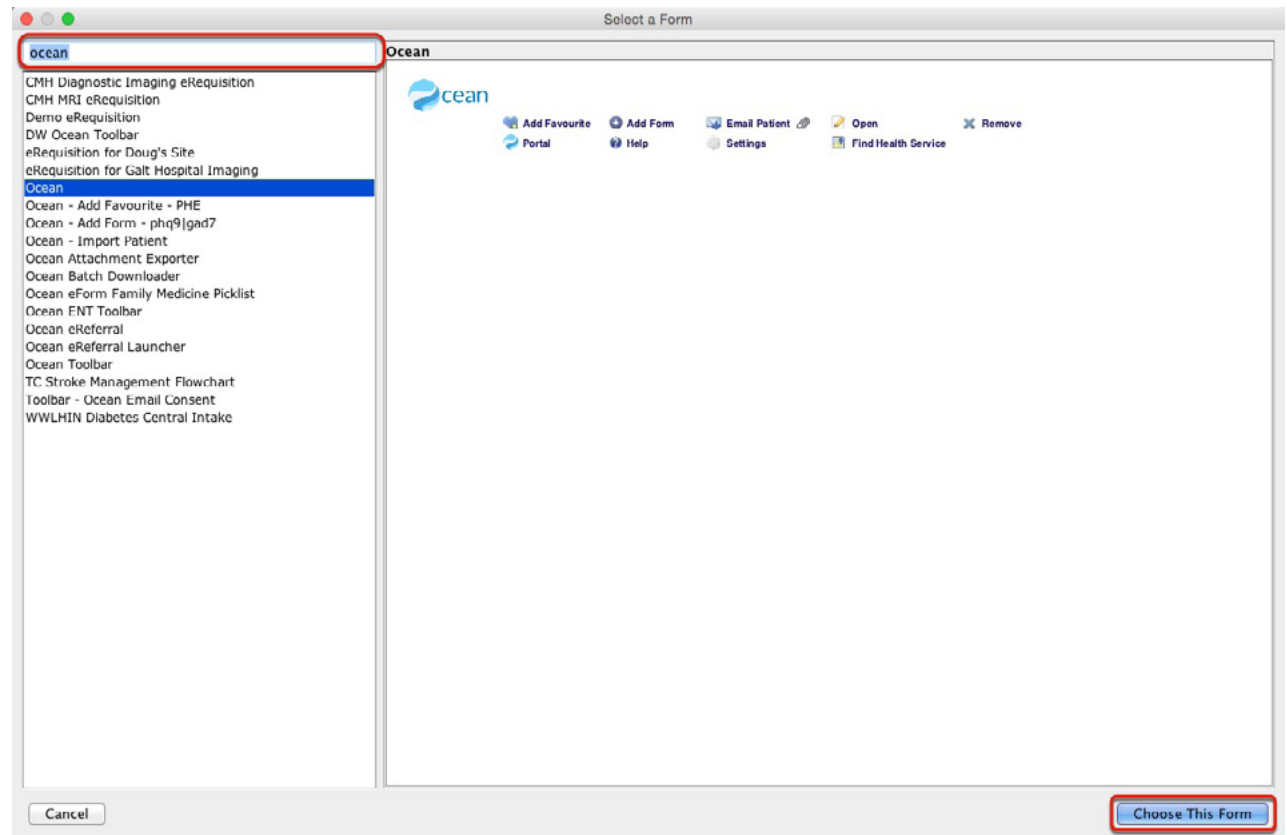


The screenshot shows the EMR interface for a patient named John Doe. The 'Data' menu is open, and 'New Custom Form...' is highlighted. The patient information on the right includes: 31 Patient Crescent, Toronto ON M5R 1X2, 416-897-1467(H), 647-897-1467(M), john.doe@gmail.com, 20, 1955 Sex: M, 4736 915 507 eligibility unknown, er doctor. The bottom of the screen shows navigation buttons: Prev CEP Msg, CEP: No messages, Next CEP Msg.

— Step 6 —

In the *Select a Form* window, enter **Ocean** in the search field.

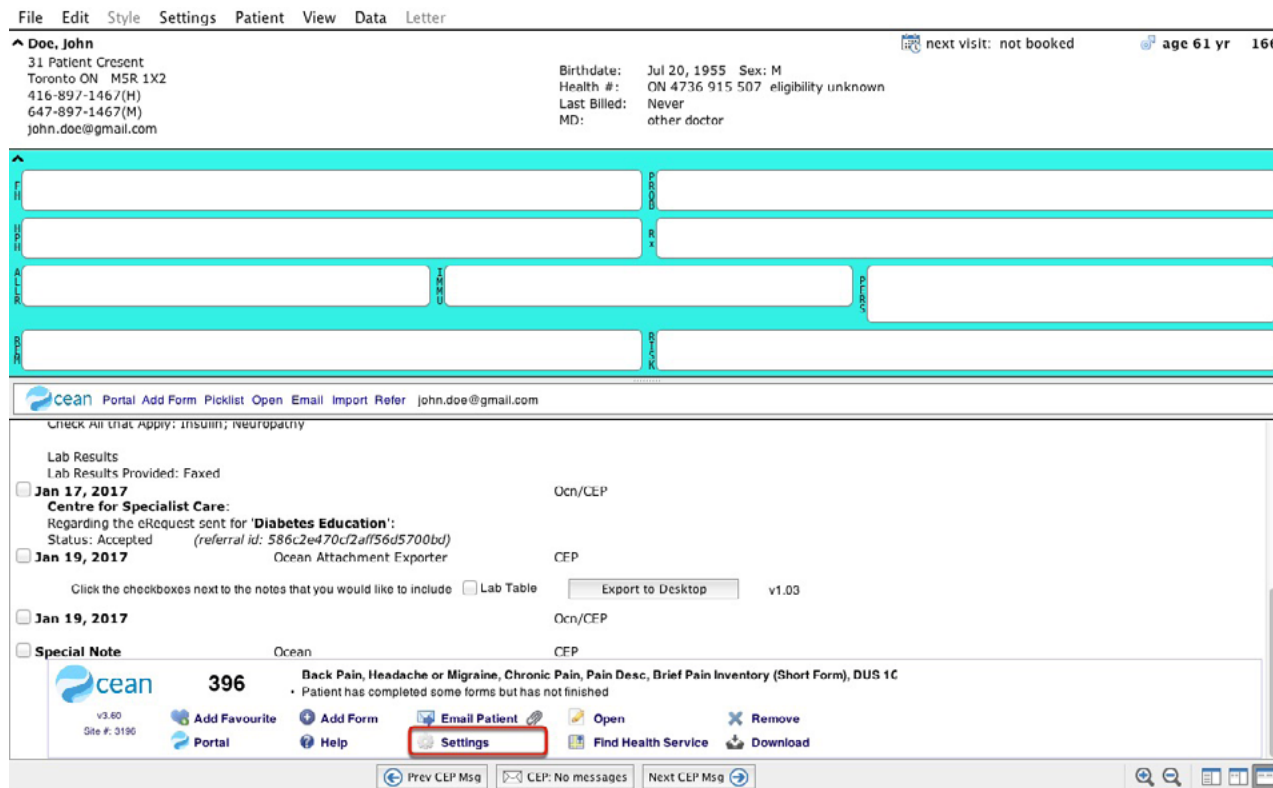
Select the **Ocean** custom form file (i.e. *Ocean*), and click the **Choose This Form** button.



— Step 7 —

Once complete, **click the *Settings* button from the Ocean custom form**, which should appear in the notes section of the patient's record.

Enter your Ocean account username and password when prompted. This will open a settings window.



The screenshot shows the Ocean EMR interface for a patient named John Doe. The top menu bar includes File, Edit, Style, Settings, Patient, View, Data, and Letter. The patient information section displays details such as birthdate (Jul 20, 1955), sex (M), and health status (ON 4736 915 507 eligibility unknown). Below this, there are several empty text input fields for notes. The bottom toolbar contains various icons, including a red box highlighting the 'Settings' button. The main content area shows a list of notes, including one dated Jan 17, 2017, regarding a specialist care request for 'Diabetes Education'.

— Step 8 —

In the settings window, click the **Ocean Site Number** button and enter your Ocean site number.

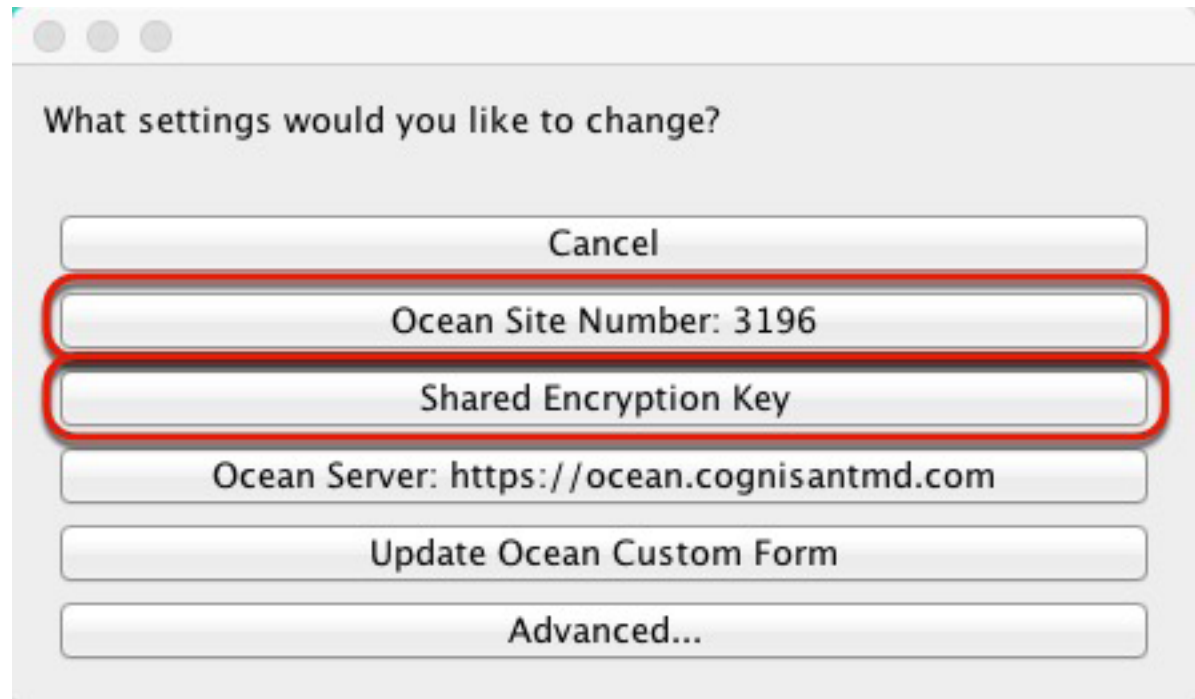
To obtain your Ocean site number, navigate to the Ocean portal, login and click the *Admin* tab. On the *Admin* tab, select the *Site Account* side tab. The number is available from the *Site Number* field. Alternatively ask the designated Ocean site administrator from your team (if applicable).

Once you have entered your Ocean site number, click the **Settings** button again from the Ocean custom form to reopen the settings window.

Click the **Shared Encryption Key** button and enter your shared encryption key.

To obtain your shared encryption key, navigate back to the *Admin* tab from the Ocean portal, and select the *Encryption* side tab. The shared encryption key should be available from this tab. Alternatively ask the designated Ocean site administrator from your team (if applicable). If you have not yet set up your shared encryption key, see the *Setting up your Ocean Account* reference guide for instructions.

Click on the *Remove* button to delete the custom form from the record.



What settings would you like to change?

Cancel

Ocean Site Number: 3196

Shared Encryption Key

Ocean Server: https://ocean.cognisantmd.com

Update Ocean Custom Form

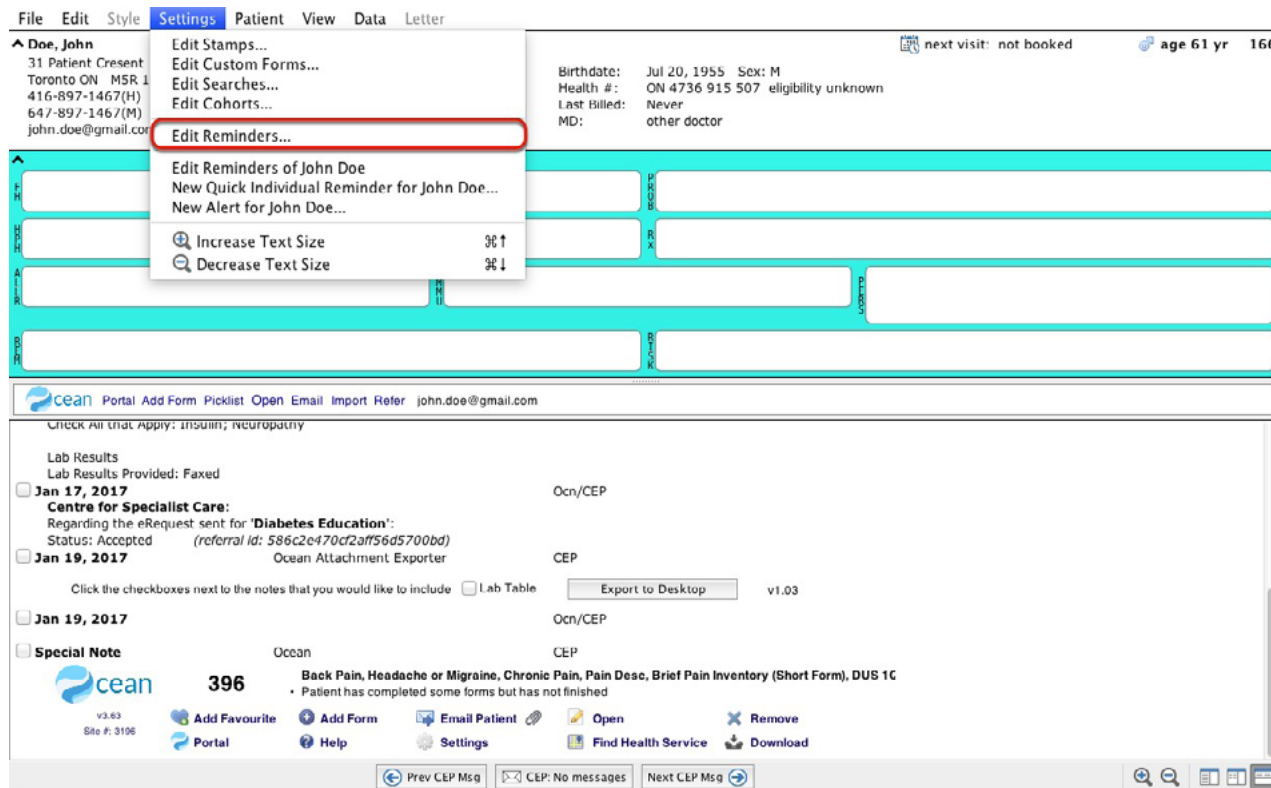
Advanced...

— Step 9 —

To configure the reminder for the Ocean toolbar, **return to the dummy patient record.**

Click the *Settings* drop-down menu, then select *Edit Reminders*.

This will open the *Edit Reminders* window.



The screenshot shows the EMR interface for a patient named John Doe. The 'Settings' menu is open, and 'Edit Reminders...' is highlighted. The patient's information is visible on the right, including birthdate, health number, and last billed date. The main area shows a list of reminders for John Doe, with options to edit, add, or delete them. The bottom of the screen shows the Ocean toolbar with various icons for adding forms, emailing patients, and finding health services.

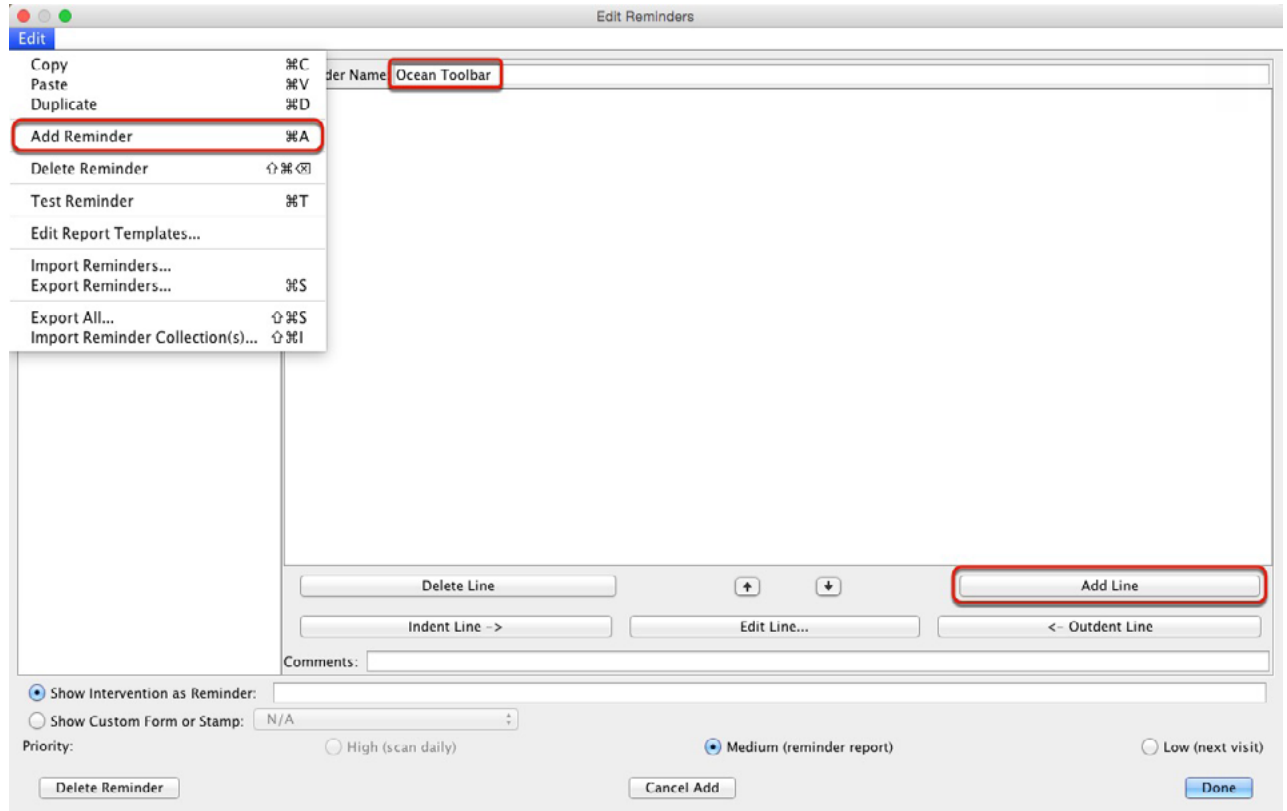
— Step 10 —

In the *Edit Reminders* window, click the *Edit* drop-down menu and select *Add Reminder*.

Enter *Ocean Toolbar* in the *Reminder Name* textbox field.

Click the *Add Line* button.

This will open the *Add Search Criterion* window.



Edit Reminders

Edit

- Copy ⌘C
- Paste ⌘V
- Duplicate ⌘D
- Add Reminder ⌘A**
- Delete Reminder ⌘⌘⌘
- Test Reminder ⌘T
- Edit Report Templates...
- Import Reminders...
- Export Reminders... ⌘S
- Export All... ⌘⌘S
- Import Reminder Collection(s)... ⌘⌘I

Reminder Name: **Ocean Toolbar**

Buttons: Delete Line, Indent Line ->, **Add Line**, Edit Line..., <- Outdent Line

Comments:

☒ Show Intervention as Reminder: N/A

Priority: ☐ High (scan daily) ☒ Medium (reminder report) ☐ Low (next visit)

Buttons: Delete Reminder, Cancel Add, Done

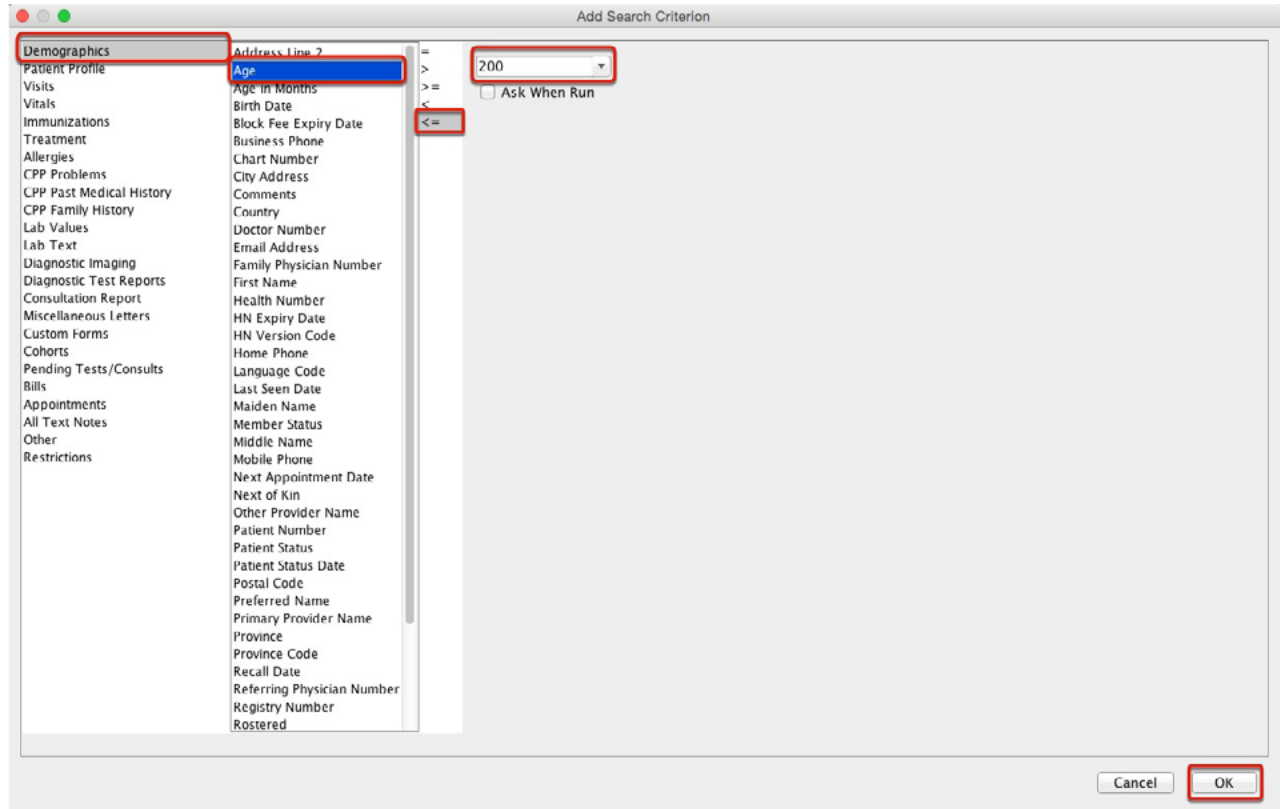
— Step 11 —

In the *Add Search Criterion* window, **specify the criteria for when you would like the Ocean toolbar to appear in a patient record.**

To have the Ocean toolbar appear in all patient records, click *Demographics*, then *Age*, then the \leq symbol, and enter *200* in the text field (meaning that the Ocean toolbar will be displayed for all patients under the age of 200).

To have the Ocean toolbar appear for only your patients (if you have a shared EMR), click *Other*, then *Current Doctors Initials*, then *is*, and enter your Telus PSS initials in the text field (meaning that the Ocean toolbar will be displayed for only your patients).

Once the criteria has been entered, **click the OK button.**

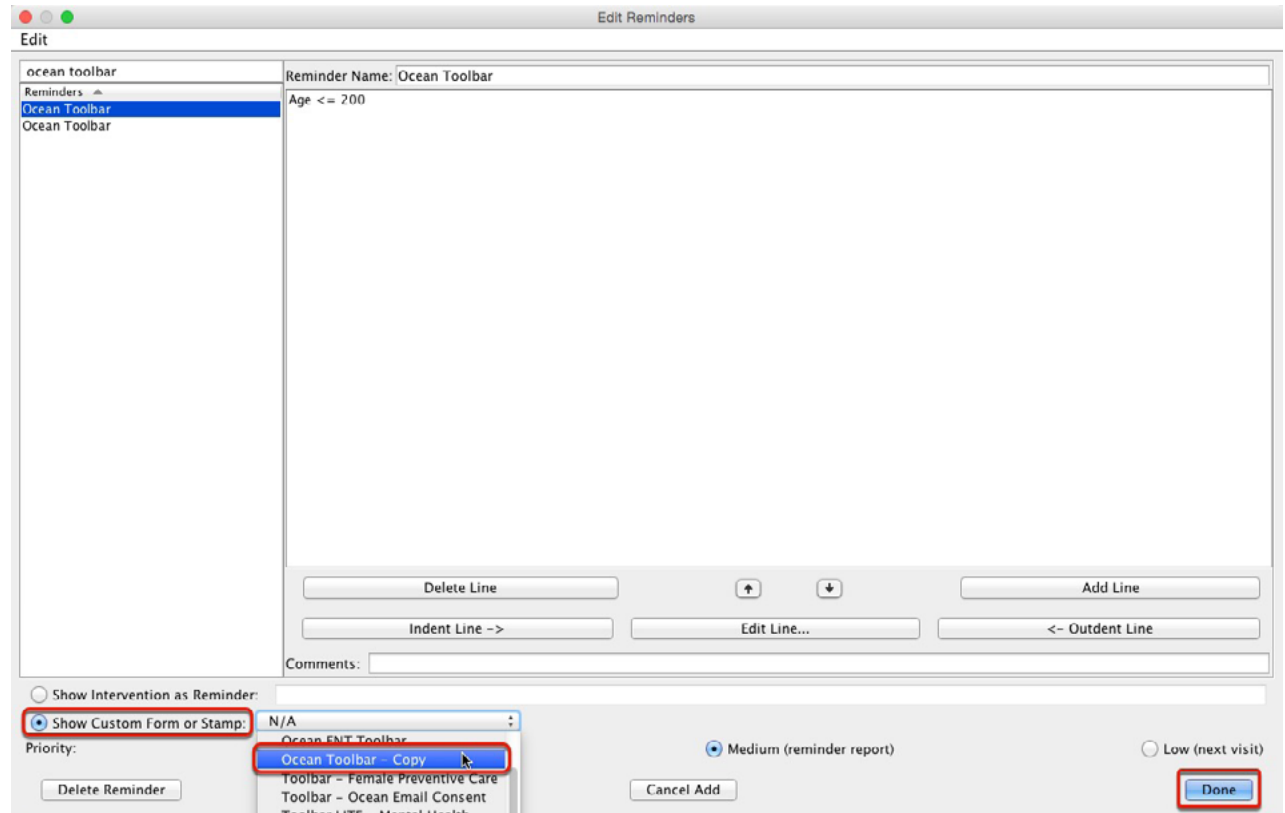


The screenshot shows the 'Add Search Criterion' dialog box. On the left, a list of categories includes 'Demographics', 'Patient Profile', 'Visits', 'Vitals', 'Immunizations', 'Treatment', 'Allergies', 'CPP Problems', 'CPP Past Medical History', 'CPP Family History', 'Lab Values', 'Lab Text', 'Diagnostic Imaging', 'Diagnostic Test Reports', 'Consultation Report', 'Miscellaneous Letters', 'Custom Forms', 'Cohorts', 'Pending Tests/Consults', 'Bills', 'Appointments', 'All Text Notes', 'Other', and 'Restrictions'. The 'Demographics' category is selected. In the center, a list of criteria includes 'Address Line 2', 'Age', 'Age in Months', 'Birth Date', 'Block Fee Expiry Date', 'Business Phone', 'Chart Number', 'City Address', 'Comments', 'Country', 'Doctor Number', 'Email Address', 'Family Physician Number', 'First Name', 'Health Number', 'HN Expiry Date', 'HN Version Code', 'Home Phone', 'Language Code', 'Last Seen Date', 'Maiden Name', 'Member Status', 'Middle Name', 'Mobile Phone', 'Next Appointment Date', 'Next of Kin', 'Other Provider Name', 'Patient Number', 'Patient Status', 'Patient Status Date', 'Postal Code', 'Preferred Name', 'Primary Provider Name', 'Province', 'Province Code', 'Recall Date', 'Referring Physician Number', 'Registry Number', and 'Rostered'. The 'Age' criterion is highlighted. To the right of 'Age', the comparison operator '<=' is selected. Further right, the value '200' is entered in a text field. At the bottom right, the 'OK' button is highlighted.

— Steps 12 —

Back in the *Edit Reminders* window, click the **Show Custom Form or Stamp** checkbox and select *Ocean Toolbar* from the drop-down menu.

Click the *Done* button.

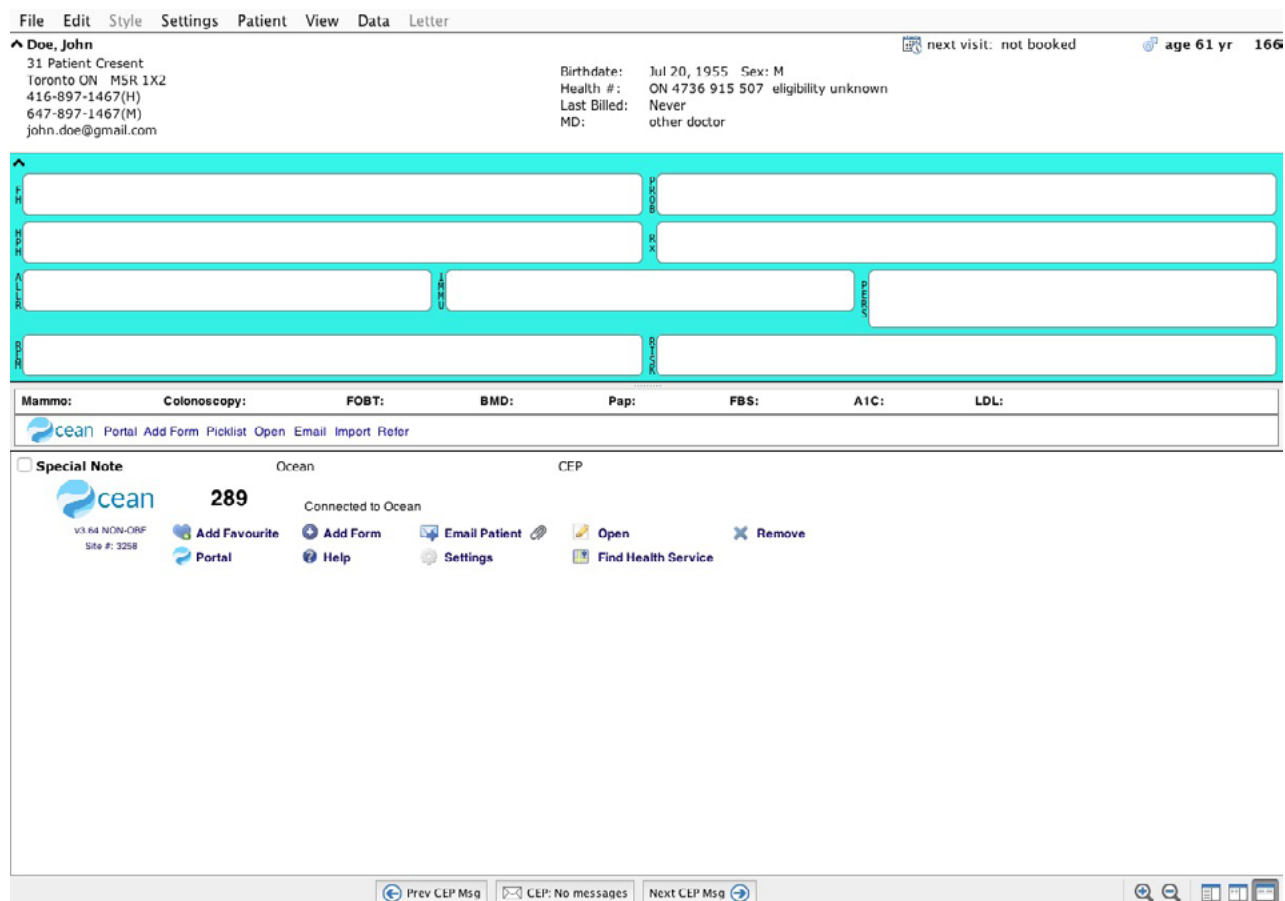


The screenshot shows the 'Edit Reminders' window. On the left, a list of reminders includes 'ocean toolbar', 'Reminders', 'Ocean Toolbar', and 'Ocean Toolbar'. The 'Ocean Toolbar' reminder is selected. The main area shows the reminder details: 'Reminder Name: Ocean Toolbar' and 'Age <= 200'. Below this are buttons for 'Delete Line', 'Add Line', 'Indent Line ->', 'Edit Line...', and '<- Outdent Line'. A 'Comments:' field is also present. At the bottom, there are radio buttons for 'Show Intervention as Reminder' and 'Show Custom Form or Stamp'. The 'Show Custom Form or Stamp' option is selected, and a dropdown menu is open showing 'N/A', 'Ocean ENT Toolbar', 'Ocean Toolbar - Copy', 'Toolbar - Female Preventive Care', 'Toolbar - Ocean Email Consent', and 'Toolbar IITE - Mental Health'. The 'Ocean Toolbar - Copy' option is highlighted. To the right of the dropdown are radio buttons for 'Medium (reminder report)' and 'Low (next visit)'. At the bottom right, there are buttons for 'Delete Reminder', 'Cancel Add', and 'Done'.

— Steps Complete —

You have now configured your Telus PSS EMR and Ocean account!

You can access Ocean from your Telus PSS EMR account from the Ocean toolbar and custom form available from patients' Telus PSS records.



The screenshot displays the Telus PSS EMR interface for a patient named John Doe. The top menu bar includes File, Edit, Style, Settings, Patient, View, Data, and Letter. The patient information section shows: 31 Patient Cresent, Toronto ON M5R 1X2, 416-897-1467(H), 647-897-1467(M), john.doe@gmail.com. Birthdate: Jul 20, 1955, Sex: M, Health #: ON 4736 915 507, eligibility unknown, Last Billed: Never, MD: other doctor. The next visit is not booked, and the patient is 61 years old. Below the patient information is a form with several empty fields for additional data. The bottom section of the interface features the Ocean toolbar, which includes a Special Note checkbox, a list of actions (Add Favourite, Add Form, Email Patient, Open, Find Health Service, Remove), and a status bar at the bottom showing 'Prev CEP Msg', 'CEP: No messages', and 'Next CEP Msg'.

This reference guide has been developed by the Centre for Effective Practice under the leadership of the System Coordinated Access program, which is hosted by the eHealth Centre of Excellence. This reference guide was developed in partnership with CognisantMD and Think Research.