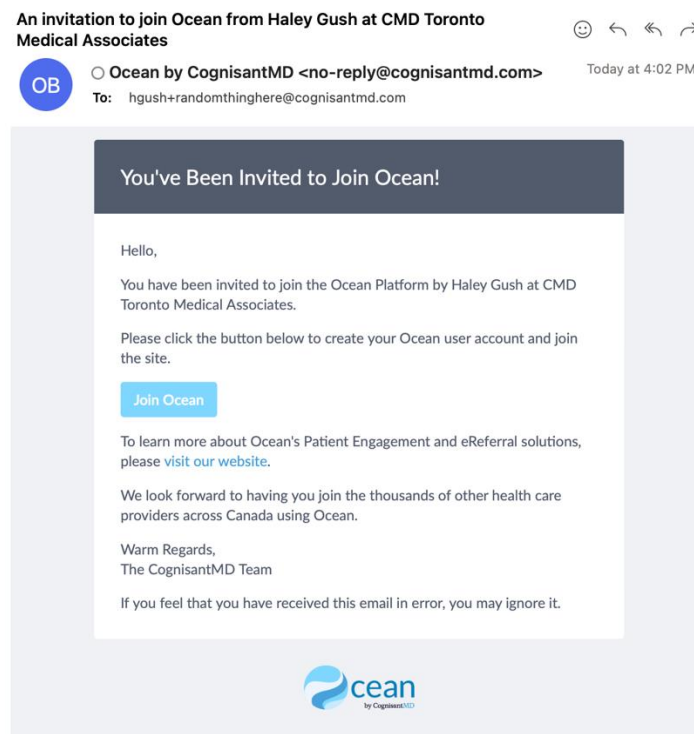


# USER SET UP GUIDE

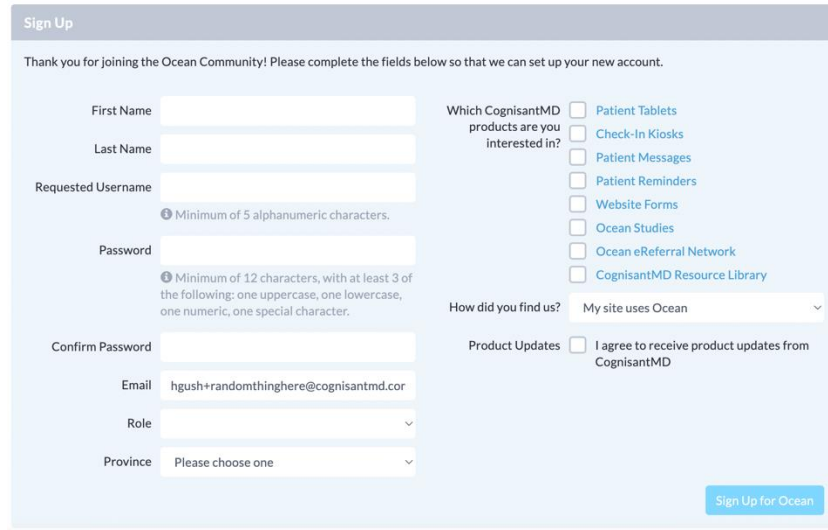
This quick guide gives new users the first steps to get started with Ocean. Completing these steps will take no more than 20 minutes. Additional configuration will be completed by your clinic's Ocean Clinical Contact.

## Step 1: Sign Up for an Ocean User Account

- After your Ocean Clinical Contact has completed your clinic's basic set up and integration, you will receive an email from Ocean inviting you to create your Ocean User Account.
- Click Join Ocean in the invitation to take you to the sign-up page to create your Ocean User Account.
- Now that you've created your Ocean User Account, you'll be prompted to sign-in using the username and password you just created.
- Once signed in for the first time you'll be presented with the Ocean License Agreement to review and agree to by clicking "I Agree" on the bottom right.



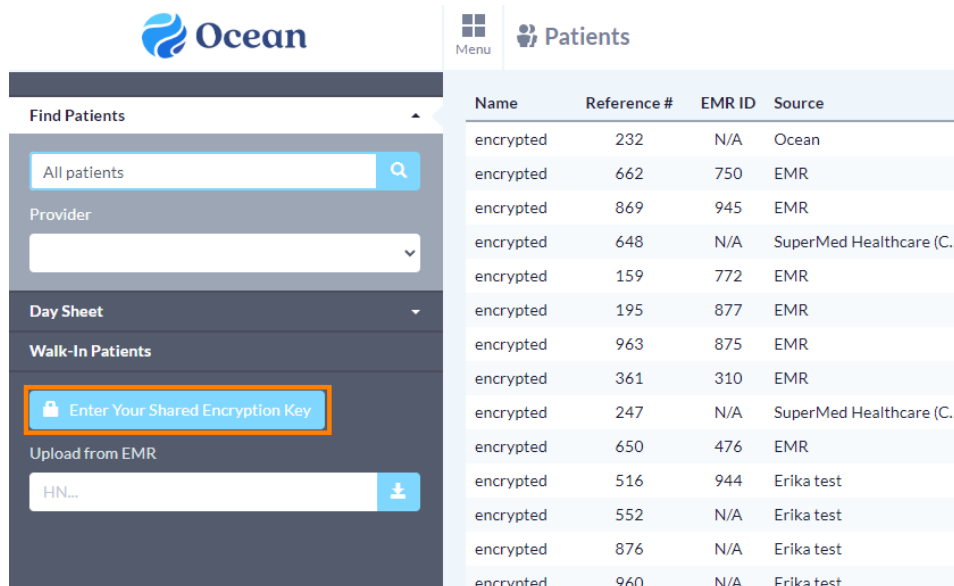
Screenshot 1: Example of email you'll receive to indicate you've been invited to an Ocean Site.



Screenshot 2: Sign-up page for Ocean User Account

### Step 2: Enter your Shared Encryption Key

- After successfully joining your Ocean Site, enter your site’s Shared Encryption Key by pressing the blue “Enter Your Shared Encryption Key” button on the left hand side.
- If you do not know your Shared Encryption Key, ask your clinic’s Ocean Clinical Contact.
- You may be prompted in the future to enter your Shared Encryption Key – please see [this support article](#) which details the different scenarios in which you will be prompted to enter your key.

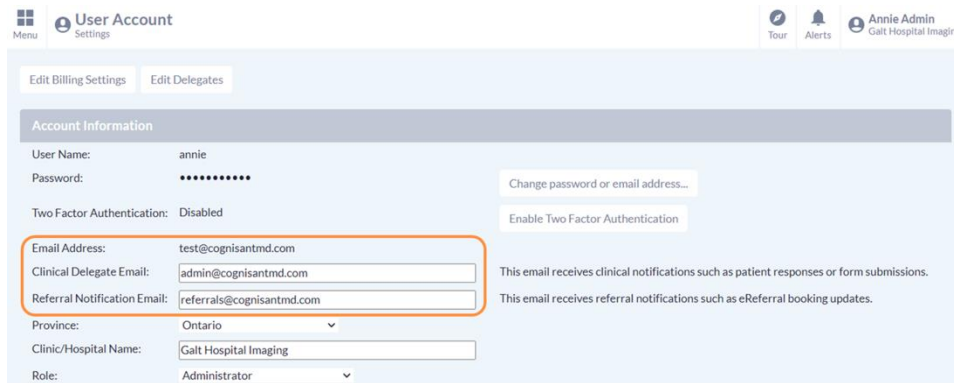


Name	Reference #	EMR ID	Source
encrypted	232	N/A	Ocean
encrypted	662	750	EMR
encrypted	869	945	EMR
encrypted	648	N/A	SuperMed Healthcare (C...
encrypted	159	772	EMR
encrypted	195	877	EMR
encrypted	963	875	EMR
encrypted	361	310	EMR
encrypted	247	N/A	SuperMed Healthcare (C...
encrypted	650	476	EMR
encrypted	516	944	Erika test
encrypted	552	N/A	Erika test
encrypted	876	N/A	Erika test
encrypted	960	N/A	Erika test

Screenshot 3: Enter Your Shared Encryption Key Button

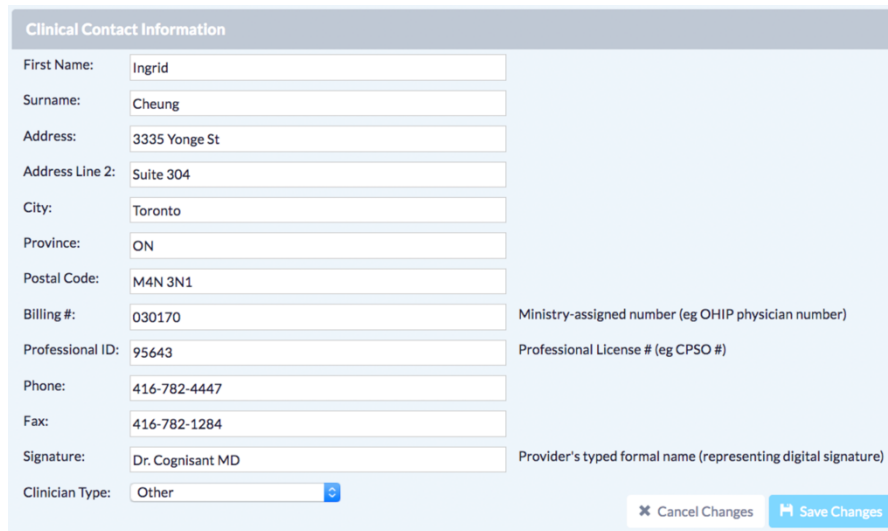
### Step 3: Update your User-Specific Settings

- Once your User Account has been created, you can update your user-specific settings.
- Login to Ocean and navigate to your [My Account Page](#) to set-up your “Referral Notification Email” where you’ll be sent consults and/or referral notifications.
- While on the My Account Page, update your [Clinical Contact Information](#) which will be used when sending an eReferral.
- If you’re a sender you may want to set-up [Clinical Delegates](#) who can send eReferrals on your behalf. There is no limit to the number of Clinical Delegates that an Ocean user can have.



The screenshot shows the 'User Account Settings' page. Under the 'Account Information' section, the 'Referral Notification Email' field is highlighted with an orange box. The email address is 'referrals@cognisantmd.com'. Other fields include 'Email Address' (test@cognisantmd.com), 'Clinical Delegate Email' (admin@cognisantmd.com), 'Province' (Ontario), and 'Clinic/Hospital Name' (Galt Hospital Imaging).

Screenshot 4: Referral Notification Email



The screenshot shows the 'Clinical Contact Information' form. Fields include: First Name (Ingrid), Surname (Cheung), Address (3335 Yonge St), Address Line 2 (Suite 304), City (Toronto), Province (ON), Postal Code (M4N 3N1), Billing # (030170), Professional ID (95643), Phone (416-782-4447), Fax (416-782-1284), Signature (Dr. Cognisant MD), and Clinician Type (Other). There are 'Cancel Changes' and 'Save Changes' buttons at the bottom right.

Screenshot 5: Clinical Contact Information

### Step 4: Link your EMR User Account to your Ocean User Account

- Each user must link their EMR User Account to their Ocean User account by following the steps [in this support article](#). This will allow you to send Ocean eReferrals with a single sign-on.

## Quick Start Tips

- Create your Ocean User Account using the link in the email you received. If you don't have an email invitation, please check your spam or check with your clinic's Ocean Clinical Contact. See below for guidance on how to respond to sign up questions:
  - Choose a username that you can easily remember – we suggest your last name followed by the first initial of your name \*note a username cannot be changed once created.
  - Role: choose Specialist, Family Physician, MOA/Secretary, Nurse, Resident, Physician Assistant or Other.
  - Why are you signing up for Ocean: Select "I want to join an existing site".
  - Clinic/Organization Name: Enter the name found on your emailed invitation.
  - Which CognisantMD products are you interested in – select Ocean eReferral Network.
- Review and agree to the Ocean License Agreement
  - Click "I Agree" at the bottom right. The agreement will continue to appear until reviewed.
  - You can view this at any time under your My Account in Ocean and clicking "View Ocean License Agreement" on the left.
- Update your Ocean User Specific Settings
  - Choose an email to receive all your eReferral notifications.
  - Update your Clinical Contact Information for sending eReferrals.
  - Add Clinical Delegates you want to send eReferrals on your behalf.
- Connect your EMR User to your Ocean User Account by following the steps in this [support article](#).
  - Ensure that you select the tab for your EMR in the linked article.
  - This step allows for single sign-on when sending an eReferral from your EMR.
- For any issues please contact a deployment team member at [ereferral@nshealth.ca](mailto:ereferral@nshealth.ca)