

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.

An invita Medical /	tion to join Ocean from Haley Gush at CMD Toronto $\hfill \hfill \hfill$
ОВ	○ Ocean by CognisantMD <no-reply@cognisantmd.com> Today at 4:02 PM To: hgush+randomthinghere@cognisantmd.com</no-reply@cognisantmd.com>
	You've Been Invited to Join Ocean!
	Hello,
	You have been invited to join the Ocean Platform by Haley Gush at CMD Toronto Medical Associates.
	Please click the button below to create your Ocean user account and join the site.
	Join Ocean
	To learn more about Ocean's Patient Engagement and eReferral solutions, please visit our website.
	We look forward to having you join the thousands of other health care providers across Canada using Ocean.
	Warm Regards, The CognisantMD Team
	If you feel that you have received this email in error, you may ignore it.

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







nank you for joining the	e Ocean Community! Please complete the fields be	low so that we can set up y	your new account.	
First Name		Which CognisantMD Patient Ta products are you interested in? Patient M Patient M	Patient Tablets Check-In Kiosks	
Last Name			Patient Messages Patient Reminders	
Requested Username	Minimum of 5 alphanumeric characters.		Website Forms Ocean Studies	
Password	Minimum of 12 characters, with at least 3 of the following: one uppercase, one lowercase, one numeric, one special character.	How did you find us?	CognisantMD Resource Library My site uses Ocean	
Confirm Password		Product Updates I agree to re	I agree to receive product updates from CognisantMD	
Email	hgush+randomthinghere@cognisantmd.cor			
	Ŷ			
Province	Please choose one			

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 <u>this support</u> <u>article</u> which details the different scenarios in which you will be prompted to enter your key.

浸 Ocean	Menu Pa	tients		
Find Patients	Name	Reference #	EMR ID	Source
	encrypted	232	N/A	Ocean
All patients Q	encrypted	662	750	EMR
Provider	encrypted	869	945	EMR
×	encrypted	648	N/A	SuperMed Healthcare (C
	encrypted	159	772	EMR
Day Sheet -	encrypted	195	877	EMR
Walk-In Patients	encrypted	963	875	EMR
	encrypted	361	310	EMR
🚔 Enter Your Shared Encryption Key	encrypted	247	N/A	SuperMed Healthcare (C
Upload from EMR	encrypted	650	476	EMR
HN	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 <u>My Account Page</u> 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 <u>Clinical Contact Information</u> which will be used when sending an eReferral.
- If you're a sender you may want to set-up <u>Clinical Delegates</u> who can send eReferrals on your behalf. There is no limit to the number of Clinical Delegates that an Ocean user can have.

Menu C	User Account Settings			Tour	Alerts	Annie Admin Galt Hospital Imaging
Edit Bi	illing Settings Edit	Delegates				
Acco						
User N	Name:	annie				
Passw	rord:	••••••	Change password or email address			
Two F	actor Authentication:	Disabled	Enable Two Factor Authentication			
Email	Address:	test@cognisantmd.com				
Clinica	al Delegate Email:	admin@cognisantmd.com	This email receives clinical notifications suc	ch as patient res	ponses or	form submissions.
Refer	ral Notification Email:	referrals@cognisantmd.com	This email receives referral notifications su	ch as eReferral I	booking u	odates.
Provir	nce:	Ontario 🗸				
Clinic	/Hospital Name:	Galt Hospital Imaging				
Role:		Administrator V				



First Name:	Ingrid	
Surname:	Cheung	
Address:	3335 Yonge St	
Address Line 2:	Suite 304	
City:	Toronto	
Province:	ON	
Postal Code:	M4N 3N1	
Billing #:	030170	Ministry-assigned number (eg OHIP physician number)
Professional ID:	95643	Professional License # (eg CPSO #)
Phone:	416-782-4447	
Fax:	416-782-1284	
Signature:	Dr. Cognisant MD	Provider's typed formal name (representing digital signature
Clinician Type:	Other 🗘	





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.
- For any issues please contact a deployment team member at ereferral@nshealth.ca

