



Admin Guide:

Ocean Basic Set-up & Integration with OSCAR Pro

This guide provides the basic steps to get your clinic connected to the Ocean Platform, including creating your Ocean site, and integrating your EMR. These steps should take 30-45 mins and should be completed by your clinic's Ocean administrator.

Step 1: Complete the Getting Started Guide

To begin, you will need to follow the three steps outlined in the [Ocean Getting Started Guide](#). This includes creating a free Ocean user account, creating your Ocean site and submitting your Ocean request form. If you haven't already signed a contract for Ocean services through OSCAR, this should be signed and returned to your OSCAR rep before the next steps can be completed.

Step 2: Integrate your EMR

Once you've received confirmation from Ocean you can continue with this step. You will need to integrate your Ocean site (created in Step 1) with your OSCAR Pro EMR by completing the following steps (to access detailed instructions for each step, please click on the links):

- [Download & install](#) the Ocean eForm, and Toolbar into your OSCAR Pro EMR (these are .html and .js files) from the Administration window.
- [Create a shortcut to the Ocean eForm on the Schedule](#) to easily access Ocean directly from a patient's appointment in the appointment schedule.
- [Create an Ocean-specific provider and EMR user account](#) Cloud Connect will automatically use this provider/user to sync with your EMR.
- [Link Your OSCAR Pro EMR to Ocean](#).
- [Create your REST client](#) in your OSCAR Pro EMR.
- [Edit your Appointment Status Settings](#) if you're using Patient Reminders with Ocean.
- [Set-up Ocean Cloud Connect](#), a secure, web-based portal that allows you to manage and configure your Ocean integration with the OSCAR Pro EMR.

Step 3: Provide a list of your users to your Ocean Practice Consultant

Compile a list of clinic staff (including their names and email addresses) who will be added to your site as Ocean users. You may have already completed this step with your Ocean sales account manager.

Step 4: Configure your Individual Ocean Products

You are now ready to configure specific Ocean solutions including Ocean Patient Messages and Reminders and Ocean Online Booking.

Basic Set-up: Quick Start Checklist

- Create your Ocean User Account
- Create your Ocean Site

- Submit your Ocean request form
- Download & install the Ocean eForm and Toolbar
- Create a shortcut on the schedule
- Create an Ocean-specific provider and EMR user account
- Link your OSCAR Pro EMR to Ocean
- Create your REST Client in OSCAR Pro
- Edit your Appointment Status Settings
- Set-up Ocean Cloud Connect
- Create a list of clinic staff that will be using Ocean

Frequently Asked Questions

- **What if I already have an Ocean user account?**
If you have an Ocean user account associated with an Ocean site, there is no need to create a new one. However, you will need to ensure that you are enabled as an administrator on that site.
- **What if I already have an Ocean site?**
If you already have an Ocean site created that has not been integrated with an EMR, you may use that site or create a new one. Please ensure that you have administrative privileges on the site.
- **Do all my staff need an Ocean user account?**
Yes, all staff that are using Ocean should have an Ocean User account linked to their EMR user for security and auditing purposes.