Site Admin Set Up for Receiving Sites – Quick Guide

THIS QUICK GUIDE GIVES OCEAN SITE ADMINS THE STEPS TO GET STARTED WITH OCEAN. THE CONFIGURATION BELOW WILL BE COMPLETED WITH THE SUPPORT OF YOUR DELIVERY TEAM.

Step 1: EMR Integration

- Once the Ocean Request Form (completed in the Getting Started Guide) has been processed by the EMR vendor, you will need to sign the contract to open API access. Once the contract has been signed, the EMR vendor will open the API and the EMR Integration can be completed. To complete the EMR Integration, please follow the steps in the appropriate EMR guide: OSCAR, OSCAR Pro (WELL Health), QHR Accuro, TELUS PS Suite, and TELUS Med Access integration guides.

Step 2: Site Settings

- Review and update the Admin Settings (Site Account, Users and Organization) for your site.

Step 3: Set up or Claim your Directory Listing(s)

- The Directory Listing includes your clinic information that will appear in the Healthmap. Claim your Directory Listing and/or Update Your Directory Listing Settings with your clinic's information. Please ensure your Directory Listing details align with the PHSA standards.

Step 4: Regional Authority and Participant Agreement

- During set up of the Directory Listing, click **Apply to Regional Authority** and select "British Columbia Regional Authority"
- Applying to Regional Authority ensures that all costs for Ocean eReferrals and some patient engagement tools are covered under the Provincial DRO Program.
- Review and click **I Agree** to the Regional Authority License Agreement to participate.

Step 5: Update eReferral Configuration and Settings

- Update the eReferral Settings, selecting that your site is **Receiving Referrals** (or **Sending & Receiving Referrals**, if applicable).
- Update the eReferral Configuration to indicate that your site is a Health Information Custodian.
- Set up your eReferral Receiver Notification emails; it is generally recommended to use a shared clinic email.

Step 6: Support User-Specific Settings

- Once your Site configuration has been completed, you can begin adding additional users to your Site.
- Review your **Default Home Page**, select **eReferrals** from the drop-down menu to land on the eReferrals page upon sign in.
- Update or verify the **Clinical Contact Information** on your **My Account** page.