

Site Admin Set Up for Sending 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 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: Accept the User Agreements

- You will be presented with an OceanMD user agreement upon your first log in
- You will be presented with a [PHSA Health User Participation Agreement](#) when you send your first referral

Step 5: Update eReferral Settings

- Update the [eReferral Settings](#) to configure your site as a sending site for eReferrals.

Step 6: Update your User Settings

- Once the site configuration has been completed, you can set up your [user-specific settings](#).
- To enable [eReferral notifications](#), set up your [eReferral receiver notification](#) emails. It is generally recommended to use a shared clinic email.
- [Set a clinical delegate](#) for your user account (if applicable).
- 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.
- [Link your EMR user account to your Ocean user account](#).
- Update [site or personal favourites](#) on the Ocean Healthmap (if applicable).

Step 7: Add & Manage Favourites on the Ocean Healthmap

- [Add favourites](#) to send eReferrals easily and efficiently to your preferred receiving clinics.