QHR Accuro Integration Set-Up

1. Accuro: Set Up Ocean Cloud Connect	In this step, you will need the UUID, Tenant ID (sometimes called ACRON or acronym), username, and password that QHR Accuro provided you with, in order for Ocean to be able to access the Accuro API, thereby connecting to your Accuro EMR.
2. Accuro: Set Your Custom Status*	If you are planning on using Patient Reminders, Ocean is able to mark your patient appointments with an "Ocean Reminder Sent" status, once they've been sent an automated appointment reminder email through Ocean. This feature is separate from Ocean eReferral appointment emails, and requires users to have a licence/subscription for the Ocean Unlimited Bundle. In order to enable this, you will need to create a custom Ocean-related status in your Accuro EMR.
3. Accuro: Configure the CDS Menu for Quick Access to Ocean	To easily access Ocean directly within Accuro, you will want to set up CDS (Clinical Decision Support) links to various Ocean products or services.
4. Accuro: Add User-Friendly Buttons to CDS Links*	Once you've set up your CDS links, you can create shortcut buttons on your home screen to easily access your CDS links with one simple click.

Set Up Ocean Cloud Connect

About Ocean Cloud Connect

Ocean Cloud Connect enables total configuration of your EMR integration from a **secure instance in the cloud** that is accessible from any internet-connected device. No on-site device acting as a server (i.e. dedicated OceanConnect tablet) is needed to keep Ocean and your EMR synchronized and active.

Prerequisites

You must be an **administrative user** on your Ocean site in order to sign into or configure Cloud Connect.

For Accuro Users

Access the **Accuro Crosshair main menu** > **Users** > **Manage Security** > **System Settings** > **General** > **EMR Settings sub-heading** > **Check "Enable Document From Field"**.

Setting Up Ocean Cloud Connect

1. Sign in to Ocean Cloud Connect.

A. Go to Ocean Cloud Connect in a **web browser**.

B. Sign in using your **Ocean credentials** (i.e. the same credentials as the Ocean Portal).

> **Note:** Despite using the same credentials, you must log in to Cloud Connect **seperately**. Being signed into the Ocean Portal does **not** automatically sign you into Cloud Connect (or vice versa).

Go to Cloud Connect

Ocean Cloud Connect

Ocean Cloud Connect Sign In

Use your Ocean credentials to login.

User Name

| User Name |

Forgot Ocean User Name?

Password

| Password |

Forgot Ocean Password?

☑ Remember me on this computer

Secure Sign In   *Looking for the Ocean Portal? Sign In here!*

C. Once you've logged in to Cloud Connect, you'll be able to connect Ocean with your EMR. Click the "**Integrate with your EMR**" button to begin.

Welcome to Ocean Cloud Connect

Ocean Cloud Connect is a secure integration server that can connect your Ocean site with your EMR.

If you use a partner EMR that provides a supported Application Programming Interface (API), Cloud Connect can securely transfer patient data between your systems, enabling you to access powerful Ocean features right from your EMR. Cloud Connect will request that you enter your site's Shared Encryption Key in order to encrypt sensitive data before it is transferred to Ocean.

To connect your EMR with Ocean, click 'Integrate with my EMR' and follow the steps.

Alternatively, you can use Cloud Connect to securely store your Shared Encryption Key without configuring an EMR. Once stored, you can log into Cloud Connect to retrieve your Shared Encryption Key and authorize additional tablets or web browsers.

Integrate with my EMR   **Store my Encryption Key**

2. Store your Shared Encryption Key in Cloud Connect.

Enter your **Shared Encryption Key** and then select "**Save and Continue**".

> **Note:** You can now securely store your Share Encryption Key in Cloud Connect for future reference. From the summary screen, click "**View Shared Encryption Key**" to view and/or update your existing key. Note that Cloud Connect simply stores your Shared Encryption Key and therefore, you **cannot change** your Shared Encryption Key within Cloud Connect.

Setup EMR Integration   ✕

Shared Encryption Key

Before we begin setting up your EMR, please enter your site's Shared Encryption Key. Your Shared Encryption Key is the 16-character key you created in the Admin tab of the Ocean Portal and is required to setup and use your EMR integration.

For more information, *click here*.

Shared Encryption Key | Shared Encryption Key |

Save and Continue

3. Set Up your EMR integration.

A. Select the EMR you would like to integrate with and then select "**Next**".

> **Setup EMR Integration**
>
> **Select your EMR**
> Each of the following partner EMR vendors provide an Application Programming Interface (API) that is supported by Ocean Cloud Connect. Please select your EMR and click 'Next'.
>
> If you do not see your EMR listed below, click here for more information.
>
> Telus PS Suite   Telus Med Access   QHR Accuro
>
> Cancel   Next

B. Enter your **EMR Instance ID** and **EMR Secret**.

If you are unsure of how to acquire the EMR instance ID and Secret, please refer to our Instructions for PS Suite or Instructions for Med Access.

C. Once entered, the Ocean and TELUS servers will **connect to authenticate** the integration.

> **Setup EMR Integration**
>
> **PSS Credentials**
> To authenticate with PSS, you must first obtain your EMR instance ID and secret from the Preferences window of your EMR. Once created, copy the values into the fields below and click 'Next'.
>
> For detailed instructions on getting access to your EMR instance ID and secret, click here.
>
> EMR Instance ID   [EMR Instance ID]
>
> EMR Secret   [EMR Secret]
>
> Cancel   Next

Please refer to these instructions only if you have specifically been directed to do so by CognisantMD Support.

D. Enter your **Mobile Activation Code**.

If you are unaware of how to acquire a Mobile Activation Code, please refer to our Instructions for PS Suite or Instructions for Med Access.

> **Note:** Please select "**Copy Manual Code**" when copying the code from your EMR to Cloud Connect to ensure that the code is copied correctly and in a format that is acceptable to Cloud Connect.

E. Once entered, the Ocean and TELUS servers will **connect to authenticate** the integration.

> **Setup EMR Integration**   ✕
>
> **EMR Credentials**
> To authenticate with PS Suite, you must first create a mobile activation code in the Preferences window of your EMR. Once created, copy the manual code into the field below and click 'Next'.
>
> For detailed instructions on creating a mobile activation code, click here.
>
> Mobile Activation Code   [Mobile Activation Code]
>
> Previous   Next

F. Click on the "**Connect with Accuro**" button.
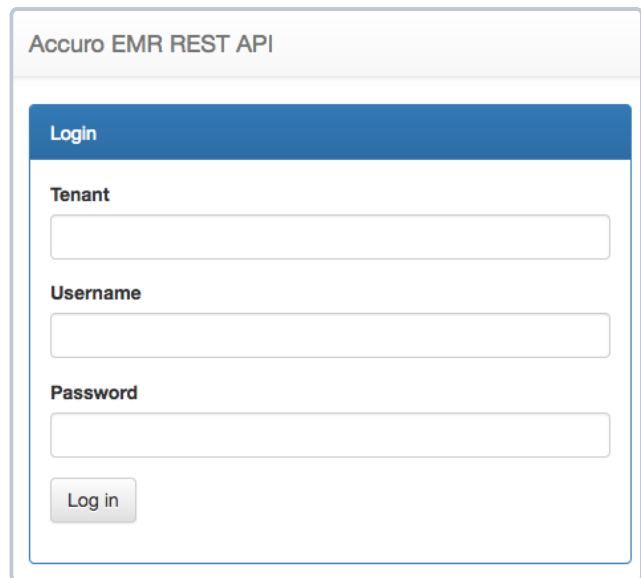
> **Setup EMR Integration**   ✕
>
> **EMR Credentials**
> To authenticate with Accuro, you will require credentials for the EMR Application Programming Interface (API).
>
> If you signed up for Ocean using the Accuro affiliate signup link, QHR will already be notified and will reach out to you with your Accuro API credentials. Otherwise, you will need to contact **QHR customer support** and request your API credentials. Please ensure that you have the following four (4) pieces of information before proceeding: **Tenant, Username, Password**, and **UUID**.
>
> Click the 'Connect with Accuro' button below to begin the authentication process. You will be redirected to Accuro, where you will be asked for your **Tenant, Username**, and **Password**. Once signed in, you will be redirected back to Ocean Cloud Connect, where you will be asked to enter your **UUID** to complete the authentication process.
>
> ◈ **Connect with Accuro**
>
> Previous   Next

G. Enter the **following details**, supplied to you by QHR:

> Tenant ID
>
> API username
>
> API password

Accuro EMR REST API

Login
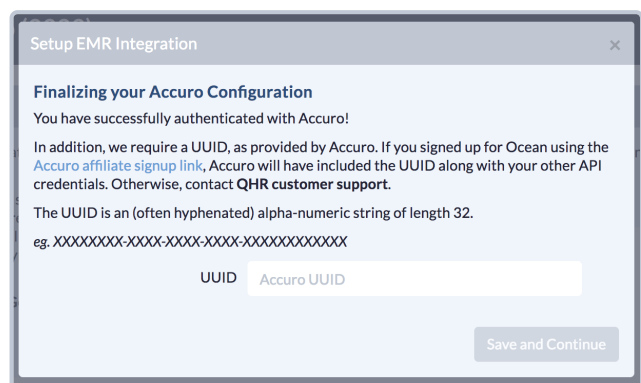
Tenant

Username

Password

Log in

H. Select "**Log in**" and then **approve** Ocean's third party access to the Accuro API.

The Ocean and Accuro servers will then **connect to authenticate** the integration. This may take a few seconds to initialize.

Accuro EMR REST API

Approve 3rd Party Access

The application **Ocean** is requesting the following access to Accuro EMR.

Access will be approved for the office **Cogap Demo Clinic**

Permissions Requested:

View Labs

Generate Accuro Access Token

View Scheduling

View and Edit Scheduling

Generate Patient Access Token

View and Edit Labs

View and Edit Contacts

View and Edit Clinical Notes

Reminder Api

View and Edit Patient Demographics

Link Patient to Medeo Account

View Clinical Notes

View Patient Demographics

Approve   Deny

I. To finalize your integration, enter your **UUID** (also supplied by QHR) and select "**Save and Continue**".

Setup EMR Integration   ×

Finalizing your Accuro Configuration

You have successfully authenticated with Accuro!

In addition, we require a UUID, as provided by Accuro. If you signed up for Ocean using the Accuro affiliate signup link, Accuro will have included the UUID along with your other API credentials. Otherwise, contact **QHR customer support**.

The UUID is an (often hyphenated) alpha-numeric string of length 32.

eg. XXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXX

UUID   Accuro UUID

Save and Continue

4. Configure your Cloud Connect settings.

A. From here, you can **customize your configuration options**. However, in most circumstances the **default** configuration will be sufficient.

For more details on configuration options, please refer to Customize your Cloud Connect Configuration.

B. Click the "**Save**" button to complete the setup process.

Setup EMR Integration ✕

General

Sync Appointments From | All Providers ▾

Mark appointments as Arrived in the next (hours) | 0 ⇕

Clinical Notes

If this checkbox is checked off and a patient fills out multiple Ocean eForms in one sitting, all resultant notes from those eForms will go into one single note in the patient's chart in PSS (vs. each form creating a separate note in the patient's chart).

Combine Progress Notes ☐

Ocean Reminders

Schedule Days to Sync | 7 ⇕

Walk In

Walk-In Provider | Please Choose... ▾

Walk-In Create Appointments at | Beginning of Schedule ▾

Save

A. From here, you can **customize your configuration options**. However, in most circumstances the **default** configuration will be sufficient.

B. QHR should **automatically filter** the list of providers to your specific clinic location and Ocean site. However, under the "General" section, the "**Sync Appointments From**" option will allow you to further filter or exclude certain providers, if needed.

If you are planning to map any Ocean eForm fields to Accuro custom fields (e.g. custom demographics, lab values), remember to enable "**Custom Fields**". For more about custom fields, please refer to: "Mapping Answers from an Ocean eForm to a Custom Demographics Field".

For more details on the rest of the configuration options, please refer to Customize your Cloud Connect Configuration.

C. Click the "**Save**" button to complete the setup process.

Setup EMR Integration ✕

General

Sync Appointments From | All Providers ▾

Clinical Notes

If this checkbox is checked off and a patient fills out multiple Ocean eForms in one sitting, all resultant notes from those eForms will go into one single encounter note in the patient's chart in Accuro (vs. each form creating a separate encounter for each Ocean eForm completed).

Combine Progress Notes ☐

Letter Type | Clinical Note ⇕

Custom Fields

Use Custom Fields ☐

Appt Reminder Sent Custom Status Name | Appt Reminder Sent Custom Status Name

Ocean Reminders

Schedule Days to Sync | 7

Save

ASSOCIATION

Note: If you clinic does not accept walk in patients, you can safely ignore the fields under the "**Walk In**" section of the configuration. For more information about walk ins, please consult our guide: Set Up Ocean to Support Walk-In Patients.

# 5. Configuration is complete!

You will now return to the **main summary screen**.

The "**Sync Status**" panel on the left will show you **if Ocean is synchronizing** appointments with your EMR via Cloud Connect, when the **last synchronization** occurred, and when the **next synchronization** is scheduled for (full syncs will automatically occur once a day at midnight and appointment syncs will occur automatically every 30 minutes).

Once an initial sync has completed, feel free to **verify patients** are being uploaded correctly by signing into the Ocean Portal and inspecting the **Patients tab**.

If there are any **errors** with the configuration, an alert will be displayed on the main summary screen, in the "**Sync Status**" panel.
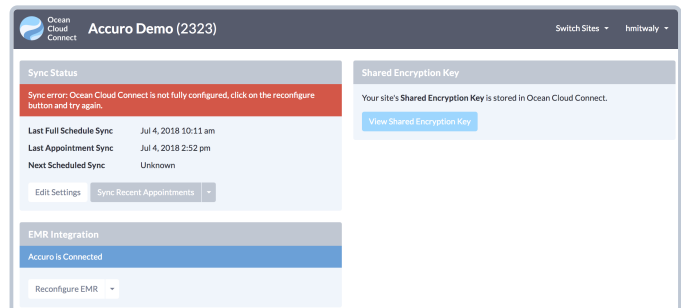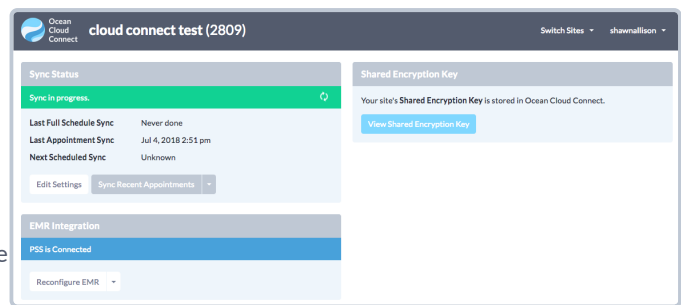
6. Ensure that Cloud Connect is activated in your Ocean Portal.

A. Log in to the Ocean Portal and navigate to the Admin tab.

B. In the "**Site Features**" section, make sure the "**Enable Ocean Cloud Connect**" checkbox is checked off.
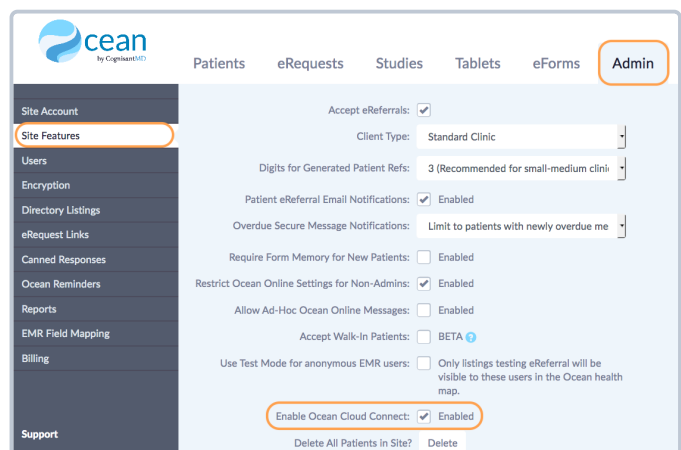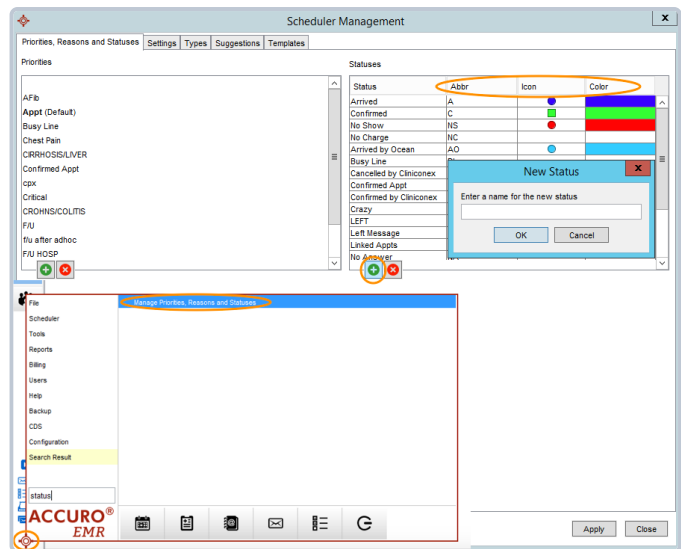

Set Your Custom Status*

This step is an **optional** part of setting up the integration between QHR Accuro and Ocean, for users who have a licence/subscription for the Ocean Unlimited Bundle.

Ocean can automatically trigger a custom status in Accuro to provide a visual indication when a patient reminder has been sent to the patient.

1. Configure your custom statuses in Accuro.

A. From the Accuro EMR, click the **Accuro (target) logo** in the bottom left and type "status" in the search box.

B. Select "**Manage Priorities, Reasons and Statuses**".

C. At the bottom of the Status area, click on the **green plus (+) sign** to add a new status.

D. Name your status. By default, Ocean sets the Ocean Reminders custom status as "**Ocean Reminder Sent**". You can choose to use these names or enter your own.

E. Double-click on the box under the **Abbr** column to select an abbreviation for the status.

F. Double-click on the box under the **Icon** column to select the custom status shape.

G. Double-click on the box under the **Colour** column to choose a colour for the status.

2. Confirm your custom statuses in Ocean Cloud Connect.

A. After you have created your custom status in Accuro, you should confirm that your Cloud Connect settings **match** the custom status names you selected in Accuro.

B. Log in to Cloud Connect on an internet browser on your computer and review the status name. If necessary, edit the text to ensure that it is **identical** to the name(s) entered in Accuro.

Configure the CDS Menu for Quick Access to Ocean

What You Can Do with CDS Links

The CDS (Clinical Decision Support) option in Accuro's quick Action menu provides a convenient user interface for interacting with Ocean directly within Accuro.

Using the CDS feature, Accuro users can add hyperlinks to Ocean that support single-sign-on (SSO) with automated patient-specific requests for interacting with Ocean.

For example, a user can configure a CDS link to automatically sign into Ocean and load a patient in order to:

- Send a secure message or questionnaire to a patient, with the patient's email and related information pre-populated

- Add a specific eForm for the patient to complete on the Ocean Tablet

- Open a PHQ-9 form for completion directly on their computer's web browser

- Send an eReferral for a patient

- View all active eReferrals for a patient

- Open the site's Ocean Portal to view the scheduler

Prerequisites for Getting Started

Before configuring your CDS links, please ensure the following steps have been completed:

An Ocean user account and Ocean site is available.

The Ocean site is connected to Accuro through Ocean Cloud Connect

You can sign into the Ocean Portal and see the "**Configure Accuro CDS Links**" button in your "**Manage Credentials**" section of the Admin tab. (If this button is missing, please complete the Ocean Cloud Connect step above to ensure your site is marked as an Accuro site.)
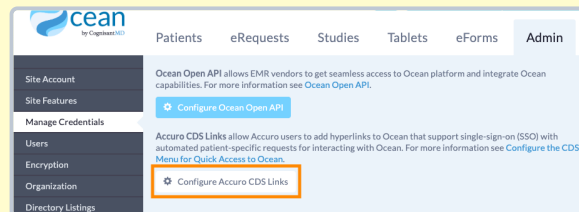
Configuring CDS Links

1. Navigate to the "Configure Accuro CDS Links" panel in the Ocean Portal.

A. Sign in to the Ocean Portal and navigate to the Admin tab.

B. Click on the "**Manage Credentials**" section, selected from the menu along the left side of the page.

C. Click the "**Configure Accuro CDS Links**" button.

Note: You will be prompted to enter your Ocean credentials (username and password) before continuing.

D. In the window that appears, you'll be able to view a full list of available CDS link URLs, as well as the four parameter/value pairs they need to be set for each link in Accuro – **siteKey**, **siteCredential**, **userID**, and **patientID**.

2. Choose which links you'd like to import

The "**View Ocean Portal**" and "**View Patient Dashboard**" links are the most versatile, as they provide links to many other functions for the patient. However, the other links can provide more direct shortcuts to specific functions.

We recommend that site administers configure their Accuro site to connect to Ocean using a **Global CDS Link**. When a global CDS link is used, individual Accuro users can benefit from using these CDS links without having to configure the links themselves.

3. Set up each link in Accuro.

Complete the following for each link that you would like to import.

Global CDS Links

To configure **Global CDS links**, follow the steps below:

A. In Accuro, open the Accuro action menu by clicking the target icon at the bottom left of the EMR. Enter the CDS menu and select "**Manage Global CDS**".

B. Click the **green plus (+) icon** to open the "**Configure Global CDS Link**" dialog:
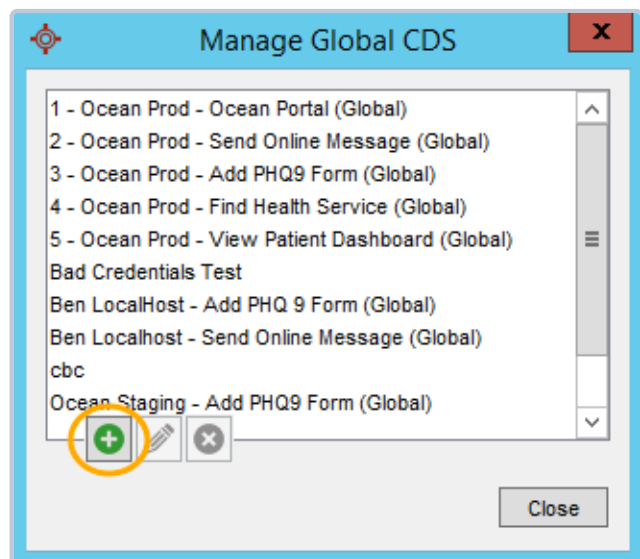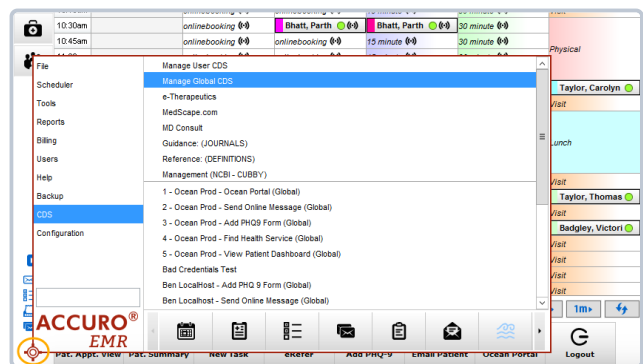
C. When the "**Configure Global CDS Link**" dialog opens, fill in the following fields using the provided values from the "Accuro CDS Link Configuration" window in Ocean:

> **Note:** Ensure the **correct capitalization** for all of the following parameters.

Name	The title of the CDS link. For example, "Ocean - Send Message".
URL	Copy and paste the exact URL from Ocean. Ensure there are no trailing spacing at the end of the copied URL.

If you're adding an "**Add eForm to Patient Queue**" or "**Open eForm**" CDS link you also need to **change the eForm ref** (in this example **phq9**) in the URL to the **eForm ref** of the form you want to add/open.

The **eForm ref** can be found in the URL when you **preview** an eForm.

Parameter/Value Table — Click the **green plus (+)** icon to add the four Parameter/Value pairs acquired from the "Accuro CDS Link Configuration" window in Ocean – **siteKey**, **siteCredential**, **userID**, and **patientID**.

These four parameters must be defined in each Ocean CDS link configured in Accuro.

See the screenshot to right for an example of a completed CDS link, for reference.

D. Click "**OK**" to save the CDS link.

E. Click "**Close**" to close the "**Configure Accuro CDS Links**" dialog box.

## CDS Links for Individual Accuro Users (optional)

Some users may prefer to have additional CDS links specific to their Accuro account. For example, a physician at a larger Accuro site who likes to use a specific questionnaire (e.g. the "Geriatric Depression Scale") may configure a direct CDS link to this questionnaire without impacting other Accuro users at the site.

To configure CDS links for **individual Accuro user accounts**, follow the steps below:

A. In Accuro, open the Accuro action menu by clicking the target icon at the bottom left of the Accuro. Enter the CDS menu and select "**Manage User CDS**".
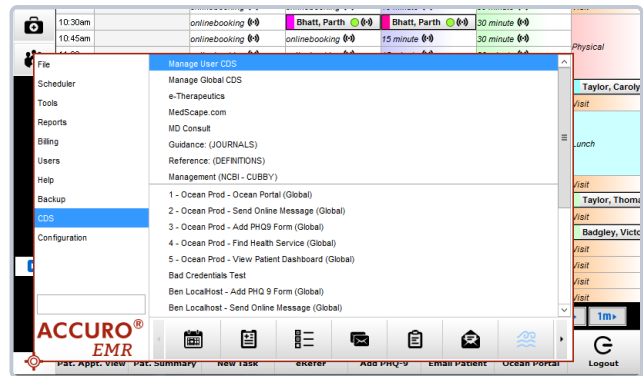
B. Click the **green plus (+) icon** to open the "**Configure User CDS Link**" dialog:
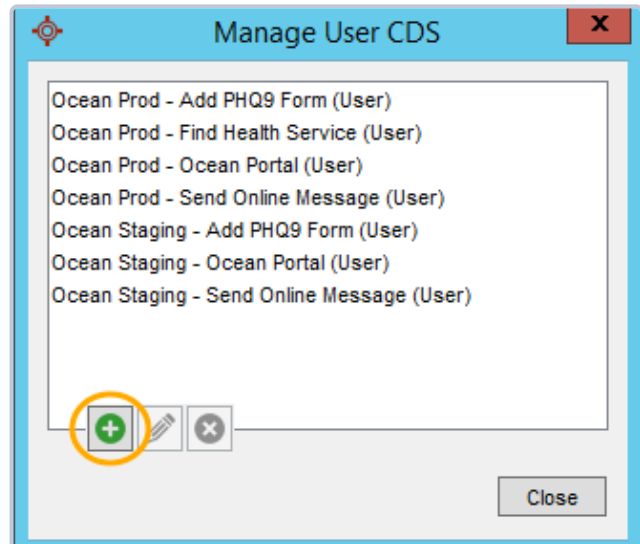
C. When the "**Configure User CDS Link**" dialog opens fill in the following fields:

> **Note:** Ensure the **correct capitalization** for all of the following parameters.

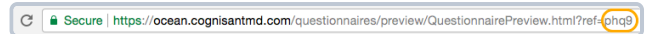**Name**   The title of the CDS link. For example, "Ocean - Add PHQ9".

URL   Copy and paste the exact URL from Ocean. Ensure there are no trailing spacing at the end of the copied URL.

If you're adding an "**Add eForm to Patient Queue**" or "**Open eForm**" CDS link you also need to **change the eForm ref** (in this example **phq9**) in the URL to the **eForm ref** of the form you want to add/open.

	The **eForm ref** can be found in the URL when you **preview** an eForm.	
Site Requires Login checkbox	Select this checkbox to enable it.	
Username	Type your **Ocean username** in this field (not your Accuro username).	
For Password	Type your **Ocean password** here.	

> **Note:** Accuro does not upload passwords containing a **%** or a **&** character properly. Consequently, if your user account password has these characters, you will need to change it.

| **Parameter/Value Table** | Click the **green plus (+)** icon to add the required Parameter/Value pairs. The following three parameters must be defined for each non-global User CDS link configuration in Accuro. | |

patientID	<patientID>
userPW	<link.password>
userName	<link.username>

See the screenshot to right for an example of a completed User CDS link, for reference.

D. Click "**OK**" to save the CDS link.

E. Click "**Close**" to close the "**Configure Accuro CDS Links**" dialog box.

4. Test your new CDS links.

Test your new CDS link(s) by selecting it from the CDS menu within the Accuro action menu.

Precautions for All Ocean CDS Links

Accuro opens the CDS Links in a stripped-down, minimalist embedded web browser. Although the browser is capable of performing most Ocean-related tasks, **it cannot print**, which prevents the printing of referral handouts and other actions.

Also note that he above links will include the **shared encryption key** (encoded after the anchor # tag). If you prefer to avoid including the shared encryption key for security reasons, you can leave it off of the URL by trimming the # character and all characters that trail it. If you leave the shared encryption key in place, be aware that all of the links above that included the key will need updating if and when you change your site's shared encryption key in the future.

Next Steps

Once all your CDS links have been set up, you have the option of adding shortcuts for quicker access to these CDS links. To learn more about how toset these up, please refer to "Add User-Friendly Buttons to CDS Links".

Add User-Friendly Buttons to CDS Links*

This step is an **optional** part of setting up the integration between QHR Accuro and Ocean.

Prerequisites

You **MUST** have your CDS links preconfigured before you can set up these shortcut buttons. To learn how to set up and configure your CDS links, please refer to the article Configure the CDS Menu for Quick Access to Ocean.
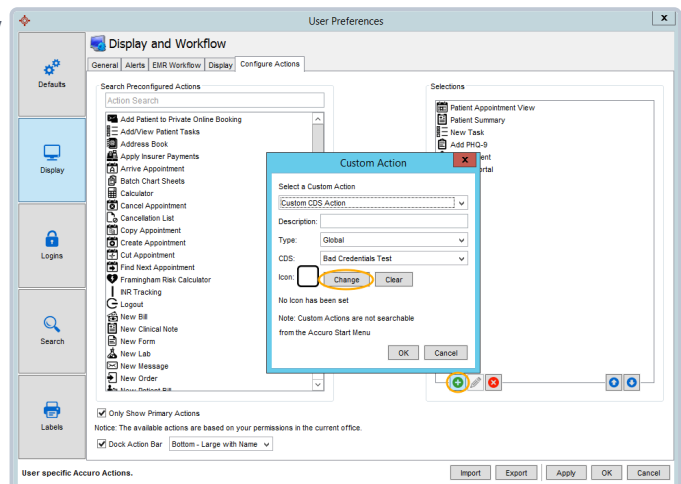
A. From the **Start** menu (accessed through the Accuro target logo), type in "user" to access the **User Preferences** Window.
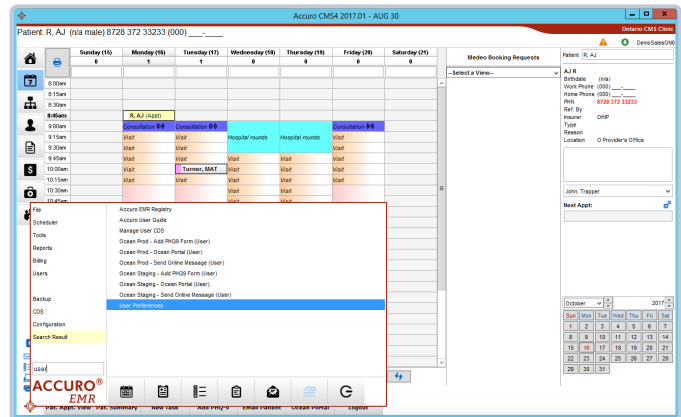

B. In User Preferences, click on **Display** (on the left) and select **Configure Actions** (the far right tab).
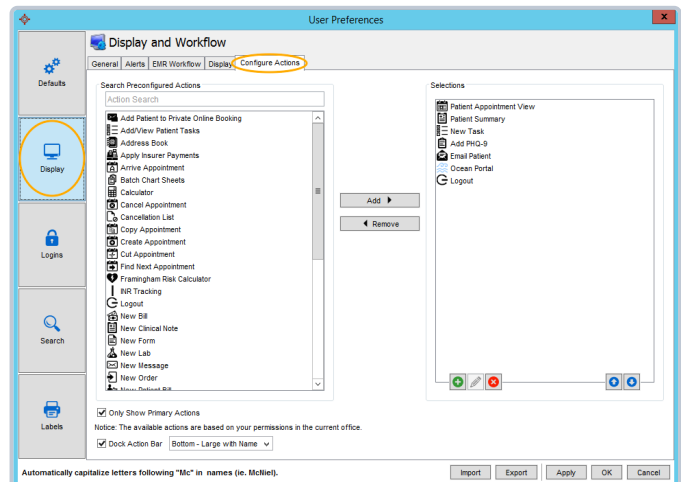
C. Click on the **green plus (+) sign** from the "Selections" window to add a **Custom Action**. From the "Select a Custom Action" dropdown, select "**Custom CDS Action**".

D. From the Custom Action window, click on "**Change**" to select a custom icon (see above screenshot). To select an icon, search by keyword and double-click the preferred icon (we use "water_element", "read_message", "message_group"). To change the colour, click on the small black box to open a colour picker.
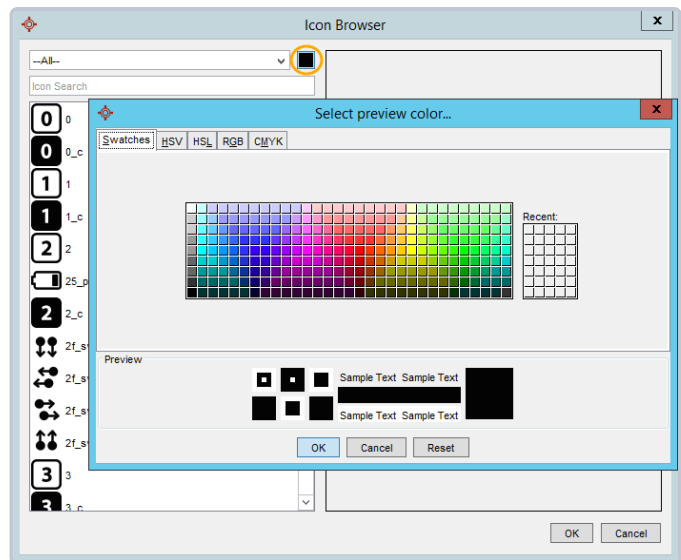
E. Select your preferred "**Dock Action Bar**" option (we chose "Bottom - Large with Name").