

TELUS PS Suite Integration Set-Up

1. PS Suite: Download & Install the Ocean Custom Form and Toolbar	To start, you will need to download 2 .cfm files and import them into your PS Suite EMR.
2. PS Suite: Create a Reminder Trigger for the Ocean Toolbar	To set your Ocean Toolbar to be visible and available to use for all your patients, you'll want to create a reminder for the Ocean Toolbar custom form.
3. PS Suite: Configure the Ocean Custom Form	<p>To link your Ocean custom form with your Ocean site number, you will need to configure the Settings on your Ocean custom form.</p> <p>To complete this step, you will need to be an admin on your Ocean site, and you will need your Ocean username, password, and site shared encryption key.</p>
4. PS Suite: Enable Cloud Connect on Your Ocean Custom Form	This will allow you to connect to the new TELUSAPI and take advantage of its accompanying features.
5. PS Suite: Create Your Ocean Cloud Connect User and Acquire EMR Credentials in PS Suite	<p>Create an Ocean-specific user in PS Suite, which will then be used to configure your Cloud Connect integration using the EMR Instance ID and Secret credentials acquired from your EMR.</p> <p>Note: You will need to be an admin user in PS Suite to complete this step.</p>
6. PS Suite: Set Up Ocean Cloud Connect	In this step, you will sign into the Cloud Connect configuration and authenticate your integration with your EMR instance.

Download & Install the Ocean Custom Form and Toolbar

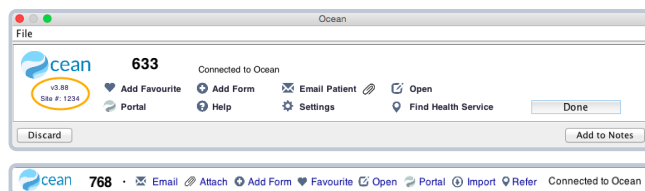
If you are setting up for the first time or downloading the latest version to update your instance, please follow the steps outlined below:

1. Download the Ocean custom form and toolbar files.

If the files do not appear as ".cfm", right-click each of the links to and save them manually by selecting "Save As..." from the menu of options.

Download the Ocean Custom Form

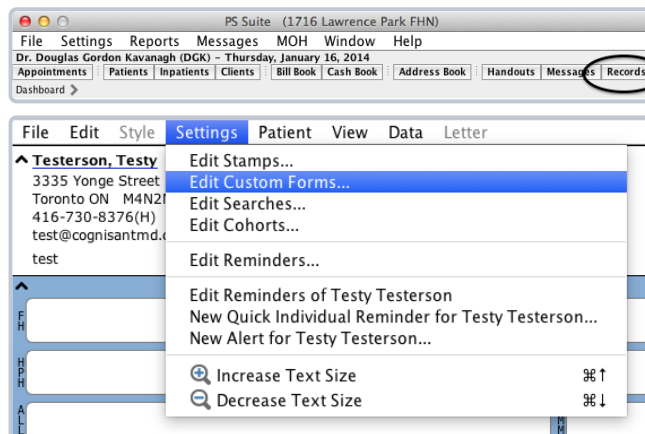
Download the Ocean Toolbar



2. Open the Edit Custom Forms window in PS Suite.

Log in to PS Suite and open the EMR (Records) window.

From the "Settings" menu, choose "Edit Custom Forms".

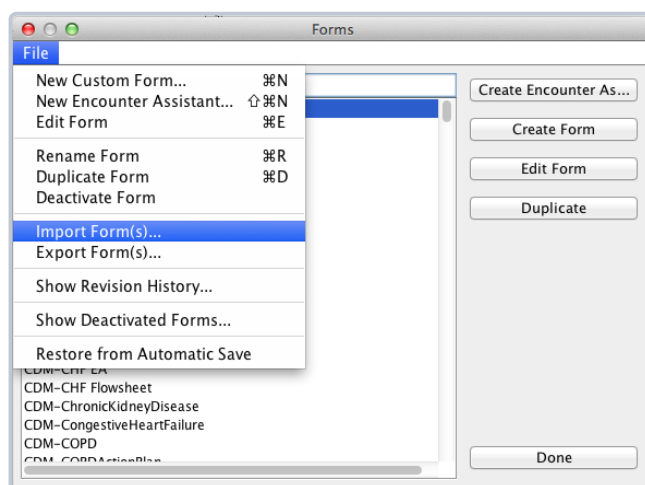


3. Import the downloaded custom form files into PS Suite.

From the Edit Custom Forms window, select "File" and then "Import Form(s)".

Locate the .cfm file that was downloaded. (This will typically be in your computer's "Downloads" folder if you've downloaded the file recently.)

Select "Choose" and close the Custom Forms window.



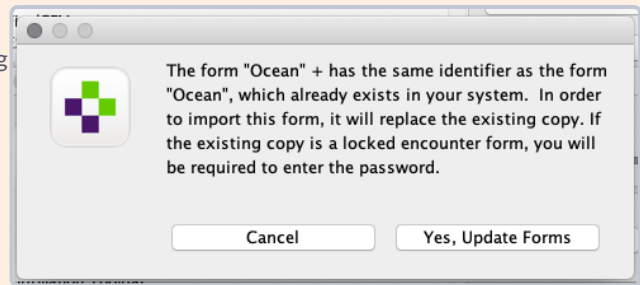
Note: Installing/updating the Ocean Toolbar and Custom Form is an instance-wide process. You do not need to perform these steps on a per user basis. Once installed, the Ocean Custom Form and Toolbar will be accessible to all users of the EMR.

Updating the Ocean Toolbar and Custom Form

If you are updating the Ocean Toolbar and Custom Form, you may be prompted by a dialogue window, when importing your new .cfm files, that a form with the same identifier already exists in your system.

You are safe to proceed and select **"Yes, Update Form."** This will safely replace and overwrite the earlier version with the updated file that has been downloaded.

Once complete, please refresh or manually close and reopen any active patient charts. This will ensure charts are correctly using the updated version.

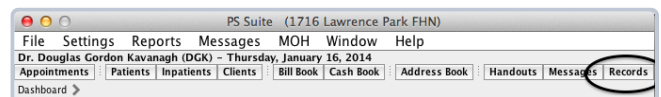


Create a Reminder Trigger for the Ocean Toolbar

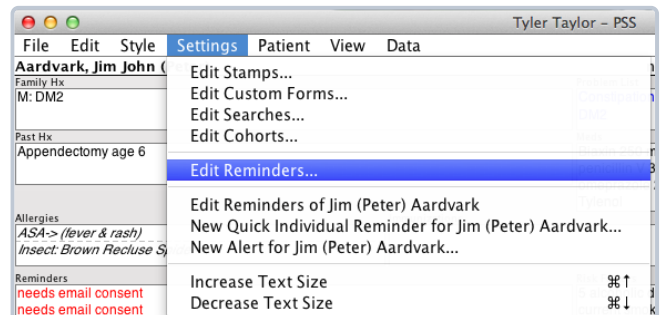
Once you have imported your toolbar custom form file into PS Suite, you will need to create a reminder so that the toolbar is available for use in your patients' charts.

1. Open the Edit Reminders window in PS Suite.

A. Open the EMR (Records) window within PS Suite.

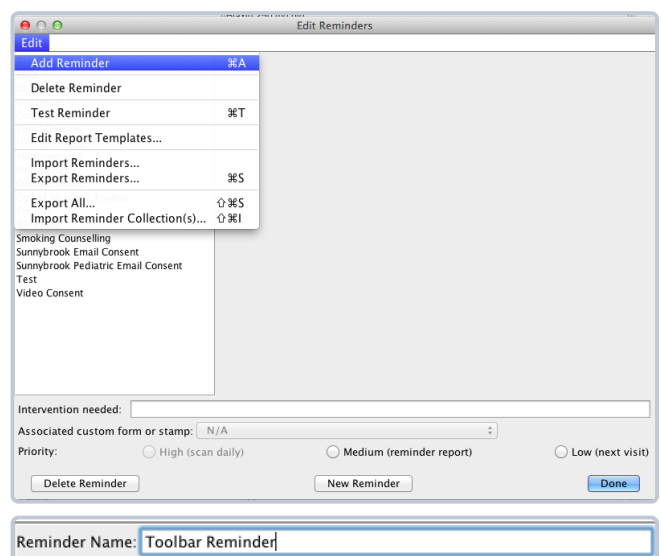


B. From the "Settings" menu, choose "Edit Reminders".



2. Add a new reminder.

A. From the Edit Reminders window, select "Edit" and then "Add Reminder".



B. Give the reminder a descriptive name, such as "Ocean Toolbar".

- C. Click "**Add Line**" to add criteria to the reminder.
- D. From there, choose some criteria to specify when you would like the toolbar to show. If you simply want the toolbar to show for all users and for all patients, you can enter some criteria that is true for all patients, such as the patient's age being less than 200. Alternatively, you can add additional criteria to make it show only for certain users or certain patient populations.
- E. Click the "**Show Custom Form or Stamp**" radio button, then choose your toolbar custom form to show for this reminder from the dropdown menu.
- F. Click "**Done**" to save the reminder and close the dialog box.
- G. Open a **patient chart** to confirm that the toolbar is displayed under the CPP.

Configure the Ocean Custom Form

Configuring your Ocean form will connect Ocean and your EMR.

1. Open the Ocean Settings menu from the Ocean custom form.

- A. Open a **patient chart** (preferably a "dummy" or test chart, or an empty chart).
- B. Insert the **Ocean custom form** into the chart by clicking the Ocean logo on the Ocean toolbar.
- C. You will be prompted to create an **Ocean user account** (if you don't already have one) or to sign in with your existing Ocean user account.
- D. Click on the "**Settings**" button on the custom form.
- E. Enter your Ocean username and password to authenticate yourself. The **Ocean Settings** dialog box will appear.

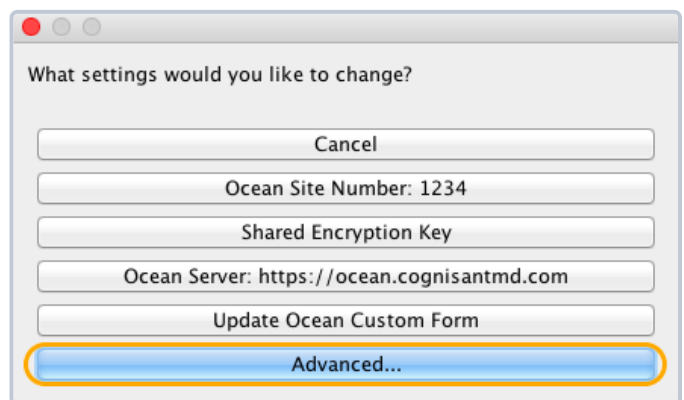
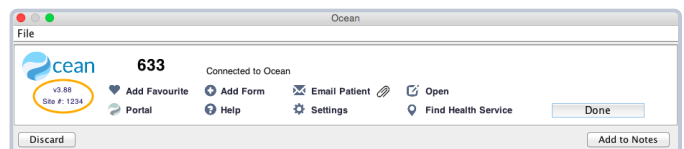
2. Enter your Ocean account and site information.

- A. Click “**Ocean Site Number**” to enter the site number provided to you by the Ocean administrator (accessible via the [Admin tab](#) on your Ocean Portal).
- B. Click “**Settings**” on your Ocean custom form again and select “**Shared Encryption Key**” to enter your shared encryption key password. If you haven’t already set this in the Ocean Portal, you will be prompted to do so first. This key will be stored secretly within your EMR, thereby preventing anyone else (including CognisantMD) from accessing any patient data.
- C. The other settings may be left **as-is**.
- D. Click the “**Remove**” button on the Ocean custom form to delete the custom form from the chart.

Enable Cloud Connect on Your Ocean Custom Form

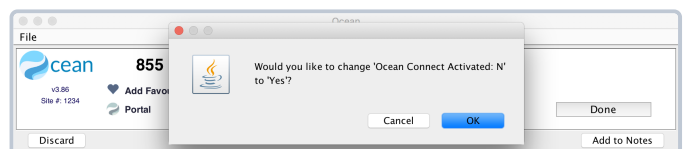
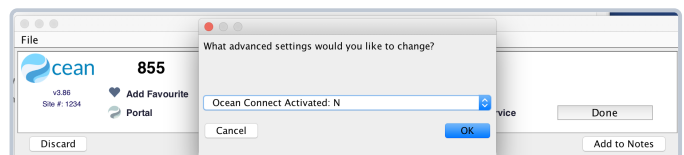
1. Access the advanced Ocean settings menu.

- A. Open the Ocean custom form in PS Suite by clicking on the Ocean logo in the toolbar.
- B. Confirm that your version is up-to-date (look for “v3.89” or later).
- C. Click the “**Settings**” button on Ocean custom form and enter your Ocean credentials.
- D. Select “**Advanced...**” from the Ocean settings menu.



2. Activate Ocean Cloud Connect.

- A. Select (or double-click) “**Ocean/Cloud Connect Activated: N**” to activate your Ocean Cloud Connect.

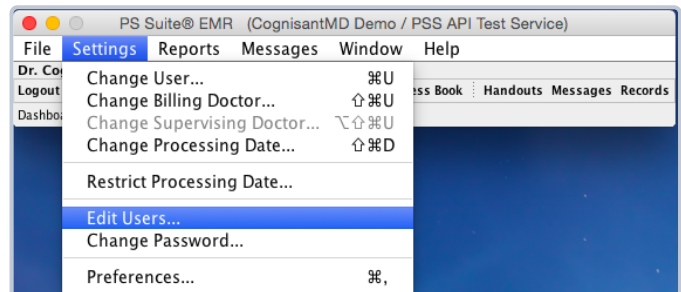


Create Your Ocean Cloud Connect User and Acquire EMR Credentials in PS Suite

1. Create a new PS Suite user, named "Ocean Connect".

This Ocean Connect user will serve as a makeshift user that Ocean Cloud Connect will use when saving notes.

- A. You can create a user in the "Edit Users" dialog box that can be accessed from the dashboard, under the Settings menu (you will need administrative privileges in PS Suite to access this dialog).



- B. Make sure you save the Ocean Connect user with the following details:

Initials "OCNC"

Role: "Other Health Professional"

Authority: "User"

Special Privileges:
boxchecked

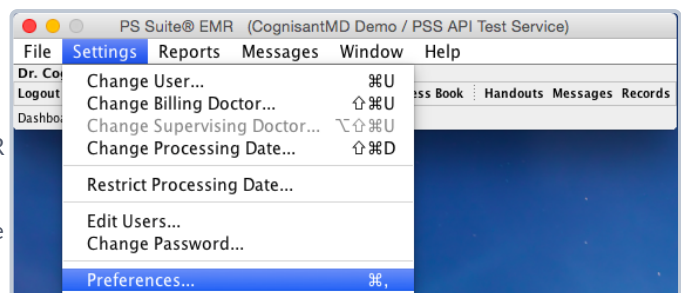
View Privileges: "All"

Action Privileges: "Notes"

- C. On the same window, under "Accessible Locations", make sure that the Ocean Connect user has access to all locations.

2. Pair the Ocean Connect user to the EMR credentials.

- A. Go back to the dashboard, open the Settings menu, and this time, select "Preferences".
- B. Enter your password to access the preferences dialog. Note that you will need administrative access to your PS Suite EMR to be able to access this dialog.
- C. Select "Mobile" from the list of preferences options along the left. Note that you will only be able to access this area if you have your mobile TELUSAPI set up.

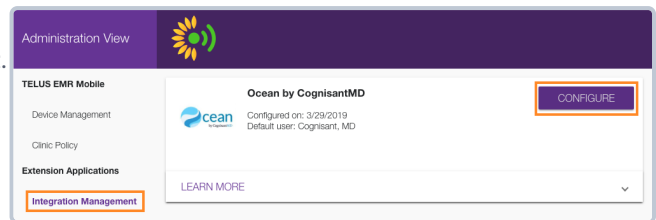


Note: Depending on your version of PS Suite, the appearance and layout of the Mobile section may differ. [Check which version of PS Suite](#) you are currently running to determine which of the below instructions applies to you.

PS Suite v5.11 or Higher

AML Activation

- A. Under the **Extension Application** header located on the left-hand side of the page, select **Integration Management**.
- B. Locate the **Ocean by CognisantMD** entry and click the purple "Configure" button.



- C. In the window that appears, click the box labeled "Enable Ocean by CognisantMD."
- D. Under the "Select User" dropdown, ensure the newly created Ocean user is selected.
- E. Note down the values listed under "EMR Instance ID" and "EMR Secret." These two values will need to be entered into [Cloud Connect](#) to authenticate the Ocean site with your PS Suite instance.



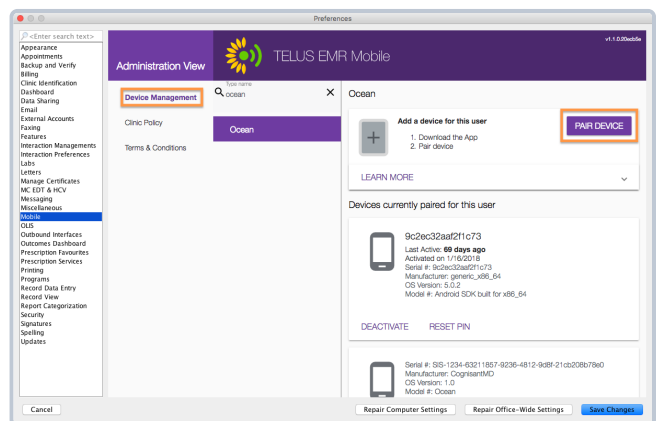
It is recommended you (temporarily) copy these to a text file on your computer for ease of use when completing your Cloud Connect integration.

- F. Press the "SAVE" button to enable the integration.

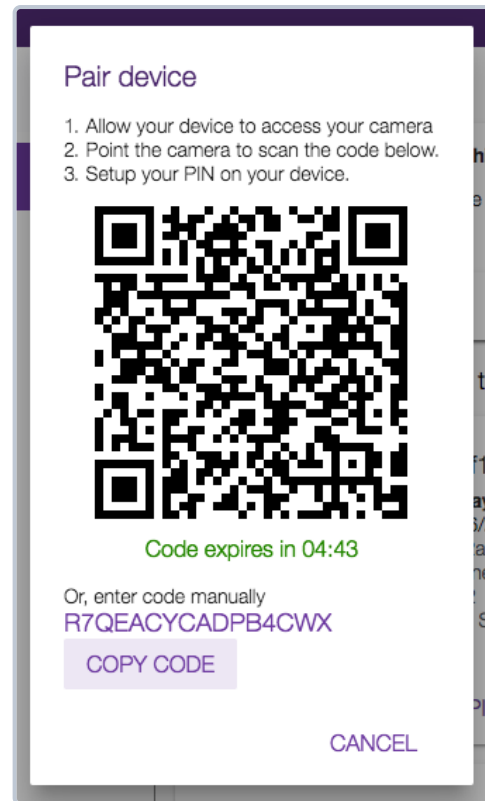
Mobile Activation (Legacy)

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

- G. Select "Device Management" on the left and proceed to select "Connect, Ocean" as your mobile device user.
- H. With the Ocean user selected, click the purple "Pair Device" button.

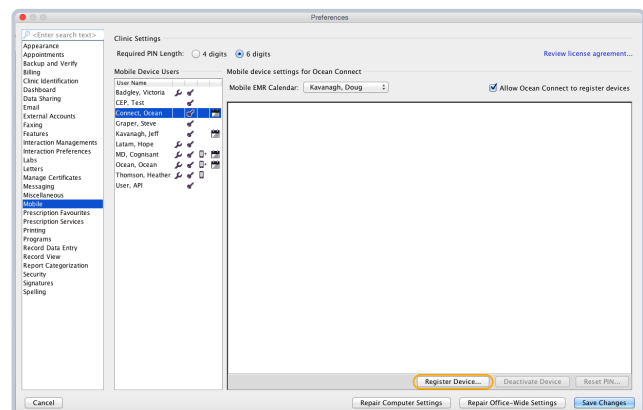


- I. This will open up an **Activation Code** dialog box. For our purposes, you can ignore the QR code. You will need the manual code to register your Ocean Cloud Connect.



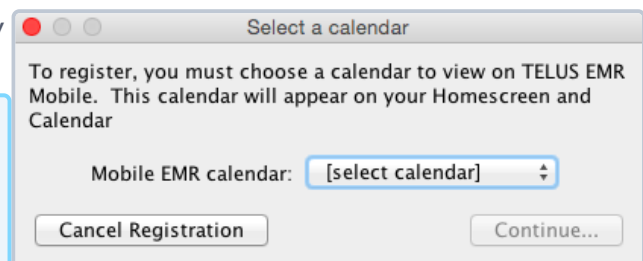
PS Suite v5.10 and Below

- J. Select "**Connect, Ocean**" as your mobile device user and click "**Register Device**".

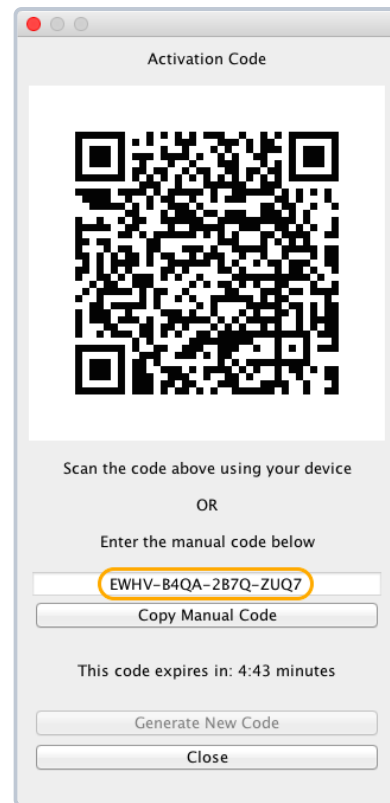


- K. You will then be prompted to select a calendar. Select any **calendar** and continue.

Note: Selecting a calendar is solely used to help create an initial connection between your EMR and Ocean. Choosing a specific provider's calendar **does not** limit or lock you into only accessing their patients through the Ocean platform.



- L. This will open up an **Activation Code** dialog box. For our purposes, you can ignore the QR code. You will need the manual code to register your Ocean Cloud Connect.



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.

[Go to Cloud Connect](#)

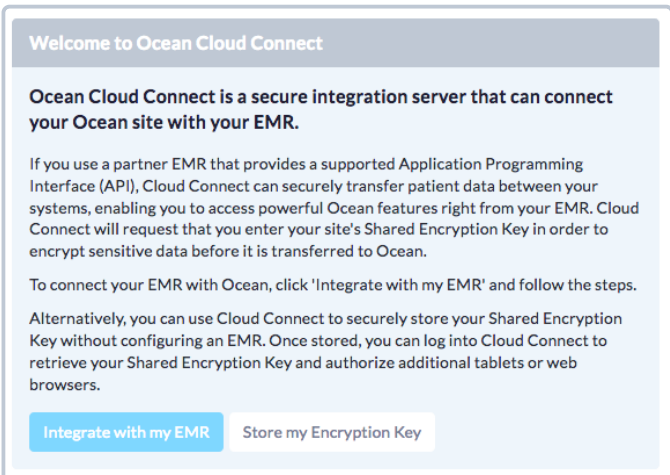
- B. Sign in using your **Ocean credentials** (i.e. the same credentials as the Ocean Portal).

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



The screenshot shows the 'Ocean Cloud Connect Sign In' page. At the top is the Ocean Cloud Connect logo. Below it is a grey header bar with the text 'Ocean Cloud Connect Sign In'. The main content area has a light blue background. It starts with a box containing the text 'Use your Ocean credentials to login.'. Below this are two input fields: 'User Name' and 'Password'. To the right of the 'Password' field is a link that says 'Forgot Ocean User Name?'. Below the 'Password' field is another link that says 'Forgot Ocean Password?'. There is a checkbox labeled 'Remember me on this computer'. At the bottom left is a blue button labeled 'Secure Sign In'. At the bottom right is a link that says '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.

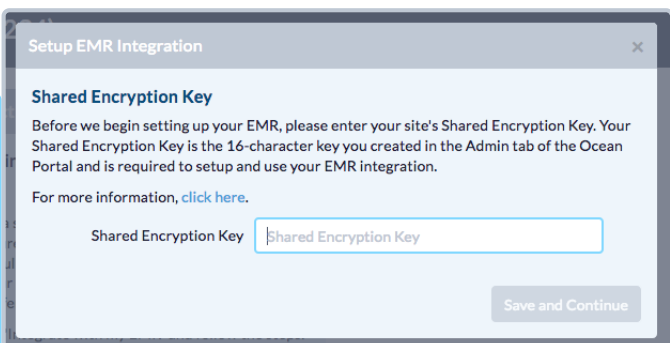


The screenshot shows the 'Welcome to Ocean Cloud Connect' page. It has a grey header bar with the text 'Welcome to Ocean Cloud Connect'. The main content area has a light blue background. It starts with a bold heading: 'Ocean Cloud Connect is a secure integration server that can connect your Ocean site with your EMR.'. Below this is a paragraph of text: '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.' Below this is another paragraph: '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.' At the bottom are two buttons: 'Integrate with my EMR' and '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.



The screenshot shows a dialog box titled 'Setup EMR Integration'. It has a grey header bar with the text 'Setup EMR Integration' and a close button (X). The main content area has a light blue background. It starts with a bold heading: 'Shared Encryption Key'. Below this is a paragraph of text: '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.' Below this is a link that says 'For more information, click here.' Below the link is a label 'Shared Encryption Key' followed by an input field containing the text 'Shared Encryption Key'. At the bottom right is a button labeled 'Save and Continue'.

3. Set Up your EMR integration.

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

The screenshot shows a dialog box titled "Setup EMR Integration". Under the heading "Select your EMR", it states: "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'." Below this, it says: "If you do not see your EMR listed below, [click here for more information](#)." There are three buttons: "Telus PS Suite", "Telus Med Access", and "QHR Accuro". At the bottom right are "Cancel" and "Next" buttons.

- 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.

The screenshot shows a dialog box titled "Setup EMR Integration". Under the heading "PSS Credentials", it states: "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'." Below this, it says: "For detailed instructions on getting access to your EMR instance ID and secret, [click here](#)." There are two input fields: "EMR Instance ID" and "EMR Secret". At the bottom right are "Cancel" and "Next" buttons.

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.

The screenshot shows a dialog box titled "Setup EMR Integration". Under the heading "EMR Credentials", it states: "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'." Below this, it says: "For detailed instructions on creating a mobile activation code, [click here](#)." There is one input field: "Mobile Activation Code". At the bottom right are "Previous" and "Next" buttons.

- F. Click on the "Connect with Accuro" button.

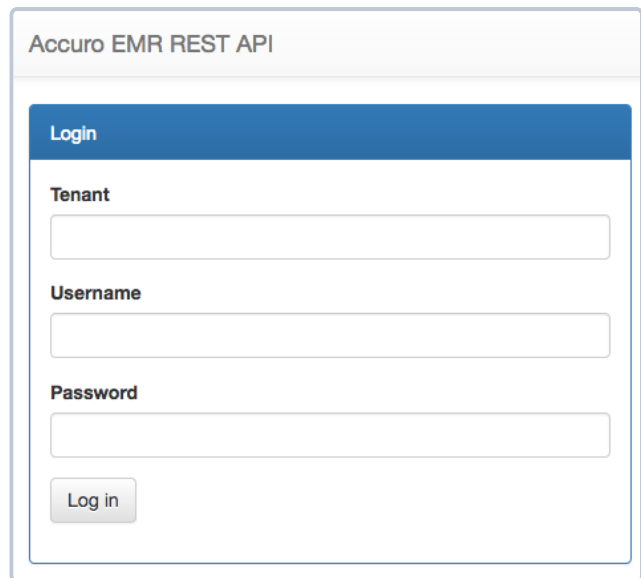
The screenshot shows a dialog box titled "Setup EMR Integration". Under the heading "EMR Credentials", it states: "To authenticate with Accuro, you will require credentials for the EMR Application Programming Interface (API)." Below this, it says: "If you signed up for Ocean using the [Accuro affiliate 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.**" Below this, it says: "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." There is a button labeled "Connect with Accuro". At the bottom right are "Previous" and "Next" buttons.

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

Tenant ID

API username

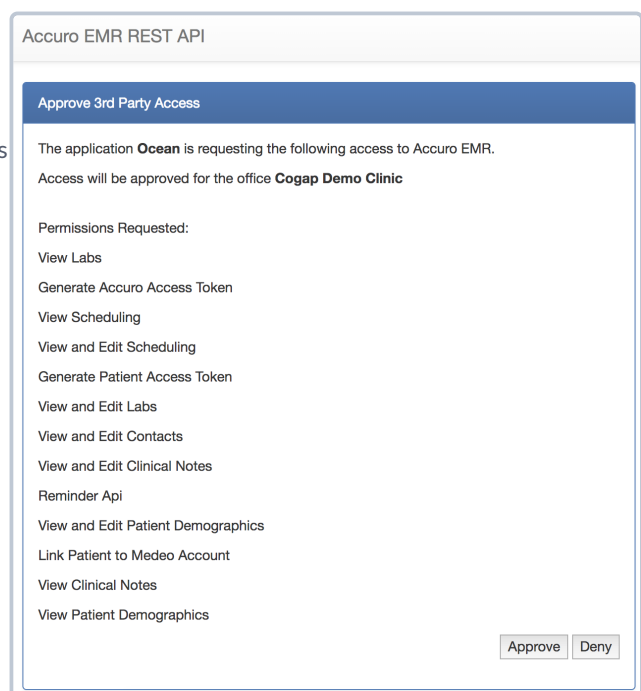
API password



The image shows a web form titled "Accuro EMR REST API". It has a blue header bar with the word "Login" in white. Below the header, there are three input fields: "Tenant", "Username", and "Password". Each field has a light gray border and a small "x" icon on the right. Below the "Password" field is a "Log in" button with a light gray background and a dark gray border.

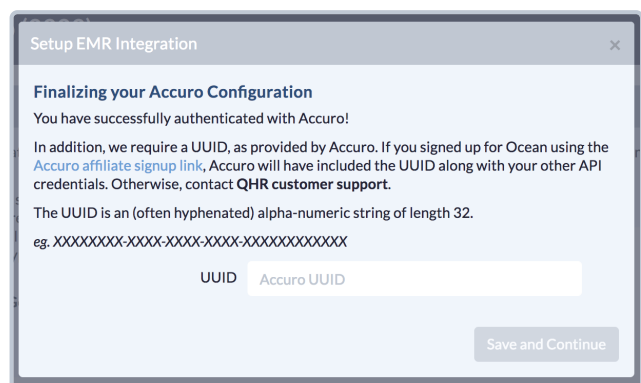
H. Select "**Log in**" and then **approve** Ocean's third party access to the Accuro API.

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



The image shows a web form titled "Accuro EMR REST API". It has a blue header bar with the text "Approve 3rd Party Access" in white. Below the header, there is a paragraph of text: "The application **Ocean** is requesting the following access to Accuro EMR. Access will be approved for the office **Cogap Demo Clinic**". Below this text is a list of 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", and "View Patient Demographics". At the bottom right of the form are two buttons: "Approve" and "Deny", both with light gray backgrounds and dark gray borders.

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



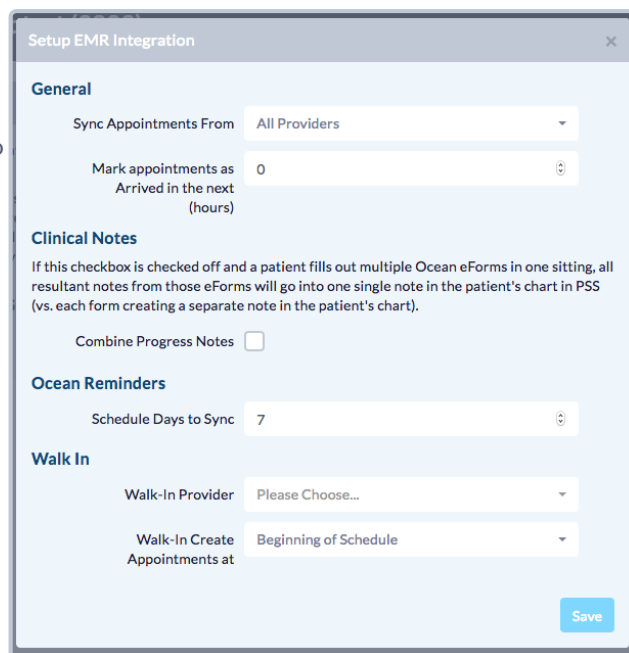
The image shows a dialog box titled "Setup EMR Integration" with a close button (X) in the top right corner. The dialog has a light blue background. It contains the following text: "Finalizing your Accuro Configuration", "You have successfully authenticated with Accuro!", "In addition, we require a UUID, 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. XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX". Below this text is a label "UUID" followed by a text input field containing "Accuro UUID". At the bottom right of the dialog is a "Save and Continue" button with a light gray background and a dark gray border.

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.



The screenshot shows the 'Setup EMR Integration' dialog box with the 'General' tab selected. The 'Sync Appointments From' dropdown is set to 'All Providers'. The 'Mark appointments as Arrived in the next (hours)' field is set to '0'. The 'Clinical Notes' section has a checkbox for 'Combine Progress Notes' which is unchecked. The 'Ocean Reminders' section has a 'Schedule Days to Sync' field set to '7'. The 'Walk In' section has a 'Walk-In Provider' dropdown set to 'Please Choose...' and a 'Walk-In Create Appointments at' dropdown set to 'Beginning of Schedule'. A 'Save' button is located at the bottom right.

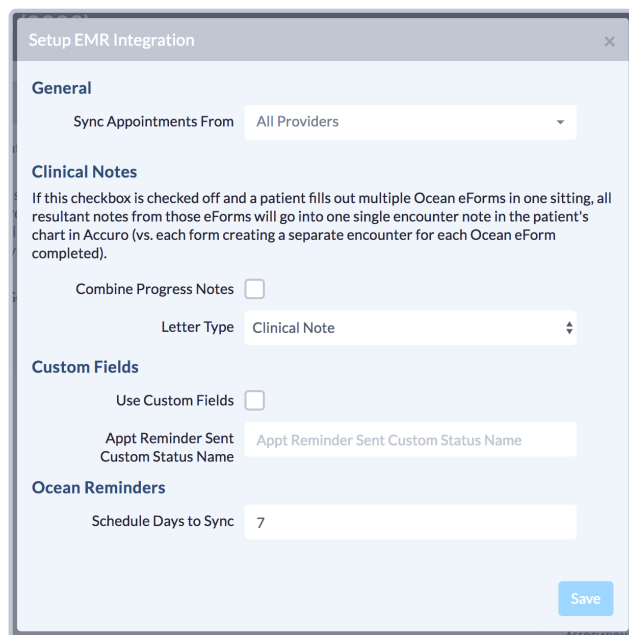
- A. From here, you can **customize your configuration options**. However, in most circumstances the **default** configuration will be sufficient.

- 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.



The screenshot shows the 'Setup EMR Integration' dialog box with the 'General' tab selected. The 'Sync Appointments From' dropdown is set to 'All Providers'. The 'Clinical Notes' section has a checkbox for 'Combine Progress Notes' which is unchecked, and a 'Letter Type' dropdown set to 'Clinical Note'. The 'Custom Fields' section has a checkbox for 'Use Custom Fields' which is unchecked, and a text field for 'Appt Reminder Sent Custom Status Name' containing 'Appt Reminder Sent Custom Status Name'. The 'Ocean Reminders' section has a 'Schedule Days to Sync' field set to '7'. A 'Save' button is located at the bottom right.

Note: If your 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](#).

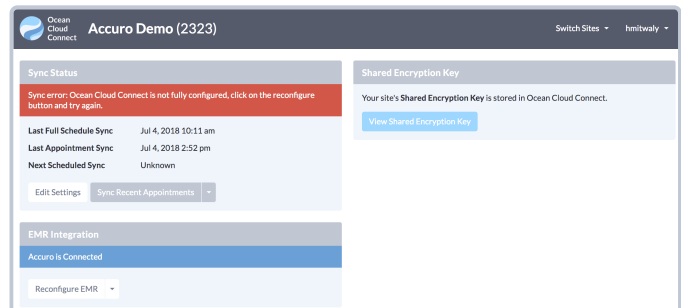
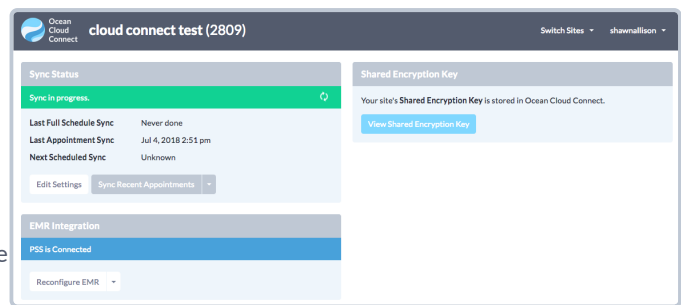
5. Configuration is complete!

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.

