WELL HEALTH OSCAR SENDER OCEAN INTEGRATION STEP-BY-STEP CHECKLIST

Last updated: 2021-08-26

Steps	Description	
Well Health Oscar Set-Up for Senders		
1	**API Enablement Request**	**Link to Process Diagram**

	☐ Confirm that site has access to the new OSCAR Integration from WELL Health
	   o Minimum Build Number for OSCAR Pro CC Integration: S-20.10.26-124209 (can be seen from top right of OSCAR login screen)
	   o The OSCAR Login Screen should display an "OSCAR Pro" label underneath login credentials
	[Note: The **presence** of the OSCAR Pro label suggests that the clinic is on a version of OSCAR that is compatible with the new integration, even if the label appears "greyed out" or cannot be clicked.]
	☐ Create an Ocean Site for the clinic if one does not already exist
	☐ Clinic or DT can complete the OSCAR Pro Cloud Connect Enablement Request and enter a deployment team's member's information as an additional contact (the submission is sent to WELL Health)
	   o WELL Health will complete the backend configuration of the clinic's OSCAR instance that will allow for integrating with Cloud Connect
	   o CMD will receive confirmation from WELL Health, and contract number to complete Cloud Connect setup and sent a "Welcome to Ocean!" email to the clinic with the DT CC'ed	

2	**Download and Install the Ocean eForms and Toolbar**	**Link to Article/Video**

	[Note: The Ocean eForm and Toolbar may already be present in the Oscar instance if the clinic was previously using Oscar Classic with Ocean, or it may have been uploaded by WELL Health]
	  1) To ensure the site has the most up-to-date files you can check the modification dates in the eForm Library by clicking Administration -> Forms/eForms -> Manage eForms (modification dates should be recent e.g. 2020/2021. If you are unsure, it is recommended that **you download and install the latest files** with the instructions below).
	  2) The Ocean eform must be be named "OCEAN". Change the name of the eForm if necessary using the pencil icon from the eForm library.
	☐ If it is unclear if the site has the latest forms, download the Ocean eForm and toolbar files
	   o Visit this page and right-click each of the files and select "Save Link As" to save them to a location that is easily accessible
	☐ Upload the Ocean eForm into OSCAR
	   o Log into OSCAR, click on "Administration" in the top toolbar
	   o Click to expand the "Forms/eForms" section and select "Manage eForms"
	   o Click "Upload" -> "Choose File" -> Locate the Ocean eForm file you downloaded (may be named OscarCustomForm.html or Ocean EForm.html)
	   o Enter "OCEAN" as the eForm name; Additional Information can be left blank; click "Upload"
	☐ Upload the Ocean Toolbar into OSCAR
	   o Click "Administration" in the top toolbar
	   o Click to expand the "Forms/eForms" section and select "Upload an Image"
	   o Select "ChooseFile" and locate the OceanToolbar.js file you downloaded
	   o Click the "Upload" button	

3	**Create a Shortcut to the Ocean eForm on the Scheduler**	**Link to Article/Video**

	☐ Display the Ocean Shortcut on the Scheduler
	   o Click on and open "Preferences"in the top toolbar of the OSCAR window
	   o Go down to "eForms to display on appointment screen", select the "OCEAN" eForm checkbox
	   o Click "Update"
	☐ View and test the Shortcut
	   o Create/find a patient appointment in the Schedule and look for the Ocean shortcut link - this shortcut should open up the OCEAN eForm	

4	**Create an Ocean Connect User in OSCAR**	**Link to Article**

[**Note:** This step is recommended for all new setups as it ensures any Ocean notes downloading are stamped with the generic Ocean username, rather than the name of the admin/user who set up CC. It also resolves the cases for patients who don't have an MRP which may cause issues downloading notes to patient charts. In cases of reauthentication where these steps were not completed on initial setup and site was not having any note download issues this would not be required]

☐ Create an Ocean Connect User
- o Click "Administration" -> "Add a Provider Record"
  Provider Number: any (can use the Suggest button)
  Last name: "Connect"
  First name: "Ocean"
  Type: Doctor
  Receives Ticklers: "checked"
  Click Add Provider Record

☐ Assign the Ocean Connect provider a primary role
- o From "Administration Panel" -> "User Management" -> "Assign Role to Provider"
- o Assign the Ocean Connect user the role of "doctor" from the dropdown in that user's row if it's not already set. Click "Add".
- o Under "Set Primary Role" at the bottom of the page:
  Provider: "Connect, Ocean" (from dropdown)
  Role: "doctor" (from dropdown)
  Click Set Primary Role. ("YES" will appear in the Primary Role column next to the Ocean Connect)

☐ Add a new "Ocean Connect" EMR User
- o From "Administration Panel" -> "User Management" -> "Add a Login Record"
  Username: OceanConnect
  Password: (set secure password; suggest site store it along with their SEK; this password is used in Step 7 below)
  Confirm: (retype password)
  Provider Number: "Connect, Ocean"
  Expiry Date: (set expiry date far into future)
  PIN: (set 4 digit PIN; suggest site store it along with SEK)
  Confirm: (retype PIN)
  Force Password Reset: false (from dropdown)
  Click Add Record

5	Link the OSCAR EMR to Ocean	**Link to Article/Video**

☐ Access the OCEAN eForm
- o Click on and open "Administration" in the top toolbar of the OSCAR window
- o Click on "Manage eForms" to open the eForm Library WIndow
- o Click on the OCEAN eForm
- o In the OCEAN eFormWindow, click on "Settings", then click "Initial Configuration"

☐ Link OSCAR with OCEAN
- o Enter your Ocean user account credentials, then click "next"
- o Enter your Ocean site number and shared encryption key, then "Secure Sign in"
- o Close the OCEAN eForm and eForm Library Window

6	Create the REST client in OSCAR	**Link to Article/Video**

☐ Click on and open "Administration"in the top toolbar of the OSCAR window then "Integrations, under API/Connections click on "REST Clients". Click "Add New"

☐ In the Create Client Window enter the following values:
- o Name: **Ocean**
- o URI:https://cloudconnect.cognisantmd.com/oscar/oauth1/callback
- o Token Lifetime (seconds): **-1**

	☐ Note down the Client Key and Client Secret. You will need these to set up Cloud Connect	
7	**Set Up Ocean Cloud Connect**	**Link to Article/Video**

	☐ Go to Ocean cloud connect https://cloudconnect.cognisantmd.com/ and sign in as an admin user
	    o Click on "Integrate with your EMR" button to begin
	    o Enter your Shared Encryption Key and select "Save and Continue"
	☐ Select the EMR you would like integrate with and then select "Next"
	☐ Enter you the following information, then click "Connect with OSCAR":
	    1. OSCAR Server URL (see Common Troubleshooting section below)
	    2. Client Key
	    3. Client Secret
	    4. OSCAR username [enter "OceanConnect" if Step 4 was completed above; otherwise use clinic contact's OSCAR username]
	    5. OSCAR password [enter password for Ocean Connect user that was set in Step 4 above; otherwise use clinic contact's OSCAR password]
	☐ Check off the checkbox next to "EMR Access" and click on" Authorize", then "Save and Continue"
	☐ Keep default configuration options unless special case, click "Save" to complete setup process
	☐ Check that the main summary screen of cloud connect has "Sync Status" information and is connected
	☐ Verify that in Ocean portal>Menu>Admin> Site Features> "Enable EMR integration via Ocean Cloud Connect" is checked off	

8	**Send an eReferral with an attachment (using the consultations workflow)**	

	☐ Enter a patient's Encounter chart and open the Consultations window
	☐ Select "Attach File to Consultation" left side of screen> Check off desired document from patient chart> click "Done Close Window". Checked off documents should now be visible in the consultation window on the left hand side.
	☐ After confirming attachment list is correct click the "Refer" button in top right hand side or consult window
	☐ The Ocean Healthmap will launch in a new browser window, send the referral as usual (check that attachments and patient information is in the referral form selected within a listing). Click Send eReferral.
	☐ After sending the referral:
	    o A copy of the sent referral will be automatically downloaded in patient's documents
	    o A consultation for the requested health service offering will have been added and the Ocean Toolbar will be updated to link to the active eReferral associated with the patient
	    o The referral document will contain a rich text note summary of the referral
	    o The consultation will include the service listed and name of consultant that the eReferral was directed to and other eReferral details
	    o The link on the Ocean Toolbar can be clicked anytime to view the Patient's Dashboard in Ocean to check on the status of their active referrals	

9	**Updating a sent eReferral Updates in OSCAR (using consultation window)**	
	☐ To access and update a sent Ocean eReferral enter the patient's encounter chart and click on the consultation you wish to view/update ☐ To update the eReferral choose "Edit on Ocean" button at top of the window. This will open the eReferral in Ocean. Here you can perform actions such as editing patient information, editing referral note information, sending a message or cancelling the referral.	
10	**Viewing Status Updates on eReferrals (in Ocean or directly from Consultation Window in OSCAR)**	

| | Click on the eReferral link on the Ocean toolbar to access the Ocean Patient Dashboard and view the status of the referral
OR
View the status of the referral in OSCAR in the consultation window:
☐ Enter the patient's encounter chart and click on the consultation you wish to view
☐ The consultation window will display the status of the referral on the left hand side
☐ After the eReferral has been marked as Completed by the recipient, the color of the consultation in OSCAR will update from **red** text to **blue** text |

Common Troubleshooting

OSCAR Server URL Issue

Issue: The "OSCAR Server URL" that the site typically uses to log-in to OSCAR is not being accepted when entered as the "OSCAR Server URL" as part of Cloud Connect setup.
- Some sites may also have multiple URLs they use to log-in and may be confused at which one to use

Management: The most definitive way to get the correct URL is to have the site submit a ticket to Well (help@oscarprohelpdesk.ca)
- The OSCAR Server URL is generally starts with "https" and ends with ".com" so you may need to remove anything appearing after ".com" such as slashes (/) or path information

Screenshots:

Entering OSCAR Server URL	Error message if URL not accepted

Cannot Add Token Lifetime
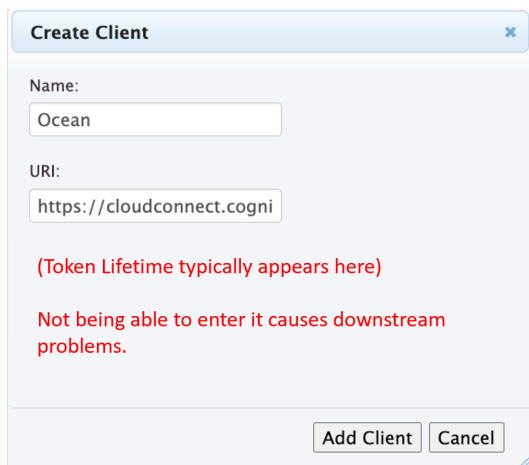
Issue: When "creating the REST client in OSCAR" the "Token Lifetime" field does not appear. Although, you are able to progress with the configuration, DTs have reported that this causes downstream functionality problems such as:
(1) For senders, when adding a Consult, the Ocean Logo and Refer button do not appear
(2) For receivers, accepting a referral did not import it into OSCAR

Management: This is an issue with how Well has set up the REST API part of the integration. Some DTs have reported that the Well team may not immediately recognize the issue, and it may appear that the integration is working from their point of view, so some persistence may be needed here. Sites should submit a ticket to Well (help@oscarprohelpdesk.ca).

Screenshots:

Ocean Toolbar is Not Present in Patient Profile

Issue: Although the Ocean Toolbar file has been uploaded into OSCAR, the Toolbar does not display in the E-Chart of patients.

Management: First ensure the Ocean Toolbar has been uploaded to OSCAR if it has not been completed by Well already (described here). If the Toolbar does not display in patient's E-Charts after being uploaded, this is likely an issue on Well's part of the configuration.. Sites should submit a ticket to Well (help@oscarprohelpdesk.ca).

The "OCEAN" eForm shortcut on the Scheduler is not Displaying as Expected

Issue: A few different issues have been communicated by DTs:
1) There are no shortcuts
2) There are shortcuts to multiple Ocean eForms
3) The shortcut is only appearing as a period " . " or is reflecting the full name "OCEAN"

Management:
1) If no shortcut, first ensure that the OCEAN form is checked as an "eForm to display on appointment screen" from Preferences (described here). Please note these preferences are **user-specific**, so this would be need to be checked off for each user.
2) If there shortcuts to multiple Ocean eForms on the scheduler, review the "eForm to display on appointment screen" from Preferences and uncheck forms that are no longer needed (e.g. the old Ocean eForm if converting from the Legacy to OSCAR Pro integration). Please note these preferences are **user-specific**, so this would potentially need to be unchecked for each user.
3) If the shortcut to the "OCEAN" eForm on the Scheduler is displaying as something longer or shorter than "OC." -- this is determined by the "Length of link and form names to display on appointment screen" option in Preferences. The number indicates the total number of characters used for the shortcut (includes 1 character for a period).

Screenshots

WELL HEALTH OSCAR SENDER OCEAN INTEGRATION STEP-BY-STEP CHECKLIST

Selecting Preferences (user-specific)

(From Preferences window)

Length of link and form names to display on appointment screen — Determines how many characters of the eForm name will displayed on the shortcut on the Scheduler

eForms to display on appointment screen — Determines which eForms will have shortcuts on the scheduler

## Appointments Confirmed in Ocean are Appearing as Black in OSCAR Scheduler

Issue: As part of the receiving workflow, an appointment that is confirmed in the Scheduling Pane in Ocean is appearing as black on the OSCAR Scheduler.

Management: Appointments appear as black in the OSCAR scheduler when they are associated with a status code that has not been configured in the EMR. Ocean automatically pushes code "h" (case-sensitive) for Confirmed appointments.

- To check the appointment statuses/codes that are configured go to Administration -> Schedule Management -> Appointment Status Setting.
- Adding or changing an appointment status code is done by Well support (help@oscarprohelpdesk.ca), and cannot be done by end-users
- In one case a clinic changed their "Confirmed" code from "H" to "h" and appointments no longer appeared as black. Well support will also update the code on existing Confirmed appointments.

Screenshots

Example of Appointment appearing as black on the Scheduler
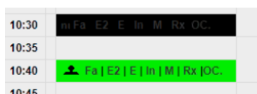
Appointment Status Manager (Administration -> Schedule Management -> Appointment Status Setting)

Ocean automatically pushes code "h" for confirmed appointments which tends to be the default for a Confirmed status. If code "h" has not been configured in the status manager, then appointments confirmed in Ocean may appear as black in the scheduler.

Contract Number Error during Cloud Connect Setup

Issue: When selecting an EMR during Cloud Connect setup, users receive a prompt that Ocean requires a contract number from the client's EMR provider. This prevents the user from proceeding with the Cloud Connect setup, and may lead to rescheduling a setup call with the client.
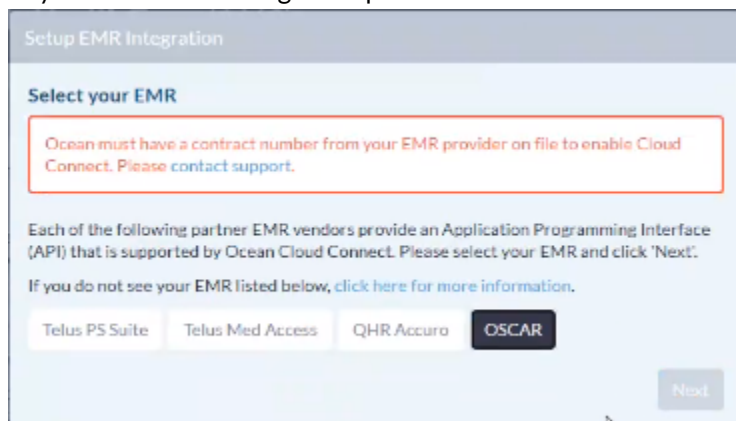

Management: Process changes have been put in place to try and reduce this problem from happening. The contract number is added by CMD on the backend when they have received the appropriate information from Well EMR during the API Enablement Process. Typically, CMD sends the "Welcome to Ocean!" email to the clinic with the DT CC'ed and includes instructions for setting up Cloud Connect -- this acts as a confirmation that the contract number has been added.

- Ensure you have received the "Welcome to Ocean!" email and review the email content prior to proceeding to Cloud Connect setup with the client.
- If you have any uncertainty, you can email techsupport@thinkresearch.com prior to the setup call to ensure that the contract number has been put in place.

Unexpected Cloud Connect Deauthorization

Issue: Sometime after Cloud Connect setup, the site's clinical administrator may receive an automated email from Ocean informing them of a Ocean Cloud Connect sync failure. The email usually references a 401 error status code.
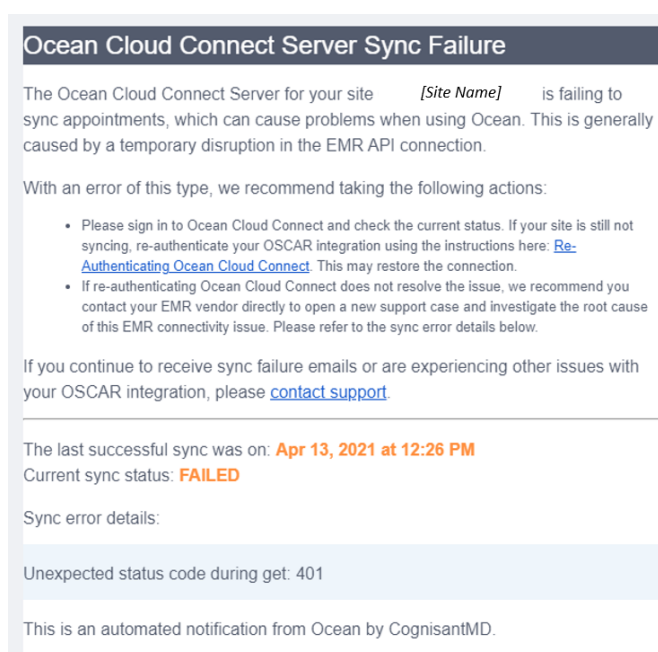
Management: There maybe be different root causes for a sync failure, and they often relate to backend changes/disruptions rather than user-initiated issues or errors in setup.. Examples of cause in the past include:
1) WELL running a backup of the client's EMR causing the token to expire and leading to a desync
2) A long-running server experiences an issue and requires a reset

- Often, this error can be solved by Re-Authenticating Cloud Connect as indicated in the email notification itself.
- You can be proactive during setup/training by ensuring you know who is set as the ' Clinical Administration / Ocean Support Contact' (located Admin -> Site Account) as this will be the individual receiving these emails.
  - This person should be an Admin on the Ocean site, and have access to the credentials needed to re-authorized Cloud Connect (Oscar Server URL, Client Key, Client Secret, OSCAR Username, OSCAR Password)
- If reauthenticating does not work, the client should start a ticket with help@oscarprodesk.ca. In their email, it would be helpful if they identify you as someone they are authorizing to discuss this issue with WELL on their behalf . Consider using the language below. Contact KJ for support as needed.
  - "For this issue only, I would like to provide consent for [DT NAME] (DT email) to speak on our clinic's behalf as they have been assisting us in the setup for Ocean eReferrals. "
  - Upon submitting the email, they will receive a ticket number automatically, which they can share with you to follow up.

Appointment Migration and Single Sign on Issue (Receivers)

Issue: During the receiving workflow of accepting a referral of Ocean -> adding an appointment to the OSCAR scheduler -> launching the 'OCEAN' eForm to 'Update Referral' with the appointment time --> the user is presented with the following issue:
1. User receives a prompt to **sign** into Ocean after clicking (this is unexpected as users aren't typically asked to sign in once they have established single sign on during the setup/training)
2. After signing in, the **appointment information from the OSCAR scheduler is not appearing** the Scheduling pane of the referral in Ocean

This has most commonly happened to DTs during training demos.

Management: This issue typically occurs when:
1) Single Sign On (SSO) hasn't been established between the user's OSCAR account and the Ocean account
2) Single Sign On was accidentally disrupted. This can happen if the user linked their same Ocean account to another EMR (e.g. Accuro). Note that Single Sign On can only occur with one EMR at a time.

To solve this issue in OSCAR and establish Single Sign On:
1. Open your My Account Settings in the Ocean Portal and check your EMR User Name field. Ensure this field is empty to confirm that this Ocean account is not linked to any other EMR.
2. Launch the Ocean Healthmap from Oscar (e.g. click the "OC." from an appointment on the scheduler and click "Find Health Service", or click "Refer" from the Ocean Toolbar inside a patient encounter)
3. Click to link your Ocean account in the top-right and enter your Ocean information. This should re-establish SSO between the OSCAR and Ocean accounts.
4. To confirm SSO has been established, you can check your My Account settings again to ensure your OSCAR name appears in the "EMR User Name" field.

With SSO established, you should not be prompted to sign-in upon clicking "Update Referral", and appointment information should be passing from OSCAR to Ocean and available for you to add. This should be an ongoing fix, and not a one-time workaround as long as SSO is maintained. If you continue to experience sign-in prompts despite this fix, please report it so we can identify any contributing factors.