

Ocean-Accuro Setup Step-by-Step Checklist (Receiver) - August 26, 2021

Description	
ACCURO SET UP	
1	Set Up Ocean Site
	<input type="checkbox"/> Set up Ocean Account and Ocean Site for clinic <ul style="list-style-type: none"> o Clinic creates account at https://ocean.cognisantmd.com/ and creates Ocean site OR <ul style="list-style-type: none"> o DT creates Ocean Site (Click name in Portal (top-right) > My Account > Create New Site) and invites clinic contact from Menu > Admin > Users <p>[Note: It is no longer recommended to use the Accuro Affiliate Link for creating an Ocean Account]</p> <input type="checkbox"/> Once site is created, all other users to be added through Menu > Admin> Users <input type="checkbox"/> Create encryption key
2	Request API Credentials Link to Process Diagram
	<input type="checkbox"/> Clinic or DT (with permission) to complete Accuro API Enablement Request <ul style="list-style-type: none"> o Add clinic contact's info as Primary Contact; add DT's contact info as Additional Contact o Inform clinic that QHR may reach out to signing authority to sign license addendum o Inform clinic to contact DT if credentials received, or any QHR questions about cost or assistance with setup <input type="checkbox"/> QHR sends clinic signing authority the Accuro License Addendum; clinic signs addendum <input type="checkbox"/> QHR emails the clinic contact the credentials (Tenant ID, Username, and UUID) and CC's support@cognisantmd.com <input type="checkbox"/> CMD adds contract ID for Cloud Connect setup and sends "Welcome to Ocean!" email with creds to clinic and DT <p>[Note: If credentials not provided in 2 weeks from request, check if clinic received/signed addendum, and email techsupport@thinkresearch.com with "QHR credentials" in subject and Site # and clinic name included in body]</p> <input type="checkbox"/> Clinic to call Accuro Support asking for API password quoting case from QHR credential email
3	Set Up Cloud Connect (must be Ocean admin and have Accuro credentials) Link to Article/Video
	IN Accuro <p>[Note: These steps in Accuro can be performed after the steps in Ocean below if you do not yet have access to the client's EMR]</p> <input type="checkbox"/> Log into Accuro EMR> Click Accuro Target menu> Users> Manage Security (must be an Accuro Admin)> System Settings> General>EMR Settings sub-heading> Tick on " Enable Document From Field" <input type="checkbox"/> If received referrals will be saved as a Document rather than an Encounter note, determine the desired folder in Accuro to save to: <ul style="list-style-type: none"> o To View Folders: Click EMR > Virtual Chart -> Green Plus sign (Upload Documents)> see list of folders under Destination Folder drop-down > Manage (opens Manage Patient Folders window) o To add a New Folder: From Manage Patient Folders window > Click Green Plus Sign -> type name of folder -> click OK -> click to Close the Manage Patient Folders window -> and click Cancel on the Upload Documents Window

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	IN Ocean/Cloud Connect: <ul style="list-style-type: none"> <input type="checkbox"/> Sign in to Cloud Connect at https://cloudconnect.cognisantmd.com/ using Ocean username/password <input type="checkbox"/> Click "Integrate with my EMR" > Enter your Ocean Shared Encryption Key > Select your EMR (QHR Accuro) > Click on "Connect with Accuro" <input type="checkbox"/> Enter credentials provided by QHR (Tenant ID, Username, API Password) > Select "Login" and then "Approve"> Enter "UUID"> Save and Continue <input type="checkbox"/> Edit Settings > Referrals > select whether received referral should be saved as an Encounter Note or Document > If documents, select a Folder and Subfolder if desired (this location can be changed later if needed) <input type="checkbox"/> Check on Cloud Connect that "Sync Status" is correct and Accuro is connected <input type="checkbox"/> Go to Ocean portal > Admin > Site Features > Click on "Enable Ocean Cloud Connect" and "Allow accepted website forms/eReferrals to create patients in your EMR" 																						
4	Configure CDS Links (One-time configuration – applies to all workstations).		Link to Article/Video																				
	<ul style="list-style-type: none"> <input type="checkbox"/> Sign in to Ocean portal > Menu > Admin> Manage Credentials > Configure Accuro CDS Links> Enter Ocean username and password (and Encryption key if needed) <input type="checkbox"/> Note relevant links to import: View Ocean Portal, Find Health Service, View Patient Dashboard, Send appointment notification <input type="checkbox"/> In Accuro: Click on Accuro Target > Manage CDS Links > Manage Global CDS > green + > Enter Name (e.g. Ocean View Ocean Portal) > Copy over URL > Copy the 4 parameters (siteKey, siteCredential, userID, patientID) and values for each from Ocean "Accuro CDS Links Configuration" window in Ocean > Click OK [Note: Be careful not to leave trailing spaces when entering Parameters and Values] <input type="checkbox"/> Click Green Plus to add another link <input type="checkbox"/> After adding parameters/Value > Click "OK and "Close" to close the "Configure Accuro CDS Links" Box. <input type="checkbox"/> Test CDS links: Select a test patient in Accuro (e.g. can use the patient search bar from the Scheduler) > Click on Accuro Target > CDS > click on link 																						
5	Configure CDS Buttons (User-specific – repeat per user).		Link to Article/Video																				
	<ul style="list-style-type: none"> <input type="checkbox"/> Click Accuro Target menu > search "user" > User Preferences > Display > Configure Actions > Green Plus <ul style="list-style-type: none"> o Select a Custom Action: Select 'Custom CDS Action' <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Description (Enter name of CDS Button)</th><th style="text-align: left;">Type</th><th style="text-align: left;">CDS</th><th style="text-align: left;">Icon (examples)</th></tr> </thead> <tbody> <tr> <td>Ocean Portal</td><td>Global</td><td>Ocean - View Portal</td><td>water_element, or sea_waves</td></tr> <tr> <td>View Pt. Referrals or Patient Dashboard</td><td>Global</td><td>Ocean - View Patient Dashboard</td><td>list, or message_group</td></tr> <tr> <td>Send Apt. Notif</td><td>Global</td><td>Ocean - Send Appointment Notification</td><td>reply, or read_message</td></tr> <tr> <td>Send eReferral, Refer, or Find Health Service (if desired)</td><td>Global</td><td>Ocean - Find Health Service</td><td>paper_plane</td></tr> </tbody> </table> <ul style="list-style-type: none"> <input type="checkbox"/> Log out of Accuro: Click on Accuro Target menu > Users > Logout <input type="checkbox"/> Log back into Accuro to ensure CDS buttons are still present [Note: Properly logging out of Accuro will help ensure CDS buttons are saved. Do NOT "force exit" by clicking the "X" or using the CTRL + Q shortcut] 			Description (Enter name of CDS Button)	Type	CDS	Icon (examples)	Ocean Portal	Global	Ocean - View Portal	water_element, or sea_waves	View Pt. Referrals or Patient Dashboard	Global	Ocean - View Patient Dashboard	list, or message_group	Send Apt. Notif	Global	Ocean - Send Appointment Notification	reply, or read_message	Send eReferral, Refer, or Find Health Service (if desired)	Global	Ocean - Find Health Service	paper_plane
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6	Test Integration (Import a Referral for a NEW test patient)																						
	<ul style="list-style-type: none"> <input type="checkbox"/> Send a test referral for a NEW test patient & Accept in Ocean Portal <input type="checkbox"/> Check that new patient is created in Accuro with encounter note or document <input type="checkbox"/> Create an appointment for patient in Accuro and click on CDS button for "Send Appointment Notification" <input type="checkbox"/> Check that appointment date/time is pulled into Ocean scheduling pane <input type="checkbox"/> Check that eReferral appears with status in Patient Dashboard (From the Patient Dashboard CDS button) 																						

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7	Test Integration (Import a Referral for an EXISTING test patient)
	<input type="checkbox"/> Send a test referral for an EXISTING test patient & accept in Ocean Portal <input type="checkbox"/> Check that demographic fields & encounter note map onto existing patient <input type="checkbox"/> Create an appointment for patient in Accuro and click on CDS button for "Send Appointment Notification" <input type="checkbox"/> Check that appointment date/time is pulled into Ocean scheduling pane <input type="checkbox"/> Check that eReferral appears with status in Patient Dashboard (From the Patient Dashboard CDS button) <input type="checkbox"/> Check that document or encounter note is added to the patient chart

Common Troubleshooting

Server Error message: java.lang.reflect.InvocationTargetException

Issue: User is presented with the following Server Error message while trying to complete an action with Ocean: "An error occurred while communicating with the server: java.lang.reflect.InvocationTargetException" (see screenshot).

Examples of some possible prompting actions:

- user clicks a Refer CDS Link to pointing to a site they are not a user on
- user copies and paste a "Save for Later Link" into a browser but the link is to an Ocean site that is not the user's DEFAULT Ocean site
- user clicks "View the eReferral" in a booking update, and then logs into Ocean, and is prompted with the error

Management: This error typically occurs when the user doesn't not have access to the Ocean site or the Site Encryption Key.

- Double check that the is a member of the Ocean site that's associated with the action. Some actions, such as copying and pasting a Save for Later link into the browser, may require the Ocean site to be the user's default.
- Confirm that the user has established Single Sign On, and it's with the correct site associated with the action. You can re-establish Single Sign on by first clearing the EMR User Name field from a user's account settings, then clicking the Refer CDS Link and linking your account by clicking the prompt in the top-right of the Healthmap (Hello [EMR Username]. Click here to link your Ocean Account").
- Consider if there if the user has proper access to the Site Encryption Key

Screenshots:



Cloud Connect Sync Errors related to clinic transitioning from local server to ASP/Cloud

Issue: Users may be experiencing errors upon transitioning from local server to cloud/ASP as their Accuro instance is no longer able to sync with Cloud Connect (see screenshot).

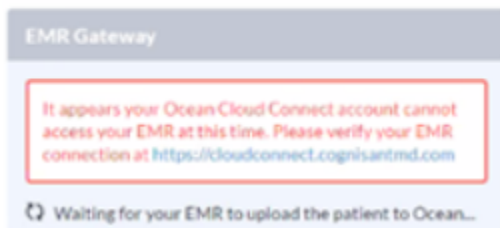
- Although the clinic may be coordinating with QHR to make the transition, QHR may not identify that this will disrupt their access to Ocean.

Management: The clinic should call QHR to get credentials to reauthenticate Cloud Connect.

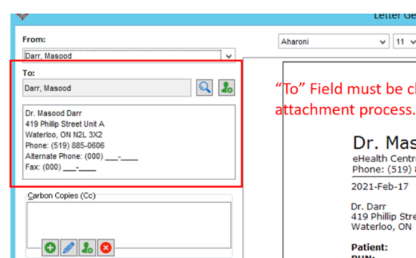
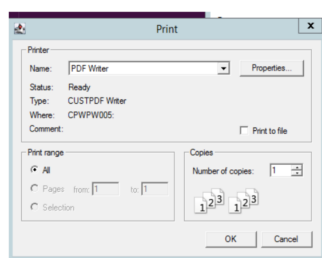
- The specific credential requiring update may differ -- DT's have reported either updates to the Tenant ID or the UUID in the past with other credentials typically remaining the same.
- Once the updated credential(s) is received, follow the [instructions to reauthenticate Cloud Connect](#)
- Test the CDS Links, and [update/configure new CDS links as needed](#), and [add/update CDS buttons to reference new CDS links if needed](#)
- There is generally no need to contact Cognisant with respect to this change as there is nothing for CMD to do on the back end for this transition

Screenshots:

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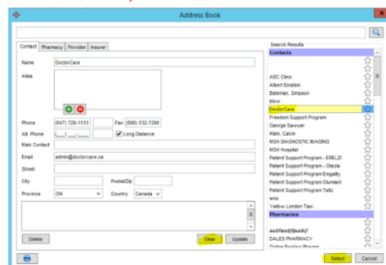
Print Dialog appear while attaching documents from Accuro, preventing attachment from reaching referral form
Issue: Users are prompted with a Print Dialog (see screenshot)) upon clicking Send in Step H of the [Accuro attachment process](#). This prevents the user from saving the Generated Letter to the chart, and making the attachment appear on the referral form.



Management: This issue occurs when the “To” field is not cleared in Step D. In other words, the Generated Letter must have no recipient to properly complete the attachment process to Ocean.

- To clear the “To” field, click the magnifying glass adjacent to the “To” field, and you will see the “Address Book” dialog.
- Depending on if the patient has a previous referral, the process for clearing the contact is slightly different (see screenshots below).
- Once the recipient is cleared, and the “To” field shows “--None--” the user should be able to complete the attachment process as outlined in the support article

Patient has no previous referral:

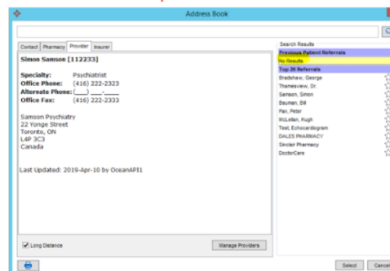


To clear recipient:

- 1) Choose any contact from the pane on the right.
- 2) Click “Clear” to clear their info
- 3) Click “Select”

This will push a ‘no recipient’ to the generated letter and will prevent the Print/PDF Writer dialog downstream. Pressing clear does not update that contact’s information in the Address Book going forward, so you don’t have to worry that you are overwriting any info.

Patient does have a previous referral:



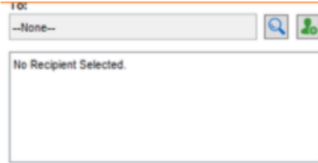
To clear recipient:

- 1) Double click “No Results”.

This will push a ‘no recipient’ to the generated letter and will prevent the Print/PDF Writer dialog downstream. This will not any contact information in the Address Book going forward, so you don’t have to worry that you are overwriting any info.

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This should be the result in the Letter Generation dialog



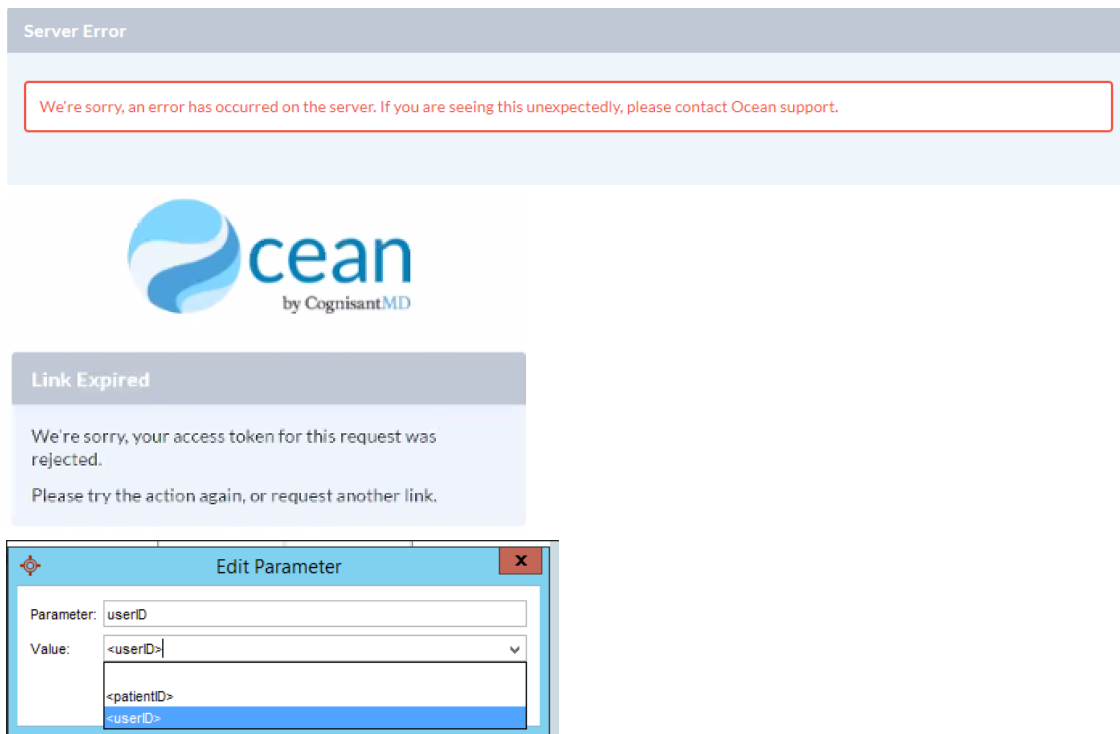
Server Error when using CDS Link for the first time

Issue: User is prompted with a server error message or Link expired (see screenshot) when testing one of their CDS Links for the first time, despite Cloud Connect syncing as normal, and other CDS links working.

Management: This issue may occur due to small errors during the CDS Link configuration, such as accidentally entering leading or trailing spaces in the URL, Parameter, or Value fields.

- Re-build the CDS Link ensuring you are not adding any leading or trailing spaces or other characters
- One thing to try from the values in the user ID and patient ID fields, is to select the <userID> and <patientID> values from the dropdown rather than copying them from Ocean
- Should the above not work, it's recommended to reboot Accuro and attempt to build the CDS link again.

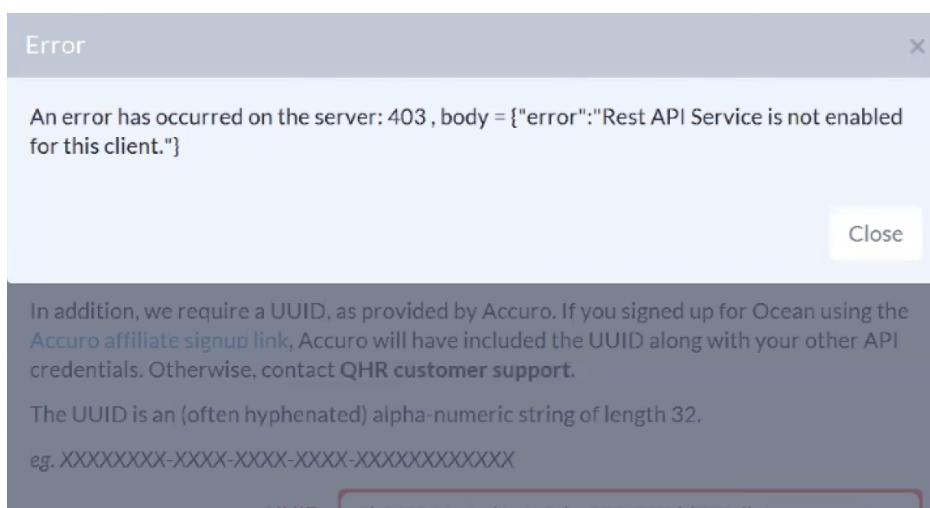
Screenshots:



Error message during Cloud Connect Setup: Rest API Service is not enabled for this client

Issue: When trying to submit the UUID credential [during Cloud Connect Setup for Accuro](#), user is presented with the following error message:

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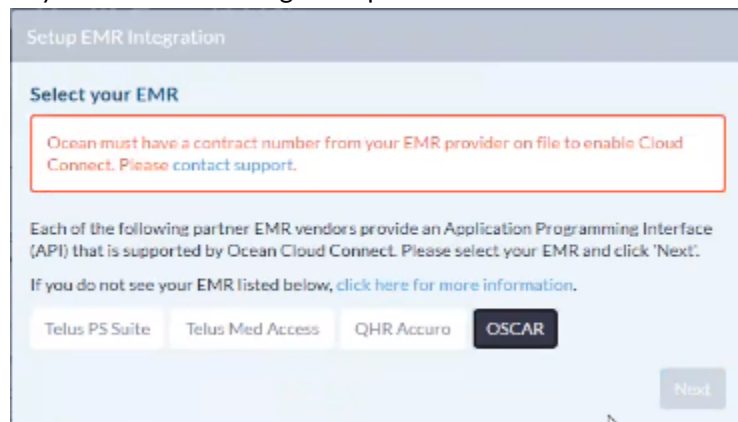


Management: This is typically an error in QHR's backend setup where a step was missed.

- Recommendation is to call QHR support and inform them that the Rest API Service is not enabled
- This may be a quick fix on the QHR end. In past screenshares the support person has navigated to a specific section in the client's Accuro, and clicked ON a checkbox in Accuro to enable the REST API

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 QHR during the [QHR Credentialing 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.