

<b>GHHN Primary Care OAB Vendor Questions - OCEAN</b>	
<b>1. Which EMRs does the OAB tool integrate with?</b>	
TELUS PS Suite	YES
CHR	Not at this time
OSCAR	YES - (OSCAR Pro (WELL) version only at this time)
Accuro	YES
<b>2. How does the OAB tool integrate with EMR schedule?</b>	
Changes made to schedule in EMR (e.g. reschedule or cancellation) automatically update OAB tool	Ocean is designed to use the EMR schedule as the single "point of truth" (there is no dedicated online booking schedule to update separate from the EMR schedule). Any changes made to the schedule are automatically reflected in the options available for the patient to book in real-time. Cancellations done through the online booking confirmation links are also automatically applied in the EMR schedule. Patient notifications of manual changes to the schedule can be done using Ocean Patient Messages (included with the online booking license).
Patient able to cancel and reschedule from OAB – changes updated in EMR	YES
Cancellations coded appropriately in EMR	Cancellations done through the online booking confirmation links are also automatically applied in the EMR schedule. The clinic has the ability to apply restrictions around how close to an appointment, someone can cancel / reschedule online.
Able to use without a health card if registered to the practice	Ocean is designed to use the health card as the primary identifier for online booking. However, a walk-in booking flow can be used for patients without a health card. In this case, admin staff match the patient appointment to their record in the EMR once the appointment has been booked.
Has waitlist & auto-notifications	Ocean uses appointment reminders to automatically notify patients (and incorporate visit-specific forms if desired)

	about upcoming appointments. Ocean does not support the concept of a "waitlist" for appointments in the online booking tool; however, many Ocean users leverage Ocean Website Forms to support waitlist management.
Team based booking (Patient only sees clinicians available to them)	YES - This can be done using customized booking links
Shared Medical Appointment (multiple schedules/clinicians)	Not at this time
Group booking (multiple patients)	Not at this time
<b>3. How are schedules and booking requests managed?</b>	
Does not require practices to manage the schedule in duplicate in the OAB tool or to manually confirm or accept a booking "request"	Correct - EMR schedule is read in live time and availability is automatically reflected in the online booking tool. Ocean also does not require an accept booking step.
Cancelation timelines definable by the clinic (e.g. canceled up to XX hours in advance is cancellation and after is no-show for purposes of capturing for billing)	YES
Trigger appropriate customizable notifications to patient for bookings and reminders (based on patient preference)	Appointment reminders available via email or email + text (can define which appointment types get email only vs. email + text) including custom messaging and appointment-specific forms.
Booking confirmation: customizable message and interval sent to patient based on type of appointment (e.g. pre-natal appointment may have different reminder message than a minor office procedure)	YES - Ocean allows clinics customize pre-visit reminders with specific timing, messaging and forms pertaining to the visit.
Reminders: customizable message and interval based on appointment type (e.g. one or multiple reminders X days in advance) -	YES - Both message itself and any included eForms can be customizable for different appointment types
Able to protect booking times designated by practice for same-day booking access, with those times becoming available at an interval specified by the practice (e.g. XX hours before a protected appointment time it becomes available for on-line booking)	YES - You can choose to do this for the schedule as whole OR you can set-up an alternate configuration for same day appointments using a separate booking link.
Able to match appointment reason with appropriate appointment length and provider as well as appropriate mode (e.g. in-person or virtual or patient preference based on clinician direction),	YES - Ocean leverages appointment <b>type</b> for this purpose.

customizable by each practice	
In a team-based practice, able to restrict booking only to providers associated with primary physician (e.g. NP, pharmacist, OT, resident, etc. on the team of the patient's MRP)	YES
Able to send relevant questionnaire(s) for completion in advance of appointment	YES - Ocean supports three options for this: forms can be incorporated into the online booking flow; forms can be sent automatically through an appointment reminder; and forms can also be sent "manually" (as needed) in a secure message.
Virtual appointment link included in appointment confirmation and EMR (patient and provider)	<p>Functionality here varies by the virtual visit solution being used - Ocean integrates with Telus PSS Virtual visits - we can book the medium as video and if the client is using Telus Virtual Visits the client will be sent the link as normal.</p> <p>We do not send the virtual appointment link for any other virtual tool.</p> <p>If a static link is used, Ocean can incorporate this into a reminder.</p>
Robust booking rules for appointment types (e.g. physician services agreement guidelines)	YES
Questionnaire(s) selection automated based on appointment type (e.g. certain questionnaire always sent for certain appointment type without manual intervention by clinic)	YES
Completed questionnaire(s) delivered directly into EMR	YES
Ability to manually resend a questionnaire if needed	YES
Ability to pull reports as needed	YES
Limit the number of appointments that can be booked within a timeline (for same provider type)	YES
For some appointment types, the appointment can be booked, but must be confirmed first by clinic	Appointments booked by Ocean are automatically booked in the EMR. To confirm that patients are booking appropriately, clinics have the ability to apply customized booking rules/restrictions and ask screening questions to direct patients to the

	appropriate appointment
Patient able to view past appointments (appointment type and provider)	YES - Although Ocean is not designed to provide a patient portal login that maintains historical data, patients can view past appointments at any time from their email alerts.
<b>4. Describe the OAB flow for a multi-site clinic</b>	
Multiple sites (EMRs) with multiple clinicians where patients may go to any site for care	Clinics get to define access rules for which clinician schedules patients have access to, as well as supporting rostered vs. non rostered booking. Within an individual booking link, you would only see a clinician's schedule for the EMR instance the booking link is tied to (i.e. cannot tie one booking link to multiple EMR instances). If an EMR instance is shared, it is possible to provide per location links.
One provider for multiple sites (EMRs)	Individual healthcare providers can have a single Ocean user account login and seamlessly move between EMR sites within the Ocean Portal. *Please note that a license is required for each EMR site and is not transferable.
<b>5. What platforms, operating systems and browsers are the OAB tool compatible with?</b>	
Operating systems	Ocean is a secure, browser-based solution that is compatible with all major desktop and mobile browsers (includes Windows, Mac, Android, OS Chrome, FireFox, Edge, Safari, Mobile Browsers).
Availability of a link that may be customized with a clinic friendly name	YES - Ocean booking links can be shortened with a URL shortener or turned into a QR code to be posted in the office with a QR creator.
Multi language capacity	YES - Ocean online booking is available in French and English. Any forms / messages associated with the booking process can also be translated by the clinic to additional languages.
<b>6. Describe the administration of patients and permissions in the system</b>	
Does not require an account	Correct – No account creation required
Robust administrative dashboard to enable the practice to manage permissions for OAB (e.g. if	YES - Highly customizable restrictions available, including at the individual patient

certain patients do not have permission to book on-line)	level.
<b>7. What kind of support is available to the clinic and patients?</b>	
Comprehensive help desk support (e.g. intuitive on-line self-help tools backed with real-time access to live support)	YES
Robust help desk support in-person or on-line as well as help options embedded in OAB tool	YES - Please note that all support is provided by email, phone, or video call (no in-clinic support).