

Clinician's Guide to Sending Bulk Ocean Secure Messages

This step-by-step guide will show you how to send bulk secure messages using Ocean.

STEP 1. Create the Patient File

Within your EMR, you will need to export a list of patients, including their basic demographic information in Excel or a CSV text file. Please see the article on the '[Upload Patients from File](#)' feature for more information on formatting this file.

STEP 2. Upload and Name the Patient File

In the Ocean Portal, under the 'Patients' tab, select '[Upload Patients from File](#)'. Search for the file that you created in Step 1. Select the appropriate file '[Importer](#)' from the dropdown menu (e.g., standard, PSS or Accuro). Give the file a name next to '[Assign Cohort ID](#)'. In this step, you should also add any eForms to be included in the email under '[Queue eForms for uploaded patients](#)'.

The screenshot displays the Ocean Portal interface. The top navigation bar includes 'Patients', 'eRequests', 'Studies', 'Tablets', 'eForms', and 'Admin'. The main content area shows a table of patients with columns for Name, Reference #, EMR ID, Emailed, Status, Pending Forms, and Backlog Forms. A patient named Anne Gables is listed with Reference # 599 and EMR ID N/A. A modal dialog box titled 'Upload Patients' is open, featuring a file selection field (currently showing 'Choose File | No file chosen'), an 'Importer' dropdown menu, an 'Assign Cohort ID' text input, and a section for 'Queue eForms for uploaded patients' with an 'Add eForm...' button. The 'Upload' button is highlighted in blue. On the left sidebar, under the 'Actions' section, the 'Upload Patients from File' option is highlighted with a red arrow.

STEP 3. Send a Batch of Emails

To send the batch email, select 'Email Cohort' in the bottom left hand corner of the 'Patients' tab. Select your group using the 'Select Cohort' dropdown menu and select the template that you wish to send from the menu in the top right hand corner of the dialogue box. Select 'Send Invitations' to send your emails.

*Please note that if you wish to edit the templates, you must do so by selecting a single patient to email within the 'Patients' tab.

The screenshot displays the Cean by CognisantMD interface. On the left, a sidebar contains 'Actions' with 'Email Cohort' highlighted by an orange arrow. The main area shows a list of patients with columns for Name, Status, Pending Forms, and Backlog Forms. A modal dialog titled 'Email Cohort' is open, featuring a 'Select Cohort' dropdown (June 7 2017 (72)), an 'Email Subject' field (Message from Cognisant MD at Demo Clinic), and an 'Email Body' field. A 'Templates' menu is circled in red in the top right corner of the dialog box. The dialog also includes an 'eForms Added' section (HQO Patient Experience Survey - 2015), a 'Link expiry' field (100 days), and 'Cancel' and 'Send Invitations' buttons.

Name	Status	Pending Forms	Backlog Forms
Marg Simpson		818	165
Daniel Dunlop		490	179
Testing Partner			
Field Updater Demographic			
Emily EmilyTest			
Yannick Campbell			
Christine Plant Partner			
Donald Duck			
Hall Burton			
Donald Drumpf			
Jane Doe			
Nirav Patel			
Princess Leah			
Hero Burger		818	165
Blanche DuBois		490	179
Gordon Gekko		366	189
Clark Kent		685	188
Lisa Simpson		830	146
Bill Murray		212	173
Ron McLean		280	157
Little Baby		649	141
Walter White		408	174
Banting Best		597	155