

Add a clinical delegate in Ocean

This guide walks you through two options to add a clinical delegate(s) who can send eReferrals on behalf of a physician.

Option 1: Admin assigns delegates for a physician

Admin can assign as many delegates as needed. These delegates will be able to send eReferrals on behalf of the physician or healthcare provider.

Step 1: Sign in and navigate to Admin settings

1. Sign in to your Ocean account.
2. Click the **Menu** icon in the top left corner next to the Ocean logo.



3. From the **Menu**, select **Admin > Site Settings > Users**.

Step 2: Add clinical delegates

1. From the **User** screen, find the physician you want to assign delegates for from the list and click **Edit Delegates**.

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aishak	Aisha Kh	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
akashbehl	Akash Behl	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
alanvong1	Alan Vong	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
avyas	Aarti Vyas	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
awynnden	Andy Wynden	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
azharnsupport	Naved Azhar	Specialist	<input type="checkbox"/>	Edit Delegates	✕
beeakin	Bee Akinboye	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
belindahardy	Belinda Hardy	Specialist	<input checked="" type="checkbox"/>	Edit Delegates	✕
brar365	Amitoz Brar	Family Physician	<input checked="" type="checkbox"/>	Edit Delegates	✕
chrisl	Chris Lee	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
daniyal	Daniyal Naumani	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
dlgisel9	Debra Gisel	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
duricm	Marija Duric	Specialist	<input checked="" type="checkbox"/>	Edit Delegates	✕
edwinl	Edwin Lee	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
emrtest	Test_Integrations EMR	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
farhanan	Nusrat Farhanan	Family Physician	<input type="checkbox"/>	Edit Delegates	✕
fdawkins	Fabian Dawkins	Family Physician	<input type="checkbox"/>	Edit Delegates	✕

2. Click **Add Clinical Delegate**.
3. Search or scroll to find the delegate user, then click their name. Changes save automatically.

Family Physician

Amitoz Brar's Delegates

Clinical Delegates
Clinical Delegates will have the ability to send eReferrals on behalf of the Ocean user

[+ Add Clinical Delegate](#)

Search

MOA Test
MOA / Secretary

No clinic

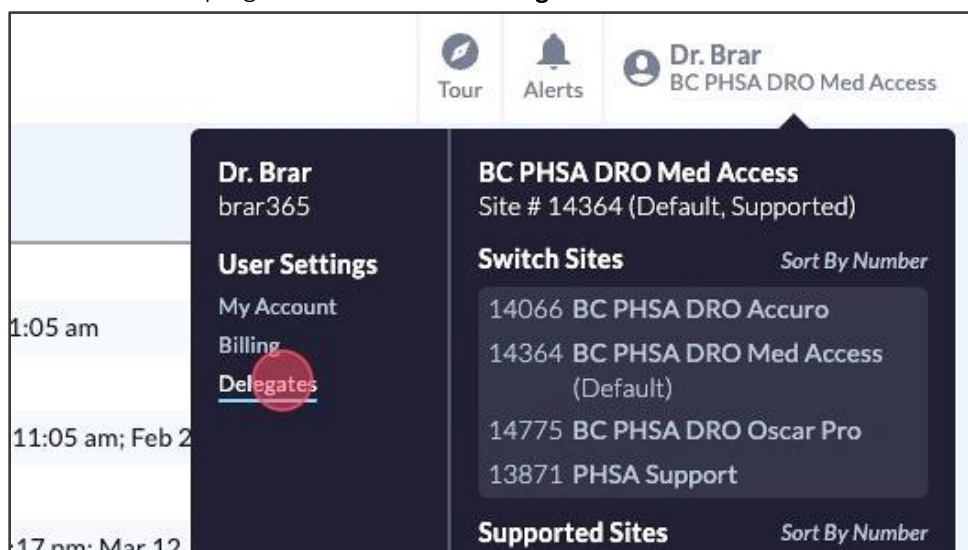
This user is a delegate for the following users:

Option 2: Physicians assign their own delegates

The physician can assign as many delegates as needed. These delegates will be able to send eReferrals on behalf of the physician or healthcare provider.

Step 1: Navigate to your delegate settings

1. Sign in to your Ocean account.
2. Click your name in the top right corner and click **Delegates**.



3. Add delegate(s)
4. Click **Add Clinical Delegate**.
5. Search or scroll to find the delegate user, then click their name. Changes save automatically.

