

Create canned responses in Ocean

This guide walks you through two ways for creating canned responses in Ocean—for booking comments and for messages.

Option 1

Step 1: Access canned responses through Admin

1. Sign in to your Ocean account.
2. Click the **Menu** icon in the top-left corner, then select **Admin**.

The screenshot shows the Ocean application interface. At the top, there's a header with the Ocean logo, a 'Menu' icon (a grid of four squares), and a '+ eReferrals & eConsults' button. To the right of the header are links for 'Settings', 'Tour', 'Alerts', and a user profile for 'Dr. Brar Brar Testing'. Below the header, a dark sidebar menu is open, showing various options. The 'Admin' option is highlighted with a red circle. Other options in the menu include 'Patients', 'eForms', 'Templates', 'Patient Engagement', 'Tablets & Kiosks', 'Patient Reminders', 'Website Forms', 'Research', 'Studies', 'Ocean Provider Network', 'eReferrals & eConsults', 'Healthmap', 'Quick Links', 'Cloud Connect', 'Resource Library', and 'Support'. On the left side of the main content area, there's a 'Filter' search bar and a list of categories with counts: 'General' (Needs Review: 0, For Me: 0, Recently Viewed), 'Received' (New: 1, Pending Booking: 3, Booked Unconfirmed: 3, Booked Confirmed: 0, Awaiting Reply: 0, Received (All): 3, Completed: 0, Forwarded (All): 0). The main content area displays a table with columns: 'Date Sent', 'Source', 'Site', 'Provider', 'Protocol', 'Priority', and 'Noted'. A single row is visible with the following data: 'r 5, 2025', 'Dr. Amitoz Brar', 'Brar Testing', 'Brar Amitoz', 'Routine'.

3. Under the **Additional Functionality** section, click **Canned Responses**.

Admin Settings

Site Settings

Site Account

View and configure basic information about your account such as site name, number, notification emails and timezone.

Encryption

Set up or view your site's shared encryption key.

Users

Invite and manage users at your site.

Licence Management

Add, remove, and manage licences for Online Booking, Patient Reminders and Patient Messages.

Billing

Setup your site's payer and view your site's credit balances and invoices.

Reports

Run reports on referral analytics, user activities, product usage and audit data.

Additional Functionality

Site Features

Enable or disable site features including Ocean Cloud Connect, eReferrals and more.

Website Form Links

Create or update Website Form Links and manage their licences.

Canned Responses

Create or update canned responses for messaging and booking comments in eReferrals.

Integrations

EMR Field Mapping

Map data gathered in Ocean Forms to EMR Fields.

Manage Credentials

Setup or modify Ocean Open API or Ocean OAuth Credentials.

Integrations

Step 2: Add canned responses for booking comments

1. In the **Canned Responses for Booking Comments** section, click **New Canned Response**.

Ocean Menu Admin Settings > Canned Response Tour Alerts Dr. Brar Brar Testing

Canned Response

Canned Responses allow you to save common message templates that you can use for booking or messaging in website forms or eReferrals. For more information on using canned responses, please refer to the Canned Responses Setup Guide.

Canned Responses for Booking Comments

[+ New Canned Response](#)

Canned Responses for Messages

No canned responses currently exist for this site.

[+ New Canned Response](#)

2. Enter a **title** and the **body** of your comment, then click **Save**.

Ocean Menu Admin Settings > Canned Response Tour Alerts Dr. Brar Brar Testing

Canned Response

Canned Responses allow you to save common message templates that you can use for booking or messaging in website forms or eReferrals. For more information on using canned responses, please refer to the Canned Responses Setup Guide.

Canned Responses for Booking Comments

Arrive Early [Delete](#) [Cancel](#) [Save](#)

Body

[+ New Canned Response](#)

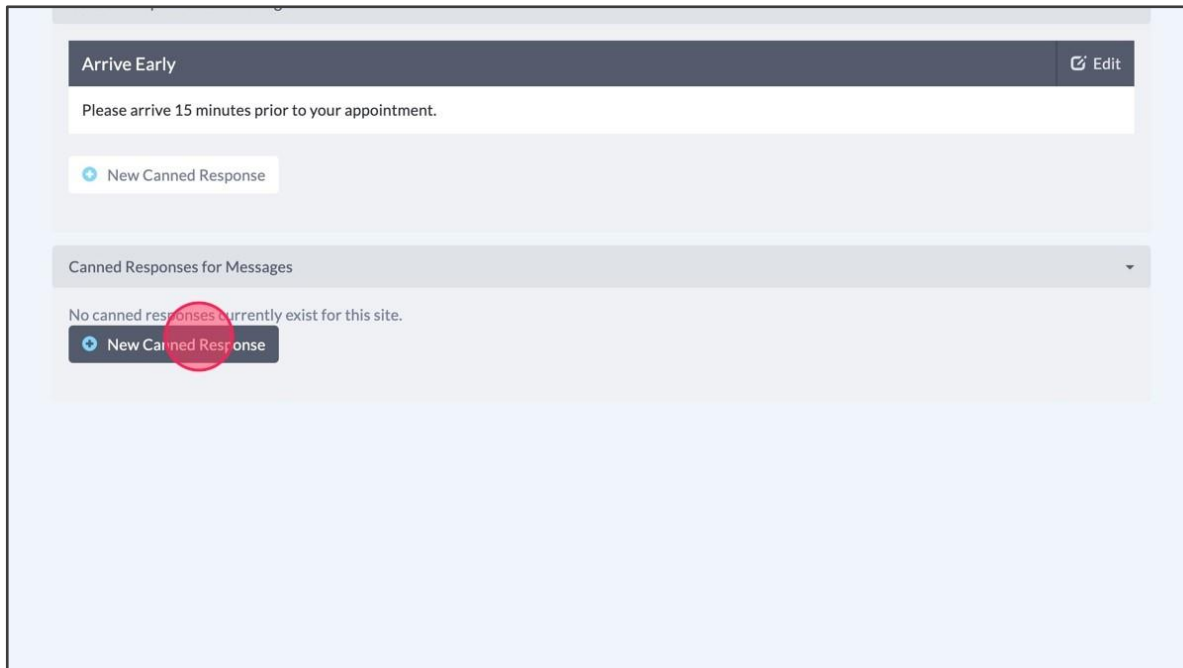
Canned Responses for Messages

No canned responses currently exist for this site.

[+ New Canned Response](#)

Step 3: Add canned responses for messages

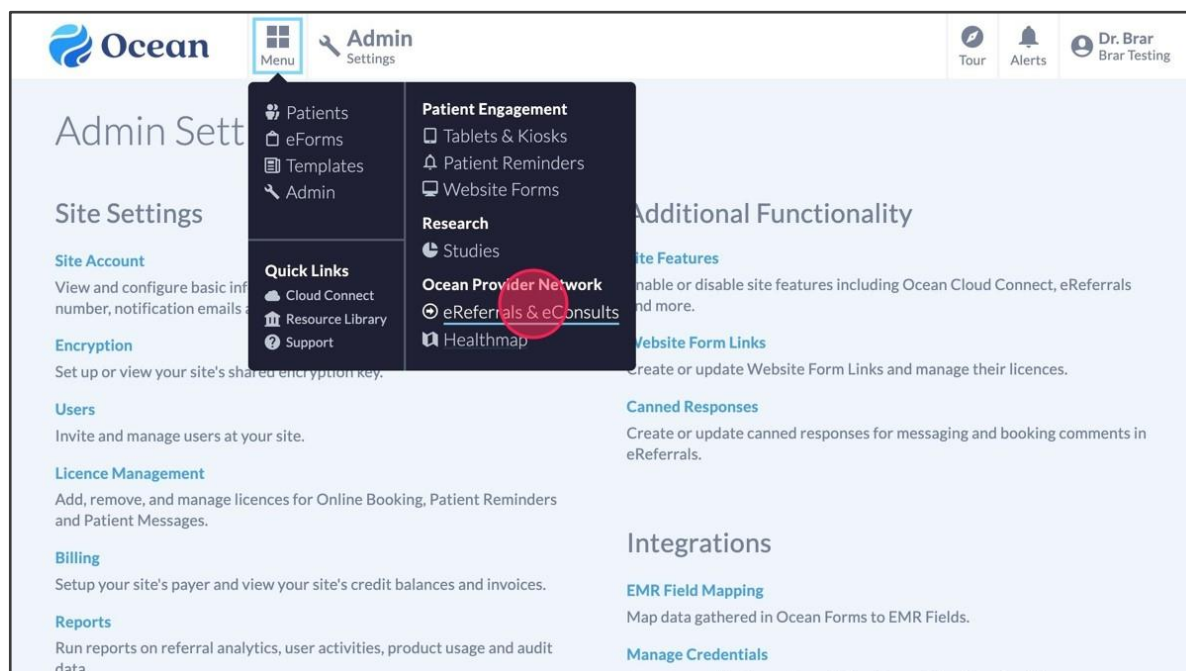
1. In the **Canned Responses for Message** section, click **New Canned Response**.
2. Enter a **title** and the **body** of your comment, then click **Save**.



Option 2

Step 1: Access canned responses through eReferrals and eConsults

1. Sign in to your Ocean account.
2. Click the **Menu** icon in the top-left corner, then select **eReferrals & eConsults**.



Step 2: Configure canned responses from settings

1. Click **Settings** in the top-right corner.

Provincial Digital Health and Information Services

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The screenshot shows the Ocean eReferrals & eConsults interface. The top navigation bar includes the Ocean logo, a Menu icon, and the title "eReferrals & eConsults". On the right, there are icons for Settings, Tour, Alerts, and a user profile for Dr. Brar Brar Testing. A left sidebar contains a search filter and a list of folders: General, Needs Review (0), For Me (0), Recently Viewed, Received (expanded), New (1), Pending Booking (3), Booked Unconfirmed (3), Booked Confirmed (0), Awaiting Reply (0), Received (All) (3), Completed (0), and Forwarded (All) (0). The main content area displays "Filters for Received folders" with dropdowns for "Brar Amitoz" and "Service (All)". Below the filters is a table of referrals:

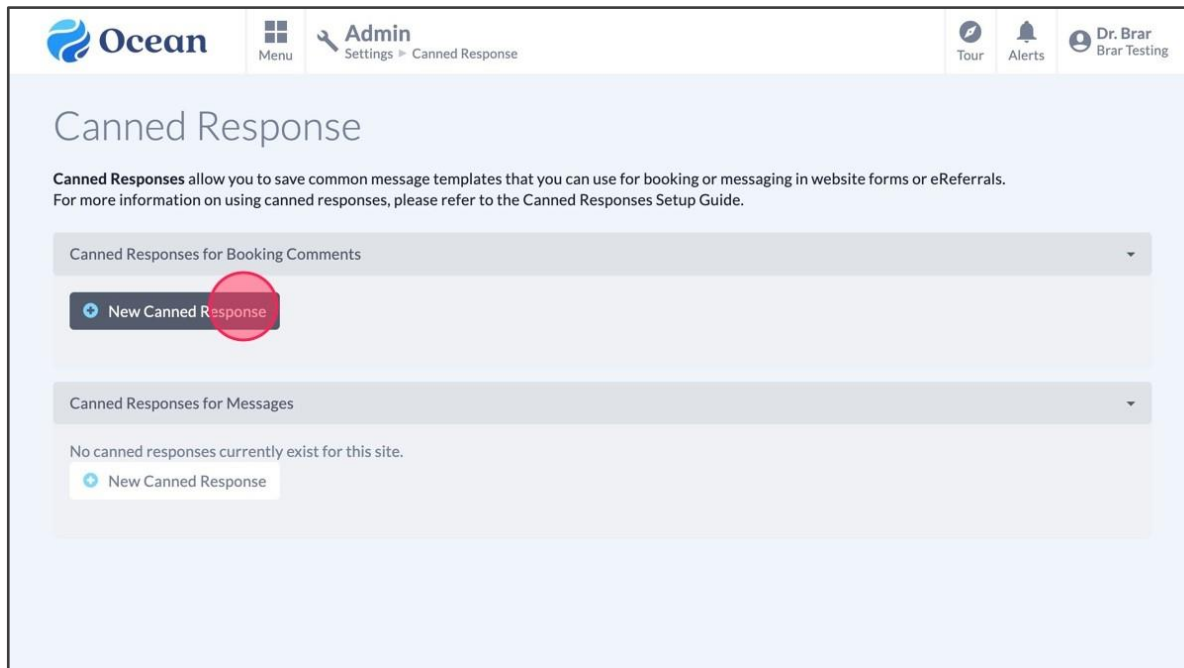
Patient	MRN	DOB	Description	Date Sent	Source	Site	Provider	Protocol	Priority	Noted
John Doe		97-09-09	MRI Head / Neck	Mar 5, 2025 12:43 pm	Dr. Amitoz Brar	Brar Testing	Brar Amitoz		Routine	

2. Click **Configure** next to **Canned Responses**.

The screenshot shows the configuration page for eReferrals. It includes a section titled "How is your site using Referrals?" with three radio button options: "Sending Referrals", "Receiving Referrals", and "Sending & Receiving Referrals" (selected). Below this is a "Configure Referrals" button. To the right, a message states: "Before you can start using referrals, please indicate how you are planning to use referrals and then complete the following steps:" followed by a checklist: "Set Shared Encryption Key" (checked), "Complete Referrals Configuration Page" (with a link to "Instructions"), and "Set Up a Directory Listing Accepting eReferrals" (checked). Further right, under "Update Organization", are links for "Run Reports" and "Setup Integrations". At the bottom, there are four configuration buttons: "Directory Listings" (with a "Configure" button), "Canned Responses" (with a "Configure" button), "Website Form Links" (with a "Configure" button), and "Website Form Links" (with a "Configure" button).

Step 3: Add canned responses for booking comments

1. In the **Canned Responses for Booking Comments** section, click **New Canned Response**.



2. Enter a **title** and the **body** of your comment, then click **Save**.

The screenshot shows the 'Ocean' Admin interface. The top navigation bar includes the 'Ocean' logo, a 'Menu' icon, an 'Admin' section with 'Settings' and 'Canned Response' links, and user information for 'Dr. Brar Brar Testing'. The main content area is titled 'Canned Response' and includes a descriptive paragraph: 'Canned Responses allow you to save common message templates that you can use for booking or messaging in website forms or eReferrals. For more information on using canned responses, please refer to the Canned Responses Setup Guide.' Below this, there are two sections: 'Canned Responses for Booking Comments' and 'Canned Responses for Messages'. The 'Booking Comments' section is active, showing a response titled 'Arrive Early' with a body text 'Please arrive 15 minutes prior to your appointment.' Action buttons for 'Delete', 'Cancel', and 'Save' are visible. A 'New Canned Response' button is also present. The 'Messages' section below it shows a message that 'No canned responses currently exist for this site.' with its own 'New Canned Response' button.

Step 4: Add canned responses for messages

3. In the **Canned Responses for Messages** section, click **New Canned Response**.

This screenshot shows a web interface for creating a canned response. At the top, there is a dark header bar with the text "Arrive Early" and an "Edit" button. Below this is a text area containing the message "Please arrive 15 minutes prior to your appointment." Underneath the text area is a button labeled "New Canned Response". Below this is a section titled "Canned Responses for Messages" with a dropdown arrow. Under this section, a message states "No canned responses currently exist for this site." Below this message is another button labeled "New Canned Response". A red circle highlights this button.

4. Enter a **title** and the **body** of your comment, then click **Save**.

This screenshot shows a web interface for creating a canned response. At the top, there is a dark header bar with the text "Arrive Early" and an "Edit" button. Below this is a text area containing the message "Please arrive 15 minutes prior to your appointment." Underneath the text area is a button labeled "New Canned Response". Below this is a section titled "Canned Responses for Messages" with a dropdown arrow. Under this section, there is a form with a "Title" field containing the text "Labs" and a "Body" field containing the text "Please review the attached labs.". To the right of the "Title" field are buttons for "Delete", "Cancel", and "Save". A red circle highlights the "Save" button. Below the form is a button labeled "New Canned Response".

Notes

1. Use clear, reusable language in your canned responses to reduce repetitive typing.
2. You can edit or delete responses later from the same section.