

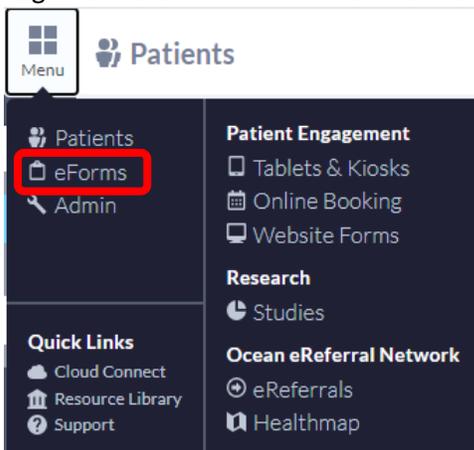
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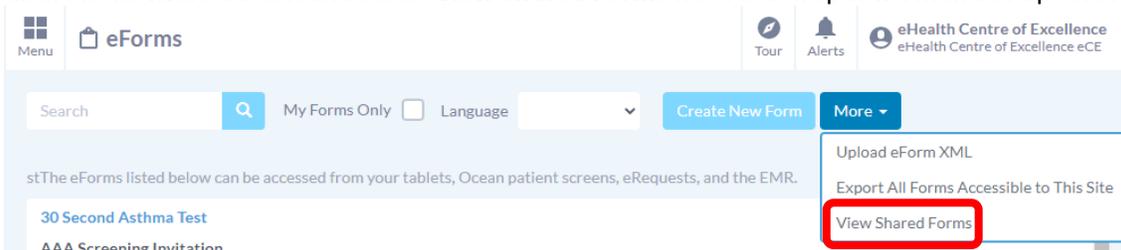
## 1 Search and Import eForms into an Ocean site

eForms listed in the Ocean directory can be searched and imported into your own Ocean Library.

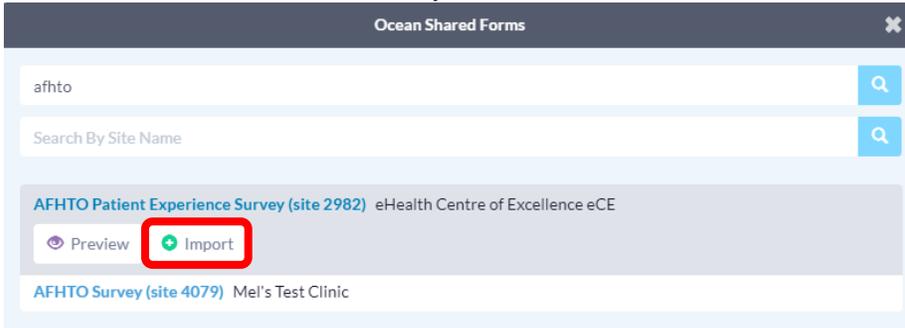
1. Log into the Ocean Portal. Click the **Menu** button in the top left corner and select **eForms**.



2. Click on the **More** button and select **View Shared Forms** from the dropdown menu of options.



3. Search for your desired eForm (e.g. *Primary Care Patient/Client Experience Survey*). Once you find the eForm, click it, and select the **Import** button.



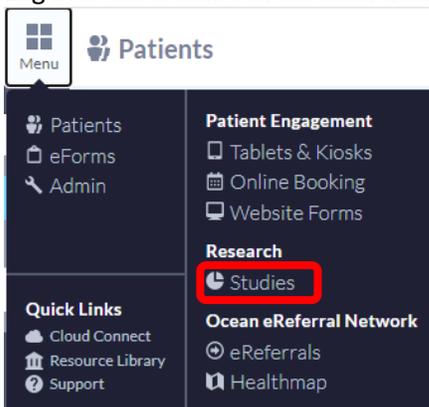
4. The imported eForm should now appear in your site's main library.

Once the form has been imported into your site, you have the option to **edit** the form, sever this form from the parent form (i.e. the original form created by the source site), or you can leave it linked. Leaving your form linked allows you to **Sync Form** to update your site's form with any changes made by the source site.

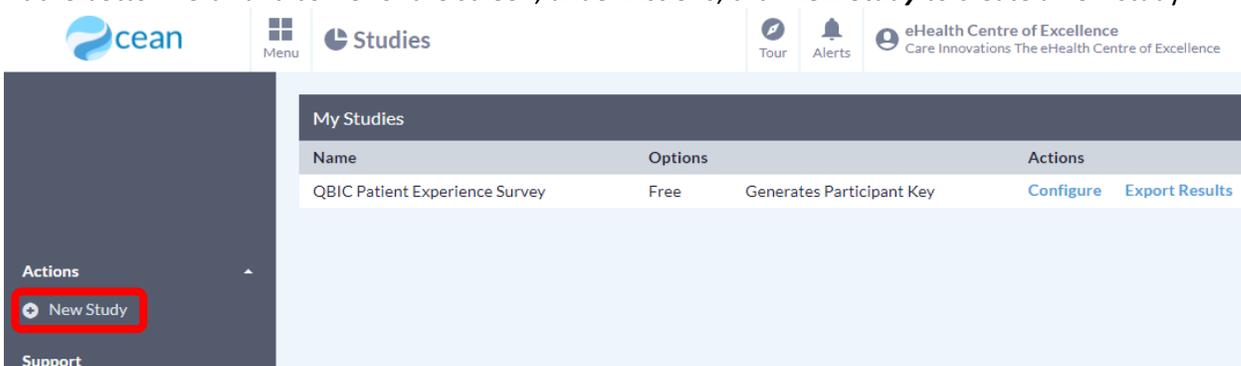
## 2 Create and Configure Your Ocean Study Settings

### 2.2 Create Your Ocean Study

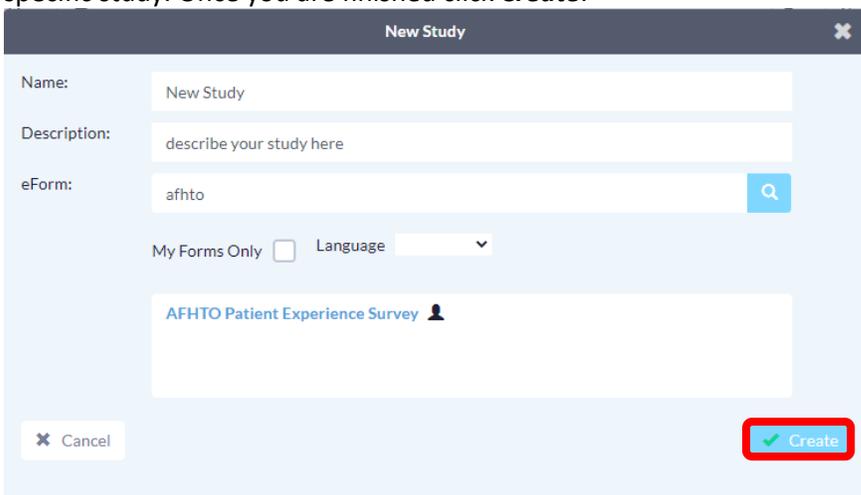
1. Log into the Ocean Portal. Click the **Menu** button in the top left corner and select **Studies**.



2. At the bottom left-hand corner of the screen, under **Actions**, click **New Study** to create a new study.



3. Name your study, add a description (optional), and search the eForm you want to associate with this specific study. Once you are finished click **Create**.



The screenshot shows the 'New Study' form. It includes fields for 'Name', 'Description', and 'eForm'. The 'eForm' field contains 'afhto' and a search icon. Below the search field, there is a checkbox for 'My Forms Only' and a 'Language' dropdown menu. A search result for 'AFHTO Patient Experience Survey' is displayed. At the bottom, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted in red.

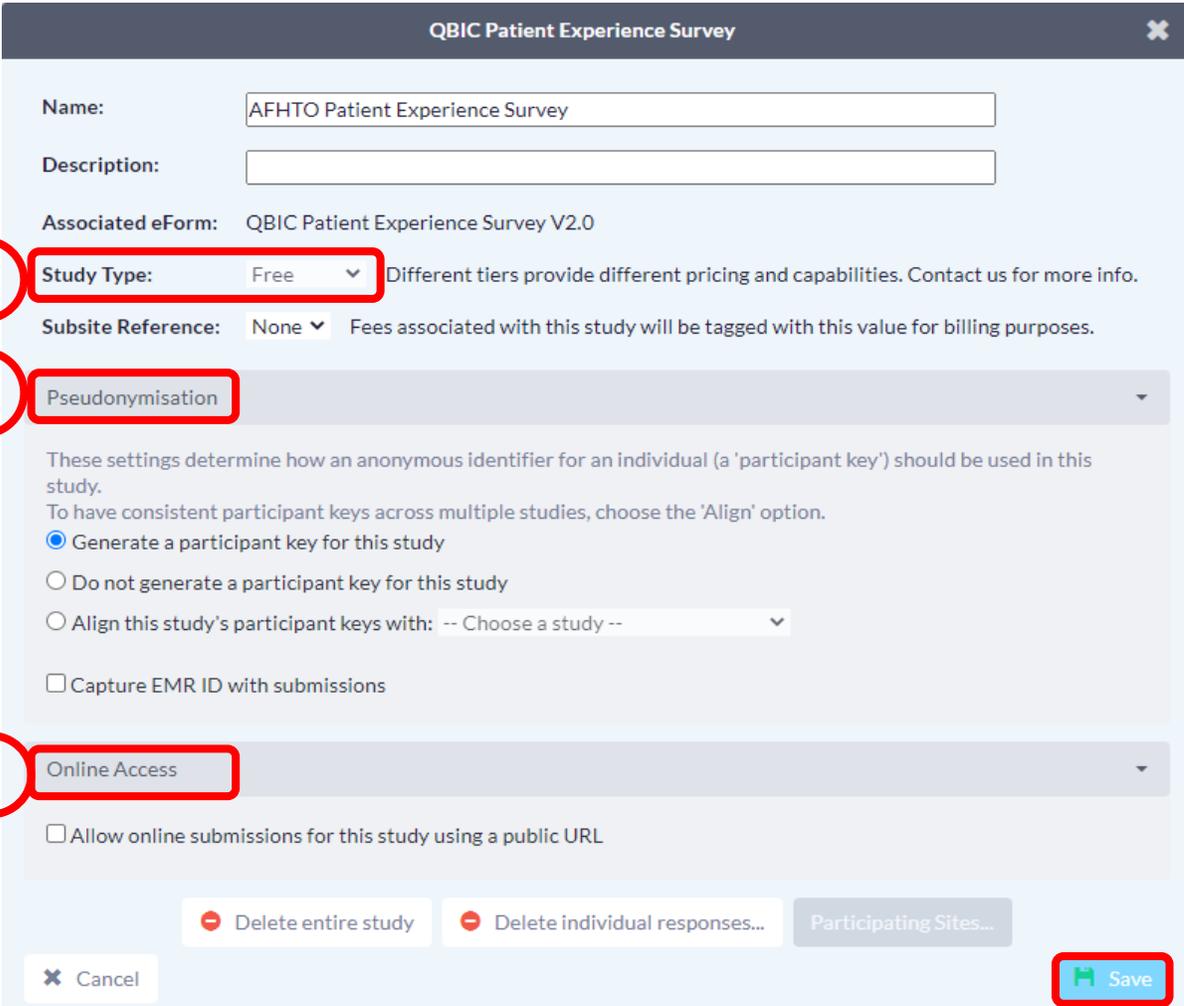
## 2.3 Configure Your Study Settings

After your study has been created, you can configure the following settings to suit your needs. Be sure to **save** your changes once you've finished.

A – **Study Type:** Patient Experience Studies will be marked as *Standard* by default. Your study will need to be manually marked as Free by CognisantMD. Once your study has been created, contact CognisantMD by submitting a support ticket at [ocean.tips/support](https://ocean.tips/support) and requesting that the survey type be marked **Free**.

B – **Pseudonymization:** Select **Generate a participant key of this study**

C – **Online Access:** You have the option to make your study available for patients to access and fill out via a link that can be made available on your website. More about this can be found [HERE](#).



**QBIC Patient Experience Survey**

Name: AFHTO Patient Experience Survey

Description:

Associated eForm: QBIC Patient Experience Survey V2.0

**A** Study Type: Free Different tiers provide different pricing and capabilities. Contact us for more info.

Subsite Reference: None Fees associated with this study will be tagged with this value for billing purposes.

**B** Pseudonymisation

These settings determine how an anonymous identifier for an individual (a 'participant key') should be used in this study.  
To have consistent participant keys across multiple studies, choose the 'Align' option.

Generate a participant key for this study

Do not generate a participant key for this study

Align this study's participant keys with: -- Choose a study --

Capture EMR ID with submissions

**C** Online Access

Allow online submissions for this study using a public URL

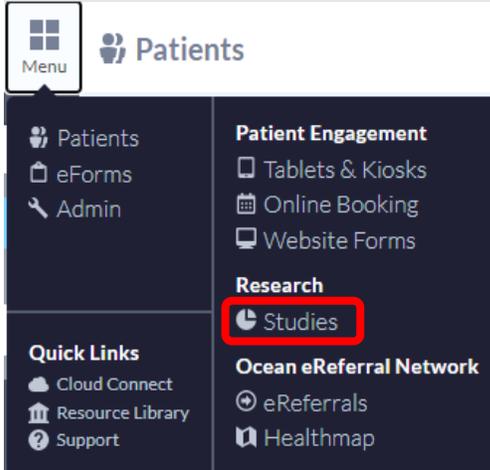
[-] Delete entire study [-] Delete individual responses... Participating Sites...

✕ Cancel **Save**

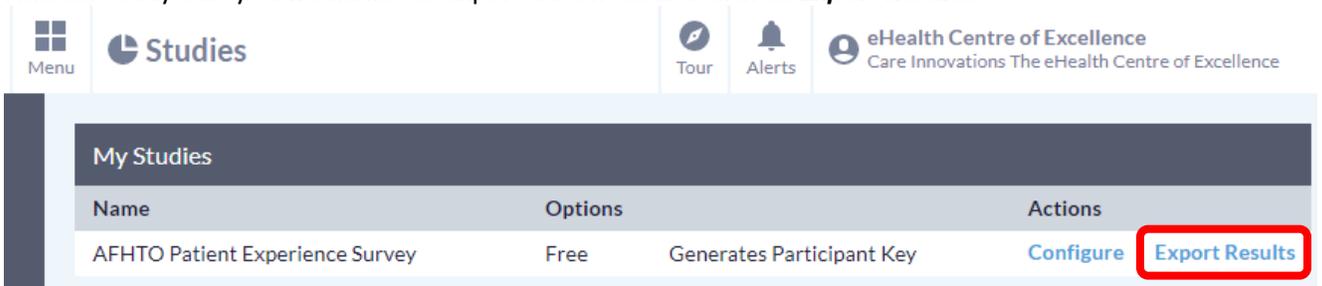
## 3 Exporting Data from Ocean Studies

You can export Ocean Studies data for viewing at any time and as many times as you like.

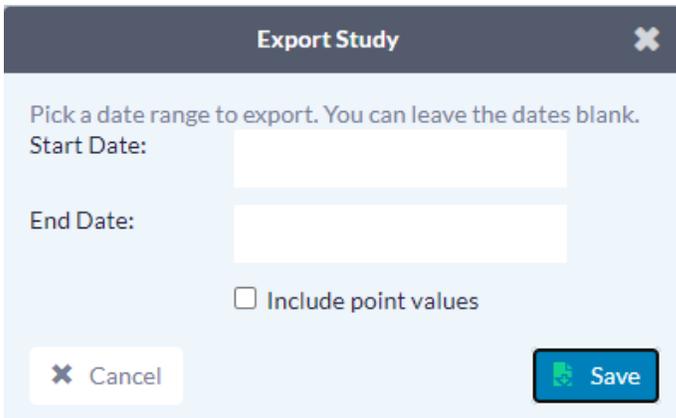
1. Log into the Ocean Portal. Click the **Menu** button in the top left corner and select **Studies**.



2. Find the study that you would like to export data from and click on **Export Results**.



3. You can export results by:
  - 1) Picking a date range to view study data within a **specific time period**
  - 2) Leave the end date blank to view study data from a **specific date onwards**
  - 3) Leave both dates blank to view **all study data ever collected**



**Export Study** [X]

Pick a date range to export. You can leave the dates blank.

Start Date:

End Date:

Include point values

[X] Cancel [Save]

4. The data will be downloaded as a CSV file.