Ocean eReferral tip sheet
Adding canned responses -
Sender & receiver administrative team members

Canned responses in OceanMD

Canned responses are pre-written messages you can insert into appointment notifications or messages. They save time, reduce errors, and keep communication consistent.

Benefits
- Efficiency – handle repetitive tasks faster
- Accuracy – reduce errors and miscommunication

Create a canned response – *Only for users with administrative privileges*
1. Go to **Menu > Admin Settings**

2. Under **Additional Functionality,** select **Canned Responses**
- Choose the type:
  - **Booking Comments** – sent to patient and referring provider
  - **Messages** – sent to Central Intake, the referring provider, or the DI site where the eReferral is located
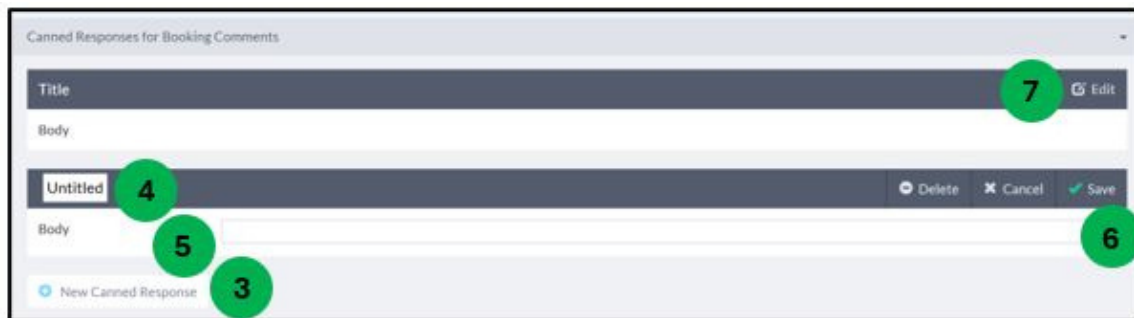
3. Click **New Canned Response**

4. Enter a **Title** – this is the label that will appear when you click the **conversation bubble icon** to insert a response

5. Add the **Message Body** (e.g., instructions, prep details, general info)

6. Click **Save**

7. To edit a canned response, click Edit on the right side of the saved response.

Using a canned response

Saved canned responses can be found when booking an appointment or sending a message.

- In **Scheduling** or **Message** tabs, click the conversation bubble icon
- Select and insert a saved response

Scheduling

Appointment: [pending] [time...]   Medium: [In-Person at 1796 Summer St ▾]   ○ Anticipated Wait Time to Appointment: [▾] ☐ Confirmed   + ▣

Comments for Referrer and Patient:

H2O Pelvic Prep
NPO 4hrs
Directions - Valley Regional Hospital

● Add Attachments...

Messaging   ▲

To: [▾]   → 💬

[   ]