Creating and Updating Client Profiles

Information for healthcare professionals

Purpose:	To provide instructions on how to create a new client profiles including the required fields, and how to update an existing profile.

Creating a Client Profile

Prior to creating a client profile in BC Virtual Visit, always ensure you have documented the client's consent to provide their email and phone for the use of BC Virtual Visit in the client's chart. At this time, consent can be capture in one of two ways:

Option 1: For users with access to Cerner PMOffice, consent to use email should be captured at the point of registration or scheduling when an encounter is created or updated in Cerner, in the PM Office under the Address tab.

Option 2: For users **with no** access to Cerner PMOffice, verbal consent can be captured as part of the client's record as per standard charting process.

Step 1: Use **Patient Search** to search the client's profile and ensure it does not already exist in the system. If a client has a Cerner profile and their email address has been entered with the Consent = 'Yes', they will also have a profile in BC VV with matching demographic information. Always complete positive patient identification (PPID) using at least three identifiers, such as name, DOB or PHN to confirm a client profile.

A reminder that email and phone information from Cerner does not flow through to BC Virtual Visit at this time. Programs will still need to collect, verify and add the patient's preferred email and mobile phone number (required for SMS notifications) when scheduling the appointment in BCVV.

NOTE: BC Virtual Visit will only send notifications to *FIRST* phone number and email address listed in the profile.

How to ensure that email and SMS notifications are sent to the correct contact:

- We know a patient's email address can change at any time. It is important to confirm the patient's email address and phone number is still correct each time a BC Virtual Visit Appointment is scheduled.

  Double check that the patient's preferred email and phone number are the *first ones* listed in the profile as shown

What to do if a profile doesn't exist in BCVV?

If a client profile does not currently exist in BCVV, there are two approaches to creating new client profile dependant on your method of registering and scheduling client visits.

1. Cerner Users with Access to PMOffice

If a profile does not exist in BC Virtual Visit, and you use Cerner for your registration and/or scheduling activities, it may be that the client's consent for receiving email for a virtual visit appointment has not been captured in Cerner PMOffice. This is the preferred method to generate a new client profile in BC Virtual Visit to ensure that client demographic data is validated against Cerner and is updated as information changes.

Step 1. Check Cerner PM Office to see that client consent has been recorded as 'Yes' for Island Health to use their email to contact them about Virtual Care

Step 2. If consent has been received, but is not recorded in PM Office, edit the Cerner record to select 'Yes' for Island Health to use their email to contact them about Virtual Care

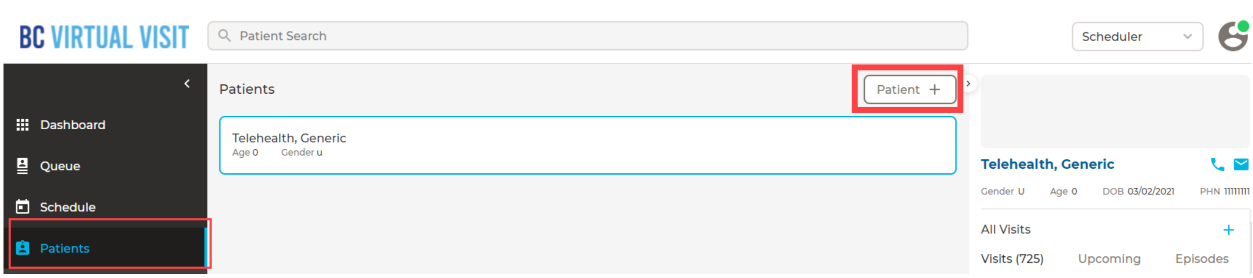
Step 3. Once consent is obtained and recorded as 'Yes' in PM Office, a BC Virtual Visit patient profile will be automatically created in BC Virtual Visit.

*If you run in to any difficulties with client profiles being automatically created in BC Virtual Visit, please contact telehealth@islandhealth.ca

2. Non-Cerner Users of Those Without Access of PMOffice

If a profile does not exist in BC Virtual Visit and your program does not use Cerner for registration and/or scheduling activities, a client profile can be manually created in BC Virtual visit.

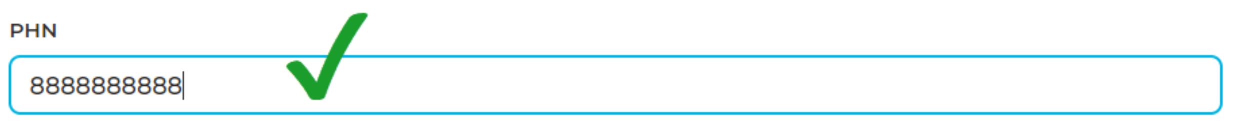
Step 1: To create a new client profile, click on **Patients** from the left navigation pane, then click on the **Patient +** button to open up the profile creation page as shown in the second image below.



Step 2: Populate the required fields below:

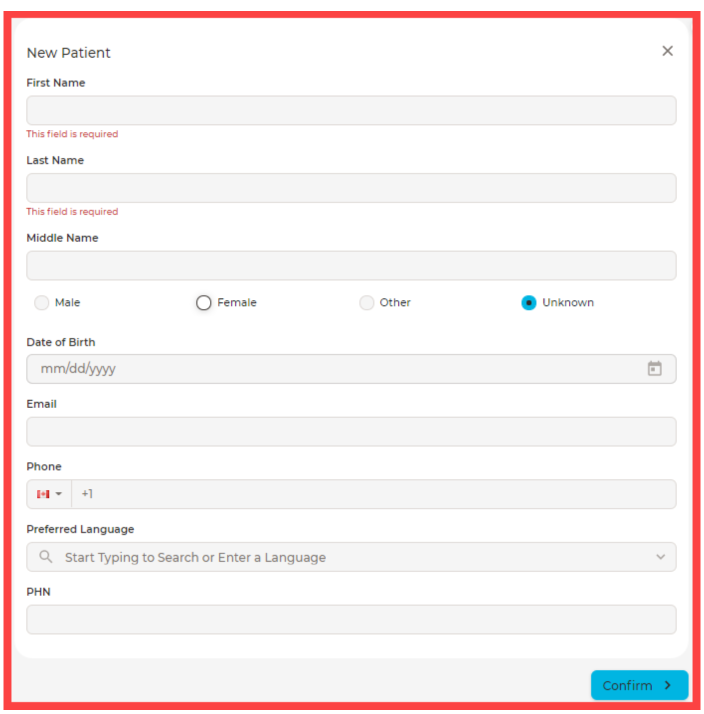
- Legal First Name and Last Name
- Gender
- Date of Birth
- Email
- BC Personal Health Number (PHN)
    - If the patient you are enrolling **does not** have a BC PHN, for example, if the patient is from out of province or military, this field can be left blank during the profile creation.
- Phone (Optional for clients wishing to receive invitations via text message)

When entering the PHN, enter the 10-digit number only. **Do not** include letters, numbers, spaces, dots or dashes. See the image below as an example:



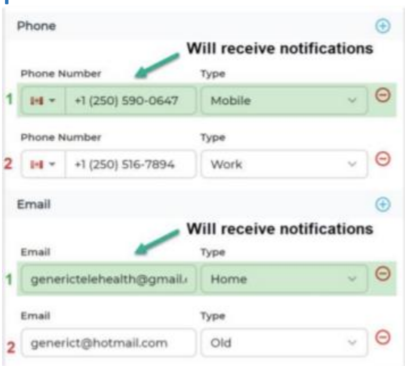
NOTE: If required, you can add a client's Cerner Medical Record Number (MRN) after you have created the profile. To do so, follow the steps directly below in "Updating a client profile".

* Cerner MRN is not a mandatory field in BC Virtual Visit



Step 3: Confirm the client details have been entered correctly and double check the email and phone number to ensure no errors have occurred. Click **Confirm** when complete.

NOTE: BC Virtual Visit will only send notifications to ***FIRST* phone number and email address listed in the profile.**



How to ensure that email and SMS notifications are sent to the correct contact method:

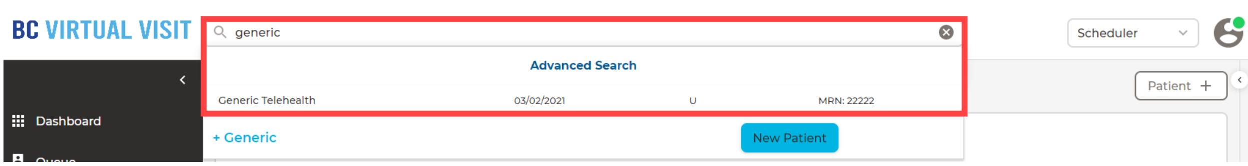
- We know a patient's email address can change at any time. It is important to confirm the patient's email address and phone number is still correct each time a BC Virtual Visit Appointment is scheduled.
- Double check that the patient's preferred email and phone number are the *first ones* listed in the profile

Updating a Client Profile

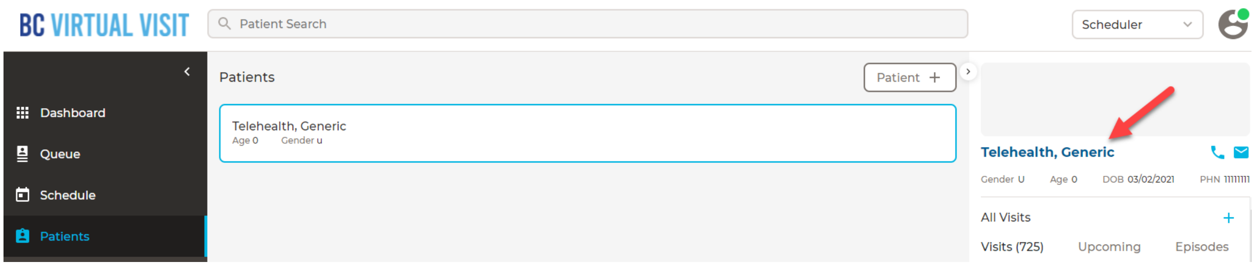
You may need to update a client's profile for any of the following reasons:

- Updating an email or phone number
- Fixing a mistake in their name, gender, date of birth or PHN if you manually created the patient profile
- Adding an MRN

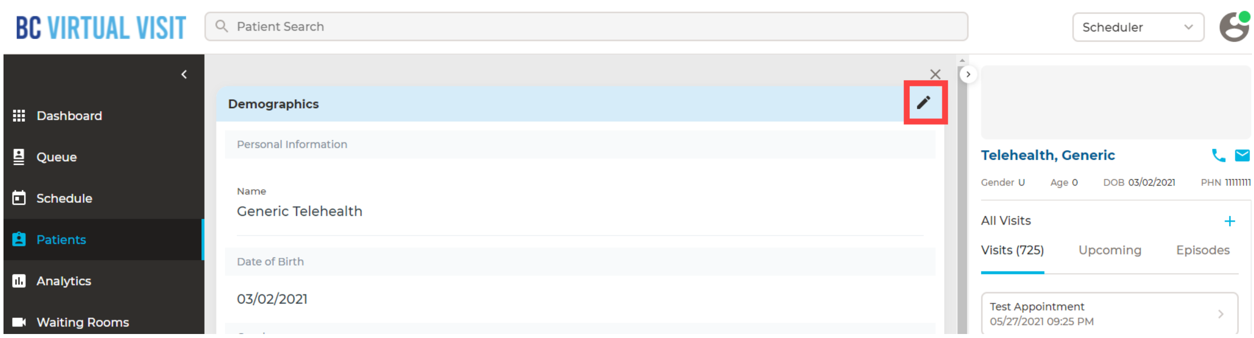
Step 1: Use **Patient Search** at the top of your screen to search the client profile you wish to update. Always complete positive patient identification using at least three identifiers, such as name, DOB or PHN to confirm a client profile.



Step 2: After selecting the client form the dropdown list above, open the client profile by clicking on the client's name on the right navigation pane.



Step 3: You will now see a demographics page. Click on  to edit the fields.



Please note that with the exception of email and phone numbers, all profiles that have indicated **Yes** to consent to use email in Cerner PM office will be validated and corrected against the Cerner information. This means that if a patient legally changes their name or updates their address Cerner is the most relevant place for these changes to occur as per normal processes. These changes will automatically flow through to BC Virtual Visit.