

**Purpose:**

To provide instructions on creating and updating patient profiles in BC Virtual Visit for Cerner and non-Cerner users. This guide includes:

- [Before Creating a Patient Profile](#)
- [Creating a Patient Profile](#)
- [Updating a Patient Profile](#)

## Before Creating a Patient Profile

Prior to creating a patient profile in BC Virtual Visit (BCVV):

**Step 1.** Always ensure you have documented the patient’s consent to provide their email and phone for the use of BC Virtual Visit in the patient’s chart. At this time, consent can be captured in one of two ways:

- **Option A:** 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 PMOffice under the Addresses tab (Ambulatory, General) or Patient Information tab (Primary Care).
- **Option B:** For users without access to Cerner PMOffice, verbal consent can be captured as part of the patient’s record as per standard charting process.

### Email Addresses and Phone Numbers

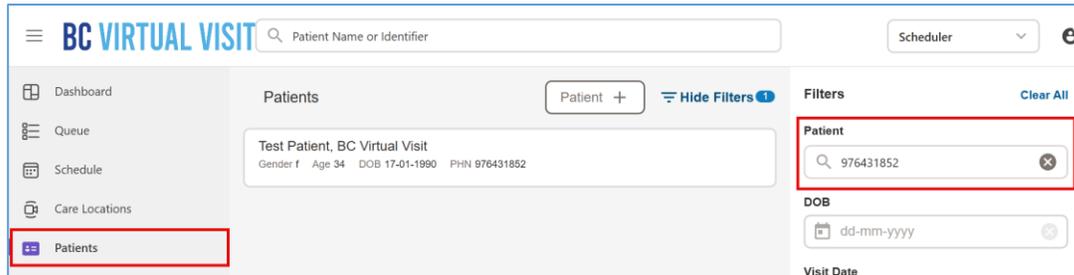
Email and phone information from Cerner flow through to BC Virtual Visit; however, Primary Email and Phone in the BCVV patient profile will remain the source of truth. If email address(es) and phone number(s) from Cerner do not already exist in the patient profile in BCVV, they will be stored in the Secondary fields below the Primary values.

Phone	
<b>Primary Phone</b> <small>This information is needed for authorization and sending notifications to the patient</small> +12505555555	Will receive appointment notifications
Phone <small>secondary field</small> +12507777777	Will NOT receive appointment notifications
Email	
<b>Primary Email</b> <small>This information is needed for authorization and sending notifications to the patient</small> generictelehealth@gmail.com	Will receive appointment notifications
Email <small>secondary field</small> generic.telehealth@hotmail.com	Will NOT receive appointment notifications

Please ensure that the patient’s preferred email and mobile phone number (required for notifications) are the values listed in the Primary value fields. If not, please edit these fields to reflect the desired values (see [Updating a Patient Profile](#) section).

**Step 2.** Ensure that the patient’s profile does not already exist in BCVV to avoid duplicate profile creation:

- Navigate to the **Patients** tab from the left navigation pane, and use the **Advanced Search (Filters)** pane on the right to search for the patient’s profile. If possible, search by a unique identifier such as the PHN or MRN to narrow down your search results.



- If a patient has a Cerner profile and has consented to receiving electronic communication in PM Office, they will have a profile in BCVV with matching demographic information.
- Once you have located the patient’s record, always complete positive patient identification (PPID) using at least two identifiers, such as legal name, DOB or PHN to confirm a patient profile before selecting it.

## Creating a Patient Profile

If a patient profile does not currently exist in BCVV, there are two approaches to creating a new patient profile depending on your method of registering and scheduling patient 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 patient’s consent for receiving email for a visit has not been captured in Cerner PMOffice. This is the preferred method to generate a new patient profile in BC Virtual Visit to ensure that patient demographic data is validated against Cerner and is updated as information changes.

**Step 1.** Check Cerner PMOffice to see if patient 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 PMOffice, edit the Cerner record to select ‘Yes’ for Island Health to use their email to contact them about Virtual Care.

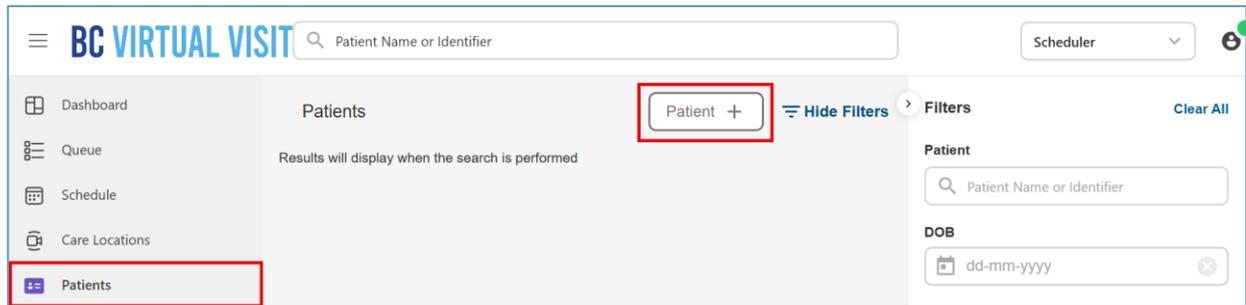
**Step 3.** Once consent is obtained and recorded as ‘Yes’ in PMOffice, a patient profile will be automatically created in BC Virtual Visit.

\*If you run into any difficulties with patient profiles being automatically created in BC Virtual Visit, please contact [virtualcare@islandhealth.ca](mailto:virtualcare@islandhealth.ca).

## 2. Non-Cerner Users or Those Without Access to 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 patient profile can be manually created in BC Virtual Visit.

**Step 1:** To create a new patient profile, click on the **Patients** tab from the left navigation pane, then click on the **Patient +** button to open up the profile creation page.



**NOTE:** If the program is using a non-Cerner EMR, create the profile in BCVV based on the patient's information in the program's EMR.

**Step 2:** Populate the required fields:

- Legal First Name and Last Name
- Gender
- Date of Birth
- Email
- Phone (for patients wishing to receive invitations via text message)
- 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.

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:

PHN

8888888888|

**NOTE:** If required, you can add a patient's \*Cerner Medical Record Number (MRN), or the patient's Preferred Name, after you have created the profile. To do so, follow the steps directly below in the [Updating a Patient Profile](#) section.

\*Cerner MRN is not a mandatory field for patient creation in BC Virtual Visit.

**New Patient**

First Name

Last Name

Middle Name

Male
  Female
  Other
  Unknown

Date of Birth

Address Line 1

Address Line 2

Country

State  City

Zip Code

Email

Phone

PHN

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

**NOTE:** BC Virtual Visit will only send appointment notifications to the Primary Phone and Primary Email as listed on the patient’s profile.

When the profile is created manually, the Phone and Email values that you entered will automatically store as the Primary values:

<p><b>Primary Phone</b></p> <p><small>This information is needed for authorization and sending notifications to the patient</small></p> <p> <input type="text" value="+1 (250) 555-6666"/> <input type="text" value="Mobile"/> </p>	<p><b>Primary Email</b></p> <p><small>This information is needed for authorization and sending notifications to the patient</small></p> <p> <input type="text" value="testpatient@gmail.com"/> <input type="text" value="Home"/> </p>
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How to ensure that email and SMS notifications are sent to the correct contact information:

- It is important to confirm the patient’s email address and phone number are still correct each time a BC Virtual Visit appointment is scheduled.
- Ensure that the patient’s preferred email and phone are listed in the Primary values in the profile.
- **If the contact information for the patient in BCVV is different from the information stored in a program's record system** (e.g. a non-Cerner EMR), the program should

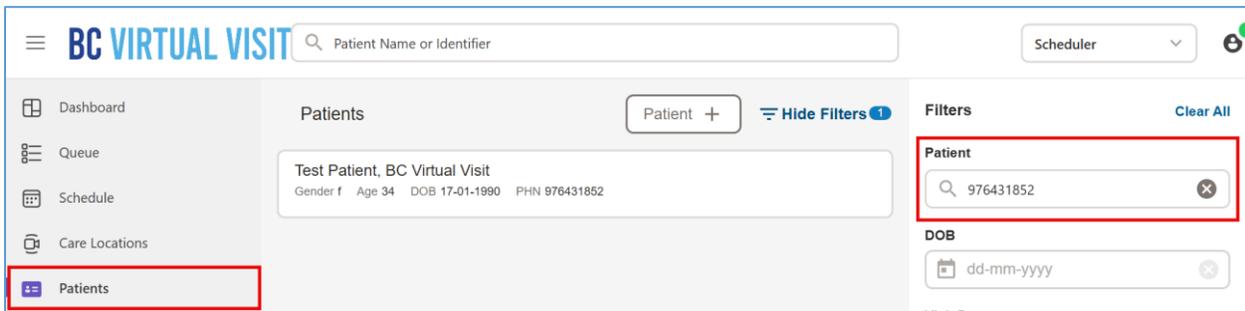
confirm the contact information with the patient, and save the correct contact in the Primary fields in BCVV, leaving the existing contact information in the Secondary fields (see the [Updating a Patient Profile](#) section on how to change the Primary fields). This will ensure patients are able to receive their BCVV notifications.

## Updating a Patient Profile

You may need to update a patient’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 in BCVV
  - If you use Cerner for registration and scheduling, please update the patient demographic information in Cerner directly as this information will override the values in BCVV
- Adding an MRN
- Adding a Preferred Name
  - A preferred name can be manually added to a patient’s profile and will display in the call for all participants, as well as show in the provider interface on the patient demographics page and visit details panel. This field cannot be populated from Cerner and must be manually added to the patient’s profile from BCVV.

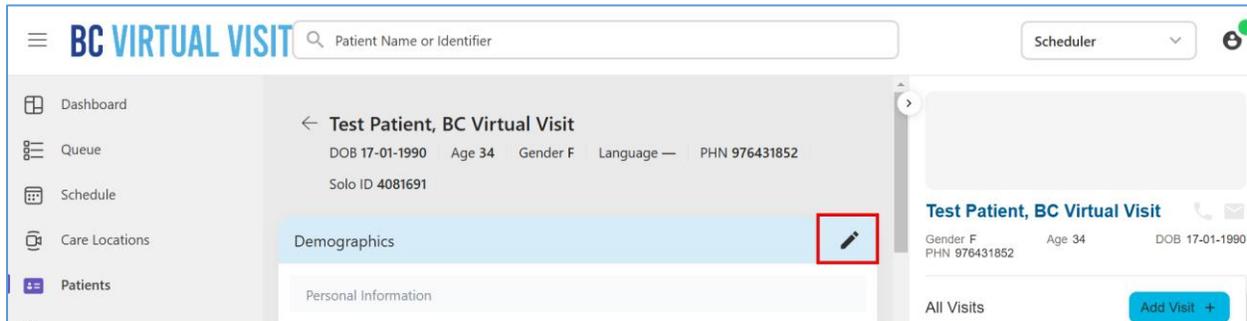
**Step 1:** Navigate to the **Patients** tab from the left navigation pane and use the **Advanced Search (Filters)** pane on the right to search for the patient profile you wish to update. If possible, search by a unique identifier such as the PHN or MRN to narrow down your search results. Always complete positive patient identification using at least two identifiers (e.g. name, DOB or PHN) to confirm you have selected the correct patient profile.



**Step 2:** After selecting the patient from the list, open the patient profile by clicking on the patient’s name on the right pane.



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



**NOTE:** You may be required to update the Primary Phone and Primary Email values in BCVV to ensure your patient receives visit notifications. Values received from Cerner will **not** override the Primary values in BCVV. There can only be one Primary Phone Number and one Primary Email per patient profile.

To set a new Primary Phone or Email, follow the instructions above to start editing the Demographics page and scroll down to the contact information section. Use the button to add the new phone number or email address to the profile, and then click on **Set as Primary**.

The form contains the following fields:

- Primary Phone:** +1 (250) 555-5555, Type: Home
- Phone Number:** +1 (250) 777-7777, Type: Mobile
- Primary Email:** generictelehealth@gmail.com, Type: Home
- Email:** generic.telehealth@hotmail.com, Type: Work

All other edits should be made in Cerner for programs who schedule and register using Cerner. The information in BCVV will be validated and corrected against the information in Cerner automatically. This ensures BCVV is updated when changes occur such as when a patient legally changes their name or updates their address.