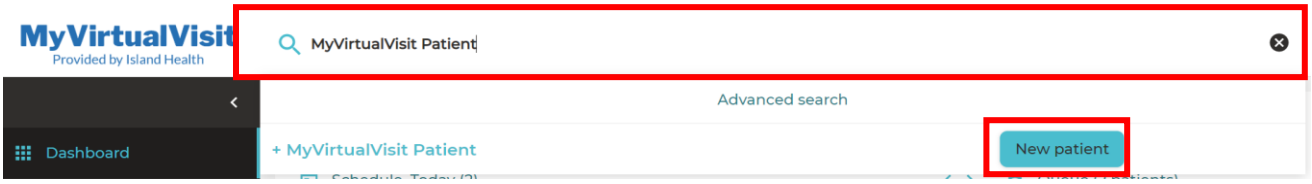
Creating, Updating and De-Activating Patient Profiles

NOTE: Once patient profile is created and saved, the PHN cannot be updated. Information on what to do if the incorrect PHN has been entered is outlined below in this document.

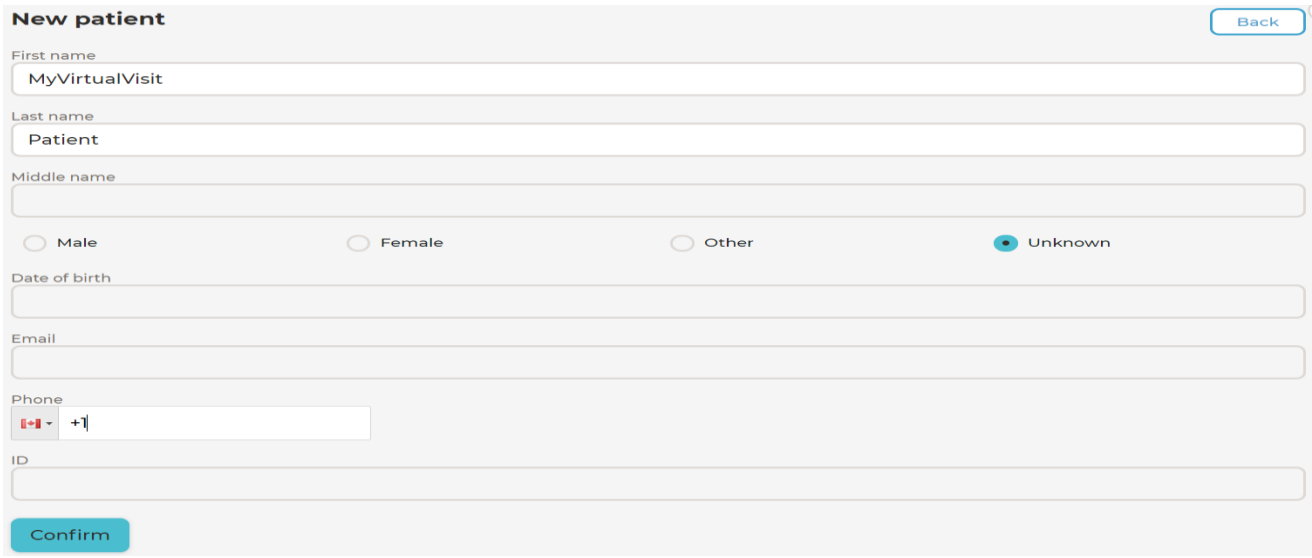
Creating a Patient Profile

1. Ensure you have documented the patient's verbal consent to provide their email and phone for the use of MyVirtualVisit in the patient's chart.

2. Use the "Patient Search" at the top of your screen and start typing in the name of the patient who you wish to create.



3. Click on the **New Patient** button to begin populating the patient profile fields.



4. The required fields include:
   - First Name and Last Name
   - Gender
   - Date of Birth
   - Email
   - Phone
   - ID (PHN)
5. Click **Confirm** when complete.

For technical support, please contact the Clinical Solutions Desk at

x18777 or 250-370-8777 (Local Victoria) or 877-563-3152 (Toll Free).

Modified: 15 June 2020

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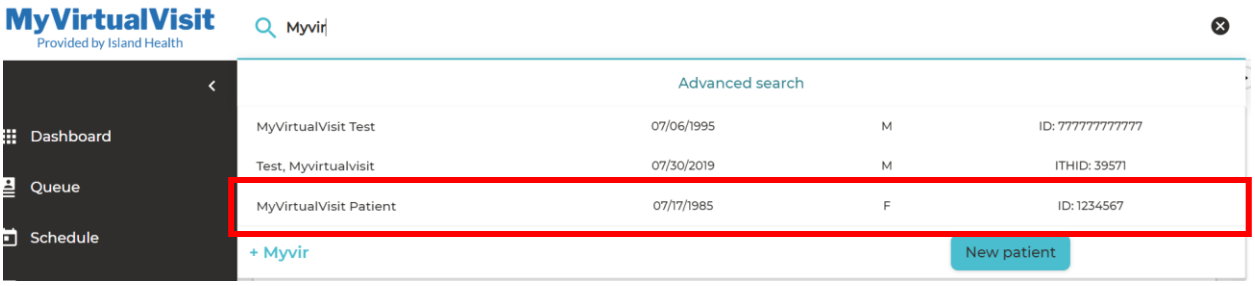
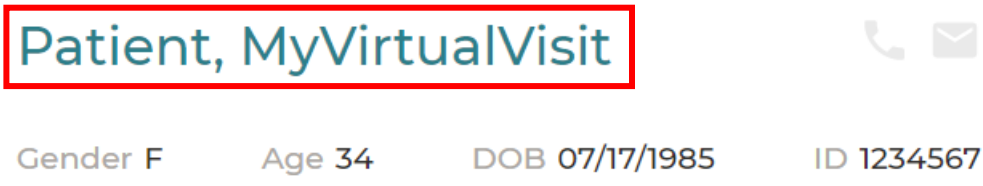
Updating a Patient Profile

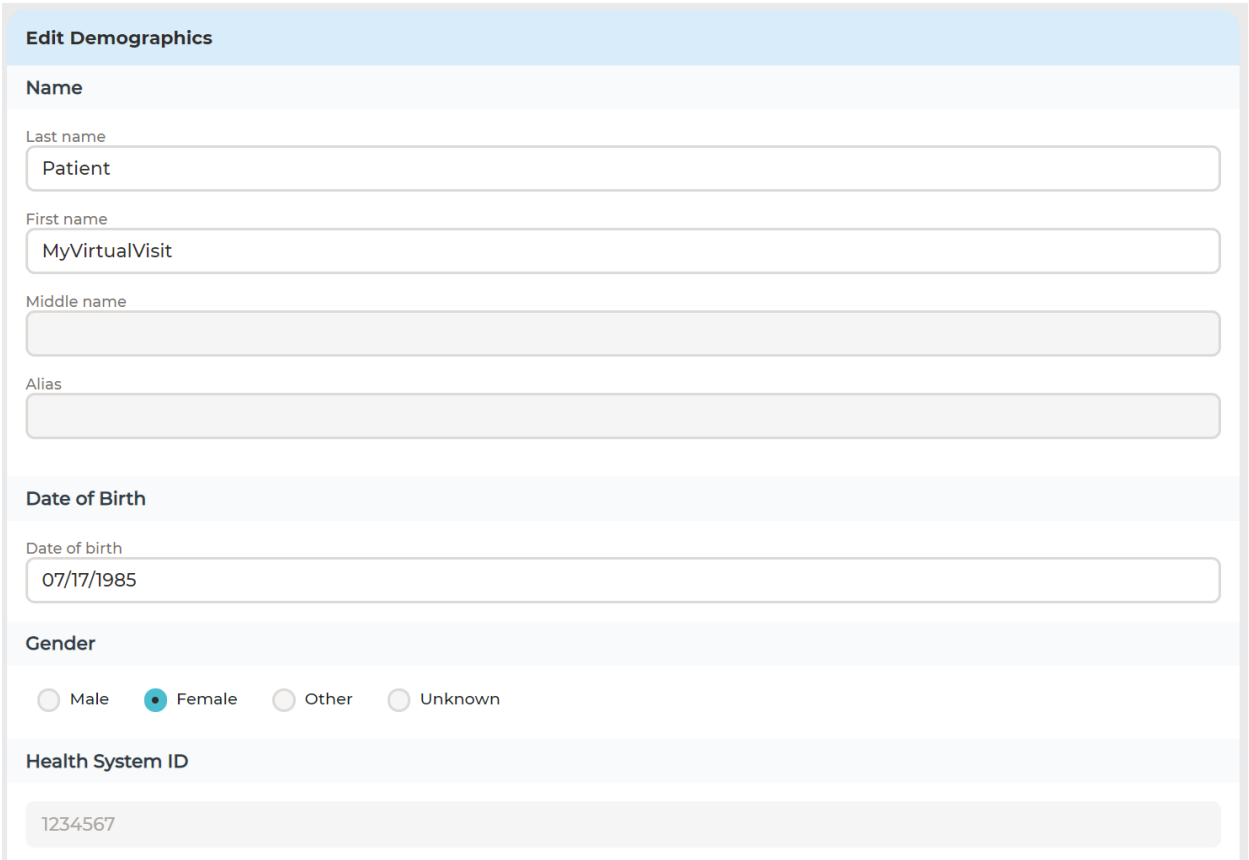
1. Use **Patient Search** at the top of your screen to search the patient profile you wish to update.



2. After selecting the patient from the dropdown list above, open the patient profile by clicking on the patient's name on the right navigation pane.



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



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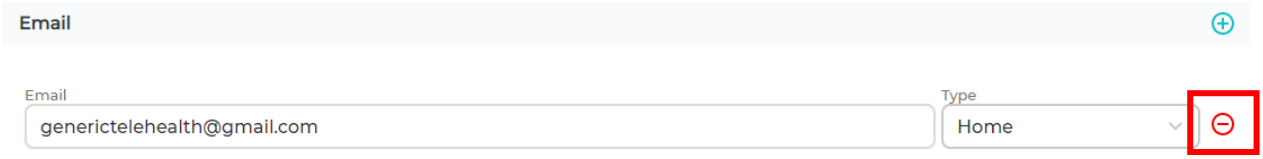
NOTE: If a patient profile has been created and saved with the incorrect PHN, the patient profile must be de-activated and a new profile must be created with the correct PHN. Patient profiles should **ONLY** be de-activated for purposes of incorrect PHN being arrived, and **NOT** de-activated if the patient no longer requires MyVirtualVisit, as they may be a patient for other clinical programs who also use MyVirtualVisit.

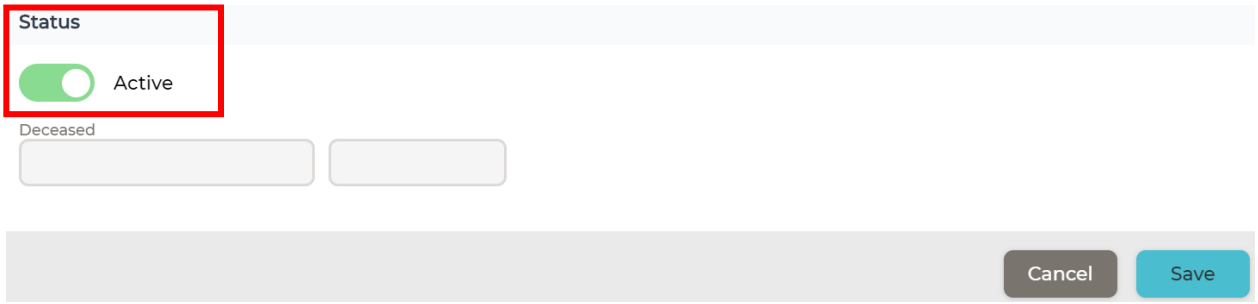
De-Activating a Patient Profile

1. Follow the instructions above to edit a patient profile.
2. Scroll down and locate the **Email** section. Click the minus symbol marked in red to remove the email from this profile.

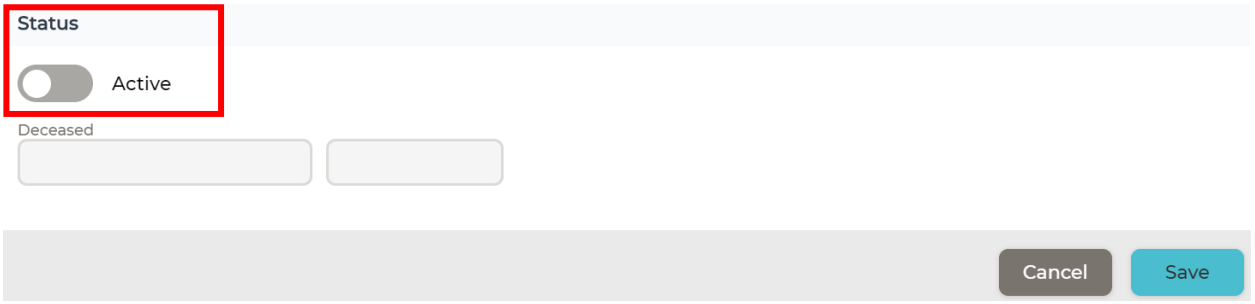
Note: You must remove the email from the patient profile prior to de-activating the profile



3. Scroll to the very bottom under the **Status** section.



4. Click on the **Active** toggle so that it turns grey. This de-activates the patient profile.



5. Click **Save** to keep the change. This patient will no longer be searchable in the system. To re-create a patient profile, follow the steps above on creating a patient profile.