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 (BCVV), 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 captured 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 for the client's profile and ensure it does not already exist in the system. If possible, search by a unique identifier such as the PHN or MRN to narrow down your search results. **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 BCVV with matching demographic information.** Please ensure you conduct a thorough search in the application before creating a new profile as this often leads to the creation of a duplicate profile. Once you've located the clients record, always complete positive patient identification (PPID) using at least two identifiers, such as legal name, DOB or PHN to confirm a client profile.
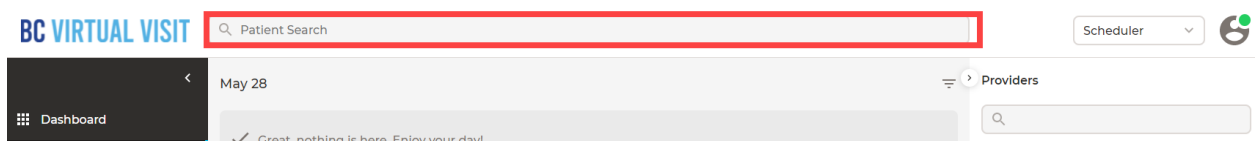
Email Addresses and Phone Numbers
Email and phone information from Cerner now flows through to BC Virtual Visit; however, the Primary Email and Primary Phone on the BCVV client profile will remain the source of truth. If the email address and phone numbers from Cerner do not already exist on the client profile in BCVV, they will store in the secondary fields below the Primary values.

Please continue to ensure that the clients preferred email and mobile phone number (required for SMS notifications) are the values listed in the Primary Phone and Primary Email fields. If not, please edit these fields to reflect the desired values (see Updating a Client Profile section).

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 client 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 virtualcare@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.

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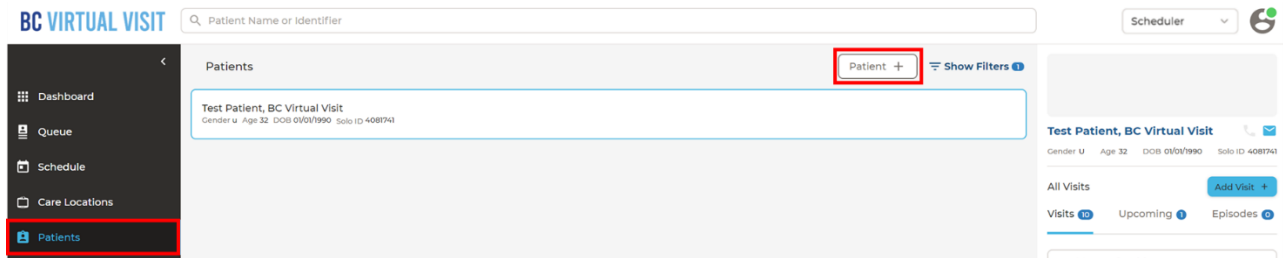
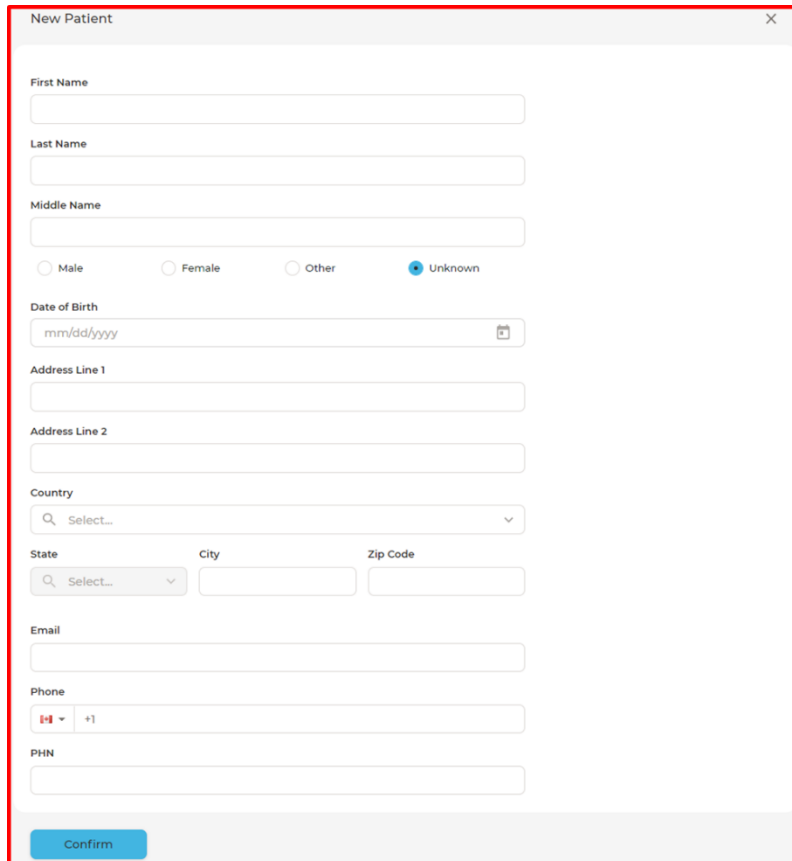**Step 2:** Populate the required fields below:

- Legal First Name and Last Name
- Gender
- Date of Birth
- Email
- Phone (for clients 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:
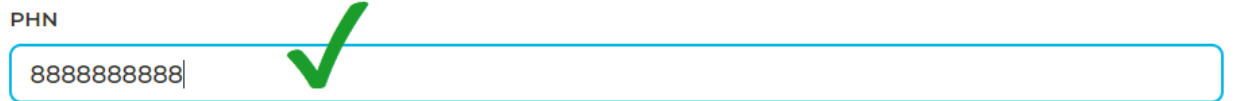
NOTE: If required, you can add a client's Cerner Medical Record Number (MRN) after you have created the profile. To do so, follow the steps directly below in "Updating a client profile".

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

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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 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:

- Phone will store as the Primary Phone (Mobile) on the clients profile once saved

- Email will store as the Primary Email (Home) on the clients profile once saved

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

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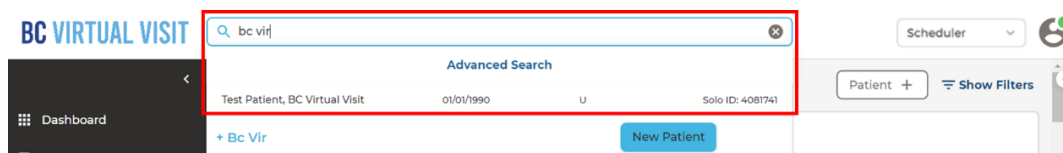**BC VIRTUAL VISIT** | island health

> - 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 listed in the Primary values on 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 client profile directly 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 client's profile and will display in the call for all participants, as well as being shown 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 client's profile from BCVV.

Step 1: Use **Patient Search** at the top of your screen to search the client 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, such as name, DOB or PHN to confirm you've selected the correct client profile.


Step 2: After selecting the client from the dropdown list above, open the client profile by clicking on the client's name on the right navigation pane.
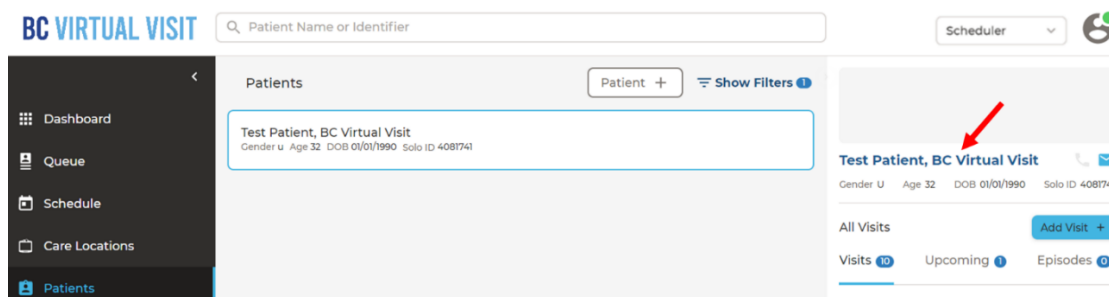
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Step 3: You will now see a Demographics page. Click on 🖉 to edit the fields.
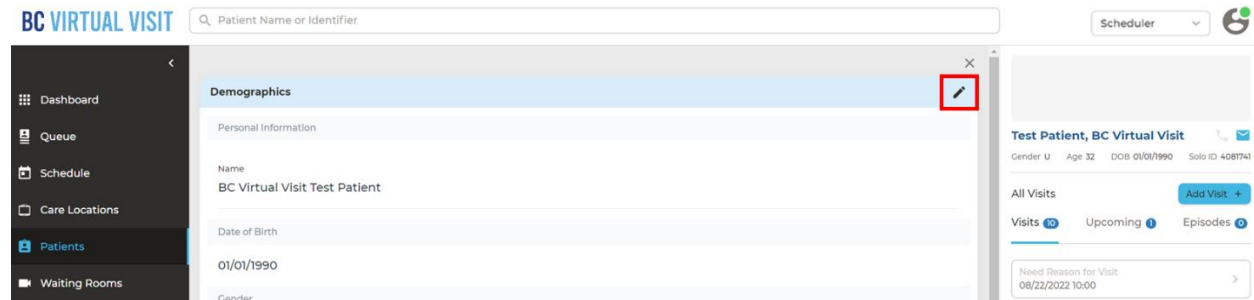
NOTE: You may be required to update the Primary Phone and Primary Email values in BCVV to ensure your client receives appointment notifications. Values received from Cerner will **not** override the Primary values in BCVV. There can only be one Primary Phone Number and one Primary Email per patient profile.

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**.

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.

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