

Purpose:

To provide instructions on scheduling visits in BC Virtual Visit (BCVV). This guide includes:

- [Before Scheduling a Visit in BC Virtual Visit](#)
- [Scheduling a Visit in BC Virtual Visit](#)
- [Rescheduling, Cancelling, and Adding/Modifying Details for a Visit in BC Virtual Visit](#)

Scheduling a Visit in BC Virtual Visit

NOTE: BC Virtual Visit enables the connection between patients and providers. It does not replace your existing scheduling solution. It is important to ensure that you document any missed or “Left Without Being Seen (LWBS)” visits in your existing EMR or scheduling solution to ensure accuracy.

Before Scheduling a Visit in BC Virtual Visit

Email address and consent are collected to support the delivery of patient care, to communicate information about the patient’s health and care, and to keep the patient informed about Island Health’s care and services. Prior to scheduling a virtual visit, ensure you complete the following:

1. Capture Patient Consent to Receive Electronic Communications

- This consent can be captured in one of two ways: either during registration/scheduling of the encounter in Cerner, or verbally, with the consent documented in the appropriate location.

Option A: For Programs That Register in Cerner using PMOffice:

At the point of registration or scheduling when an encounter is created or updated in Cerner (in PM Office under the **Addresses tab** (Ambulatory, General) **or Patient Information tab** (Primary Care)), consent can be captured by:

- i. Typing the email address provided by the patient in the **Email Address** field.
 - Confirm you have recorded the correct email address with the patient by stating it back.
- ii. In the **Consent to use email** field, select “Yes” from the dropdown if the patient consents.

Email Address: PrimaryCare@Testing.com	Consent to use email: Yes
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- Capturing patient email and consent in PMOffice helps support integration between Cerner and BC Virtual Visit. Collection of patient email and Consent = 'Yes' in Cerner allows automated creation of new patient profiles and updating of existing profiles in BCVV.
- It is important to ask your patients to review the [Electronic Communication/Virtual Health - Information for Patients to Consider](#) document outlining potential risks associated with electronic communication. You can provide your patient a copy or refer them to review the document on the [BC Virtual Visit webpage](#). It will also be linked in the email invitation they will receive when the visit is scheduled.

Option B: For Programs That Do Not Register in Cerner:

Verbal consent can be captured as part of the patient's record as per standard charting process (such as Cerner, Paper, Authorization for Electronic Communications Form).

2. Capture Patient Consent to Virtual Care

- When offering a virtual visit, patients should be informed by a health care team member about the benefits and limitations of virtual care and how to prepare for the visit.
- A patient's verbal agreement to the use of technology must be obtained to proceed with a virtual visit and be confirmed by the health care provider at the time of the visit. **The patient's voluntary, informed acceptance or refusal to attend a virtual care visit is to be documented in the patient's Health Record.** If the visit will include a treatment or procedure, informed consent must be obtained by the patient as per Island Health's [Consent to Health Care and Advance Health Care Planning](#) policy.

3. Confirm and Update a Patient's Email and Phone Number in BC Virtual Visit

- A patient's email address may change at any point. It is important to confirm the patient's Primary Email in the patient's BC Virtual Visit profile is correct each time a visit is scheduled. Verifying and updating the patient's email address as part of the scheduling process will ensure that email notifications reach the intended participant.
- Similarly, if a patient would like to receive SMS notifications, confirm that the Primary Phone number in the patient's BCVV profile is correct.
- View the [Creating and Updating Patient Profiles guide](#), for instructions on updating email and phone under a patient's profile in BCVV.

NOTE: If the patient has scheduled visit(s) and the Primary Phone or Primary Email are updated on the patient profile, the patient will automatically receive visit notifications to their updated contact information. The patient can join from the previous invitation (if accessible) or through the new one as the visit link stays the same.

4. Confirm Available Devices

It is important to confirm the patient’s comfort level with technology, using a web-based virtual application, and access to a suitable device. Key questions to review when scheduling include:

<input type="checkbox"/>	Does the patient have a personal email address that they feel comfortable using to receive visit details?
<input type="checkbox"/>	Does the patient have access to a device they can use for their BC Virtual Visit appointment?
<input type="checkbox"/>	Does their device have a built-in microphone, camera, and speakers? (e.g. can the patient use FaceTime, Zoom, Skype, etc., on their device?)
<input type="checkbox"/>	Does the patient have a private space to attend their visit?
<input type="checkbox"/>	Does the patient have a secure and reliable Internet or Wi-Fi connection in the space they will be having their visit?

For first time users, it is helpful to determine what kind of device your patient has and provide guidance in advance of their visit. Detailed instructions on downloading the application for each device can be found on the [BC Virtual Visit Webpage](#).

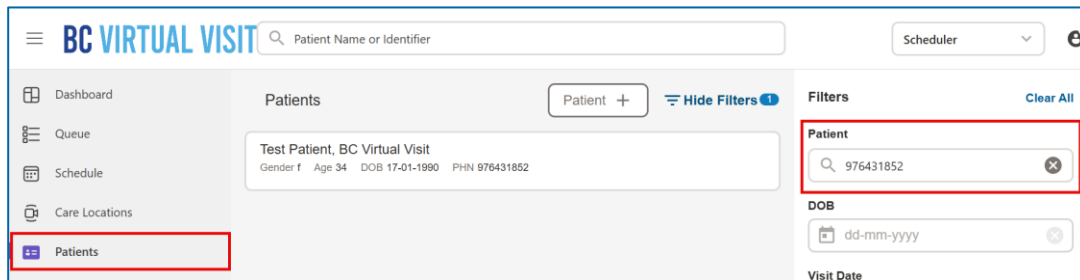
Apple iPhone or iPad	Download the <u>BC Virtual Visit iOS Application</u> on their iPhone or iPad.
Android Phone or Tablet	Continue using Chrome, or download the <u>BC Virtual Visit Android Application</u> on their Android device.
Mac Computer or Desktop	Download the <u>Teladoc Health Desktop Application</u> on their Mac device. <ul style="list-style-type: none"> Patients may also join via the Chrome or Safari browsers if they are uncomfortable with downloading the Desktop application.
Windows PC or Laptop	Download the <u>Teladoc Health Desktop Application</u> on their Windows device.

- Patients may also join via the Chrome, Firefox, or Edge browsers if they are uncomfortable with downloading the Desktop application

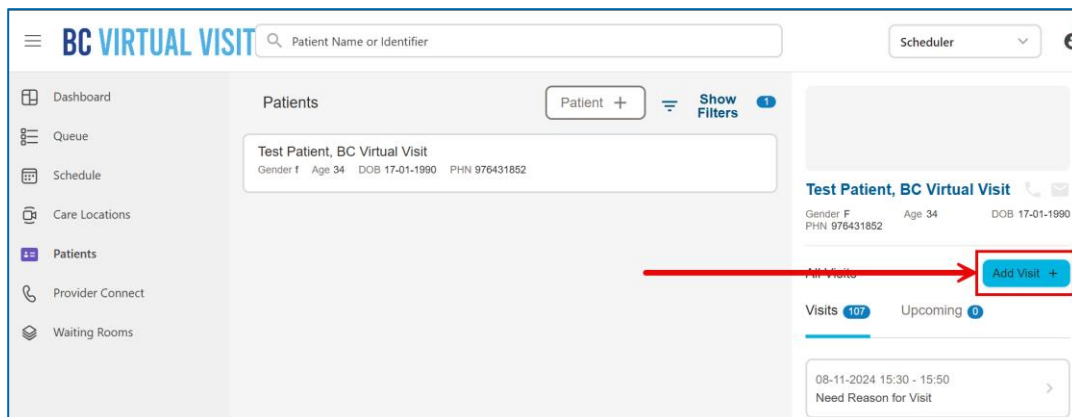
IMPORTANT: If this is the patient’s first virtual visit, recommend they prepare for the visit *ahead of time*, by reviewing the **Tips for a Successful Appointment** on the [BC Virtual Visit Webpage](#). If they would like to complete a test call or need technical support, they can call the **Patient Virtual Healthcare Tech Support Desk at 1-844-442-4433** (Monday to Friday 7 am - 5pm, excluding statutory holidays).

Scheduling a Visit in BC Virtual Visit

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’s profile. 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 three identifiers (e.g. name, DOB or PHN) to confirm you have selected the correct patient profile.



2. Select the patient on the list. From the pane that opens on the right, click **Add Visit**.

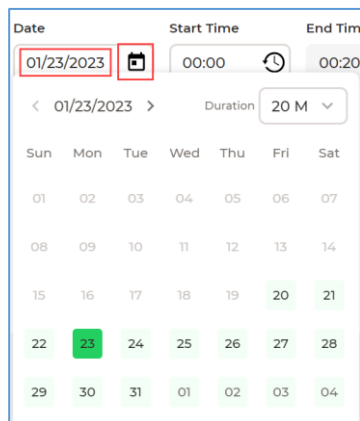


3. The **New Visit** form will open, with the patient’s name already selected.

4. Select the **Waiting Room** you would like to schedule the visit in.
5. Add an **Assigned Provider** to the visit if desired. Only one health care provider can be added, and they must be a member of the selected waiting room. *Whether a health care provider is added to a visit has no impact on whether they (or other waiting room members) can join the visit with the patient.* By tagging a health care provider to a visit, they will receive notifications if enabled in their settings and will allow waiting room members to filter visits by the health care provider's name.

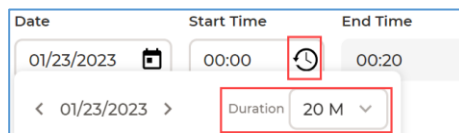
Recommended workflow for visits with multiple health care providers: Add the primary health care provider to the **Assigned Provider** field and continue using the **Reason(s) for Visit** field to identify any additional health care providers joining the visit (if your clinic is already using custom **Reason(s) for Visit** values).

6. Select the desired date, time, and duration for the visit.
 - a. Select a date by clicking the calendar icon and clicking on the desired date of the visit. You can also, edit the date directly by typing the date in mm/dd/yyyy format into the date field.



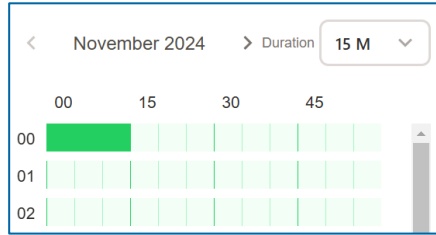
The screenshot shows a scheduling form with three main sections: Date, Start Time, and End Time. The Date field contains '01/23/2023' and a calendar icon. Below it is a calendar grid with the date '23' highlighted in green. The Start Time field contains '00:00' and a clock icon. The End Time field contains '00:20'. A Duration dropdown menu is set to '20 M'.

- b. Select the desired visit **Duration** by clicking the clock icon, then selecting a duration using the dropdown.



This screenshot is similar to the previous one, but the Duration dropdown menu is open, showing '20 M' as the selected option. The Start Time field now has a clock icon, and the End Time field is still '00:20'.

- c. To set a start time for the visit, you may type a time in 24-hour format directly in the **Start Time** field. The time must be a multiple of 5 minutes (e.g. 8:00, 8:05, 8:10). The **End Time** field will autofill based on the **Duration** selected.
 - You may also use the time picker to set a start time: Click the time when you want the visit to start. The green bar will adjust to your selection based on the **Duration** selected.



7. Select any **Reason(s) for Visit** (which may be secondary health care providers joining the visit in some clinic workflows).

Reason(s) for Visit

<input type="checkbox"/> 3 Month Visit	<input type="checkbox"/> 6 Month Visit	<input type="checkbox"/> 12 Month Visit
<input type="checkbox"/> 18 Month Visit	<input type="checkbox"/> Physician	<input type="checkbox"/> RN/CNL
<input type="checkbox"/> SW	<input type="checkbox"/> PT/OT	<input type="checkbox"/> Research Assistant

Other

8. Click **Confirm** at the bottom of the page to confirm the appointment. This will trigger the sending of an email and/or mobile phone invitation to your patient.



NOTE: The BC Virtual Visit appointment link your patient receives contains a unique link just for them. They should **NOT** forward their invitation to others as only one person may join using this link. If an additional participant tries to join using the same link, their audio and video will be blocked.

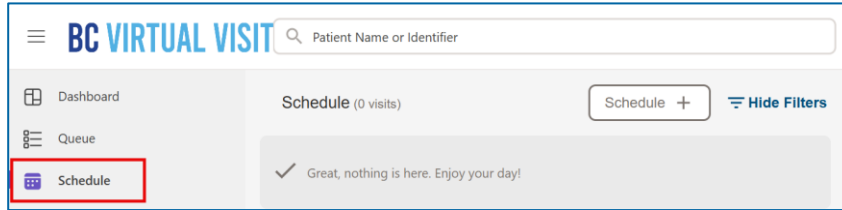
If the patient needs a family member or guest to attend their visit from a different location, the health care provider can invite them ahead of time or from within the video call. For more information on scheduling family or guests, please review the [**Scheduling Family or Guests guide.**](#)

9. You will now see the appointment summary page, indicating you have successfully scheduled this visit. From here, you are also able to reschedule, cancel, re-send, add/modify an assigned health care provider, or add/modify a reason(s) for visit for an existing BC Virtual Visit appointment.

Rescheduling, Cancelling, Resending, and Adding/Modifying Reason(s) for a Visit or Assigned Health Care Provider in BC Virtual Visit

The following sections walk through how to navigate to the appointment summary page where you will be able to reschedule, cancel, re-send an invitation, or modify a health care provider or Reason(s) for Visit for an **existing** BC Virtual Visit appointment.

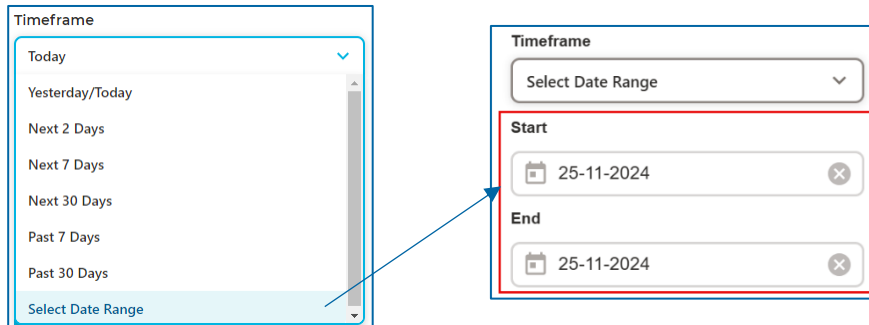
1. Select **Schedule** from the left navigation bar.



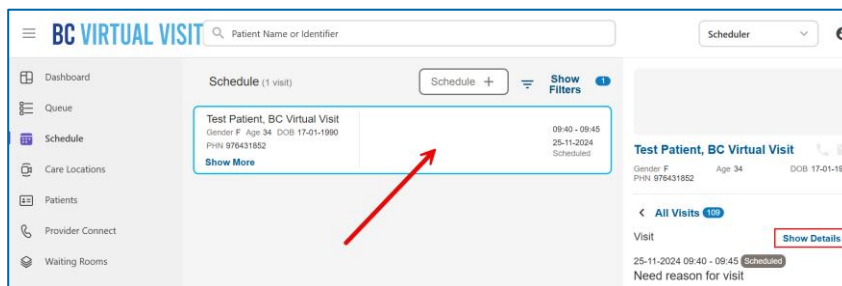
2. If not already visible, click on the filter icon to open your filter options.



3. Click on "Select Date Range" from the Timeframe filter dropdown. Set both the Start and End Date as the date of the visit you wish to view.



4. Select the visit you wish to cancel, re-send, or modify/add an assigned health care provider or reason for visit. Then click on **Show Details** on the right pane.

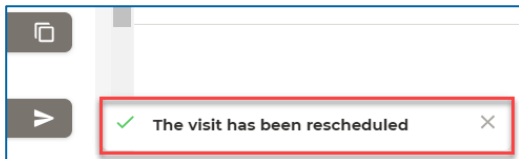


5. You will now be taken to the appointment summary page, where you may choose to cancel, re-send, add/modify an assigned health care provider, or and/modify a reason(s) for visit for an existing BC Virtual Visit appointment.

Rescheduling a Visit

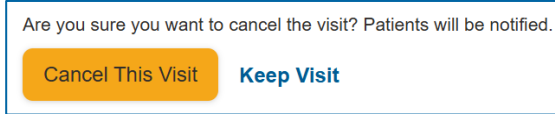
1. In the appointment summary page, click **Reschedule**. A menu will appear allowing you to set a new date and time for the visit.

2. Update the Date and Start Time of the visit then click **Confirm**. After confirming the rescheduled visit, you will see a pop-up in the bottom right of your screen notifying you that the visit has been rescheduled. The patient will receive an email and/or SMS (text) message depending on the contact information listed in their profile.

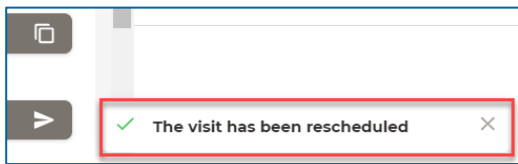


Canceling a Visit

1. In the appointment summary page, click **Cancel**. A menu will appear; click **Cancel This Visit** to confirm.



2. After confirming the cancellation of the visit, you will see a pop-up in the bottom right of your screen notifying you that the visit has been cancelled. The patient will receive an email and/or SMS (text) message depending on the contact information listed in their profile.



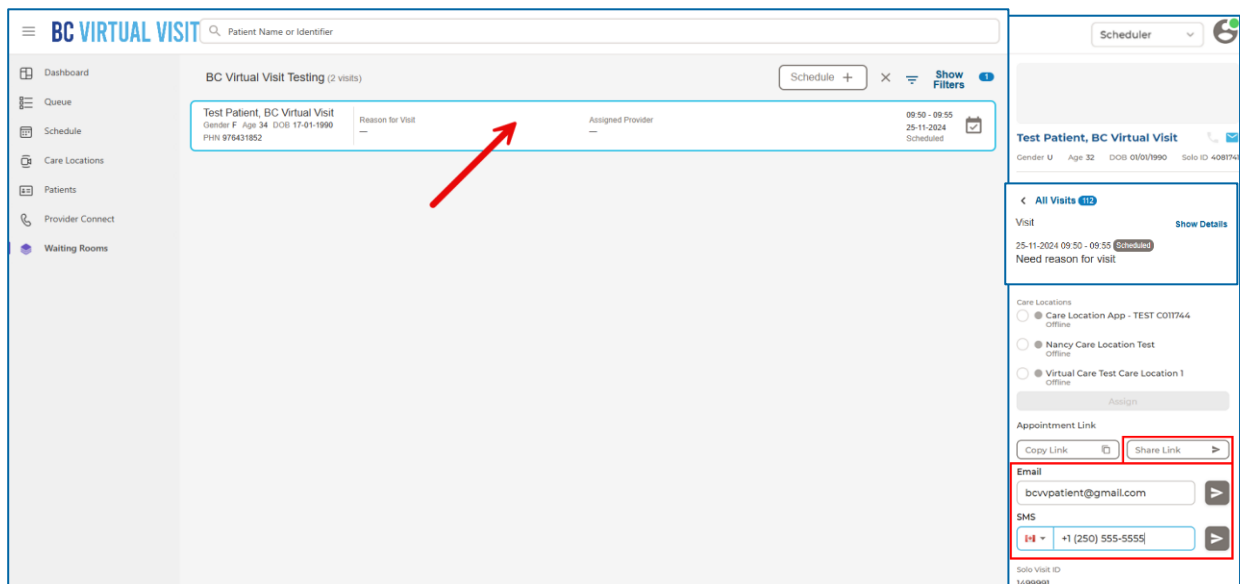
Resending an Invitation for a Visit

You may need to resend an existing visit invitation to your patient if they misplaced their invitation and would like to receive a new one. There are two different options:

1. In the appointment summary page, click on **Send** next to the patient's email and/or mobile phone number (SMS). By doing so, a new visit invitation will be sent to your patient.

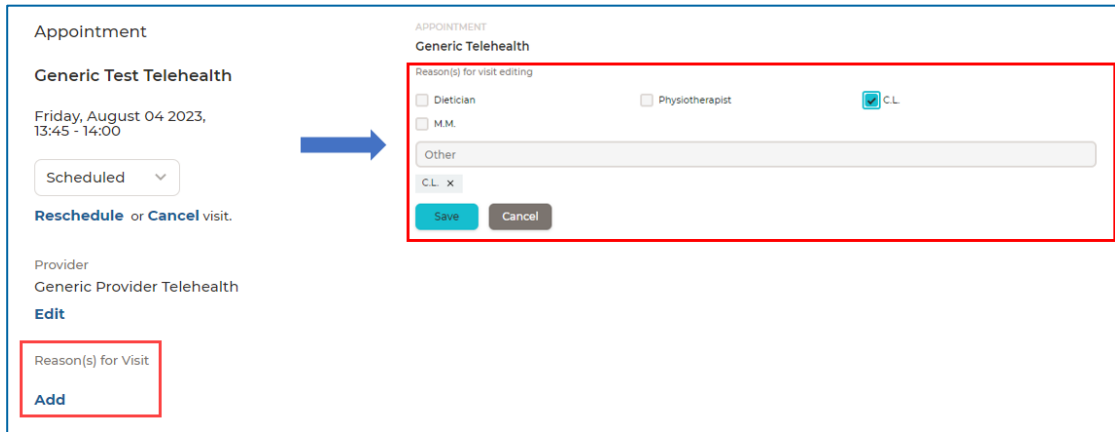
OR

2. For a selected scheduled visit, click **Share Link** and then select the **Send** button next to the patient's email and/or mobile phone number (SMS) options.



Adding or Modifying a Reason for Visit for an Existing Visit

Adding a Reason for Visit: In the appointment summary page, click on **Add** underneath **Reason for Visit**, and then choose one of the pre-determined options or enter free text (if enabled in the waiting room). Once you have selected your **Reason for Visit**, click **Save**.

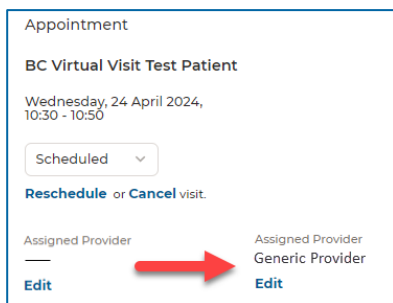


Modifying a Reason for Visit: If you had a **Reason for Visit** selected for your BC Virtual Visit appointment, you can modify it by following the same steps as above. Instead of an **Add** option, you will see an **Edit** option.

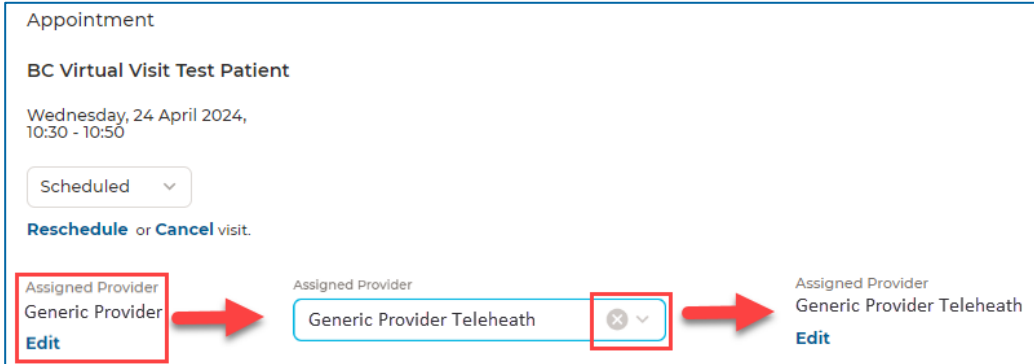
Adding or Modifying an Assigned Provider for an Existing Visit

Assigning a health care provider to a scheduled visit does not prevent other health care providers from connecting to that same visit. Assigning a primary health care provider can improve front-end visibility, allow for improved visit filtering, and provide additional notification flexibility (e.g. health care providers can choose to only receive notifications where they are assigned to the given visit).

Adding an Assigned Provider: In the appointment summary page, click on **Edit** underneath **Assigned Provider**, and then search for one of the health care providers that has access to the waiting room. Select a health care provider for the visit to have it apply to the scheduled visit.



Modifying an Assigned Provider: You can change the health care provider that you have associated to a visit. Select **Edit** under the health care provider’s name and either begin typing the new health care provider’s name or select **X** and then search for the new health care provider. Once selected, they will now be associated to the scheduled visit.



You can also add or edit an existing health care provider via the right-hand profile pane when a visit has been selected.

