# Blind Rehabilitation (ANRV)

# User Manual

**Version 5.1.6**

**August 2022 (Version 5.1 VA Release)**

**February 2023**

**Department of Veterans Affairs (VA)**

**Office of Information and Technology (OIT)**

# Revision History

When updates occur, the Title Page lists the new revised date, and this page describes the changes. Bookmarks link the described **content changes** to its place within manual. There are no bookmarks for format updates. Page numbers change with each update; therefore, they are not included as a reference in the Revision History table.

| Date | Version | Description | Author |
|---|---|---|---|
| 02/2023 | 5.1.6 | Version 5.1.6 Update<br>• Updated Section 3.3 for Document Retrieval<br>• Updated Section 6.1 to include System Administrator's ability to update DUZ code and Figure 6<br>• Added Section 6.1.1 to include Staff Transfer instructions<br>• Updated Figure 21 in Section 7.1.1<br>• Updated Sections 7.1, 7.4, 7.5, 7.6, 7.7, 7.10, and 9 to include new BR Patient Search with first initial of last name and last four of SSN functionality<br>• Added Section 7.8 Create Referral<br>• New Initiating Areas, Statuses, and Referral Types in Section 7.9<br>• Updated Section 7.10 to include workaround for referrals summary reports<br>• Updated Section 8.3 to include PDF printing 3x10 labels functionality and added Figure 31 and Figure 32<br>• Updated Appendix A to include new hotkey functionality<br>• Appendix B has been added to include additional JAWS information | Booz Allen Hamilton |
| 11/2022 | 5.1.2 | Version 5.1.2 Update<br>• Updated **Document Retrieval** File Names to reflect the current version.<br>**The following defects have been repaired with Build 5.1.2.3:**<br>HDSO-728 - 508 issue - Change Referral is missing the program label for Offered Service Date.<br>HDSO-925 - 508 issue - Modify/Create Referral Search results are not announced by JAWS.<br>HDSO-797 - 508 issue - Screen reader identifies Status Change reason as editable, but it is not. | Booz Allen Hamilton |

| Date | Version | Description | Author |
|---|---|---|---|
| | | HDSO-739 - 508 issue - The warning timeout message is not read by the screen reader. | |
| | | HDSO-742 - 508 issue - Error message notification conveyed by the screen reader is incomplete. | |
| | | HDSO-947 - INC23985738 - BR-5.1 Create Referral Option for VA Outpatient Low Vision (LV) Clinic isn't working properly. | |
| | | HDSO-726 - 508 issue - Patient Status Change - Status Change Date is missing the programmatic label. | |
| | | HDSO-741 - 508 issue - Other causes of vision loss Ocular health is not 508 compliant. | |
| | | HDSO-914 - Referrals as notifications aren't showing on the home screen. | |
| | | HDSO-895 - Other Health & Medical Treatment notes are not being displayed in the patient record. | |
| | | HDSO-736 - 508 issue - Activate patient date and reason have no programmatic label. | |
| | | HDSO-844 - 508 issue - Create Referrals - Referred To Institution is not selectable. | |
| | | HDSO-845 - 508 issue - Create Referrals is missing a table heading for Existing Referrals. | |
| | | HDSO-847 - 508 issue - Create Referrals Referred From Institution has no programmatic label. | |
| | | HDSO-1022 - INC24177532 Blind Rehab - user unable to log into BR 5.1. | |
| | | HDSO-730 - 508 issue - Modify Referrals found Edit Referral buttons are programmatically identical & missing headings. | |
| | | HDSO-1094 - Data Only Reports. | |
| | | HDSO-915 - Connectivity configuration for Master Patient Index (MPI). | |
| | | HDSO-737 - BR Patient page takes too long to load patient data in IOC. | |
| | | HDSO-858 508 issue - Modify Referral By patient the New Status is missing the label. | |
| | | HDSO-998 INC24102338 - BR 5.1 - Station 534 is not updating when PSDUpdater runs. | |
| 08/2022 | 5.1.0.20 | Updated document to reflect changes feature changes: The following are the new features and functions added to the BR 5.1 release. <br> • Two Factor authentication – logon using PIV pin <br> • A pagination feature was added for search results. <br> Added additional page information is for preliminary information with these sections: <br> • Basic Information | Booz Allen Hamilton |

| Date | Version | Description | Author |
|---|---|---|---|
| | | • [Ocular Health](#)<br>• [Patient History](#)<br>• [Living Arrangements](#)<br>• [Blind Rehabilitation Experience](#)<br><br>[The following were removed from Administration tab submenu:](#)<br><br>• TIU Document Definitions<br>• MPI Patient Registration<br>• Patient ICN Lookup<br>• Patients not registered with MPI<br>• Visual Acuity Discrepancy<br><br>[The following submenu items were removed from enter/edit:](#)<br><br>• Low Vision Patient<br>• Education Service Activities<br>• VARO Claims<br>• Annual Outcome Survey<br>• Pre/Post Blind Rehab Survey<br>• Modify Converted National Waitlist Record VIST Visits<br>• BRC Clinical Assessments<br>• Create Treatment Plan<br>• Modify Treatment Plan<br>• Enter Non-Treatment Plan Training<br>• Enter Treatment Plan or Training<br><br>The following submenus were removed from print individual records:<br><br>• Treatment Plan<br>• Training History<br>• Annual Outcome Survey<br>• Pre/Post Blind Rehab survey<br><br>The following submenus were removed from print reports:<br><br>• Low Vision Patients Report<br>• VARO Claim List<br>• Education & In Service Activities<br>• VIST Visits Date List<br>• BRC Pre-Admission By Priority Level<br>• BRC Workload Monthly Summary<br>• BRC Workload Monthly Summary By VISN<br>• BRC Workload Semi-Annual Summary<br>• BRC Workload Monthly Summary By VISN<br>• BROS Workload Summary | |

| Date | Version | Description | Author |
|---|---|---|---|
| | | BROS Workload Summary By VISN | |
| 08/2010 | 5.0.27.6 | **Page 7:**<br>• On the Login page the REFRESH button has been removed. The new login page screen shot is updated.<br>**Page 24:**<br>• Administrator Menu feature, BR Institutions New feature is added to Edit BR Institution page for display and validating against the active users attached to that institution.<br>**Page 44:**<br>• At the Enter/Edit BR Patient: Basic Information screen, the Tracked By field dropdown list modified to display the users with the roles VIST Coordinator, BROS and Low Vision.<br>**Page 10 & 40:**<br>• VIST Visits Menu item is added under the Enter/Edit Menu options.<br>**Page 291:**<br>• Page numbers are updated for Index | Project Team |
| 03/2007 | 5.0.26.8 | The following changes have occurred since the 5.0.26.8 version of this document:<br>**Page 8:**<br>• On the Home or Welcome page, under User Notifications, New referrals and Deceased Patients can now be viewed by clicking on the link.<br>**Page 25:**<br>• New Administrator Menu feature, BR Institutions, displays a list of the names of existing Blind Rehabilitation Institutions, the Service Area, and if the Institution's Active status is set to 'Yes' or 'No.'<br>**Page 28:**<br>• New Administrator Menu feature, Logged In Users is used to display a list and count of all users logged into the system<br>**Page 29:**<br>• New Administrator Menu feature, Patient ICN Lookup is used to find a patient by Identification Control Number (ICN)<br>**Page 37:**<br>• New Administrator Menu report, Menu-Item List, provides a list of Menu Items<br>**Page 38:**<br>• New Administrator Menu report, Role-Menu Assignment, provides a list of the available menu items that have been assigned to each role<br>**Page 45:** | Project Team |

| Date | Version | Description | Author |
|---|---|---|---|
|  |  | • At the Enter/Edit BR Patient: Basic Information screen, added the Tracked By field, which is used to select the person who is tracking this patient<br>**Page 218:**<br>• New Print Reports Menu report, added the BRC Pre-Admission by Priority Level report that provides a list of the requested Report Fields including an edit link to access Modify Referral and Note information.<br>**Page 262:**<br>• At the Waitlist Menu, added a BRC Current Waiting List report that provides a list of Referrals Waiting by Program Type and Status.<br>**Page 264:**<br>• New Waitlist Menu report, added the BRC Historical Waitlist report that provides a list of Waiting Referrals and the number of Waiting Referrals with or without details.<br>**Page 266:**<br>• New Waitlist Menu report, added the BRC Historical Waitlist By VISN report that provides a list of Waiting Referrals (by VISN) and the number of Waiting Referrals. |  |
| 11/2006 | 5.0.27.6 | Updated document to V5.0.27.6 | Project Team |
| 07/2006 | 5.0.27.6 | Revision 5 – Updated document to reflect current changes. | Project Team |
| 03/2006 | 5.0.27.6 | Revision 5.x.x.x | Project Team |
| 09/2005 | 5.0 | Updated document V5.0 to remove TIU document definitions.<br><br>Updated document V5.0 to reflect current features. | Project Team |
| 08/2005 | 5.0 | Complete revisions. | Project Team |
| 04/2005 | 4.0 | Start revisions from EVS review | Project Team |
| 03/2005 | 4.0 | Draft | Project Team |
| 01/2005 | 4.0 | Start 1.3 Revisions | Project Team |
| 10/2004 | 4.0 | Start 1.2 Revisions | Project Team |
| 07/2004 | 4.0 | V 1.2 – Changes based on V 0.1.11 of the prototype. | Project Team |
| 05/2004 | 4.0 | V 1.1 – Changes based on V 0.1.6 of the prototype. | Project Team |

| Date | Version | Description | Author |
|---|---|---|---|
|  |  | V 1.0 – Final approved by SQA<br>V 0.5 – Revised content based on changes to v 0.1.5 |  |
| 04/2004 | 4.0 | Create Draft<br>Revised/added content<br>V 0.4 – Revised content based on SQA feedback.<br>Added Deceased Patient List Report | Project Team |

# Table of Contents

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# 1. Introduction

The Blind Rehabilitation Version 5.1 application (BR 5.1) provides enhanced tracking, and reporting, of the BR services provided to Veterans by:

- Visual Impairment Service Teams (VIST) Coordinators

- Blind Rehabilitation Centers (BRCs)

- Blind Rehabilitation Outpatient Specialists (BROS)

- Visual Impairment Services Outpatient Rehabilitation (VISOR) Programs

- Advanced Low Vision Clinic (ALVC) programs (referred to as Visual Impairment Center to Optimize Remaining Sight (VICTORS)

- Intermediate Low Vision Clinic (ILVC) programs (referred to as VA Outpatient LV Clinics)

Intermediate Low Vision Clinic (ILVC) programs (referred to as VA Outpatient LV Clinics) The Blind and Visual Impairment Continuum of Care application provides enhanced tracking, and reporting, of the blind rehabilitation services provided to veterans.  Features include Electronic referral process to track patient applications for service, notifications feature to alert users of pending referrals, encounters/progress notes will be automatically created, nationwide centralization of BRVS services data to allow nationwide reporting, ad-hoc reporting capabilities, allows the ability to track BRVS patient care access across institutions, and patients can be referred or transferred to other institutions if they move without having to recreate patient data. The VistA namespace is ANRV.

**NOTE:** This user manual contains all options for the Blind Rehabilitation web application. Each individual user will see only the options for which he/she has permissions.

# 2. Accessibility

BR 5.1 is an accessible web-based application, via a web browser.

## 2.1.  Skip to Main Content Option

The Skip to main content option automatically places the cursor into the Content Area to allow screen readers to avoid reading all Header and Task Menu option links. This enables the screen reader to begin reading the first line of content on the page.

# 3. Orientation

## 3.1.  Recommended Users

The intended audience for BR 5.1 includes:

- Office of Information and Technology/Development, Security, and Operations
- Local Coordinators
- Visual Impairment Service Team (VIST) Coordinators
- Blind Rehabilitation Outpatient Specialist (BROS)
- Blind Rehabilitation Center Staff (BRC)

## 3.2.  Related Manuals

- Blind Rehabilitation V. 5.1 Installation/Implementation Guide
- Blind Rehabilitation V. 5.1 Release Notes
- Online Help is available from within the application

## 3.3.  Documentation Retrieval

BR documentation can be found on the VA Software Documentation Library (VDL) at: https://www.va.gov/vdl.

**Table 1: Document Retrieval Directories**

| File Name | Description | Retrieval Format |
|---|---|---|
| ANRV_5_1_6_RN.docx | Blind Rehabilitation (BR) Release 5.1.6 Release Notes | Binary |
| ANRV_5_1_6_CIG.PDF | * Blind Rehabilitation Centralized Server Installation/Implementation Guide | Binary |
| ANRV_5_1_6_DIBRG.PDF | Blind Rehabilitation 5.1 Deployment, Installation, Back-out and Rollback Guide | Binary |
| ANRV_5_1_6_UM.PDF | Blind Rehabilitation User Manual | Binary |

**\*** This Installation Guide is only for Centralized Servers, not to be used at the field VistA site.

## 3.4.  Standards

Keyboard key names appear in bold type exactly as they appear on a standard keyboard and are enclosed in brackets. For example, the enter key appears as **<Enter>**.

# 4. Launching the Software Application

To launch BR 5.1 web application, click the following URL:

REDACTED

**NOTE:** You can also add the BR Application web site (URL) to your Favorites list in your Internet Web Browser or create a shortcut on your desktop.

To create a shortcut:

1. Right click on your desktop

2. Select New then select Shortcut

3. Follow the instructions that display in the Create Shortcut dialog box.

## 4.1.   Logging In

When you launch BR 5.1, the Login screen displays:

**Figure 1: BR 5.1 Login Screen**



1. Click the single sign-on icon.

2. Select your authentication Certificate and enter PIN when prompted.

3.  Not all users will have multiple institutions and will default to their respective institution. If there is a dropdown, Select the institution desired from the drop-down list:



4.  Click **Login** to display the Welcome Page.

**Figure 2: Welcome Page**



## 4.2.  Welcome Page

The Welcome Page is the Home Page and may be referred to as such throughout the Online Help menu and BR System. It is the first page a user will see after logging in. This page contains the Mission and Vision statements and a User Notification section.

If there are New Referrals and/or Deceased Patients a link will display under the User Notification section. Click on either of these links to view information for New Referrals and/or Deceased patients.

## 4.3.  User Notification Page

Use this page to view and manage notifications sent to you. After viewing the notification, click the **Done** button to return to the home page or click the **Delete** button to remove this notification from your list. Notifications will remain in your list until you delete them.

## 4.4.  Logging Out

Click the logout option at the top right corner of the screen to logout of the current user. The Blind Rehabilitation logout screen will appear.

**Figure 3: Logout Screen**

# 5. Page Layout

The BR pages are divided into four major sections:

- Header Menu - The horizontal area at the top of the page that displays links to other pages and menus. These links will remain consistent while navigating the BR application.

- Task Menu - The vertical list of links located on the left side of the page. These links are content specific to the Header Menu links.

- Content Area - The area to the right of the Task Menu and below the Header Menu that comprises the center of the page.

- Footer - The area at the bottom on the page, it provides additional links to other related Web sites.

## 5.1.  Header Menu

The **Header Menu** assists you in navigating the BR application by displaying a different set of **Task Menu** options based on the selected **Header Menu** option. The options that display on your page will depend on the administrative permissions that have been assigned to you.

### 5.1.1.  Home Menu Option

The Home menu option returns you to the BR Welcome page.

### 5.1.2.  Administrator Menu Option

**NOTE:** System Administration is performed at the Centralized level. The Menu options in the Administrator Menu are not performed at the local facility. Only Central Administrators will have access to the Administrator Menu Options.

The Administrator Menu option displays the Task Menu options that are available to users assigned the Administrator permissions. The options that display in the Task Menu include:

- BR Staff
- Role Menu Access
- BR Institutions
- Logging Level
- Logged in Users
- PSD Updater
- Institution List by Name
- Institution List by Service Area
- Role List by Description

- Staff List by Last Name

- Staff List by Institution

- Staff List by Role

- Menu Item List

- Role-Menu Assignment

### 5.1.3.   Enter/Edit Menu Option

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The Enter/Edit Options Menu is the default Task Menu. It displays the Task Menu options that are associated with entering and editing patient information. The options that display in the Task Menu include:

- Enter/Edit a BR Patient

- Enter/Edit a Patient's Status

- Enter/Edit the Benefits & Services Checklist

- Enter/Edit Eye Exams (Eligibility)

- Enter/Edit the VIST Annual Review

- Creating a Referral

- Modifying a Referral (Search)

- Modifying a Referral by Patient

### 5.1.4.   Letter and Label Menu Option

The options that display in the Task Menu include:

- Enter/Edit Letters

- Print Letters

- Print Patient Mailing Labels

### 5.1.5.   Print Individual Records Menu Option

The Print Individual Records Menu option displays the following Task Menu options:

- Patient Record

- Eye Exam (Eligibility) History

- VIST Annual Review History

- Benefits & Services Checklist

- Referral History

- PCE Problem List

### 5.1.6. Print Reports Menu Option

The Print Reports Menu option displays the following Task Menu options:

- Additions to VIST Roster

- Deceased Patients List

- Inactive VIST Patient Roster

- Referral Roster by From Institution

- Referral Roster by To Institution

- Referral Schedule Report

- VIST Roster List

- VIST Roster Summary

- VIST Roster Summary By VISN

## 5.2. Task Menu

The Task Menu displays vertically along the left margin of the page. Task Menu options display as links to a specific task (or screen). The specific Task Menu options that display, and from which you can select, is controlled by the selected Header Menu.

When you click an option in the Task Menu, except for the Help option, the Content Area will display the page that you will use to perform the selected task.

**NOTE:** The Help Task Menu option does not affect the Content Area, because the Online Help launches in a secondary browser.

## 5.3. Content Area

The Content Area displays to the right of the Task Menu and under the Header Menu. This area is the primary interface through which you can enter, and view data related to the task that you select from the Task Menu.

**NOTE:** The Help Task Menu option does not affect the Content Area, because the Online Help launches in a secondary browser.

## 5.4.  Footer

The Footer displays horizontally at the bottom of every page and provides a standard set of links to related Web sites.

## 5.5.  Online Help

Access Online Help from the Task Menu or from the Help link displayed in the Content Area on some pages.

When you access Online Help from the Task Menu, it will open to the Introduction Help topic from which you can find the topic you want using the Contents, Index, or Search features.

When you access Online Help from the link in the Content Area of a page, it automatically opens to the Help topic associated with the current page.

# 6. Administrator Menu

The Administrator Menu option displays the Task Menu options that are available to users with Administrator permissions.

**Figure 4: Administrator Menu Task Menu Options**



**NOTE:** System Administration is performed at the Centralized level. The menu options in the Administrator Menu are <u>not</u> performed at the local facility. Only Central Administrators will have access to the Administrator Menu Options.

## 6.1. BR Staff

The BR system allows users with the applicable permissions (such as VIST supervisors) to enter and edit BR Staff. This information is used to track usage and control access to the BR application.

**NOTE:** An entry must be present in the New Person file (#200) and/or the USR Class Membership file (#8930.3) before the staff members' information can be entered in the BR system.

1. From the Header Menu, select the Administrator Menu option. From the Task Menu, select the BR Staff link. This will display the Staff Search screen in the content area.

**NOTE:** The Administrator Menu option will display only if the Administrator Security key is assigned to the user.

**Figure 5: BR Staff**



2. Select the correct institution from the drop-down list of Institutions. In the Lookup User (last name, first name) field enter at least the first three letters of the staff member's last name. To narrow the search, type the last name and/or all or part of the first name in the field, and then select the Submit button. The search will return all staff members (display alphabetically by last name) whose names match the information entered. A message displays if no record is found. Select Reset to clear fields.

**NOTE:** Partial entries must include at least the first three letters of the user's last name. If less than three letters are used an error message will appear, "Please enter a name of at least 3 characters."

3. Select the **Get User** button to select the user you want to enter/edit. The staff's details will be displayed.

The selected user's last name and first name will be pre-populated in the fields provided along with any other previously entered information. If the selected user is already entered in the BR system, you can display any roles and institutions currently assigned to the user by selecting the Roles and Institutions buttons respectively.

The DUZ code will be pre-populated from the user's VistA account. A user can only be registered to the BR application through one VistA site. In the event that a user changes locations within the VA and is associated through a new VistA, an Application Administrator will be able to update the user's DUZ code directly on the BR Staff page, as depicted in Figure 6. Refer to Section 6.1.1 for instructions on DUZ code updates and proceed with caution.

**NOTE:** It is important that the **DUZ code** remains **UNEDITED** unless a staff transfer is being performed.

**Figure 6: BR Staff DUZ Code Field**



4. Select the user's title from the **Title** drop-down list. Examples include:

- ADMINISTRATIVE
- BLIND REHAB INSTRUCTORS
- CONSULTANT
- IRM SUPPORT USER
- LPN
- MEDICAL SUPPORT ASST.
- NURSING ASSISTANTS
- OCCUPATIONAL THERAPIST
- OPTOMETRIST
- PHYSICIAN
- PHYSICIAN ASST.
- PROGRAM SUPPORT ASST.
- PSYCHOLOGIST
- RECREATION THERAPIST
- REGISTERED NURSES
- RESEARCH

- SECRETARY

- SOCIAL WORKER

- SYSTEM ADMINISTRATOR

- THERAPY ASST.

- TRAINING SPECIALIST

5. Use the drop-down list provided to indicate whether the user is active or inactive.

6. Select the user's **FTE Percentage** from the drop-down list provided. The following selections are available:

- 100%

- 88%

- 75%

- 50%

- 33%

- 25%

- 0%

7. Type, or select from the pop-up calendar, the user's **Activation date**.

8. Type the user's **Address, City, State, Zip Code**, and **Primary Phone** number in the fields provided.

9. Type, or select from the pop-up calendar, the user's **Deactivation Date**.

10. To assign a role to the user, select the **Roles** button to display the **Staff Roles** screen.

Select a role to assign to this user. Select multiple roles by holding the **Ctrl** key when making the selections. When selection is completed, select the **Add Selected Roles** button below the **Available Roles** section. The assigned roles display in the **Assigned Roles** section. To remove an assigned role, first select, and then select the **Remove Selected Roles** button below the **Assigned Roles** section. Select **Save** to save updates and return to the staff's data. Select **Done** to return to the **Welcome Page**.

**Figure 7: Add/Remove Staff Roles**



11. To assign an institution to the user, select the **Institution** button to display the **Staff Institutions and Service Areas** screen:

Select the institution you want to assign to this user. Select multiple institutions by holding the **Ctrl** key when you make the selections. When selection is completed, select the **Add Selected Institutions** button below the **Available Institutions – Service Area** section. The assigned institutions display in the **Assigned Institutions – Service Area** section. To remove an assigned institution, first select, and then select the **Remove Selected Institutions** button below the **Assigned Institutions – Service Area** section. Select **Save** to save updates and return to the staff's data. Select **Done** to return to the **Welcome Page**.

12. Select the **Save** button to save changes.

Information regarding the date when and by whom the user's record was created and/or modified will be displayed in the **Staff Record Create and Last Modification Information** section.

13. Select **Done** to return to the **Welcome Page**.

## 6.1.1.    Staff Transfer

For staff transfers, the employee's DUZ code will need to be updated to match the new institution's DUZ code.

**NOTE:** Do not perform a Staff Search in the BR 5.1 Application at the **new** Institution **UNTIL AFTER** the BR 5.1 staff record from the original institution is updated with the new institutions DUZ Code for the staff member, *WHICH WILL BE DIFFERENT* from the previous duty station.

DUZ Can be found via the VistA "TBOX" menu. Choose the "Display user characteristics" option on that menu. The DUZ is the number following the name, in parenthesis.

**Example Output:**

REDACTED

With the new DUZ, in the BR 5.1 Application Administration Menu, select the BR Staff Option, search Institution for the old Institution's staff record. Update the DUZ code to the new Institution's DUZ code and save the changes to the staff record. Now Search at the new institution for the staff record and adjust the assigned role(s) and institution(s).

## 6.2.   Role Menu Access

Use the **Role Menu Access** to assign BR menu items to the different Roles.

1.  From the **Header Menu**, select the **Administrator Menu** option. From the **Task Menu**, select the **Role Menu Access** link. This will display the **Existing Roles** screen in the content area.

**NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to the user.

2.  To assign or modify the menu items assigned to a specific role, select the **Edit** button next to the role. This displays the **Edit Role** screen.

From the **Available Menu Items** list select the items to be added to the role. Select multiple menu items by pressing and holding down the **Ctrl** key when you make the selections. When selection is complete, select the **Add Selected Menu Items** button below the **Available Menu Items** section. The assigned menu items list in the **Assigned Menu Items** section. To remove an assigned menu item, first select, and then select the **Remove Selected Menu Items** button below the **Assigned Menu Items** section.

**Figure 8: Edit Role**



3. Select the **Save** button to save your changes.

4. Select **Done** to return to the **Welcome Page.**

# 6.3. BR Institutions

This feature displays a list of the existing BR Institutions. Providing the Service Area, Active Status, and Total Number of Active Users

1. From the **Header Menu**, select the **Administrator Menu** option. From the **Task Menu**, select the **BR Institutions** link. This will display the **Existing Institutions** in the content area.

**NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to the user.

2. To change the Active Status, select the **Edit** button. This displays the **Edit Blind Rehabilitation Institution**. Under **Active Status**, select the drop-down arrow and choose **yes** or **no**. Select **Yes** for indicating active or **No** for indicating inactive.

**Figure 9: Edit Blind Rehabilitation Institution**



3. Select the **Save** to save your changes.

   a. Select **Return** to return to the **Existing Institutions** page

4. Select **Done** to return to the **Welcome Page**.

# 6.4.   Logging Level

The BR application generates logging events while it runs. These can indicate error conditions, informational messages, or to debug helper output.

1. From the **Header Menu**, select the **Administrator Menu** option.

**NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, select Logging Level to display the list of Available logging levels in the Content Area.

3. To change the **Logging Level**, select the new level, and then select the **Set Logging Level** button. The current level will be selected.

**Figure 10: Logging Level**



A logging event can be one of the following levels:

- OFF

- ERROR

- WARN

- INFO - (Normal Mode)

- DEBUG

- ALL

Although events of all types are being generated as the application runs, the logging level admin screen determines which level of events is saved into the log file.

- The **OFF** setting turns off all log events.

- If set to **ERROR**, only error events are saved.

- If set to **WARN**, warn and error events are saved.

- If set to **INFO**, info, warn and error events are saved.

- If set to **DEBUG**, debug, info, warn and error events are saved.

- The **ALL** setting is the same as debug for the current time.

**DEBUG** is a very verbose mode and should only be used to troubleshoot support issues, as it slows down the application. The normal mode in which to run should be **INFO**.

4. Select the **Done** button to return to the Welcome Page

# 6.5.   Logged-In Users

Use this function to display a list and count of all users logged into the system. This functionality also allows the System Administrator to forcibly log a user out.

1. From the **Header Menu**, select the **Administrator Menu** option.

**NOTE:** The **Administrator Menu** option will display only if the Administrator role is assigned to you.

2.  From the **Task Menu**, select **Logged in Users** to display the list of and the number of **Logged in Users** in the **Content Area**.

3.  Select the **Logout** button next to a user to log the user out of the system.

4.  Select **Done** to return to the **Welcome Page**.

## 6.6.    PSD Updater

The **PSD Updater** manually runs the Person Service Demographics (PSD) update for all BR patients. This option should not be run during the normal working hours as it is quite intensive and will slow down the application for all users.

1.  From the **Header Menu**, select the **Administrator Menu** option.

**NOTE:** The **Administrator Menu** option will display only if the Administrator role is assigned to you.

2.  From the Task Menu, select PSD Updater to display PSD Updater Management in the Content Area.

3.  Select **Run PSD Updater** to start the PSD update process.

4.  Select **Done** to return to the **Welcome Page**.

**Figure 11: Successful PSD Updater Screen**



## 6.7.    Administrator Reports

### 6.7.1.    Institution List by Name

The **Institution List by Name** report provides a list of Institutions in alphabetical order by name.

This report contains:

- Institution Name
- Station Number
- City
- State
- VISN
- Report Printed Date

1. From the **Header Menu**, select the **Administrator Menu** option.
2. **NOTE:** The **Administrator Menu** option will display only if the Administrator role is assigned to you.
3. From the **Task Menu**, select the **Institution List by Name** link to display the **Institution List by Name Report** screen in the **Content Area**.
4. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 12: Institution List by Name Report**



## 6.7.2. Institution List by Service Area

The **Institution List by Service Area** report provides a list of Institutions in alphabetical order by **Service Area** then by **Institution Name**.

This report contains:

- Institution Name

- Station Number

- City

- State

- VISN

- Total of the Service Area

- Report Printed Date

1. From the **Header Menu**, select the **Administrator Menu** option.

    **NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, select the Institution List by Service Area link to display the Institution List By Service Area Report screen in the Content Area.

3. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 13: Institution List by Service Area Report**



## 6.7.3. Role List by Description

The **Role List by Description** report provides a list of Roles in alphabetical order by Description.

This report contains:

- Role Description

- Role Code

- Status

- Report Printed Date

1. From the **Header Menu**, click the **Administrator Menu** option.

   **NOTE**: The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, click the Role List by Description link to display the Role List by Description Report screen in the Content Area.

3. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 14: Role List by Description**



## 6.7.4.  Staff List by Last Name

The **Staff List by Last Name** report provides a list of Staff members in alphabetical order by last name.

This Report Contains the Staff's:

- Last Name

- First Name

- Title

- Status

- Activation Date

- Deactivation Date

- City

- State

- Report Printed Date

1. From the **Header Menu**, click the **Administrator Menu** option.

   **NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, click the **Staff List by Last Name** link to display the **Staff List by Last Name** - Report Criteria screen in the Content Area.

3. Select the Export button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 15: Staff List by Last Name**

| | | | | | Report Printed: | 10/18/2021 | |
|---|---|---|---|---|---|---|---|

**Staff List by Last Name**

| Last Name | First Name | Title | Status | Activation Date | Deactivation Date | City | State |
|---|---|---|---|---|---|---|---|
| Tester | One | Blind Rehab Spec. (Vist Coordinator) | Active | 08/21/2019 | Still Active | No Data | No Data |
| Tester | Two | Blind Rehab Spec. (Vist Coordinator) | Active | 06/09/2017 | Still Active | No Data | No Data |
| Tester | Three | Blind Rehab Spec. (Vist Coordinator) | Active | 05/10/2018 | Still Active | No Data | No Data |
| Tester | Four | Blind Rehab Spec. (Vist Coordinator) | Active | 07/29/2019 | Still Active | No Data | FL |
| Tester | Five | Blind Rehab Spec. (Vist Coordinator) | Active | 08/19/2019 | Still Active | No Data | No Data |
| Tester | Six | Blind Rehab Spec. (Vist Coordinator) | Active | 05/30/2018 | Still Active | No Data | No Data |
| Tester | Seven | No Data | Active | 12/28/2018 | Still Active | No Data | No Data |
| Tester | Eight | System Administrator | Active | 12/28/2018 | Still Active | No Data | No Data |
| Tester | Nine | System Administrator | Active | 09/01/2021 | Still Active | No Data | No Data |
| Tester | Ten | System Administrator | Active | 09/23/2021 | Still Active | No Data | No Data |
| Tester | Eleven | Consultant | Active | 09/17/2021 | Still Active | No Data | No Data |
| Tester | Twelve | Lucas | Active | 09/15/2021 | Still Active | Chicago | ID |

## 6.7.5.    Staff List by Institution

The Staff List by Institution report provides a list of staff members for each institution. List alphabetical first by Institution and then by last name.

This report contains:

- Last Name

- First Name

- Title

- Status

- Activation Date

- Deactivation Date

- City

- State

- Institution Name

- Report Printed Date

1. From the Header Menu, click the Administrator Menu option.

   **NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, click the Staff List by Institution link to display the Staff List by Institution Report screen in the Content Area.

3. Select the Export button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 16: Staff List by Institution**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | Report Printed: | 10/18/2021 |

**Staff List by Institution**

| Last Name | First Name | Title | Status | Activation Date | Deactivation Date | City | State |
|---|---|---|---|---|---|---|---|
| **Institution: 13TH & MISSION DOM** | | | | | | **Total for the Institution: 11** | |
| Tester | One | Blind Rehab (Bros) | Active | 05/17/2018 | Still Active | No Data | No Data |
| Tester | Two | Blind Rehab Spec. (Vist Coordinator) | Inactive | 05/16/2018 | Still Active | No Data | MD |
| Tester | Three | Lpn | Active | 04/26/2018 | Still Active | No Data | No Data |
| Tester | Four | Blind Rehab Spec. (Vist Coordinator) | Active | 07/29/2019 | Still Active | Houston | TX |
| Tester | Five | Blind Rehab Spec. (Vist Coordinator) | Active | 11/01/2018 | Still Active | No Data | No Data |
| Tester | Six | Consultant | Active | 09/13/2021 | Still Active | No Data | No Data |
| Tester | Seven | Blind Rehab (Bros) | Active | 11/19/2018 | Still Active | UAT | VA |
| Tester | Eight | Blind Rehab (Bros) | Active | 05/21/2018 | Still Active | UAT | VA |
| Tester | Nine | Blind Rehab (Bros) | Active | 05/15/2018 | Still Active | UAT | VA |
| Tester | Ten | Blind Rehab (Bros) | Active | 05/09/2018 | Still Active | UAT | VA |
| Tester | Eleven | Blind Rehab Spec. (Vist Coordinator) | Active | 07/29/2019 | Still Active | Bethesda | MD |
| **Institution: AAC MASTER VETERAN RECORDS** | | | | | | **Total for the Institution: 3** | |
| Tester | Twelve | Blind Rehab Spec. (Vist Coordinator) | Active | 06/05/2018 | Still Active | No Data | No Data |

## 6.7.6.    Staff List by Role

The **Staff List by Role** report provides a list of staff members in alphabetical order first by **Role** and then by last name.

This report contains:

- Last Name

- First Name

- Title

- Status

- Activation Date

- Deactivation Date

- City

- State

- Role

- Report Printed Date

1. From the **Header Menu**, click the **Administrator Menu** option.

   **NOTE**: The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, click **the Staff List by Role** link to display the **Staff List by Role** Report screen in the Content Area.

3. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 17: Staff List by Role**

| Last Name | First Name | Title | Status | Activation Date | Deactivation Date | City | State |
|---|---|---|---|---|---|---|---|
| Role: BLIND REHAB INSTRUCTORS | | | | | | | Total for the Role: 5 |
| Tester | One | System Administrator | Active | 09/01/2021 | Still Active | No Data | No Data |
| Tester | Two | Blind Rehab Specialist (Chiefs/Asst. | Active | 07/09/2021 | Still Active | Salt Lake City | UT |
| Tester | Third | System Administrator | Active | 10/12/2021 | Still Active | No Data | No Data |
| Tester | Four | System Administrator | Active | 09/01/2021 | Still Active | No Data | No Data |
| Tester | Five | System Administrator | Active | 08/09/2019 | Still Active | No Data | No Data |
| Role: BLIND REHAB SPEC. (INTERN) | | | | | | | Total for the Role: 4 |
| Tester | Six | System Administrator | Active | 09/01/2021 | Still Active | No Data | No Data |
| Tester | Seven | Blind Rehab Specialist (Chiefs/Asst. | Active | 07/09/2021 | Still Active | Salt Lake City | UT |
| Tester | Eight | System Administrator | Active | 10/12/2021 | Still Active | No Data | No Data |
| Tester | Nine | System Administrator | Active | 09/01/2021 | Still Active | No Data | No Data |

Report Printed: 10/18/2021

**Staff List by Role**

## 6.7.7. Menu Item List
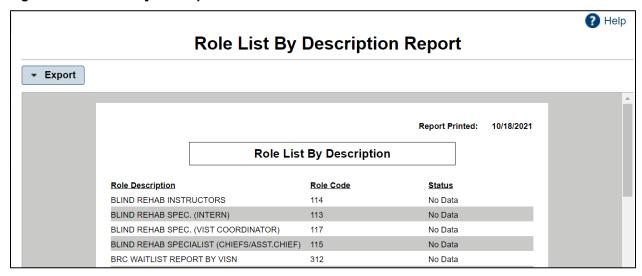
The **Menu Item List** report provides a list of Menu Items in alphabetical order by Description.

This report contains:

- Description

- Report Printed Date

1. From the **Header Menu**, click the **Administrator Menu** option.

   **NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the **Task Menu**, click the **Menu Item List** link to display the **Menu Item List Report** screen in the **Content Area**.

3. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 18: Menu Item List**



## 6.7.8.    Role-Menu Assignment

The **Role-Menu Assignment** report provides a list of the available menu items that have been assigned to each role. List alphabetically first by role description and then by menu description. It is used to show what permissions are granted to a user if a role is assigned to them.

This report contains:

- Role Description
- Menu Description
- Reported Printed Date

1. From the **Header Menu**, click the **Administrator Menu** option.

   **NOTE:** The Administrator Menu option will display only if the Administrator role is assigned to you.

2. From the Task Menu, click the Role-Menu Assignment link to display the Role-Menu Assignment Report screen in the Content Area.

3. Select the **Export** button and choose the download type (CSV, Excel, PDF, RTF, or Word).

**Figure 19: Role-Menu Assignment**

# 7. Enter/Edit Menu

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

## 7.1. Searching for and Selecting a Patient

You must select a patient prior to performing patient-related tasks. There are two types of patient searches in BR 5.1, the Health*e*Vet-VistA Patient Search, and the BR Patient Search. The Health*e*Vet-VistA Patient Search looks in the local VistA system (Patient File #2) using the Logged In institution. The Patient Search functionality can be utilized by entering the first initial of a patient's last name with the last four digits of their social security number.

The Health*e*Vet-VistA Patient Search is used to select a patient that is in their local VistA system but has not been added to the Blind Rehabilitation application. This search is utilized when selecting the **BR Patient** under the **Enter/Edit Menu**.

<u>**NOTE**</u>: If a user logs into the system and selects a task other than the **BR Patient** or **Low Vision Patient** Links under the **Enter/Edit Menu**, they will get the **BR Patient Search**, not the **Health*e*Vet-VistA Patient Search** and if they are searching for a patient that has not been added to the **Blind Rehabilitation application,** the patient will <u>not</u> display.

### 7.1.1. Health*e*Vet-VistA Patient Search

Select **BR Patient under the Enter/Edit Task Menu**. The **Health*e*Vet-VistA Patient Search** feature displays in the Content Area when a patient is not already selected, and you select one of the following Enter/Edit Task Menu options:

- Enter/Edit a BR Patient

- Enter/Edit a Low Vision Patient

    1. Type at least the first three letters of the patient's last name in the **Select Patient** field and click the **Search** button. A list of patients displays (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

**Figure 20: Patient Search Results**



At this point, the system is accessing existing VA patients that have not been added into the BR application. Users also can Search by Input Provider, Ward, Clinic, or Specialty.

2.  Select the patient whose record you want to access by clicking on the patient's name.

After selecting your patient, the Patient Lookup Status Notification screen displays. If a patient has any CWAD's (Crisis Notes, Warning Notes, Allergies, and Directives), these warning messages will appear. There could be multiple notifications screens for you to navigate through, for example, Means Test, Deceased, and Sensitive patient, if applicable.

The selected patient is maintained as the "Current Patient" throughout the subsequent tasks until you select another patient or log off. As you select subsequent tasks from the **Task Menu**, you are asked if you want to continue with the current patient or select another patient.

The **BR Patient Search** feature displays in the **Content Area** when you select one of the Enter/Edit Task Menu options below. If a patient is already selected, that patient's information displays, and you will be asked if you want to continue with the current patient or select a new patient.

**NOTE:** The patient you are searching for must exist in the Blind Rehabilitation system for the following options:

- Enter/Edit a Patient's Status
- Enter/Edit the Benefits & Services Checklist
- Enter/Edit Eye Exams (Eligibility)
- Enter/Edit the VIST Annual Review
- Creating a Referral
- Modifying a Referral (Search)

- Modifying a Referral by Patient

3. Type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name. In addition to the previous search rules, to narrow your search, you can also enter all or part of the patient's first name. Enter the search data in the fields provided and click the **Search** button.

4. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5. From the Patients Found page, select the patient whose record you want to access by clicking the **Select** button next to the patient's name.

The selected patient is maintained as the "Current Patient" throughout the subsequent tasks until you select another patient or log off. As you select subsequent tasks from the **Task Menu**, you are asked if you want to continue with the current patient or select another patient.

**Figure 21: Blind Patient Local VistA Site Search**



## 7.2. Enter/Edit a BR Patient

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

__NOTE:__ Some fields are non-editable, display only. This means that the data in the field is defaulted by the system, and it cannot be changed.

1. From the Enter/Edit Menu, click **BR Patient**. The **Health*e*Vet-VistA Patient Search** feature displays in the Content Area. Refer to "Searching for and Selecting a Patient" under "Enter/Edit Menu" for instructions on patient selection.

## 7.2.1. Basic Information

1. From the **Institution** drop-down list, select the institution associated with the patient's visit.

2. From the **Tracked By** drop-down list, select the person who is tracking this patient (for example, to whom you want to send deceased patient notifications).

3. Type, or use the pop-up calendar to select the date on which the patient was enrolled as a BR patient.

4. Select the patient's eligibility for services using the **VIST Eligible** drop-down list. The following options are available:

   - YES

   - NO – REVIEWED FOR BRC ATTENDANCE

   - NO – OTHER

   - NO – NOT LEGALLY BLIND

   - INACTIVE

5. Select the source from which the referral originated from the **Referral Source** drop-down list. The following options are available:

   - VA EYE CLINIC

   - NON – VA EYE CLINIC

   - STATE AGENCY

   - COMMUNITY AGENCY

   - VA STAFF

   - VETERANS SERVICE ORGANIZATION

   - FAMILY FRIEND

   - SELF

   - OTHER

   - Transfer from another VIST

   - VBA Printout

   - VBA Staff

   - Not known

   - DOD

6. From the **Major Activity** drop-down list, select the code that most closely corresponds to the patient's major activity. The following options are available:

   - EMP FOR PAY (The patient is employed for pay)

- ENG IN TRN/SCHOOL (The patient is engaged in training or school program)
- VOL WORK 10HRS/WK (The patient performs volunteer work at least 10 hours per week)
- RETIRED W/APPROP. ACT. (The patient is retired and performs appropriate activities)
- TOO ILL OR TOO DISABLED (The patient is too ill or too disabled to perform activities)
- NO WELL DEFINED ACT. (The patient performs no well-defined activities)
- NOT KNOWN (Major activities are unknown)

The status of the patient's eligibility displays in the **Eligibility (VIST)** field.

7. Select the category of eligibility as prescribed on the AMIS from the **VA Entitlement** drop-down list. The following options are available:
   - 0% ONLY
   - 10% SC THRU SMC
   - SC FOR BLINDNESS
   - NSC PENSION A&A/HB
   - NSC PENSION ONLY
   - NSC OTHER ELIGIBILITY

If available, the date of the patient's last VIST Annual Review displays at the bottom of the Review section. You cannot edit his field.

### 7.2.1.1.  Ocular Health

1. Use the drop-down lists provided to indicate the primary and, if applicable, the secondary cause of the patient's vision loss. This is a mandatory field. The following options are available:
   - APHAKIA 379.31
   - CATARACT 366.9
   - CEREBOVASCULAR 438.9
   - CHORIOID/RETINAL
   - CHORIORENTINITIS 363.20
   - CORNEAL DISEASE 371.00
   - DIABETIC RETINOPATHY (PROLIFERATIVE) 362.02/250.0
   - DIABETIC RETINOPATHY, BACKGROUND (NON-PROLIFERATIVE) 362.01/250.50

- GLAUCOMA 365.9

- HEMIANOPSIA; BILATERAL FIELD DEFECTS 368.46

- HISTOPLASMOSIS 115.99

- MACULAR DEGENERATION, WET, EXUDATIVE 362.52

- MACULAR DEGENERATION, DRY, NONEXUDATIVE 362.51

- MACULAR DISEASE NOS 362.50

- NOT APPLICABLE

- OPTIC ATROPHY 377.10

- OPTIC NERVE 377.49

- OTHER EYE DISORDERS 379.8

- RETINAL DETATCHMENT

- RETINAL DISORDER 362.9

- RETINAL VASCULAR OCCLUSION

- RETINITIS PIGMENTOSA 362.74

- SOLAR BURNS

- STARGARDTS 362.75

- TRAUMA 950.9

- UNKNOWN 377.9

2. If the patient has another cause of vision loss, select the other cause from the drop-down list provided, and then click the **Add Other Cause of Vision Loss** button to add the cause to the patient's record. Multiple causes can be added to the patient's record.

3. Type the onset year of the patient's vision loss in the field provided.

4. Use the drop-down list provided to select the value that best represents the patient's family history of eye disease. The following options are available:

- APHAKIA

- CATARACT

- CEREBOVASCULAR

- CHORIOID/RETINAL

- CHORIORENTINITIS

- CORNEAL DISEASE

- DIABETIC RETINOPATHY

- GLAUCOMA

- HISTOPLASMOSIS

- MACULAR DEGENERATION

- MACULAR DISEASE

- NOT APPLICABLE

- OPTIC ATROPHY

- OPTIC NERVE

- OTHER

- RETINAL DETATCHMENT

- RETINAL DISORDER

- RETINAL VASCULAR OCCLUSION

- RETINITIS PIGMENTOSA

- TRAUMA

5. Use the drop-down list provided to indicate whether the patient uses eye prosthesis.

6. If the patient uses eye prosthesis, type or use the pop-up calendar to select the date on which the prosthesis was last replaced.

7. Click the **Previous** to return to the previous screen, the **Save** button to save the information, the **Next** button to advance to the next screen, or **Done**.

### 7.2.1.2.   Patient History

Use Patient History to capture relevant historic information about the patient.

1. Type the number of years of education the patient has completed.

2. From the drop-down list provided, indicate whether the patient is currently engaged in training or school. The following options are available:

- YES

- NO

- UNKNOWN

3. Use the field provided to type additional education information. The field can accommodate up to 240 characters.

4. Use the field provided to type the patient's work history. The field can accommodate up to 300 characters.

5. Use the drop-down list to indicate the patient's employment status. The following options are available:

- YES

- NO

- UNKNOWN

6. Use the field provided to type the patient's primary occupation. The field can accommodate up to 80 characters.

7. Use the drop-down list to indicate whether the patient's sight loss caused the patient to lose his/her job. The following options are available:

- YES

- NO

- UNKNOWN

## 7.2.2. Financial/Benefits

Use the fields provided to enter information about the patient's finances and benefits.

8. Type the patient's monthly household income in the field provided.

9. Type the source of the patient's household income in the field provided. The field can accommodate up to 80 characters.

10. Type additional information about the patient's financial and benefits in the field provided. The field can accommodate up to 10,000 characters.

11. Click the **Previous** to return to the previous screen, the **Save** button to save the information, the **Next** button to advance to the next screen, or **Done**.

### 7.2.2.1. Domestic Information

1. The system displays the current patient's marital status.

2. If applicable, the system displays spousal information for the current patient in the fields provided.

3. If applicable, type the names of the patient's dependents in the fields provided, and then click the **Add Dependent** button to add the dependents to the patient's record. Repeat this step as necessary to add all the patient's dependents.

4. Type any additional information regarding the patient's marital status in the field provided. The field can accommodate up to 80 characters.

### 7.2.2.2. Living Arrangements

1. From the drop-down list provided, select the value that best represents the patient's living arrangements. The following options are available:

- ALONE

- FAMILY

- NURSING HOME

- STATE VETERANS CENTER
- UNKNOWN
- LIVES WITH FRIEND
- BOARD AND CARE
- OTHER
- SPOUSE ONLY

2. From the drop-down list provided, select the value that best represents the type of residence in which the patient lives. The following options are available:

- HOUSE
- APARTMENT
- NURSING HOME
- VA DOMICILLIARY
- STATE VETERANS HOME
- BOARD & CARE
- HOMELESS
- OTHER
- NOT KNOWN

3. Click the **Previous** to return to the previous screen, the **Save** button to save the information, the **Next** button to advance to the next screen, or **Done**.

### 7.2.2.3. Other Health

In the field provided, type information regarding other health problems the patient may have. The field can accommodate up to 10,000 characters.

### 7.2.2.4. Medical Treatment

1. Type, or use the pop-up calendar to select the date of the patient's last medical exam.

2. Use the drop-down list provided to indicate whether the VA provided the patient's previous training.

3. Type any additional medical information about the patient in the field provided. The field can accommodate up to 80 characters.

### 7.2.2.5.  Blind Rehabilitation Experience

1. Use the drop-down list provided to indicate whether the patient has received any previous blind rehabilitation training. If Yes is selected the remaining fields will become active and editable.

2. If the patient has received previous blind rehabilitation training, use the drop-down list provided to indicate whether the VA provided the patient's previous training.

3. Type, or use the pop-up calendar to select the date of the patient's previous blind rehabilitation training.

4. Use the drop-down list provided to select the type of Blind Rehabilitation training that the patient previously received. The following options are available:

   - BRC AUDIBLE DEVICES
   - BRC CAT – 1$^{st}$ EXP
   - BRC CAT – ADL TRN
   - BRC DUAL PROGRAM – 1$^{st}$ EXP
   - BRC DUAL PROGRAM – ADL TRN
   - BRC Other Programs – 1$^{st}$ EXP
   - BRC Other Programs – ADL TRN
   - BRC REGULAR PROGRAM – 1$^{st}$ EXP
   - BRC REGULAR PROGRAM – ADL TRN
   - BROS LOCAL TRAINING – 1$^{st}$ EXP
   - BROS LOCAL TRAINING – ADL TRN
   - NON-VA BLINDNESS AGENCY – 1$^{ST}$ EXP
   - NON-VA BLINDNESS AGENCY – ADL TRN
   - NON-VA LOCAL CAT – 1$^{ST}$ EXP
   - NON-VA LOCAL CAT – ADL TRN
   - VA OUTPATIENT LV CLINIC – 1$^{ST}$ EXP
   - VA OUTPATIENT LV CLINIC – ADL TRN
   - VISOR – 1$^{ST}$ EXP
   - VISOR – ADL TRN

**NOTE**: EXP means Experience; ADL TRN means Additional Training.

5. Click the **Previous** to return to the previous screen, the **Save** button to save the information, the **Next** button to advance to the next screen, or **Done**.

### 7.2.2.6.    Assessment Questions

1.  Type any adjustments to sight loss in the field provided. The field can accommodate up to 10,000 characters.

2.  Type any living skills assessments or information in the field provided. The field can accommodate up to 10,000 characters.

3.  Type any orientation and mobility assessments or information in the field provided. The field can accommodate up to 10,000 characters.

4.  Type any visual skills assessments or information in the field provided. The field can accommodate up to 10,000 characters.

5.  Type any manual skills assessments or information in the field provided. The field can accommodate up to 10,000 characters.

6.  Type any computer skills assessments or information in the field provided. The field can accommodate up to 10,000 characters.

7.  Type any activities, social, or recreational assessments or information in the field provided. The field can accommodate up to 10,000 characters.

8.  Type any impressions information in the field provided. The field can accommodate up to 10,000 characters.

9.  Type any veteran goals in the field provided. The field can accommodate up to 10,000 characters.

10. Type any appropriateness for blind rehabilitation in the field provided. The field can accommodate up to 10,000 characters.

11. Type any plans in the field provided. The field can accommodate up to 10,000 characters.

## 7.3.    Enter/Edit a Low Vision Patient

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The Blind Rehabilitation Application provides the functionality to Maintain Low Vision Patients. Maintenance includes Enter, Edit, and Print capabilities. The Enter/Edit capabilities are part of the Clinicians (i.e., Ophthalmologists and Optometrists) Activities, while the Print Low Vision Patient Report is part of the general user activities.

1.  From the **Enter/Edit Menu**, click **Low Vision Patient**. The Health*e*Vet-VistA Patient Search feature displays in the Content Area. Refer to "Searching for and Selecting a Patient" under "Enter/Edit Menu" for instructions on patient selection.

The Enter/Edit Low Vision Patient page displays for the current patient

**Figure 22: Edit Low Vision Patient**

## Edit Existing Low Vision Patient

### Current Patient

| | | |
|---|---|---|
| **Name:**<br>TESTERTWO, INPATIENT | **Date of Birth (Age):**<br>1969 (52) | **Gender:**<br>Male |
| **Social Security Number:** | **Patient Type:**<br>VIST | **Patient Status:**<br>ACTIVE |
| **Roster Institutions:**<br>BANGOR MAINE CBOC (402HB) | | |

\* - Field(s) identified with the asterisk are mandatory.

**\* Date Added as Low Vision Patient (MM/DD/YYYY):**

03/13/2019

**\* Institution:**

BANGOR MAINE CBOC (402HB)

**\* Tracked By:**

BRVSPROVIDER, ONE

**\* Primary Cause of Vision Loss:**

CHORIOID/RETINAL

Save    Done

2. Type or select from the pop-up calendar the date the patient was added as a **Low Vision Patient**.

3. In the **Institution field**, click the down arrow and select the correct institution.

4. In the **Primary Cause of Vision Loss** field, click the down arrow and select the primary cause of vision loss.

5. Enter or edit the data in the fields, and then click the **Save** button to save the information you entered. The message: **"Patient Successfully Saved"** displays.

6. Click the Done button to return to the Welcome Page.

## 7.4.    Enter/Edit a Patient's Status

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The Enter/Edit Patient Status page allows you to assign a status of Inactive to a patient. You can also reassign a status of Active to a patient.

From the Task Menu, click the **Patient Status** link.

If a patient is already selected, you will be asked if you want to continue with the current patient or select another patient.

To select another patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name. In addition to the previous search rules, to narrow your search, you can also enter all or part of the patient's first name. Enter the search data in the fields provided. and click the **Search** button.

1. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

**Figure 23: Patient Search Results**

| Name ⇕ | Roster Institution ⇕ | Date of Birth ⇕ | SSN ⇕ | |
|---|---|---|---|---|
| TEST, OTHD | ALEXANDRIA VAMC (502) | 1960 | | Select |
| TEST, PATIENTTEST | ALEXANDRIA VAMC (502) | 1980 | | Select |
| TESTER, TESTTWO | BALTIMORE MD VAMC (512) | 1978 | | Select |
| TESTERTWO, INPATIENT | BANGOR MAINE CBOC (402HB) | 1969 | | Select |
| TESTING, JAMTEST CAL | ALEXANDRIA VAMC (502) | 1971 | | Select |
| TESTINPAT, TESTING | BALTIMORE MD VAMC (512) | 1981 | | Select |
| TESTMOCHA, PATIENTA | ALEXANDRIA VAMC (502) | 1978 | | Select |
| TESTONE, ONE | ABRAHAM LINCOLN NATL CEMETERY (915) | 1965 | | Select |
| TESTOUTABC, TEN | BALTIMORE CBOC (512GD) | 1979 | | Select |
| TESTOUTDEF, ONE | EAST LOS ANGELES CBOC (691GF) | 1971 | | Select |
| In total there are 13 patient(s). | | | | |
| BR Patient Search | | | | |

2. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's name.

The Patient Status page displays the following sections:

- Current Patient information

- Current Patient Status

- Inactivate/Activate Patient

**NOTE**: The patient's status can be Active or Inactive. If the patient's status is active, this section will allow you to inactive the patient. If the patient's status is inactive, this section will allow you to activate the patient.

**Figure 24: Patient Status Change**



**Patient Status Change**

**Current Patient**

Name:
TEST, OTHD

Date of Birth (Age):
1960 (61)

Gender:
Male

Social Security Number:

Patient Type:
VIST

Patient Status:
ACTIVE

Roster Institutions:
ALEXANDRIA VAMC (502)

**Current Patient Status**

| Patient Status | Patient Enrollment Date | Last Status Change Reason | Last Status Change Date |
| --- | --- | --- | --- |
| Active | 2019-06-12 | None | |

**Inactivate Patient**
* - Fields identified with the asterisk are mandatory.

*Status Change Date (MM/DD/YYYY):

*Select Reason:

### 7.4.1. Current Patient Status

The Current Patient status section displays the patient's status, either Active or Inactive, the date, and the reason the patient's status was changed to Inactive.

### 7.4.2. Changing a Patient's Status

If the current patient's status is "Active," you can change the patient's status to "Inactive." If the current patient's status is "Inactive," you can change the patient's status to "Active."

1. Type, or select from the pop-up calendar the effective date of the patient's change of status.

2. If you are changing the patient's status from "Active" to "Inactive," you will need to select one of the following reasons from the drop-down list provided:

   - Other/Deceased (not confirmed)

   - No longer legally blind

   - Not Eligible for VA Healthcare

   - Unable to locate

**NOTE**: The Select Reason drop-down list does not display when changing a patient's status from "Inactive" to "Active."

3. Click the **Activate/Inactivate Patient Status** button to change the patient's status

4. Click the **Done** button to return to the Welcome Page.

# 7.5. Enter/Edit the Benefits & Services Checklist

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.
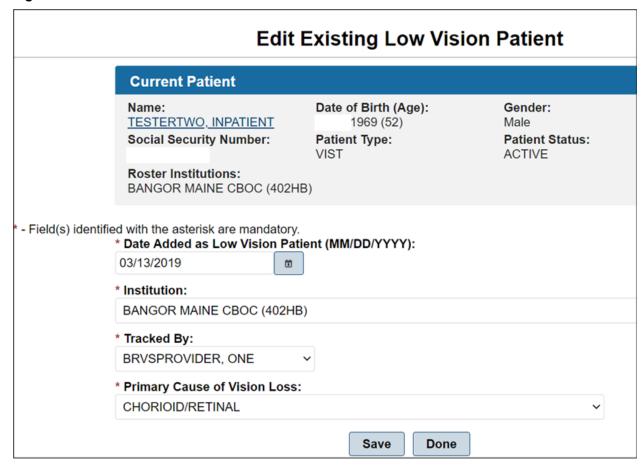
Use Benefits & Services Checklist to enter the patient's current benefits. This includes VA, Non-VA, and Local benefits.

1. From the Enter/Edit Menu, click **Benefits & Services Checklist**.

If a patient is already selected, you are asked if you want to continue with the current patient or select another patient.

To continue with the current patient, click **OK**.

To select a different patient, to select another patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name. In addition to the previous search rules, to narrow your search, you can also enter all or part of the patient's first name. Enter the search data in the fields provided. and click the **Search** button.

2. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

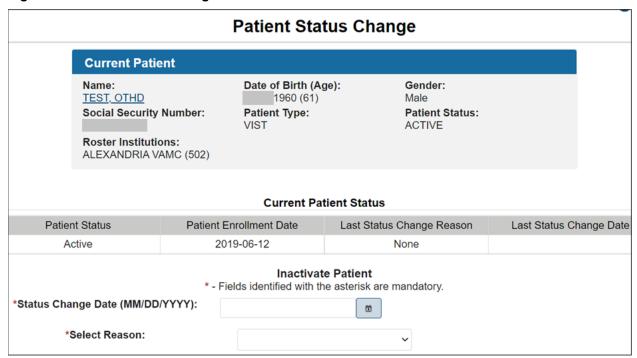3. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's name to display the Edit Benefits and Services Checklist screen. If you are editing for this patient, their current benefits default in the fields. The Current Patient information displays in the upper part of the screen.

**Figure 25: Benefits and Services Options Screen**

There are three sections to this screen:

- VA Benefits and Services
- Non- VA Benefits and Services
- Local Benefits and Services

### 7.5.1.    VA Benefits and Services

At each field, click the down arrow to display the drop-down list of choices. Each field in this section has the following choices from which to select:

- Declined
- Not Available
- Not Eligible
- Pending
- Yes

1. **Audible Device Training** allows you to note if the Veteran has exercised his/her right to an Audible Device. From the drop-down list, select whether the Veteran has used or is eligible for the Audible Device.

2. **Auto Grant** denotes if the Veteran has exercised his/her right to an Auto Grant. From the drop-down list, select whether the Veteran has used or is eligible for the Auto Grant.

3. **Blind Rehab Training** allows you to note if the Veteran has attended or declined blind rehabilitation services. You may also indicate if the Veteran has a pending application for blind rehab.

4. **Tri-care** allows you to indicate if the Veteran/family is eligible for Tri-care. You may also indicate if an application is pending for Tri-care.

5. **CHAMPVA** allows you to indicate if the Veteran/family is eligible for CHAMPVA. You can also indicate if an application is pending for CHAMPVA.

6. **Clothing Allowance** allows you to indicate if the Veteran is eligible for the clothing allowance. You can also indicate if an application for the clothing allowance is pending approval by PSAS.

7. **Education –VA Response** allows you to indicate if the Veteran/family has taken advantage of the Education benefit. You may also note if an application is pending.

8. **Fee Basis** indicates a Veteran's eligibility for and status with Fee Basis services.

9. **HISA** indicates if the Veteran has eligibility for and/or used the HISA grant.

10. **Insurance – SDVI** indicates if the Veteran has insurance.

11. **Insurance – Waive Premium** indicates whether the Veteran is eligible for and has applied for a waiver of the premiums for the SDVI Life Insurance.

12. **Prosthetics** describes if the Veteran is eligible for prosthetic items.

13. **SAH- 801 (a)** is the structural alteration to housing program administered by the VARO. This field allows you to enter the Veteran's use and eligibility for this grant.

14. **SAH – 801 (b)** is the structural alteration to housing program administered by the VARO. This field allows you to enter the Veteran's use and eligibility for this grant.

15. **Vocational Rehabilitation** denotes if the Veteran has participated in the VA vocational rehabilitation program.

16. **VIST Annual Review** allows you to enter information regarding the Veteran's participation in the annual VIST review in your program.

## 7.5.2.    Non-VA Benefits and Services

At each field, click the down arrow to display the drop-down list of choices. Each field in this section has the following choices from which to select:

- Declined

- Not Available

- Not Eligible

- Pending

- Yes

At each field, select the correct choice.

1. **Identification Card**

**NOTE:** The AFB form of identification is no longer available. Individuals should apply at their state motor vehicle offices for non-driver identification cards that serve the same purpose and provide legal identification comparable to the sighted person's driver's license.

2. **Blinded Veterans Association** - This is the Congressional chartered service organization established for blind Veterans. Although originally established for SC Veterans, over the years the BVA has amended its bylaws and now allows all NSC Veterans with vision problems to join as equal members with a few significant exceptions including the necessity to be a SC Veteran for blindness in order to stand for the offices of President and Vice President of the organization.

3. **Commissary and Exchange** – These are privileges granted to SC Veterans rated 100%. A blind Veteran may also select a sighted companion who will be admitted with a letter of proof by the eligible Veteran.

4. **National Consumer Group** - These are the principal advocacy organizations of and for the blind. The American Council of the Blind, the National Federation of the Blind and the Guide Dog Users, Inc. are among the major organizations.

5. **Free Postage** - This is the provision by which a blind person may send large print, Braille and taped materials free of postage to a person requiring these media.

6. **Phone Directory Assistance** - This is the service available in most areas of the country enabling a blind customer to be waived of information charges on their residential phone. You must apply for this service with both your local and long-distance carrier.

7. **Dog Guide Training** - There are approximately 16 schools across the country that provide selection of, matching with and training in the use of guide dogs for legally blind persons.

8. **Hadley School for The Blind** - This is an international correspondence school providing courses in many subject areas. Instructional materials are provided in Braille, large print and tape formats.

9. **Disabled Parking Placard** - This is a privilege granted to eligible disabled persons that will allow them to park in designated handicapped parking spaces or to park free of meter charges or to remain in time-restricted parking spaces beyond the posted limit with the display of the placard or with disabled license tags on the car. The disabled person may but does not need to be the driver, so a blind person may obtain disabled tags or the placard for use in a vehicle he/she owns or in which he/she rides.

10. **Income Tax Deduction** - This is a provision in the IRS code that enables a legally blind person to take an extra amount in deductions from their long form tax return. In the past, this was a full dependent's deduction but was reduced in the IRS reforms of 1993 and is currently approximately $600.

11. **National Parks Admission Permit** - This is a life-long permit a disabled person may obtain at any National Park that will entitle them and any companions accompanying them in the same vehicle free admission to National parks.

12. **Radio Reading Service** - This is a service available in many parts of the country that provides materials such as the local paper and current publication read over a closed-circuit radio receiver for which a special receiver must be obtained from the service.

13. **Learning Ally** - This is a service that provides text and professional materials recorded on tape.

14. **Social Security** - The Social Security Administration has several benefits that a blind person may be eligible for including SSI and SSDI. For blind persons receiving SSDI, the earning limit for gainful employment is higher than for other disabled persons; currently it is $1000 a month.

15. **Talking Books** - This is a service available from the National Library Service, Library of Congress that provides recorded books for persons unable to read regular print. The NLS program also provides books and magazines in Braille.

16. **Voting Rights** - A blind or visually impaired person has the right to be accompanied by the person of their choice into the voting booth to assist them in casting their vote. There are slight variations in some jurisdictions with respect to what forms of identification the escort must provide.

### 7.5.3.    Local Benefits and Services

There are a variety of local programs, services and benefits from which a blind or visually impaired Veteran may benefit. These vary widely throughout the country, and it is important to be familiar with those in your area in order to provide blind Veterans the greatest array of services.

At each local program, benefit and/or service field, click the down arrow to display the drop-down list of choices. Each field in this section has the following choices from which to select:

- Declined
- Not Available
- Not Eligible
- Pending
- Yes

When all data is selected, click the **Save** button. The system displays the following message:

**"Benefits & Services Checklist successfully saved"**

Click the **Done** button to return to the Welcome Page.

## 7.6.    Enter/Edit Eye Exams (Eligibility)

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

1. From the Task Menu, click the **Eye Exams (for Eligibility)** link.

If a patient is already selected, you will be asked if you want to continue with the current patient or select another patient.

2. Type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

3. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

4. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's name.

The Eye Exams (Eligibility) page displays. The Eye Exams (Eligibility) page allows you to view and enter information about the patient's eye exams. The page displays the following sections:

- Current Patient information
- Existing Eye Exams
- Enter New Eye Exam

### 7.6.1. Existing Eye Exams

This section displays the results of the patient's previous eye exams. The results list chronologically in ascending order. You can select an existing eye exam to edit by clicking the **Edit Exam** button located to the right of the existing exam.

**NOTE**: The procedure to edit an exam is the same as the procedure to enter a new eye exam.

### 7.6.2. Enter New Eye Exam

This section allows you to enter eye exam information for the selected patient.

1.  From the drop-down list provided, select the **Institution** in which the exam occurred.
2.  Type, or select from the pop-up calendar, the date of the patient's eye exam.
3.  In the **Performed by VA?** field, select the correct option. Choices are NO, YES, or UNKNOWN.
4.  Use the drop-down lists provided to select the **visual acuity** for the patient's right and left eyes. The following options are available:

    -   NO LIGHT PERCEPTION
    -   LIGHT PERCEPTION ONLY / HAND MOTION
    -   1/200 UP TO AND INCLUDING 5/200
    -   6/200 UP TO AND INCLUDING 20/200
    -   20/70 UP TO AND INCLUDING 20/190
    -   20/40 UP TO AND INCLUDING 20/60
    -   20/30 OR BETTER
    -   UNKNOWN

5.  Use the drop-down lists provided to select the **field of vision** for the patient's right and left eyes. The following options are available:

    -   5 DEGREES OR LESS
    -   6 TO 20 DEGREES
    -   21 TO 30 DEGREES
    -   >30 DEGREES
    -   NOT APPLICABLE
    -   UNKNOWN

6.  Use the drop-down lists provided to select the **Legal Blindness/Visual Impairment Status** (Primary). The following options are available:

    -   Field < or = 10 degrees or 20/500-20/1000

- Field < or = 20 degrees or 20/200-20/400

- Field < or = 5 degrees or HM at < or = 10' or count fingers < 3' or 20/1000

- Impairment level not further specified, blindness, one eye

- Legal blindness (general U.S. definition)

- Near normal, 20/30-20/70 unspec. Visual disturbance

- Normal vision; 20/25 or better; unspec. Disorder of refraction or accommodation

- Not legal blindness; 20/70-20/160

- One eye: total impairment; other eye: near normal vision

- One eye: total impairment; other eye: not specified

- Orthoptic Training

- Totally blind, NLP or LPO

7. Type any relevant notes in the text box provided. The field can accommodate up to 320 characters.

8. Click the **Add Eye Exam** button to add the claim to the list of existing eye exams.

9. Repeat steps 1 through 7 until all exams are entered, and then click the Done button to return to the Welcome Page.

## 7.7.    Enter/Edit the VIST Annual Review

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The VIST Annual Reviews page allows you to view and enter information about the patient's annual VIST reviews. Each patient is contacted annually to check his or her status and to ensure that further care, if needed, is provided. VIST Annual Review information is used for reporting purposes.

1. From the Task Menu, click **VIST Annual Review**.

If a patient is already selected, you will be asked if you want to continue with the current patient or select another patient.

2. Type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

3. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

**Figure 26: Patient Search Results**

| Name ⇕ | Roster Institution ⇕ | Date of Birth ⇕ | SSN ⇕ | |
|---|---|---|---|---|
| TEST, OTHD | ALEXANDRIA VAMC (502) | 1960 | | Select |
| TEST, PATIENTTEST | ALEXANDRIA VAMC (502) | 1980 | | Select |
| TESTER, TESTTWO | BALTIMORE MD VAMC (512) | 1978 | | Select |
| TESTERTWO, INPATIENT | BANGOR MAINE CBOC (402HB) | 1969 | | Select |
| TESTING, JAMTEST CAL | ALEXANDRIA VAMC (502) | 1971 | | Select |
| TESTINPAT, TESTING | BALTIMORE MD VAMC (512) | 1981 | | Select |
| TESTMOCHA, PATIENTA | ALEXANDRIA VAMC (502) | 1978 | | Select |
| TESTONE, ONE | ABRAHAM LINCOLN NATL CEMETERY (915) | 1965 | | Select |
| TESTOUTABC, TEN | BALTIMORE CBOC (512GD) | 1979 | | Select |
| TESTOUTDEF, ONE | EAST LOS ANGELES CBOC (691GF) | 1971 | | Select |
| In total there are 13 patient(s). | | | | |
| BR Patient Search | | | | |

4. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's name.

The VIST Annual Review page displays for the current patient.

The VIST Annual Reviews page displays the following sections:

- Current Patient information

- Existing VIST Annual Reviews

- Enter New VIST Annual Review

**Figure 27: VIST Annual Review Screen**



**Current Patient**

| | | |
|---|---|---|
| **Name:** TEST, OTHD | **Date of Birth (Age):** 1960 (61) | **Gender:** Male |
| **Social Security Number:** | **Patient Type:** VIST | **Patient Status:** ACTIVE |
| **Roster Institutions:** ALEXANDRIA VAMC (502) | | |

**Existing VIST Annual Reviews - Count: 1**

| Review Date | Institution | Status | Type | Location | Eligibility on Review Date | |
|---|---|---|---|---|---|---|
| 11/01/2021 | BALTIMORE MD VAMC (512) | COMPLETE | FORMAL | NOT APPLICABLE | | Edit Review |

**Enter New VIST Annual Review**
\* - Fields identified with the asterisk are mandatory.

* **Institution:** ALEXANDRIA VAMC (502)

* **Review Date (MM/DD/YYYY):** [ ]    **Current Eligibility Test:**

* **Status:** [ ]    * **Type:** [ ]

* **Location:** [ ]

### 7.7.1.    Existing VIST Annual Reviews

This section displays information about the patient's previous VIST annual reviews. The reviews list chronologically in ascending order. You can select an existing Annual Review to edit by clicking the **Edit Review** button located to the right of the existing review.

**NOTE**: The procedure to edit a review is the same as the procedure to enter a new VIST Annual Review.

### 7.7.2.    Enter New VIST Annual Review

1. Select the **Institution** in which the review occurred from the drop-down list provided.

2. Type, or use the pop-up calendar to select the date of the VIST review.

3. Select the status of the patient's review using the **Status of Review** drop-down list. This field is mandatory when a review date is entered. The following options are available:

   - COMPLETE

   - DECLINED

   - NO SHOW

   - COULD NOT CONTACT

4. Select the **type** of the patient's review using the **Type of Review** drop-down list. This field is mandatory when a review date is entered. The following options are available:

- FORMAL – The patient is brought into the facility and has all required procedures performed during of one day.

- COMPONENT – The required procedures are performed over the course of several days.

5. Select the **location** where the VIST review was performed. The following options are available:

- HOME

- OFFICE

- TELEPHONE

- OTHER

6. Click the **Add Review** button to add the review to the list of existing VIST Annual Reviews.

7. Click the **Done** button to return to the Welcome Page.

## 7.8.    Create Referral

**WARNING:** Do not use the **Browser Back** button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The BR application provides the functionality necessary to enter all referrals. In addition, the BR application will provide historical referral information. As referrals are updated, the users will be able to review the history to see the status and number of referrals over time for a given patient.

1. From the **Enter/Edit Menu**, click **Create Referral**. If a patient is already selected, you are asked if you want to continue with the current patient or select another patient. To continue with the current patient, click **OK**.

2. To select a different patient, type the patient's nine-digit Social Security Number (SSN), or their last name and first name, or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

**Figure 28: Patient Search**

3. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.
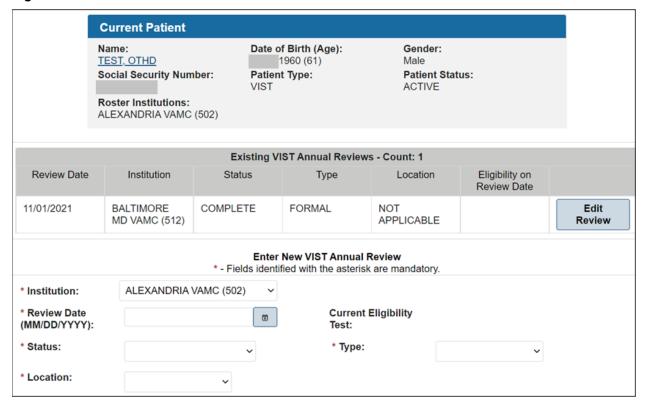
4. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's's name to display the Create Referrals screen. The Current Patient information section contains the Name, Date of Birth, Social Security Number, Patient Type, and Patient Status.

**Figure 29: Create Referral Page**



If this is the first referral for this patient, 'No existing referrals' displays under the Current Patient information. Otherwise, there is a list of outstanding referrals (available for editing) above the Enter New Referral for this Patient section.

a. To edit an existing referral, click the **Edit** button to display the current information. You can enter a new Status and Status Change Reason. See Section 7.10.

b. When editing is complete, click **Save**.

c. When a final status has been selected and saved, the referral is complete and can no longer be modified.

**NOTE:** Some fields are non-editable, display only. This means that the data in the field is defaulted by the system, and it cannot be changed.

5. Use the following fields to enter a new referral for this patient:

Referral Types

- All

- BRC Regular Program – 1st EXP

- BRC Regular Program – ADL TRN
- BRC CAT – 1st EXP
- BRC CAT – ADL TRN
- BRC Other Programs – 1st EXP
- BRC Other Programs – ADL TRN
- BRC Dual Program – 1st EXP
- BRC Dual Program – ADL TRN
- BROS Prep – 1st EXP
- BROS Prep - ADL TRN
- BROS Local – 1st EXP
- BROS Local – Additional Training
- BROS Follow-up – 1st EXP
- BROS Follow-up – Additional Training
- VA Audible Devices
- VA Outpatient LV Clinic – 1st EXP
- VA Out patient LV Clinic – ADL TRN
- VISOR – 1st EXP
- VISOR – ADL TRN
- Non-VA Blindness Agency – 1st EXP
- Non-VA Blindness Agency – ADL TRN
- Non-VA Local CAT – 1st EXP
- Non-VA Local CAT – ADL TRN
- VIST Coordinator
- VICTORS – 1st EXP
- VICTORS – ADL TRN
- Vision Therapy – 1st EXP
- Vision Therapy – ADD TRN
- BROS Poly Vision Therapy – 1st EXP
- BROS Poly Vision Therapy – ADD TRN

**NOTE**: EXP means Experience; ADL TRN means Additional Training.

Agency Type:

This is a conditional field that will display only if the selection of the 'Type of Referral' field is *Non-VA Blindness Agency* or *Non-VA Local CAT*.

From the drop-down list, select the type of agency. Options include:

- Benefits/Services

- Residential Program

- Individual Training

- Dog Guide School

- Community Based Independent Living Services

- CAT Training

- Other

Fee Basis:

This field will display only if all Non-VA Blindness Agency option is selected for the 'Type of Referral' field. From the drop-down list, select the Fee Basis. Options include:

- Yes

- No

- Unknown

Application Date:

Enter the date in which the application is started or click the calendar and select the date. The system defaults to the current date. Once entered, the date becomes a non-editable field.

Initiating Areas:

- All

- BRC

- BROS

- OTHER

- VA LOW VISION CLINIC

- VICTORS

- VISOR

- VIST

Special Circumstances:

If the patient requires special accommodations, select a special circumstance from the drop-down list. Options include:

- Co-Pay

- Infectious Disease

- Traumatic Brain Injury (TBI)

- Wheel Chair

- Severe Hearing Loss

- Psychological Involvement

- Oxygen Use

- Dialysis

- Colostomy

- Diabetes Type II

- Diabetes Type I

Referred From Institution:

From the drop-down list, select the institution that initiated the referral. If there is a selection at the 'Referral To Institution' option, a cancellation can only be made to an existing referral with a pending status or submit an incomplete referral.

Referred To Institution:

From the drop-down list, select the institution associated with where the patient will be receiving services. Options include those institutions that offer the services specified by the referral type specified. The list will be restricted to only those institutions offering the selected referral type.

6. Enter data in all of the required fields, and then click **Add Referral** to save the data. Click **Done** to return to the Welcome Page.

## 7.9.   Modifying a Referral (Search)

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

This Blind Rehabilitation (BR) application menu option provides the functionality necessary to edit and update existing referrals or to cancel inactive referrals.

1. From the Enter/Edit Menu, click Modify Referral (Search) to display the Referral Search screen.

2. Use the following fields to search for, and then modify a referral:

- Select Institution Search Type:
- Select one of the following search types:
- Referred From one of your Institutions

Use this type to search for referrals **from** your institution. Selecting this search type causes the option list in the Referred from Institutions field below to display the institutions from which that referral may have been sent. Use the Referred to Institutions field to select all the institutions to

which that referral may have been sent or you can select a specific institution to which that referral may have been sent.

Referred To one of your Institutions

Use this type to search for referrals **to** your institutions. Selecting this search type causes the option list in the Referred to Institutions field below to display the institutions to which that referral may have been sent. Use the Referred from Institutions field to select all the institutions from which that referral may have been sent or you can select a specific institution from which that referral may have been sent.

Referred from Institutions:

Select the institution that initiated the referral. Default value is all. If the user selects the referral to option, the user will only be able to cancel an existing referral with a pending status or submit an incomplete referral.

Referred to Institutions:

Select the **institution** to which the referral was sent. The user will select this option to finish processing a referral. This will also be the option to finish referrals they initiated (For example, to resolve referrals to outside agency. This would be a case where the same person initiating would resolve. The Referral From & To Institutions would be the same in this situation.)

Initiating Areas:

Select the **area initiating** the referral. Options include:

- All
- BRC
- BROS
- OTHER
- VA LOW VISION CLINIC
- VICTORS
- VISOR
- VIST

Statuses:

Select one or more **referral statuses**. Options include:

- All
- Waitlist
- Accepted
- Admitted
- Cancelled
- Completed

- Discharged

- In Review

- In Training

- Offered

- Pending

- Scheduled

- Withdrawn

Referral Types

Select all, one, or several **referral types**. Options include:

- All

- BRC Regular Program – 1<sup>st</sup> EXP

- BRC Regular Program – ADL TRN

- BRC CAT – 1<sup>st</sup> EXP

- BRC CAT – ADL TRN

- BRC Other Programs – 1<sup>st</sup> EXP

- BRC Other Programs – ADL TRN

- BRC Dual Program – 1<sup>st</sup> EXP

- BRC Dual Program – ADL TRN

- BROS Prep – 1<sup>st</sup> EXP

- BROS Prep - ADL TRN

- BROS Local – 1<sup>st</sup> EXP

- BROS Local – Additional Training

- BROS Follow-up – 1<sup>st</sup> EXP

- BROS Follow-up – Additional Training

- VA Audible Devices

- VA Outpatient LV Clinic – 1<sup>st</sup> EXP

- VA Out patient LV Clinic – ADL TRN

- VISOR – 1<sup>st</sup> EXP

- VISOR – ADL TRN

- Non-VA Blindness Agency – 1<sup>st</sup> EXP

- Non-VA Blindness Agency – ADL TRN

- Non-VA Local CAT – 1ˢᵗ EXP

- Non-VA Local CAT – ADL TRN

- VIST Coordinator

- VICTORS – 1st EXP

- VICTORS – ADL TRN

- Vision Therapy – 1st EXP

- Vision Therapy – ADD TRN

- BROS Poly Vision Therapy – 1st EXP

- BROS Poly Vision Therapy – ADD TRN

**NOTE**: EXP means Experience; ADL TRN means Additional Training.

Start Date (MM/DD/YYYY)

Enter the Start Date (MM/DD/YYYY) for the referral or click the icon next to the field and select from a calendar.

End Date (MM/DD/YYYY)

Enter the End Date (MM/DD/YYYY) for the referral or click the icon next to the field and select from a calendar.

1. Select data in the fields, and then click the **Search** button.

The system displays a list of appropriate referrals from which the user may select for editing. The list contains the Created Date, Patient Name, Priority Level, Referral Type, Status, Days Since Referral Received, and Referred to Institution (Station ID). The list can be resorted (in ascending or descending order) by column heading; just select the column by which you want to sort the list.

**NOTE:** If the referral is finished the following message displays: *'This referral is finished and cannot be modified'*

New Status:

Select the appropriate status. Choices for Non-BRC referrals include:

- In Review

- Accepted

- Offered

- Scheduled

- Completed

- Cancelled

- Withdrawn

Choices for BRC Referrals include:

- In Review

- Accepted

- Offered

- Scheduled

- Discharged

- Cancelled

- Withdrawn

**Status Definitions**

Select **In Review** if you are in the process of reviewing the referral to determine acceptance.

Select **Accepted** if the referral has been approved. This means the application review process is completed and the application is approved.

Select **Offered** if the patient has been offered a date of service.

If Offered Status is selected, select the Offer Accepted value of Yes if the patient accepts the date of service offered. Select a value of No if the patient does not accept the date of service offered. This date must be on or after the 'Referral Date.' Once you enter data in this field, it becomes a non-editable field.

If the **Offered Accepted** is **Yes**, the system automatically sets the referral to a Scheduled Status for the current date.

If the **Offered** date is <u>not</u> accepted, additional dates of service may be offered. This is only available if the patient does not accept the first admission offer. Enter the additional service dates the patient is offered. This date must be on or after the 'Referral Date'. Once you enter data in this field, it becomes a non-editable field.

Once the **Offered** date is accepted, the system automatically sets the status to Schedule for the current date.

**For a Non-BRC Referral:** Select **Completed** Status, after the patient receives the services.

**For a BRC Referral:** The system sets the Admission Status automatically when the date the patient is admitted into the BRC for training is received from MAS. This field automatically updates if/when the patient is admitted to the MAS system.

<u>**NOTE**</u>**:** If the system is unable to determine the Admission Date, a notification is sent to the appropriate institution for the user to select the admission date from a list of available dates pulled from MAS.

**For a BRC Referral:** The system sets the Discharge Status automatically when the date the patient is discharged from the BRC after completing the training is received from MAS. A discharge date is <u>not</u> allowed without an admission date. The discharge date cannot be before the admission date. This field automatically updates if/when the patient is discharged within the MAS system.

**NOTE:** If the system is unable to determine the Discharge Date, a notification is sent to the appropriate institution for the user to select the discharge date from a list of available dates pulled from MAS.

Select **Cancelled** status if the BRC denies services to the patient. You must also select the appropriate reason. Once the Cancelled status is selected, the referral remains in a cancelled status and is not editable. Options include:

- Medical Unstable

- Visual Status

- Psychological Status

- Personal Status

- Not Eligible for VA Care

- Deceased

- Referred to VIST

- Referred to BROS

2. Enter data in the fields and click **Save**. To select another Referral, click **Return to Referral List.** To add a note to the referral, click **Add Note.** The system will display an Existing Notes box and a New Note box which is interactive so you can enter a new note.

When complete, click **Save Note.** To cancel, click **Cancel Note.** Click **Done** to return to the Welcome page.

# 7.10. Modifying a Referral By Patient

**WARNING:** Do not use the Browser Back button in the Enter/Edit functions of the application. This will cause an error and previously entered information will be lost.

The Blind Rehabilitation (BR) application provides the functionality necessary to modify/update existing referrals for a specific patient. In addition, the BR application will provide historical referral information. As referrals are updated, the users will be able to review the history to see the status and number of referrals over time for a given patient

1. From the Enter/Edit Menu, click **Modify Referral By Patient**. If a patient is already selected, you are asked if you want to continue with the current patient or select another patient. To continue with the current patient, click **OK**.

2. To select a different patient, type the patient's nine-digit Social Security Number (SSN), or their last name and first name, or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

3. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

4. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** button next to the patient's name. The system displays a list of referrals from which you can select, and then modify the referral status.

The list contains the Referral Number, Created Date, Patient Name, Referral Type, Status, Referred to Institution (Station ID), Initiating Area, and Special Consideration.

5. To edit the status of a specific referral, click the **Edit Referral** button to display the edit screen with details of the referral. Details include referral information, referral number, and the referral status history.

The following fields display for editing:

New Status:

Select the appropriate status. Choices for Non-BRC referrals include:

- In Review
- Accepted
- Offered
- Scheduled
- Completed
- Cancelled
- Withdrawn
- In Training


Choices for BRC Referrals include:

- In Review
- Accepted
- Offered
- Scheduled
- Discharged
- Cancelled
- Withdrawn

**Status Definitions**

Select **In Review** if you are in the process of reviewing the referral to determine acceptance.

Select **Accepted** if the referral has been approved. This means the application review process is completed and the application is approved.

Select **Offered** if the patient has been offered a date of service.

If Offered Status is selected, select the Offer Accepted value of Yes if the patient accepts the date of service offered. Select a value of No if the patient does not accept the date of service offered. This date must be on or after the 'Referral Date.' Once you enter data in this field, it becomes a non-editable field.

If the **Offered Accepted** is **Yes**, the system automatically sets the referral to a Scheduled Status for the current date.

If the **Offered** date is <u>not</u> accepted, additional dates of service may be offered. This is only available if the patient does not accept the first admission offer. Enter the additional service dates the patient is offered. This date must be on or after the 'Referral Date'. Once you enter data in this field, it becomes a non-editable field.

Once the **Offered** date is accepted, the system automatically sets the status to Schedule for the current date.

**For a Non-BRC Referral:** Select **Completed** Status, after the patient receives the services.

**For a BRC Referral:** The system sets the Admission Status automatically when the date the patient is admitted into the BRC for training is received from MAS. This field automatically updates if/when the patient is admitted to the MAS system.

**<u>NOTE</u>:** If the system is unable to determine the Admission Date, a notification is sent to the appropriate institution for the user to select the admission date from a list of available dates pulled from MAS.

**For a BRC Referral:** The system sets the Discharge Status automatically when the date the patient is discharged from the BRC after completing the training is received from MAS. A discharge date is <u>not</u> allowed without an admission date. The discharge date cannot be before the admission date. This field automatically updates if/when the patient is discharged within the MAS system.

**<u>NOTE</u>:** If the system is unable to determine the Discharge Date, a notification is sent to the appropriate institution for the user to select the discharge date from a list of available dates pulled from MAS.

Select **Cancelled** status if the BRC denies services to the patient. You must also select the appropriate reason. Once the Cancelled status is selected, the referral remains in a cancelled status and is not editable. Options include:

- Medical Unstable
- Visual Status
- Psychological Status
- Personal Status
- Not Eligible for VA Care
- Deceased
- Referred to VIST
- Referred to BROS

Select **Withdrawn** status if the patient declines to receive services. You must also select the appropriate reason. Once the Withdrawn status is selected, the referral remains in a cancelled status and is not editable. Choices for Status Change Reasons include:

- Medical Unstable

- Visual Status

- Psychological Status

- Personal Status

- Not Eligible for VA Care

- Deceased

- Referred to VIST

- Referred to BROS

6. Enter data in the fields and click Save. To add a note to the referral, click **Add Note**. The system will display an Existing Notes box (if there are existing notes) and a New Note box which is interactive, so you can enter a new note. When complete, click **Save Note**. To cancel, click **Cancel.** To select another Referral, click **Return to Referral List**. Click **Done** to return to the Welcome page.

The instructions that follow include a different method for searching and modifying a referral.

1. Navigate to **Enter/Edit** then **Modify Referral (Search).**
2. From the **Select Institution search type** list, select **Referrals From your Institution.**
3. Select **All** from the **Referred To Institutions** list.
4. Select the desired various referral types.
5. Select the desired date range.
6. Click **Search**.

# 8. Letter and Labels Menu

The **Letter and Labels Menu** link is accessible from the **Header Menu**.

This menu provides options to edit letters, print letters, and print mailing labels as necessary for patients.

Select the **Done** link in the **Content Area** to return to the **Welcome Page**.

**Figure 30: Letters and Labels Menu Task Menu Options**



## 8.1.   Enter/Edit Letters

Navigation

Select the **Enter/Edit Letters** link from the **Task Menu** to display the **Letters – Search Criteria** in the Content Area:

- **Search**: Select the Institution, and then click **Search** to display the list of existing letters for that institution.

Select Add Letter to Enter New Letter

Select **Done** to return to the **Welcome Page**

- **Add Letter**: Select the Institution, and then click **Add Letter** to **Enter New Letter**

- **Reset**: Select **Reset** to deselect an institution

- **Done**: Select **Done** to return to the **Welcome Page**

Editing an Existing Letter

1. Select the institution, and then click **Search** to display the list of **Existing Letters** for that institution. From the **Existing Letters** section click the **Edit** button next to the letter to be edited. The letter displays for editing.

2. The data within the less than (<) and greater than (>) signs must be replaced. Delete the directional signs (< and >) when entering specific data.

> For Example:
>
> |Todays Date|
>
> |PatientFirstName| |PatientMiddleName| |PatientLastName|
>
> |PatientAddressLine1|
>
> |PatientAddressLine2|
>
> |PatientAddressLine3|
>
> |PatientCity|, |PatientState| |PatientZip|
>
> When Printed Becomes:
>
> December 07, 2005
>
> Three VISTpatient
>
> 123 Anystreet
>
> Anycity, Anystate, 12345

3. The **Data Fields** are located to the right of the **Letter Text** area. Highlight desired data field and copy and paste into the letter. Include the vertical lines ( | ) before and after data field text, the data value for that field will be substituted, for the selected institution, when the letter is printed.

4. When complete, select **Save**. To print the letter, refer to **Printing a Letter** later in this section.

**NOTE**: When a letter is edited, the text entered remains until that letter is edited again.

Enter a New Letter

1. From the **Letters - Search Criteria** screen select the Institution and click the **Add Letter** button to display the **Enter New Letter** screen.

2. Enter the letter name in the **Letter Name field.**

3. Add desired data fields. The **Data Fields** are located to the right of the **Letter Text** area. Highlight desired data field and copy and paste into the letter. Include the vertical lines ( | ) before and after data field text, the data value for that field will be substituted, for the selected institution, when the letter is printed.

4. Enter the text of the letter.

5. When complete, click **Save**. The **Letters** screen displays the list of existing letters, including the letter just created.

**NOTE**: When a letter is edited, the text entered remains until that letter is edited again.

6. To print the letter, refer to **Printing a Letter** later in this section.

7. Select **Cancel** to return to the **Letter - Search Criteria** page.

8. Select **Done** to return to the **Welcome Page**.

Printing a Letter

1. Select the **Institution**, and then click **Search** to display the list of **Existing Letters** for that institution.

2. From the **Existing Letters** screen, click the **Print** button to the right of the letter needing to be printed. **The Letters – Select Patient Criteria** screen displays.

3. Use the **Select Patients Method** field to display (and edit) a list of currently selected patients or to load from a roster for the specific selected institution. If the **Select Patients Method** is to '**LOAD PATIENT LIST FROM ROSTER**,' the list of available institutions is displayed. Choose one or more institutions from which to select patients.

**NOTE**: To select multiple institutions, hold the <**Ctrl**> key down while making the selections.

4. Select Submit to display the Currently Selected Patients

   i.   To remove patients from the list, select the patient's name (to select multiple, hold the <**Ctrl**> key down while making the selections) and select **Remove All**.

   ii.  When the list is complete, click the **Continue** button to display the **Print BR Letter Criteria** screen. The name of the letter you are printing displays.

   iii. Enter the desired font size and click the **Print** button. If you change the size of the font, you can click the **Reset** button to return to the default font.

   iv.  The letter displays on the screen. To print the letter, use the appropriate printing option available.

5. Select **Reset** to clear selections

6. Select **Done** to return to the Welcome Page

## 8.2.  Print Letters

From the Task Menu select Print Letters to display the Letters - Search Criteria screen.

1. Select the **Institution**, and then select **Search** to display the list of **Existing Letters** for that institution.

2. From the **Existing Letters** screen, select the **Print** button to the right of the letter needing to be printed. The **Letters – Select Patient Criteria** screen displays.

3. Use the **Select Patients Method** field to display (and edit) a list of currently selected patients or to load from a roster for the specific selected institution. If the **Select Patients Method** is to '**LOAD PATIENT LIST FROM ROSTER**,' the list of available institutions is displayed. Choose one or more institutions from which to select patients.

**NOTE**: To select multiple institutions, hold the <**Ctrl**> key down while making the selections.

4. Select Submit to display the Currently Selected Patients

   i.   To remove patients from the list, select the patient's name (to select multiple, hold the <**Ctrl**> key down while making the selections) and select **Remove All**.

ii. When the list is complete, select the **Continue** button to display the **Print BR Letter Criteria** screen. The name of the letter you are printing displays.

iii. Enter the desired font size and select the **Print** button. Select the **Reset** button to return to the default font.

iv. The letter displays on the screen. To print the letter, use the appropriate printing option available.

5. Select **Reset** to clear selections.

6. Select **Done** to return to the Welcome Page.

## 8.3. Print Patient Mailing Labels

From the Task Menu, click Print Patient Mailing Labels to display the Patient Mailing Labels - Select Patient Criteria screen. **NOTE:** The list you create will not exist after you Logout. The exported PDF file now prints a sheet of 3 x 10 labels.

**Figure 31: Patient Mailing Labels – Select Patient Criteria**



1. Select the institution, and then click **Submit** to display the list of existing patients for that institution.

2. Use the **Select Patients Method** field to display (and edit) a list of currently selected patients or to load from a roster for the specific selected institution.

3. After you display a list of patients you have the option to remove any patient to which you do not want to send the letter by clicking the **Remove** button next to the patient's name.

**Figure 32: Mailing Label Table**

| | | | | | |
|---|---|---|---|---|---|
| TESTERONE, OUTPATIENT | BALTIMORE MD VAMC (512) | 01/01/1961 | | No Data- | Remove |
| TESTINPAT, TESTING | BALTIMORE MD VAMC (512) | 01/10/1981 | | | Remove |
| TESTOUTABC, TEN | BALTIMORE CBOC (512GD) | 11/11/1979 | | | Remove |
| THYAHN, TEHASXY ZLUSDY | BALTIMORE MD VAMC (512) | 03/21/1976 | | | Remove |
| THYFKHY, AHXYHA Z | BALTIMORE CBOC (512GD) | 11/16/1971 | | | Remove |
| TLKLSS, AXRDH E | BALTIMORE MD VAMC (512) | 06/15/1901 | | | Remove |
| TLKLSS, TXY | BALTIMORE MD VAMC (512) | 07/22/1965 | | | Remove |
| In total there are 44 patient(s). | | | | | |

New Search   Remove All   Continue   Done

4. When the list is complete, click the **Continue** button to display the **Patient Mailing Labels Criteria** screen.

   - **Label Sort Order:** Click the down arrow to specify the sorting order of the patient list. The options are: LAST NAME (default setting), CITY, COUNTY, and STATE.

   - **Label Type:** Use this field to determine the size of the label. You can print 30 (default setting) or 14 labels per sheet.

5. Click the **Submit** button to generate the labels.

6. To generate the labels in Adobe Acrobat format for printing, click the **Printer** icon and follow the directions on the screen. The exported PDF file now prints a sheet of 3x10 labels.

# 9. Printing Individual Records Menu

These menu options contain the functionality to print the individual <u>records</u> for a specific patient.

## 9.1.   Printing a Patient Record

Use this menu option to print the record for a specific patient.

1.  From the Header Menu, click the **Print Individual Patient Records Menu** option.

2.  From the Task menu, click the **Patient Record** menu option. If a current patient is already selected, you will be asked if you want to continue with the current patient or select another patient. Click the **OK** button to continue with the current patient.

3.  To select a different patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

4.  The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5.  From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** Button next to the patient's name. The Patient Record for the selected patient displays. To print the Patient Record, use the appropriate printing option available. Click the **Home** button to return to the Welcome Page.

## 9.2.   Printing an Eye Exam (Eligibility) History

Use this menu option to print the patient's eye exam (eligibility) history record.

1.  From the **Header** Menu, click the **Print Individual Patient Records** Menu option.

2.  From the **Task menu**, click the **Eye Exam (Eligibility) History** menu option. If a current patient is already selected, you will be asked if you want to continue with the current patient or select another patient. Click the **OK** button to continue with the current patient.

3.  To select a different patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

4.  The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5.  From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** Button next to the patient's name. The Individual Eye (Eligibility) History - Report Criteria screen displays. The Current Patient information displays in the upper part of the screen.

6. Enter the **Start Date** (MM/DD/YYYY) for the record or click the calendar icon to select the date.

7. Enter the **End Date** (MM/DD/YYYY) for the record or click the calendar icon to select the date.

8. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 9.3.  Printing a Benefits & Services Checklist

Use this menu option to print the patient's Benefits & Services Checklist record.

1. From the **Header** Menu, click the **Print Individual Patient Records** Menu option.

2. From the **Task menu**, click the **Benefits & Services Checklist** menu option. If a current patient is already selected, you will be asked if you want to continue with the current patient or select another patient. Click the **OK** button to continue with the current patient.

3. To select a different patient, type the patient's nine-digit+- Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

4. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** Button next to the patient's name. The Individual Benefits & Services Checklist displays for the selected patient. To print the record, use the appropriate printing option available. Click the **Home** button to return to the Welcome Page.

## 9.4.  Printing a Referral History

Use this menu option to print the patient's Referral History record.

1. From the **Header** Menu, click the **Print Individual Patient Records** Menu option.

2. From the **Task menu**, click the **Referral History** menu option. If a current patient is already selected, you will be asked if you want to continue with the current patient or select another patient. Click the **OK** button to continue with the current patient.

3. To select a different patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

4. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** Button next to the patient's name. The Individual Referral History - Report Criteria screen displays. The Current Patient information displays in the upper part of the screen.

6. Enter the **Start Date** (MM/DD/YYYY) for the record or click the calendar icon to select the date.

7. Enter the **End Date** (MM/DD/YYYY) for the record or click the calendar icon to select the date.

8. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 9.5. Printing a PCE Problem List

Use this menu option to print the **Patient Care Encounter (PCE)** file.

1. From the **Header** Menu, click the **Print Individual Patient Records** Menu option.

2. From the **Task menu**, click the **PCE Problem List** menu option. If a current patient is already selected, you will be asked if you want to continue with the current patient or select another patient. Click the **OK** button to continue with the current patient.

3. To select a different patient, type the patient's nine-digit Social Security Number (SSN), or the first letter of the patient's last name and the last four digits of the patient's SSN, or the first three letters of the patient's last name in the fields provided and click the **Search** button.

4. The Patients Found page displays with a list of patients (in ascending alphabetical order) who match the search criteria. The patients' records display as separate line items.

5. From the Patients Found page, select the patient whose record you want to access by clicking on the **Select** Button next to the patient's name. The PCE Problem List screen displays. The Current Patient information displays in the upper part of the screen.

6. Click the down arrow and select the **institution** from the list that displays.

7. Click the down arrow and select the **status**. Options are:

   - All

   - Active

   - Inactive

8. Enter data in the fields and click **Submit**. The **PCE Problem List** for the selected patient displays. To print the record, use the appropriate printing option available.

# 10. Printing Reports Menu

The Blind Rehabilitation application offers reporting capability that is easy to use. This feature has numerous report options.

1. From the Header Menu, click the **Print Reports Menu** option.

2. From the list of available reports displayed in the **Task Menu**, select the report you want to run.

3. The criteria selection page for the selected report will display in the **Content Area**.

Because each report has unique reporting criteria, each BR report will have a unique page from which you can select the criteria and parameters and generate the report. Descriptions of each of the available BR reports are provided in the following sections.

## 10.1. Printing Additions to VIST Roster Report

The Additions to VIST Roster report provides a list of patients added to the VIST Roster during the specified report period.

**Figure 33: Additions to VIST Roster Report**

1. Select one or more or all the **Institutions** from which you want to report. The Institutions list alphabetically in ascending order.

2. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

3. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

4. If applicable, place a check in the **Include Deceased Patients** checkbox to include deceased patients that have been added to the VIST Roster.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Additions to VIST Roster report displays the enrollment date, patient name, SSN, VIST Eligibility, referral source, and if applicable, the date of death of patients by institution. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

**Figure 34: VIST Roster Report Print selection**



## 10.2. Printing a Deceased Patients List Report

The Deceased Patients List report provides a list of patients who have died since the last time the report was run. The BR Patients are updated with deceased dates appropriately.

1. Select one or more or all the **Institutions** from which you want to report for deceased patients. The institutions list alphabetically in ascending order by name.

2. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

3. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

4. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

5. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Deceased Patient List report displays the Patient Name, SSNs, and Date of Death of deceased patients. The report displays subtotals of deceased patients by each selected institution and a total for all institutions. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

# 10.3. Printing an Inactive VIST Patient Roster Report

The Inactive VIST Patient Roster report provides a list of patients that have been assigned an "Inactive" status.

**Figure 35: Inactive VIST Patient Roster Report**



1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

3. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

4. If applicable, place a check in the Include **Deceased Patients** checkbox to include deceased patients on the report.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

# 10.4. Printing a Referral Roster By From Institution

This menu option provides you with a printout of referrals for blind rehabilitation based on the referral schedule. You have the choice of how far back in time (i.e., one day, one month, one year, two years, etc.) from which to retrieve information for the report results.

**Figure 36: Referral Roster by From Institution Report**



1. From the Print Reports Menu, click **Referral Schedule Report** to display the Referral Schedule Report– Report Criteria screen.

2. Use the following fields to search for a referral:

Select Institution Search Type:

Select one of the following search types:

Referred From one of your Institutions

Use this type to search for referrals from your institution. Selecting this search type causes the option list in the Referred from Institutions field below to display the institutions from which that referral may have been sent. Use the Referred to Institutions field to select all the institutions to which that referral may have been sent or you can select a specific institution to which that referral may have been sent.

Referred To one of your Institutions

Use this type to search for referrals to your institutions. Selecting this search type causes the option list in the Referred To Institutions field below to display the institutions to which that referral may have been sent. Use the Referred From Institutions field to select all the institutions

from which that referral may have been sent or you can select a specific institution from which that referral may have been sent.

Referred From Institutions:

Select the institution(s) that initiated the referral.

Referred To Institutions:

Select the institution(s) to which the referral is sent.

Initiating Areas:

Initiating Areas:

Select the area initiating the referral. Options include:

- All
- BRC
- BROS
- OTHER
- VICTORS
- VISOR
- VIST

Select the area initiating the referral. Options include:

- Scheduled
- Admitted
- Cancelled
- Completed
- Discharged
- In Training
- Completed
- Transferred
- Withdrawn

**NOTE:** To simplify the selection when trying to identify specific Waitlist related information, selecting Waitlist causes the program to automatically select the appropriate statuses (Pending, In Review, and Accepted) that identify individuals on the waitlist based on the waitlist records with these statuses.

Referral Types

Select all, one, or several **referral types**. Options include:

- All

- BRC CAT – 1ˢᵗ Experience
- BRC CAT – Additional Training
- BRC Dual Program – 1ˢᵗ Experience
- BRC Dual Program – Additional Training
- BRC Other Programs – 1ˢᵗ Experience
- BRC Other Programs – Additional Training
- BRC Regular Program – 1ˢᵗ Experience
- BRC Regular Program – Additional Training
- BROS Follow-up – 1ˢᵗ Experience
- BROS Follow-up – Additional Training
- BROS Local – 1ˢᵗ Experience
- BROS Local – Additional Training
- BROS Prep – 1ˢᵗ Experience
- BROS Prep – Additional Training
- Non-VA Blindness Agency – 1ˢᵗ Experience
- Non-VA Blindness Agency – Additional Training
- Non-VA Local CAT – 1ˢᵗ Experience
- Non-VA Local CAT – Additional Training
- VA Audible Devices
- VA Outpatient LV Clinic – 1ˢᵗ Experience
- VA Outpatient LV Clinic – Additional Training
- VICTORS – 1ˢᵗ Experience
- VICTORS – Additional Training
- VISOR – 1ˢᵗ Experience
- VISOR – Additional Training
- VIST Coordinator

3. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

4. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6.  Select data in the fields, and then click the **Submit** button.

The report displays the schedule. The list contains the Referral Date, Created By, Patient Name, SSN, Initiating Area, Status, Referral Type, Referred from Institution (Station ID), Admit/Discharge/Offered Service Dates, and Special Circumstances. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.5.  Printing a Referral Roster by To Institution

This menu option provides you with a printout of referrals for blind rehabilitation based on the date of referral. You have the choice of how far back in time (i.e., one day, one month, one year, two years, etc.) from which to retrieve information for the report results.

**Figure 37: Referral Roster List by to Institution Report**



1.  From the Print Reports Menu, click **Referral Roster by To Institution** to display the Referral Roster List – Report Criteria screen.

2.  Use the following fields to search for a referral:

Select Institution Search Type:

Select one of the following search types:

- Referred From one of your Institutions

   o  Use this type to search for **referrals** *from* your institution. Selecting this search type causes the option list in the Referred From Institutions field below to display the institutions from which that referral may have been sent. Use the Referred To

Institutions field to select all the institutions to which that referral may have been sent or you can select a specific institution to which that referral may have been sent.

- Referred To one of your Institutions

  o Use this type to search for **referrals *to*** your institutions. Selecting this search type causes the option list in the Referred To Institutions field below to display the institutions to which that referral may have been sent. Use the Referred From Institutions field to select all the institutions from which that referral may have been sent or you can select a specific institution from which that referral may have been sent.

- Referred From Institutions:

  o Select the **institution(**s) that initiated the referral.

- Referred To Institutions:

  o Select the **institution**(s) to which the referral is sent.


Initiating Areas:

Select the area initiating the referral. Options include:

- All

- Waitlist

- Accepted

- Admitted

- Cancelled

- Completed

- Discharged

- In Review

- In Training

- Offered

- Pending

- Scheduled

- Transferred

- Withdrawn

Statuses:

Select one or more **referral statuses**. Options include:

- All

- Waitlist

- Discharged

- Offered

- In Review

- Completed

- Admitted

- Accepted

- Withdrawn

- Cancelled

- Scheduled

- Pending

**NOTE**: To simplify the selection when trying to identify specific Waitlist related information, selecting **Waitlist** causes the program to automatically select the appropriate statuses (Pending, In Review, and Accepted) that identify individuals on the waitlist based on the waitlist records with these statuses.

Referral Types:

Select all, one, or several **referral types**. Options include:

- All

- BRC CAT – 1$^{st}$ Experience

- BRC CAT – Additional Training

- BRC Dual Program – 1$^{st}$ Experience

- BRC Dual Program – Additional Training

- BRC Other Programs – 1$^{st}$ Experience

- BRC Other Programs – Additional Training

- BRC Regular Program – 1$^{st}$ Experience

- BRC Regular Program – Additional Training

- BROS Follow-up – 1$^{st}$ Experience

- BROS Follow-up – Additional Training

- BROS Local – 1$^{st}$ Experience

- BROS Local – Additional Training

- BROS Prep – 1$^{st}$ Experience

- BROS Prep – Additional Training

- Non-VA Blindness Agency – 1<sup>st</sup> Experience

- Non-VA Blindness Agency – Additional Training

- Non-VA Local CAT – 1<sup>st</sup> Experience

- Non-VA Local CAT – Additional Training

- VA Audible Devices

- VA Outpatient LV Clinic – 1<sup>st</sup> Experience

- VA Outpatient LV Clinic – Additional Training

- VICTORS – 1<sup>st</sup> Experience

- VICTORS – Additional Training

- VISOR – 1<sup>st</sup> Experience

- VISOR – Additional Training

- VIST Coordinator

**NOTE**: EXP means Experience; ADL TRN means Additional Training.


3. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

4. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.
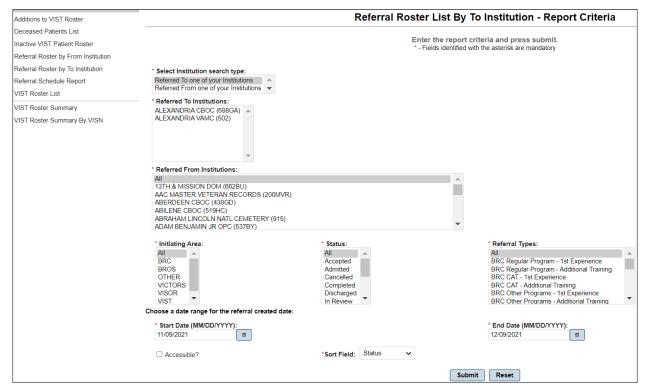
- Select data in the fields, and then click the **Submit** button.

The report displays the list of referrals. The list contains the Referral Number, Created Date, Patient Name, Referral Type, Status, Referred to Institution (Station ID), Initiating Area, and Special Consideration. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.6.  Printing a Referral Schedule Report

This menu option provides you with a printout of referrals for blind rehabilitation based on the referral schedule. You have the choice of how far back in time (i.e., one day, one month, one year, two years, etc.) from which to retrieve information for the report results.

**Figure 38: Referral Schedule Report**



1. From the Print Reports Menu, click **Referral Schedule Report** to display the Referral Schedule Report– Report Criteria screen

2. Use the following fields to search for a referral:

Referred To Institutions:

Select the **institution**(s) that you want to include in the report.

Statuses:

Select one or more referral statuses. Options include:

- All
- Scheduled
- Admitted
- Cancelled
- Completed
- Discharged
- In Training
- Completed
- Transferred
- Withdrawn

Referral Types

Select all, one, or several **referral types**. Options include:

- All
- BRC CAT – 1st Experience
- BRC CAT – Additional Training
- BRC Dual Program – 1st Experience

- BRC Dual Program – Additional Training
- BRC Other Programs – 1st Experience
- BRC Other Programs – Additional Training
- BRC Regular Program – 1st Experience
- BRC Regular Program – Additional Training

3. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

4. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Select data in the fields, and then click the **Submit** button.

The report displays the schedule. The list contains the Referral Date, Created By, Patient Name, SSN, Initiating Area, Status, Referral Type, Referred from Institution (Station ID), Admit/Discharge/Offered Service Dates, and Special Circumstances. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.6.1. Printing a VIST Roster Summary

The VIST Roster Summary Report provides all VIST Roster summary information that occurred within the chosen dates. The report sorts by date.

**Figure 39: VIST Roster Criteria**



1. From the Print Reports Menu, click VIST Roster Summary to display the VIST Roster Summary – Report Criteria screen.

2. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.
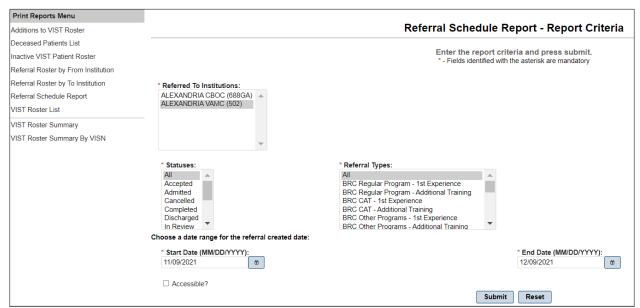
3. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

4. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

5. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The report displays for each selected applicable institution. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.6.2. Printing a VIST Roster Summary By VISN

The VIST Roster Summary Report by VISN (Veterans Integrated Service Network) provides all VIST Roster summary information that occurred within the chosen dates for the selected VISN(s). The report sorts by date.

**Figure 40: VIST Roster Summary by VISN**



1. From the Print Reports Menu, click VIST Roster Summary by VISN to display the VIST Roster Summary by VISN – Report Criteria screen.

2. Select one or more or all the **VISN(s)** from which you want to report. They list in ascending order.

3. Enter the **Start Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will determine how far back the system will search for patients in the selected institution(s).

4. Enter the **End Date** (MM/DD/YYYY) for the report or click the icon next to the field and select from a calendar. This date will usually be the current date.

5. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The VIST Roster Summary By VISN report displays. To generate the report in Adobe Acrobat format for printing, click the **Printer** icon and follow the directions on the screen.

# 10.7. Print VIST Roster Sorts Menu

This menu option displays a menu of sort options. Use to select the sort criteria for the VIST Roster before you generate each report. Each of these menu options generates a VIST Roster sorted by the specific option you select.

1. Select the **Print VIST Roster Sorts Menu** to display the following sort menu options:

   - Sort By Residence State

   - Sort By County

   - Sort By City

   - Sort By Zip

   - Sort By Month of Birth

   - Sort By Age

   - Sort Address/Phone

   - Sort By Primary Cause of Vision Loss

   - Sort By Period of Service

   - Sort By Referral source

   - Sort By eye Exam Notes

## 10.7.1.   Sort By Residence State

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. In the States field, select the appropriate State.

3. If applicable, place a check in the **Include Deceased Patients** checkbox to include deceased patients that have been added to the VIST Roster.

4. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

5. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

6. The Sort by State report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

### 10.7.2. Sort By County

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. In the **County to Use** field, select ALL or SELECTED.

   - If you choose ALL, when you click **Submit** to generate the report the Selected Counties field defaults to ALL.

   - If you choose SELECTED, the County to Add field becomes available to use and you must enter the Counties:

3. Enter the desired County in the **County to Add** field, and then click **ADD**. This will add the County to the Selected Counties field and make it available for selection when running the report.

4. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by County report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

### 10.7.3. Sort by City

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. In the **City to Use** field, select All or SELECTED.

   - If you choose ALL, when you click **Submit** to generate the report, the Selected Cities field defaults to ALL.

   - If you choose SELECTED, the City to Add field becomes available to use and you must enter the Cities:

3. Enter the desired City in the **City to Add** field, and then click **ADD**. This will add the City to the Selected City field and make it available for selection when running the report.

4. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by City report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.7.4.  Sort by Zip

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. In the **Zip Codes to Use** field, select All or SELECTED.

   - If you choose ALL, when you click **Submit** to generate the report, the Selected Zip codes field defaults to ALL.

   - If you choose SELECTED, the Zip code to Add field becomes available to use and you must enter the zip codes:

3. Enter the desired zip code in the **Zip code to Add** field, and then click **ADD**. This will add the Zip code to the Selected Zip code field and make it available for selection when running the report.

4. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Zip Code report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.7.5.   Sort by Month of Birth

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. Click the down arrow to select the starting month in the **Birth Month Start** field.

3. Click the down arrow to select the ending month in the **Birth Month End** field.

4. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

## 10.7.6.   Sort by Age

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. Click the down arrow to select the start age in the **Start Age** field.

3. Click the down arrow to select the end age in the **End Age** field.

4. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

5. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

6. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Age report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.7.7.   Sort by Address/Phone

1. Select one or more or all the Institutions from which you want to report. The institutions list alphabetically in ascending order by name.

2. If applicable, place a check in the Include Deceased Patients checkbox to include deceased patients that have been added to the VIST Roster.

3. If applicable, place a check in the Accessible? checkbox field to indicate that you want the report 508 compliant.

4. Click the Submit button to generate the report or click the Reset button to clear the selected criteria and start over.

The Sort by Address/Phone report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.7.8.   Sort by Primary Cause of Vision Loss

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2. If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

3. If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

4. Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Primary Cause of Vision Loss report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

## 10.7.9.   Sort by Period of Service

1. Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2.  If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

3.  If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

4.  Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Period of Service report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

### 10.7.10.   Sort by Referral Source

1.  Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2.  If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

3.  If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

4.  Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Referral Source report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

### 10.7.11.   Sort by Eye Exam Notes

1.  Select one or more or all the **Institutions** from which you want to report. The institutions list alphabetically in ascending order by name.

2.  If applicable, place a check in the **Include Deceased Patient**s checkbox to include deceased patients that have been added to the VIST Roster.

3.  If applicable, place a check in the **Accessible?** checkbox field to indicate that you want the report 508 compliant.

4.  Click the **Submit** button to generate the report or click the **Reset** button to clear the selected criteria and start over.

The Sort by Eye Exam Notes report displays. To generate the report in Adobe Acrobat format for printing, click the **Export** dropdown button and choose the file type to save the report.

# A. Internet Explorer Keyboard Shortcuts

You can use shortcut keys to view and explore web pages, use the address bar, work with favorites, and edit.

**Table 2: Keyboard Short Cuts – Viewing and Exploring the Web Pages**

| Short Cut Keys | Action Preformed |
|---|---|
| F1 | Display the Internet Explorer Help, or when in a dialog box, display context helps on an item |
| F11 | Toggle between Full Screen and regular view of the browser window |
| TAB | Move forward through the items on a Web page, the Address bar, and the Links bar |
| SHIFT+TAB | Move back through the items on a Web page, the Address bar, and the Links bar |
| ALT+HOME | Go to your Home page |
| ALT+K | Click OK button |
| ALT+LEFT ARROW | Go to the previous page |
| ALT+LEFT BACKSPACE | Go to the previous page |
| ALT+RIGHT ARROW | Go to the next page |
| ALT+S | Click Save and Continue button |
| SHIFT+F10 | Display a shortcut menu for a link |
| CTRL+TAB or F6 | Move forward between frames |
| SHIFT+CTRL+TAB | Move back between frames |
| UP ARROW | Scroll toward the beginning of a document |
| DOWN ARROW | Scroll toward the end of a document |
| PAGE UP | Scroll toward the beginning of a document in larger increments |
| PAGE DOWN | Scroll toward the end of a document in larger increments |
| HOME | Move to the beginning of a document |
| END | Move to the end of a document |
| CTRL+F | Find on this page |
| F5 | Refresh the current Web page only if the time stamp for the Web version and your locally stored version are different |
| CTRL+R | Refresh the current Web page only if the time stamp for the Web version and your locally stored version are different |
| CTRL+F5 | Refresh the current Web page, even if the time stamp for the Web version and your locally stored version are the same |
| ESC | Stop downloading a page |
| CTRL+O | Go to a new location |
| CTRL+L | Go to a new location |
| CTRL+N | Open a new window |

| Short Cut Keys | Action Preformed |
|---|---|
| CTRL+W | Close the current window |
| CTRL+S | Save the current page |
| CTRL+P | Print the current page or active frame |
| ENTER | Activate a selected link |
| CTRL+E | Open Search in Explorer bar |
| CTRL+I | Open Favorites in Explorer bar |
| CTRL+H | Open History in Explorer bar |
| CTRL+click | In History or Favorites bars, open multiple folders |

**Table 3: Keyboard Short Cuts – Using the Address Bar**

| Short Cut Keys | Action Preformed |
|---|---|
| ALT+D | Select the text in the Address bar |
| F4 | Display the Address bar history |
| CTRL+LEFT ARROW | When in the Address bar, move the cursor left to the next logical break (. or /) |
| CTRL+RIGHT ARROW | When in the Address bar, move the cursor right to the next logical break (. or /) |
| CTRL+ENTER | Add "www." To the beginning and ".com" to the end of the text typed in the Address bar |
| UP ARROW | Move forward through the list of AutoComplete matches |
| DOWN ARROW | Move back through the list of AutoComplete matches |

**Table 4: Keyboard Short Cuts – Working with Favorites**

| Short Cut Keys | Action Preformed |
|---|---|
| CTRL+D | Add the current page to your favorites |
| CTRL+B | Open the Organize Favorites dialog box |
| ALT+UP ARROW | Move selected item up in the Favorites list in the Organize Favorites dialog box |
| ALT+DOWN ARROW | Move selected item down in the Favorites list in the Organize Favorites dialog box |

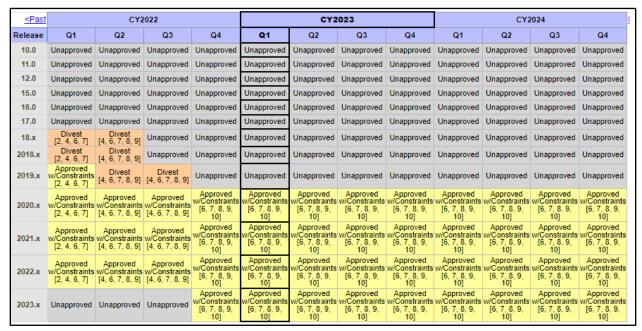**Table 5: Keyboard Short Cuts – Editing**

| Short Cut Keys | Action Preformed |
|---|---|
| CTRL+X | Remove the selected items and copy them to the Clipboard |
| CTRL+C | Copy the selected items to the Clipboard |
| CTRL+V | Insert the contents of the Clipboard at the selected location |
| CTRL+A | Select all items on the current Web page |

# B. Additional JAWS Information

The supported JAWS versions can be found at the following link: Job Access With Speech (JAWS) (va.gov)

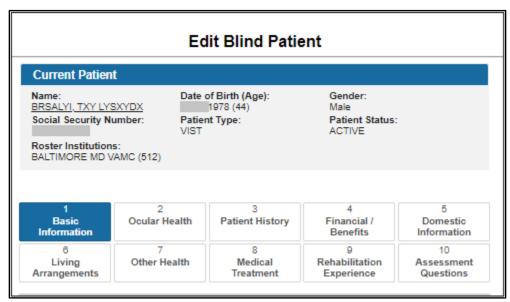Figure 41 depicts the supported JAWS versions in a table format.

**Figure 41: Supported JAWS Versions**

| <Past | CY2022 | | | | CY2023 | | | | CY2024 | | | | ! |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Release | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | |
| 10.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 11.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 12.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 15.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 16.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 17.0 | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 18.x | Divest [2, 4, 6, 7] | Divest [4, 6, 7, 8, 9] | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 2018.x | Divest [2, 4, 6, 7] | Divest [4, 6, 7, 8, 9] | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 2019.x | Approved w/Constraints [2, 4, 6, 7] | Divest [4, 6, 7, 8, 9] | Divest [4, 6, 7, 8, 9] | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | Unapproved | |
| 2020.x | Approved w/Constraints [2, 4, 6, 7] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | |
| 2021.x | Approved w/Constraints [2, 4, 6, 7] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | |
| 2022.x | Approved w/Constraints [2, 4, 6, 7] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [4, 6, 7, 8, 9] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | |
| 2023.x | Unapproved | Unapproved | Unapproved | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | Approved w/Constraints [6, 7, 8, 9, 10] | |

Once a new patient has been registered, the Edit Blind Patient section will display boxes numbered 1-10 as depicted in Figure 42. JAWS will read these boxes as Tabs.

**Figure 42: Edit Blind Patient Tabs**

Users that have JAWS 2020 or later versions can use the **Tab** key to navigate through the 10 **Edit Blind Patient** tabs. The **Space** bar can be used to select an **Edit Blind Patient** tab. Users that have JAWS 2021 or later versions can utilize the appropriate keystrokes to bring up the JAWS links list. JAWS will read the **Edit Blind Patient** tabs from the links list.