

Community Viewer (CV) Version 2.7

User Guide for VA Staff



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1. Introduction

Community Viewer (CV) is a browser-based software application that facilitates the secure exchange of data between Department of Veterans Affairs (VA) systems and authorized non-VA providers, known as Community Care Providers (CCPs). The exchange of data improves the coordination of care and continuity of care for VA patients receiving treatment outside of the VA network.

CV pulls information from VA health care systems in real time for viewing within a web browser. Through CV, VA Staff assign patients to CCPs and provision CCP use within the CV system, allowing CCPs access to view consolidated patient data from multiple Veterans Information Systems and Technology Architecture (VistA) systems.

This User Guide is intended for VA Staff users who use the functionality within the **Community Care Provider Management (CCPM)** widget of CV to:

- Create and edit providers
- Assign patients
- Search patient assignments
- Manage patient data access parameters



There are notations throughout this guide to indicate functionality that is available only to CV Portal Administrators, VA Staff users with administrative privileges.

Figure 1: Third-Party Administrator (TPA) Portals Notice

IMPORTANT:

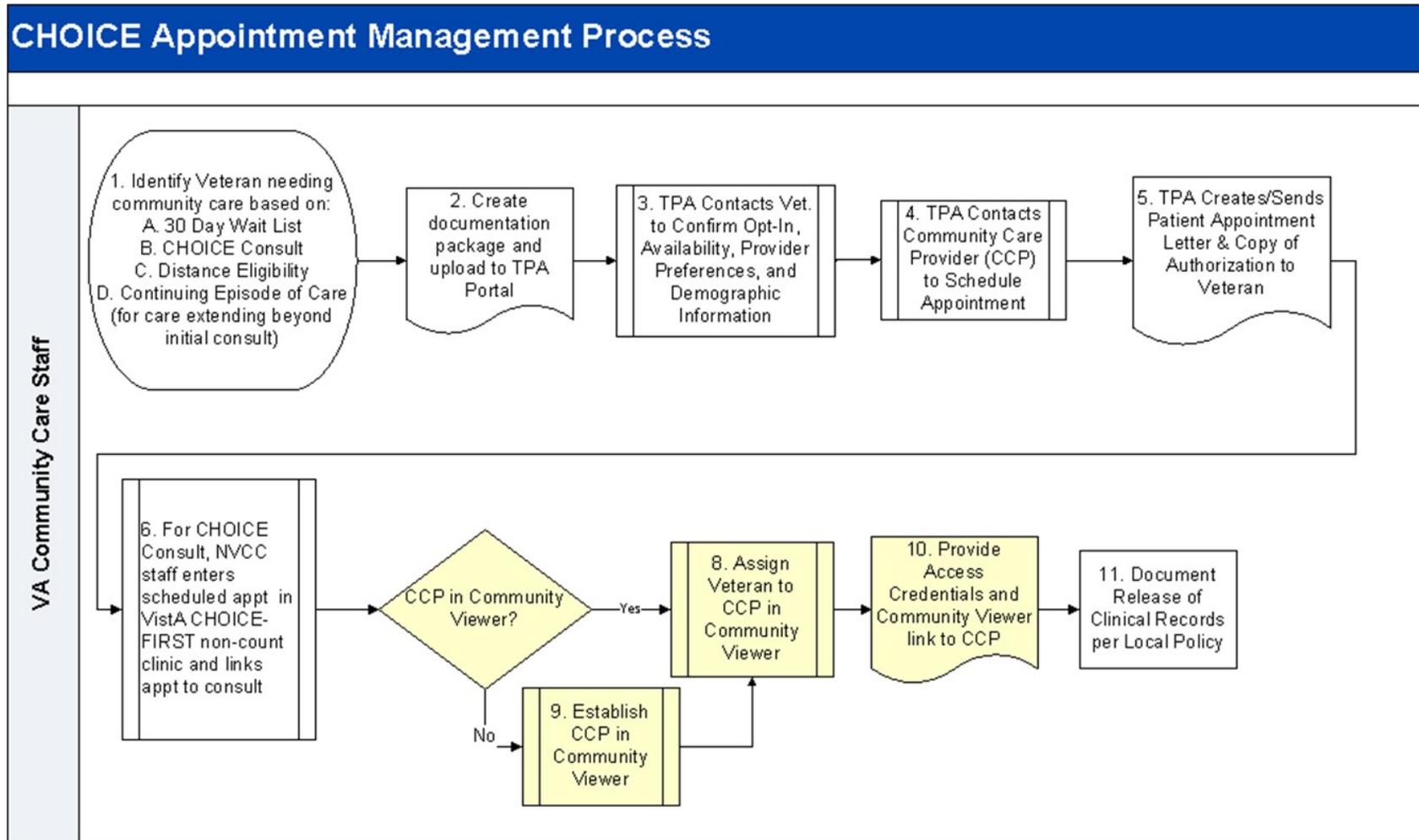
CV is designed to improve the community providers' ability to view comprehensive VA health information for Veterans.

CV does **NOT** replace the creation and uploading of documentation packages to the Third Party Administrator (TPA) portals.

VA Administrative Staff must continue to create and upload documentation packages as specified in the current SOP.

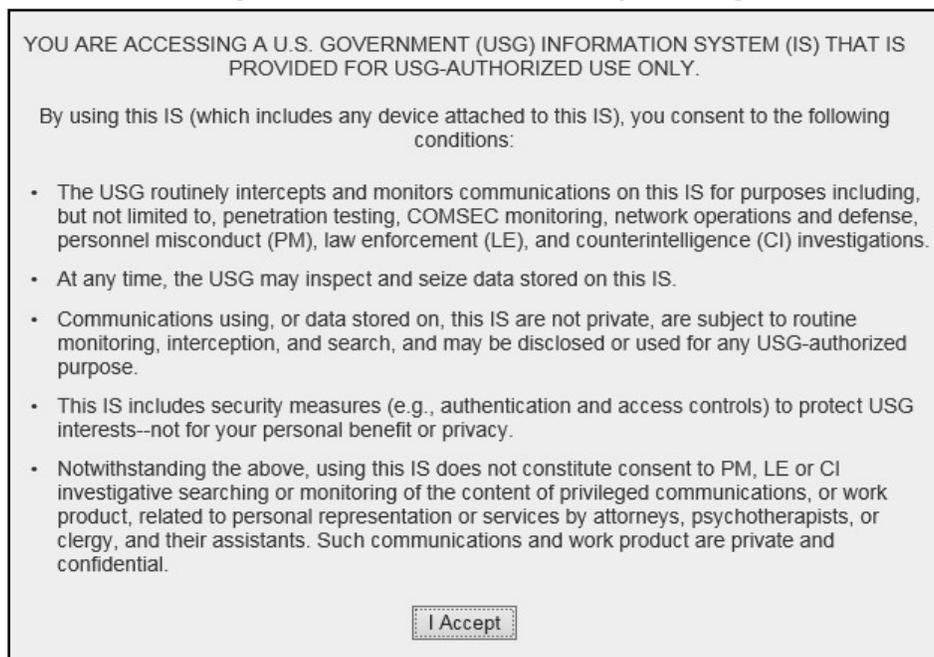
Figure 2 depicts the typical user workflow.

Figure 2: User Workflow



Please read and bear in mind the warning displayed in [Figure 3](#) before using CV.

Figure 3: CV Authorized Use Only Warning



1.1. Purpose of the Guide

The purpose of this User Guide is to familiarize VA Staff with the important features and navigational elements of the CCPM widget of CV.

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption.

- [Cross-References](#) are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is expressed by **bold**, underlined, and *italicized* text
- The information symbol **i** calls the reader's attention to additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **VA Staff Portal:** The landing page, or default view, of CV that appears after logging in; the portal page displays widgets and the tools that enable quick access to basic features
- **Widget:** A component of the CV interface that enables a user to view information or perform a function
- **Widget Tray:** An expandable and collapsible tray at the bottom of the portal page that provides access to the widgets available for placement on the portal page

1.2. Assumptions

The User Guide is written from the perspective of VA Staff and assumes that:

- You can open, navigate, and use a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have the Uniform Resource Locator (URL) for the CV **Login** page, system user names, a Personal Identification Verification (PIV) card, and Access/Verify codes required for launching CV
- You will use CCPM to make patient assignments to providers and manage providers who practice outside the VA network

1.3. System Requirements

CV is a front-end web application, designed to run in a web browser on the VA network. Accessing CV through a browser or device that is not fully compatible with the application may result in certain features not working as expected.



This release does not support mobile devices.

It is recommended that CV is accessed from a desktop or laptop PC using a supported browser, such as:

- Chrome v54 or higher
- Microsoft Edge v41
- Firefox v58
- Internet Explorer (IE) v11
- Safari v11

1.4. Getting Help

Authorized users who have trouble logging in to CV or experience other application issues should call the Enterprise Service Desk (ESD) for assistance, or create a ticket using the YourIT self-service portal.



IT Enterprise Service Desk

REDACTED

Prior to contacting the ESD for support, please refer to [Section 2, Logging in to CV](#), for detailed information about how to access CV, and to [Section 5, Troubleshooting](#), for suggested resolution steps and troubleshooting information.

2. Logging in to CV

Before logging in to and utilizing the functionality of the **CCPM** widget, please read the **Sensitive Information** warning in [Figure 1](#).

If you have not received an access confirmation e-mail, you must first request access through your facility Community Care lead or your VISN Business Integration Manager (BIM).

CV authenticates all VA users using their PIV card, their credentials, and the master list of registered users. During log in, first-time CV users are prompted to enter their agency, site, and user settings. This data is used to create a CV user profile, and it is utilized during future login sessions.

To log in to CV:

1. Ensure your PIV card is inserted into your computer or card reader
2. Open a supported Internet browser
3. Enter the URL for the [CV web application](#) into the address bar of the browser
4. When prompted with a certificate list, select the PIV Authentication certificate
5. When prompted, enter your PIV Personal Identification Number (PIN)
6. Click **I Accept** after reading the important user consent information regarding accessing a government information system ([Figure 3](#))
7. Enter the following information in the fields on the **Login** page ([Figure 4](#)):
 - a. VistA Access Code
 - b. VistA Verify Code
 - c. Select **VA** from the **Agency** field
 - d. Select your local VistA host site from the **Site** dropdown
8. Click **Login**

Figure 4: Login Page

Community Viewer
powered by JLV

VistA Access Code:

VistA Verify Code:

Agency: VA Site: IPOTEST4

[Edit Profile](#)

Login

Announcements
02/22/2018: CCPM ONLY test [View More Announcements](#)

System Status
CV data sources available.

[CV Help](#)



Users who are not authorized to access CV receive an *Access denied* message. Access to CV is limited to authorized users and is configured by System Administrators. If you believe you have received the message in error, please contact the ESD. See [Section 1.4, Getting Help](#), for details.

2.1. System Notifications

The CV **Login** page displays system notifications to alert you to system outages, scheduled system activities, and important upgrades. The **Login** page also displays a notification when your VistA Verify code must be reset. The **CV Help** link opens CV online help, which guides you through the steps to reset your Verify code.

2.2. Editing Your User Profile at Log in

Users can customize their profile from the **Login** page. First-time CV users will be prompted to enter their agency, site, and User Interface (UI) theme settings before logging in. Once saved, the profile information is used each time you log in to CV.

UI theme preferences can also be set within CV. See [Section 2.3.3, Profile Settings](#).

To edit the user profile at log in:

1. Click the **Edit Profile** link on the **Login** page
 - a. Profile options are presented
2. Enter your agency and site in the fields provided
3. Select the desired UI theme
4. Click **Save and Login**

2.3. The CV Portal Pages

The CV portal pages have tools that enable quick access to basic features. These tools appear in the upper right corner of the application window (highlighted in [Figure 5](#)).

- **Select the UI theme:** Click Settings  to select the UI theme (See [Section 2.3.3, Profile Settings](#))
- **Access online help:** Click Help  to open web-based, online help
- **Log out:** Click Logout  to terminate the current CV session

Figure 5: CV Portal Tools



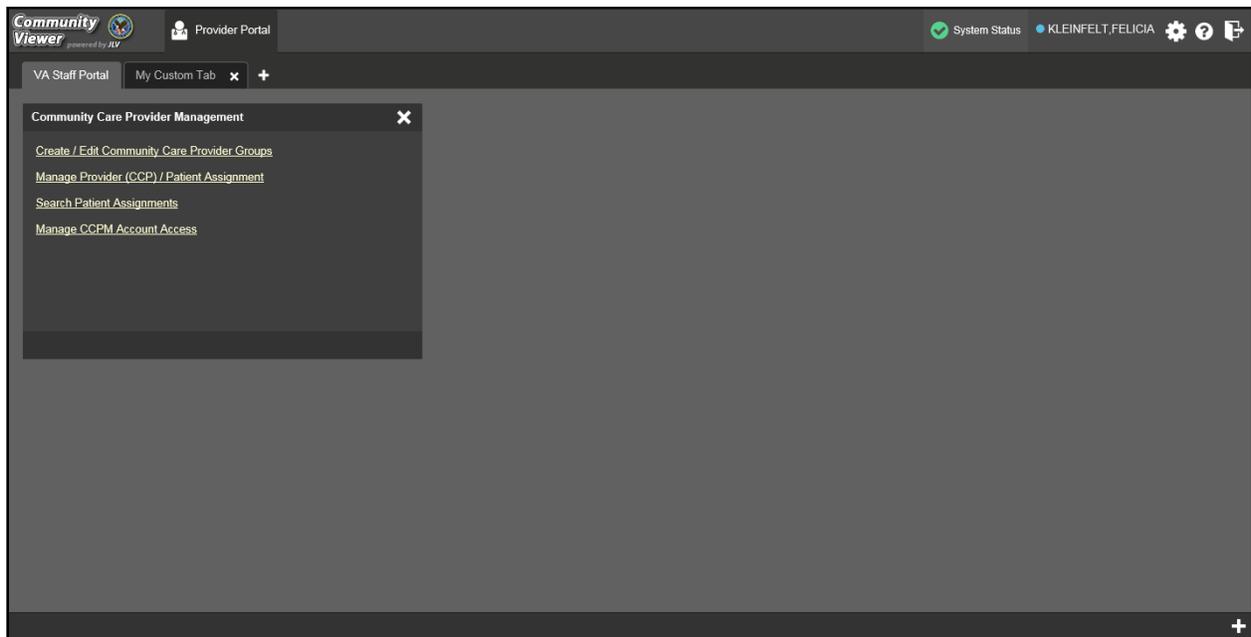
2.3.1. Default View

After logging in to CV, the **VA Staff Portal** opens. The default view of the **VA Staff Portal** includes the **CCPM** widget ([Figure 6](#)).



If the **CCPM** widget is not displayed, click the plus + sign in the lower right corner of the screen, ([Figure 6](#)) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the screen, and drop the widget in the desired location.

Figure 6: Default View



2.3.2. Viewing System Status

CV's Health Monitor provides system status updates and monitors the services CV uses to connect to VA data sources. The services that are monitored include: Master Veteran Index (MVI), VistA Data Service (VDS), and jMeadows Data Service.

The system status is displayed in two areas:

1. On the **Login** page ([Figure 4](#))
2. Atop the **VA Staff Portal** page (highlighted in [Figure 7](#))

When all monitored systems and services are online and connected, a green icon  appears next to the status, with the message, "CV data sources available" ([Figure 4](#)).

When one or more monitored systems or services are offline or unavailable, a yellow warning icon  appears with the message, "CV is having problems."

When CV's health monitor is unable to retrieve and report system status information, a red icon  appears with the message, "System status is unavailable." When this status appears, you may not be able to log into CV or view patient data until the connection is restored. See [Section 1.4, Getting Help](#), for information on how to contact the ESD.

Figure 7: System Status Indicator



2.3.3. Profile Settings

Profile settings are accessible within CV by clicking **Settings**  located in the upperright corner of the portal pages ([Figure 6](#)).

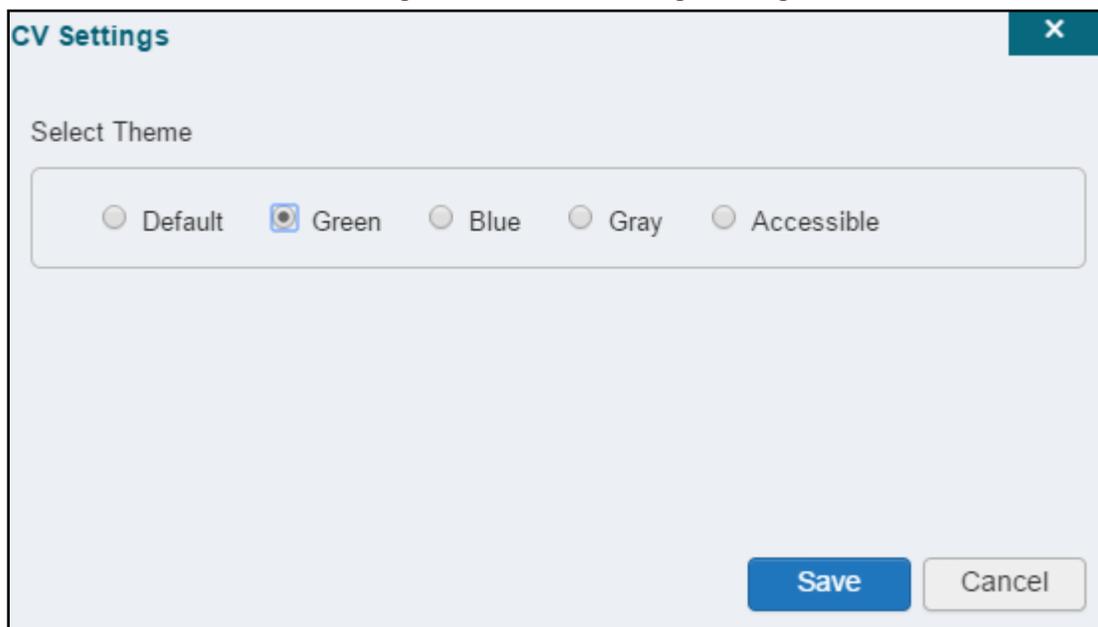
 In this release, the configuration options are limited to choosing a UI theme.

Selecting a **UI Theme** sets the font color, foreground, and background colors of the CV Graphical User Interface (GUI). Themes apply to all application elements, including widgets, toolbars, and dialog boxes. Theme choices are Default, Green, Blue, Gray, and Accessible. The Accessible theme ([Figure 12](#)) is 508-compliant, and it is designed to work with the accessibility tools installed on a user's device.

To set the UI theme:

1. Click **Settings**  in the upper right corner of the portal pages
2. The **CV Settings** dialog opens ([Figure 8](#))
3. Click the radio button next to the desired theme
4. Click **Save**
5. Click **Cancel** to exit the **CV Settings** dialog and restore the previous theme

Figure 8: The CV Settings Dialog



UI theme choices are displayed in the figures below. The Default theme was presented in [Section 2.3.1, Default View, Figure 6](#).

Figure 9: Blue UI Theme

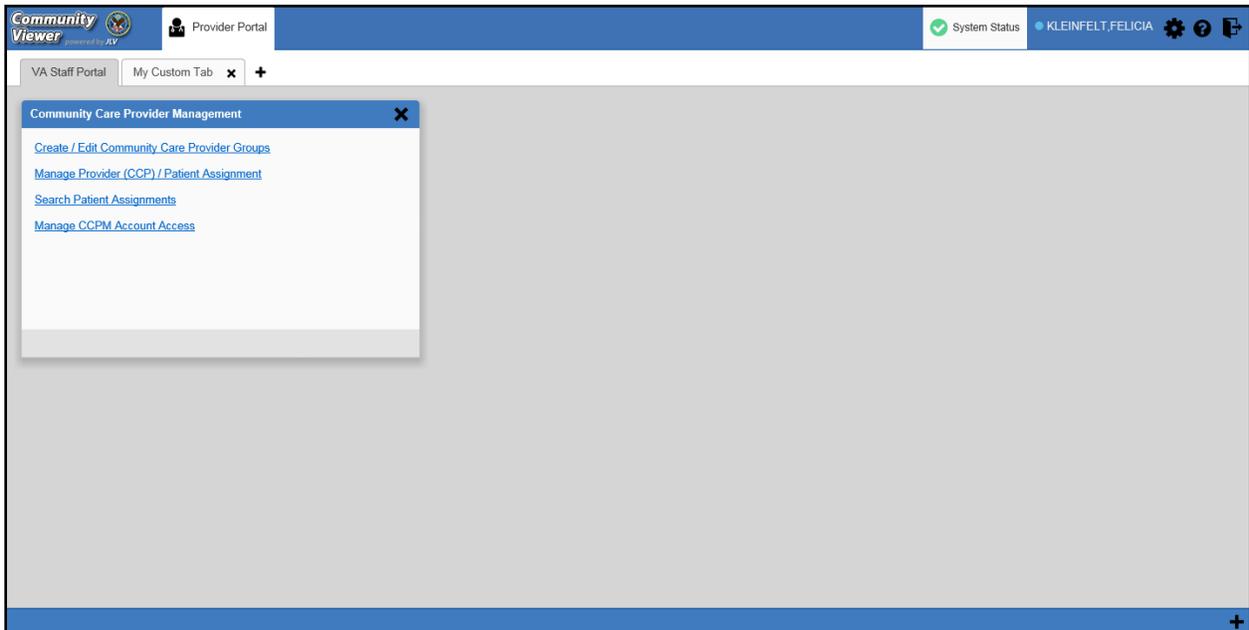


Figure 10: Gray UI Theme

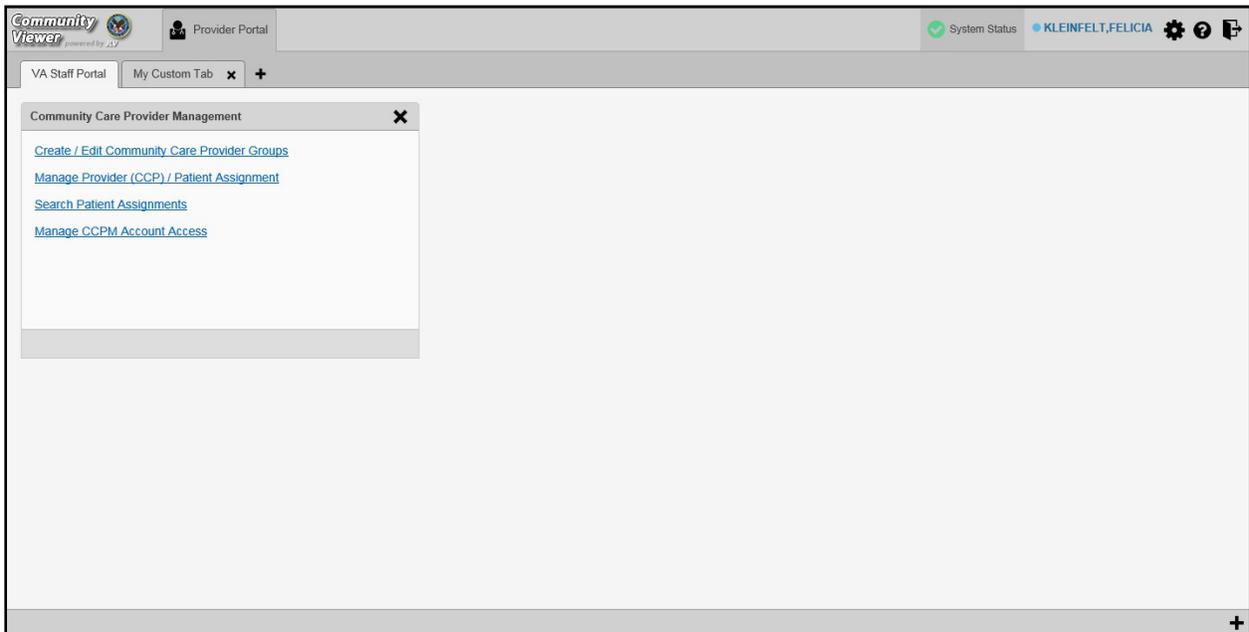


Figure 11: Green UI Theme

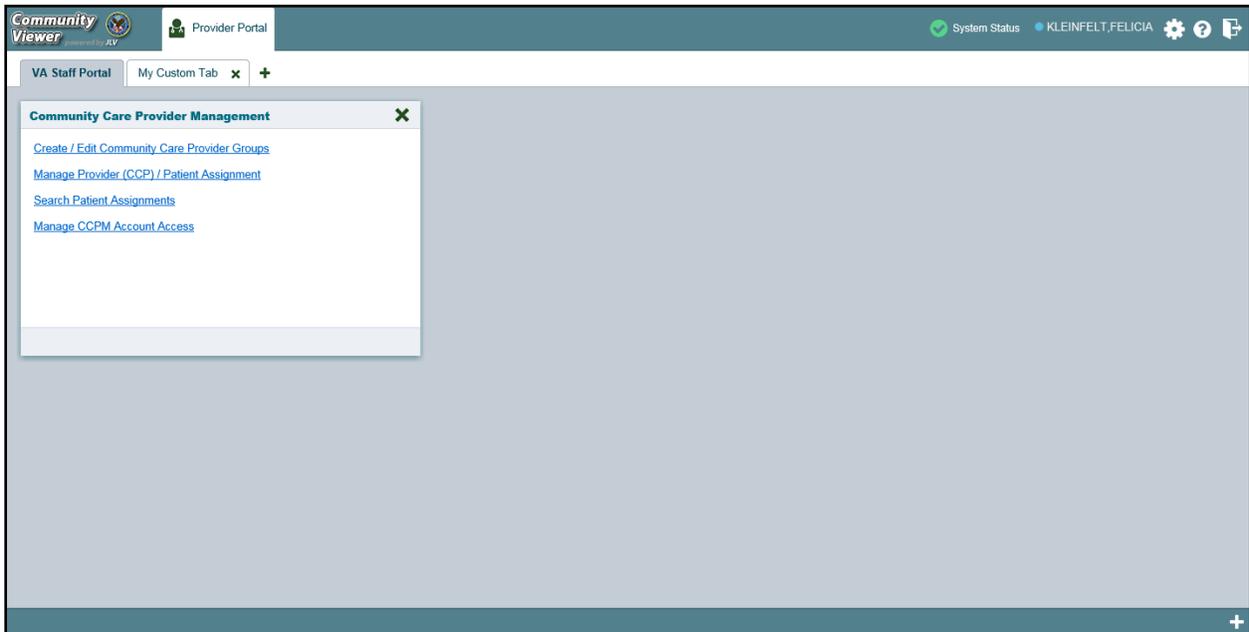
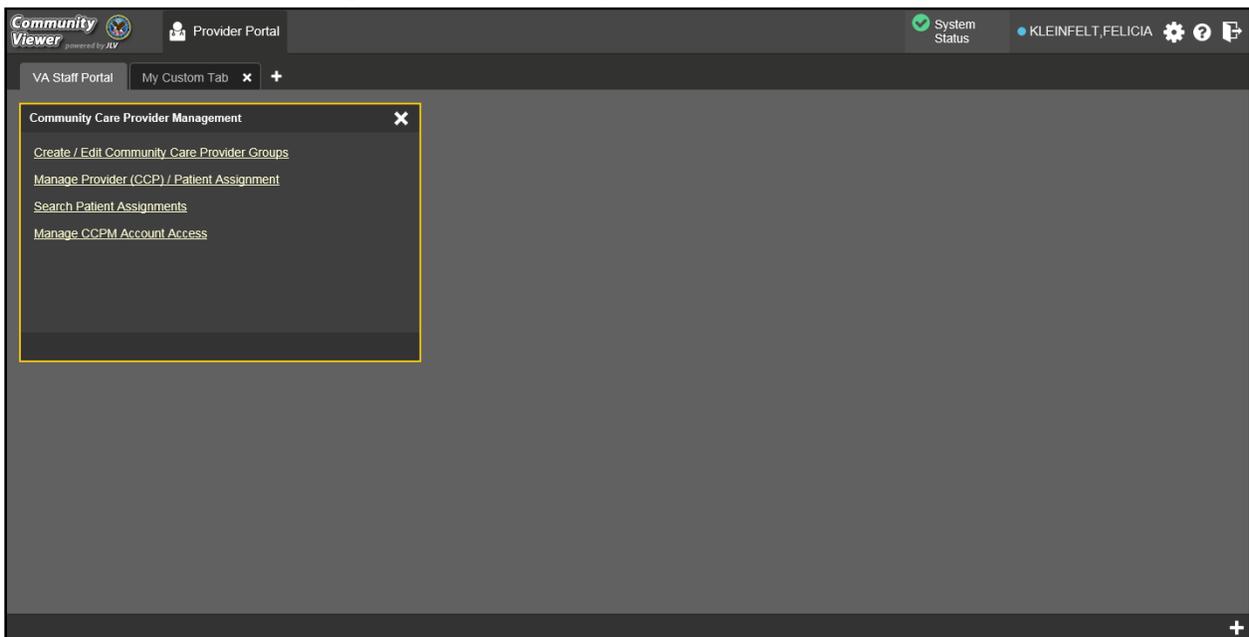


Figure 12: Accessible (508-Compliant) UI Theme



2.3.4. Using the Accessible Theme's Functionality

The Accessible theme includes larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility to support Federal accessibility requirements and Section 508 compliance.

2.3.4.1. Keyboard Focus and Screen Navigation in Accessible Theme

Keyboard focus is the highlighting of screen elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The screen element in focus is outlined in gold ([Figure 12](#)) as a visual indicator of keyboard focus.

CV enables the use of Windows keystrokes (Tab, Shift + Tab, arrow keys, Enter), and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All UI items are accessible via the keyboard under the Accessible theme.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. For example, pressing **Enter** or the **Spacebar** when the **Settings** icon  is in focus opens the CV Settings dialog. Using the arrow keys or the **Tab** key allows a user to move between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in [Table 1](#).

Table 1: Keyboard Accessible Keystrokes

Keystroke	Description
<i>Application and Portal Navigation</i>	
Alt+4	Press to transfer keyboard focus to the main or top screen element: Focus is transferred to the Provider Portal tab on a Portal Page. Focus is transferred to the first link or data element in a widget. Focus is transferred to the dialog box's close button (X).
Alt+5	Press on a page with two panels to toggle keyboard focus between the main or top element on left and right panels.
ENTER	Press to transfer keyboard focus to the highlighted widget.
TAB	Press to transfer keyboard focus to other UI items.
ESC	Press to return keyboard focus to the panel containing the UI item with keyboard focus or to exit a window or widget.
SPACEBAR	Press to activate any UI item (for example, click a button).
Arrow Keys	When keyboard focus is on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a dropdown, press the down arrow to view the contents.
<i>Portal Tabs</i>	
Arrow Keys	Use the left and right arrow keys to navigate between tabs. Add a Tab: 1) Press the right arrow key until Add Tab (+) is in focus. 2) Press Enter. 3) The new tab dialog box opens and prompts you to enter a name for the new tab.
TAB	Press one or more times when focus is on a portal tab to place the (+) in keyboard focus.
ENTER	Press while the (+) is in focus to add a new portal tab. A dialog will prompt the user to enter a name for the tab.
ESC	Focus on a tab and press Esc to remove it.
<i>Windows and Dialog Boxes</i>	
TAB	Press the Tab key to move the keyboard focus to other UI items within the window.

Keystroke	Description
<i>Adding Widgets to the Portal Pages</i>	
Alt + 1, 2, or 3	Add a widget to a Portal Page from the Widget Tray: <ol style="list-style-type: none"> 1) Determine which column (1, 2, or 3) of the Portal Page you want to place the widget. 2) Focus on the desired widget icon in the Widget Tray. 3) Press Alt + 1, 2, or 3, depending on the desired column.

2.4. Logging Out of the Current CV Session

You may intentionally log out to end a CV session by clicking **Logout**  at any time. If you fail to log out, the current session will terminate automatically after 30 minutes of inactivity. You will be redirected to the **Login** page when any new activity is attempted.

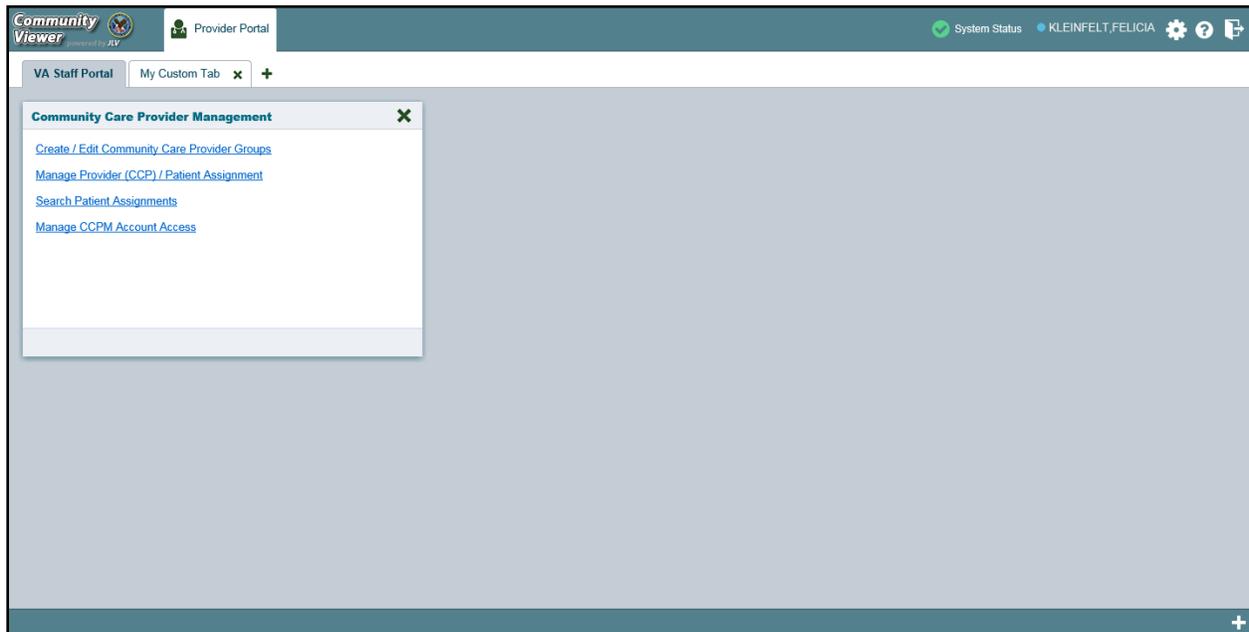
3. Using CV

After logging in, VA Staff see the **CCPM** widget on the **VA Staff Portal** tab by default.



If the **CCPM** widget is not displayed, click the plus + sign in the lower right corner of the portal page ([Figure 13](#)) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the portal page, and drop it in the desired location.

Figure 13: Default Portal Page (Green Theme)



VA Staff create providers, assign patients to CCPs, and grant the CCP limited access to patient records within the **CCPM** widget.

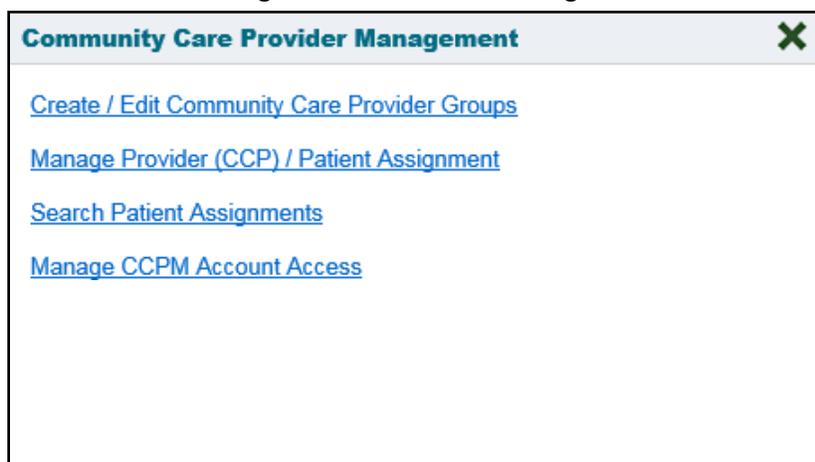
There are four workflow options ([Figure 14](#)) within the **CCPM**:

- Create/Edit Community Care Provider Groups
- Manage Provider (CCP)/Patient Assignment
- Search Patient Assignments
- Manage CCPM Account Access



The Manage CCPM Account Access link is available only to CV Portal Administrators.

Figure 14: The CCPM Widget



3.1. About Provider Groups and Facilities

Before a user can assign a patient to a CCP, the CCP must be assigned to a provider group.

CV has been prepopulated with over 200,000 groups and providers. Users can edit existing groups, but in this release, the task of creating provider groups is performed by CV Portal Administrators. Users should contact a CV Portal Administrator to request the creation of a new group.



Provider Groups are validated on the combination of the group name and street address, in order to avoid the creation of duplicates.

Each group is associated with one or more local VA sites, referred to as *Facilities*. A facility is a local VA site. Provider groups can contain one or more VA facilities.

EXAMPLE 1: Dr. Hanyok works with a family practice called Evergreen Health Care. In this example, Dr. Hanyok is the *Provider*, and Evergreen Health Care is the *Provider Group* to which she is assigned.

EXAMPLE 2: Dr. Woodroof, the *Provider*, is a sole practitioner. The *Provider Group* name for a sole practitioner may be a business name or can be the provider's name; in this example, Dr. Woodroof.

3.2. Editing Provider Groups

Provider groups can be edited through the CCPM widget ([Figure 15](#)).

Figure 15: Search and Manage CCP Groups Panes

The screenshot displays the 'Community Viewer' Provider Portal interface. The top navigation bar includes the 'Community Viewer' logo, 'Provider Portal', 'System Status', and the user name 'KLEINFELT, FELICIA'. The main content area is split into two panes: 'Search Community Care Provider Groups' and 'Manage Community Care Provider Groups'. The search pane features a 'Facilities' dropdown menu with 'V1 994 IPOTEST4 (IPO4)', a 'Browse' button, and input fields for 'Valley', 'City', and 'Zip', with a 'Search' button. Below these is a list of search results for 'Valley Provider Group' with address '123 Isle St, Main City, HI'. The manage pane shows the same 'Facilities' dropdown, a 'Browse' button, and a form for editing the 'Valley Provider Group'. Fields include 'Provider Group Name', 'Address' (123 Isle St), 'City' (Main City), 'State' (Hawaii), 'ZIP' (96545), 'NPI' (Optional), 'Point of Contact (POC)', 'POC Email Address' (poc@testmail.com), 'POC Phone' ((555) 123-1234), and 'Secondary Phone' (Optional). At the bottom of the manage pane is an 'Assigned Providers' section with a table header: 'Provider Name', 'Email', 'Specialty'. At the bottom of the entire interface are buttons for 'Create New Provider Group', 'Delete Provider Group', 'Save', and 'Cancel'.

To edit a provider group ([Figure 15](#)):

1. Click the **Create/Edit Community Care Provider Groups** link in the CCPM widget
2. Enter the provider group name in the **Search** field
3. Click **Search**
4. Select the desired provider group from the search results
5. Edit the provider group fields as needed
6. Click **Browse** next to the **Facilities** field, and select the desired facility from the list
7. Providers assigned to the provider group are listed in the lower right portion of the screen
 - a. Edit provider profiles or remove providers from the group using the **Edit** link within the **Assigned Providers** list ([Figure 16](#))
8. Click **Save**

Figure 16: Search and Manage CCP Groups Panes, Assigned Providers Edit and Delete Links

The screenshot displays the 'Community Viewer' interface with two main panes. The left pane, titled 'Search Community Care Provider Groups', includes a 'Facilities' dropdown menu with 'V1 994 IPOTEST4 (IPO4)' selected, a 'Browse' button, a search input field containing 'valley', and a 'Search' button. Below the search field is a list of search results for 'Valley Provider Group' with address '123 Isle St.' and city 'Main City, HI'. The right pane, titled 'Manage Community Care Provider Groups', shows the same facility selected. It contains a form with fields for 'Provider Group Name' (Valley Provider Group), 'Address' (123 Isle St.), 'City' (Main City), 'State' (Hawaii), 'ZIP' (96545), 'NPI' (Optional), 'Point of Contact (POC)' (Point of Contact), 'POC Email Address' (poc@testmail.com), 'POC Phone' ((555) 123-1234), and 'Secondary Phone' (Optional). Below the form is a table of 'Assigned Providers' with columns for 'Provider Name', 'Email', 'Specialty', and 'Edit/Delete'. The table lists 'Doctor, A. Heart' with email 'doctor@testmail.com' and specialty 'Cardiology'. At the bottom of the right pane are buttons for 'Delete Provider Group', 'Save', and 'Cancel'. A 'Create New Provider Group' button is located at the bottom left of the interface.

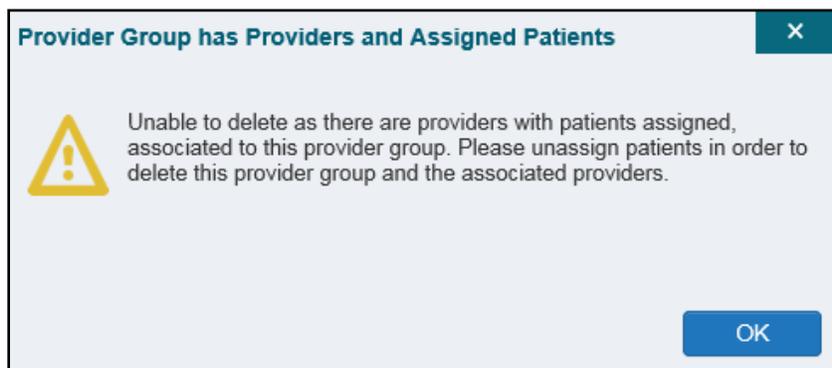


In this release, the tasks of adding new groups and deleting providers are performed by CV Portal Administrators. VA Staff users will not see the **Create New Provider Group** button, the **Delete Provider** button, or the **Delete** link. Contact a CV Portal Administrator for assistance with these tasks.

3.2.1. Deleting a Provider Group

CV Portal Administrators may only delete a provider group when the individual providers within that group have no patient assignments. If any patients are assigned to a provider within the provider group, the error message in [Figure 17](#) will display. [Section 3.2.6, Assigning and Unassigning Patients](#), details steps to unassign patients from an individual provider.

Figure 17: Provider Group Deletion Error Message

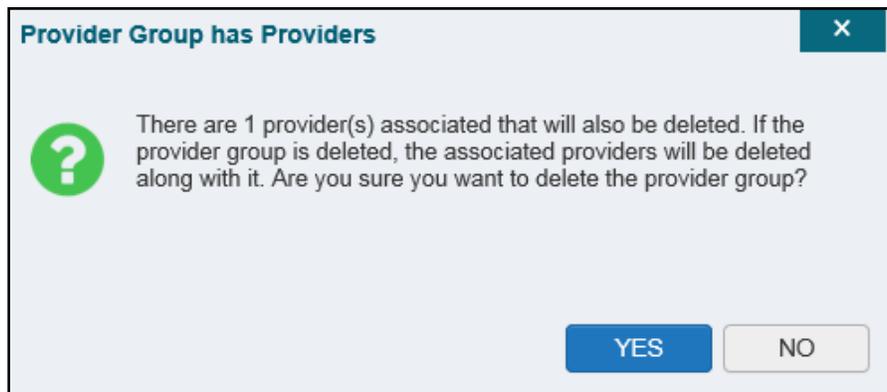


To delete a provider group:

1. Click the **Create/Edit Community Care Provider Groups** link in the **CCPM** widget
2. Enter the provider group name in the **Search** field
3. Click **Search**
4. Select the desired provider group from the search results
5. Select the **Delete Provider Group** button

A CV Portal Administrator can delete providers along with their associated provider group as long as they do not have patients assigned. If the provider group has associated providers that you intend to also delete, select the **Yes** button when prompted.

Figure 18: Provider Group Has Providers Without Patient Assignments



3.2.2. Creating Provider Accounts

All CCP accounts are created in the **CCPM** widget. When a CCP account is created, so is their user profile. Users can assign patients to CCPs once their account has been created.

To create a provider:

1. Click the **Manage Provider (CCP)/Patient Assignment** link ([Figure 14](#)) in the **CCPM** widget
2. Click **Create New Provider** in the Search Providers pane, on the left side of the application window, as shown in [Figure 19](#)
 - a. The Create/Edit Provider pane opens on the right side of the application window
3. Click **Browse** to the right of the **Provider Group** field to search for an existing group
4. Select the desired group from the list of results and click **OK**

Figure 19: Search Providers and Manage Providers Panes

The screenshot displays the 'Community Viewer' Provider Portal interface. The top navigation bar includes the 'Community Viewer' logo, 'Provider Portal' text, and system status information for 'KLEINFELT, FELICIA'. The main content area is split into two panes:

- Search Providers:** Features a 'Facilities' dropdown menu with 'V1 994 IPOTEST4 (IPO4)' selected, a 'Browse' button, a search input field, and a 'Search' button. Below is a table with columns for 'Provider Name' and 'Provider Group', and a 'Create New Provider' button at the bottom.
- Manage Providers:** A form with various fields: 'Provider Group' (Required), 'Network(s)' (Required), 'Specialty' (Optional), 'First Name' (Required), 'Last Name' (Required), 'NPI' (Optional) and 'Account Type' (dropdown), 'Email' (Required), 'Phone' (Required), 'User Name' (Required), and 'Password' (Required) with a 'Generate' button. At the bottom, there are checkboxes for 'Allow Access to Data Types' with options for VA (checked), DoD, VA VLER, and DoD VLER.

Buttons for 'Save' and 'Cancel' are located at the bottom right of the interface.

5. Enter the provider information in each of the required fields on the **Manage Providers** pane ([Figure 19](#))



Providers are differentiated by their e-mail address. When a new provider is created, the e-mail address, which also serves as the provider’s username, is validated in order to avoid the creation of duplicates. If an e-mail address is already associated with a provider in CV, a, “*Username already exists*” message displays ([Figure 20](#)).

Figure 20: Username Already Exists Error Message

The screenshot shows a web form titled "Manage Providers". The form contains several input fields and buttons. The fields are: Provider Group (Aloha Dental), Network(s) (TRIWEST), Specialty (Optional), First Name (A. Heart), Last Name (Doctor), NPI (Optional), Account Type (dropdown), Email (doctor@testmail.com), Phone ((999) 999-9999), User Name (doctor@testmail.com), and Password (>_lc68TEe:). There are "Browse" buttons for Provider Group and Network(s), and a "Generate" button for Password. At the bottom, there are checkboxes for "Allow Access to Data Types": VA (checked), DoD, VA VLER, and DoD VLER. A red error message "Username already exists" is displayed next to the User Name field.

6. Click **Browse** to select the **Provider Group**
7. Click **Browse** to select the **Network(s)** to which the provider belongs from the following options: Health Net, PC3, Provider Agreement, TriWest, or Other
 - a. A free-text field labeled **Other Network** opens when **Other** is selected
8. Enter a **Specialty** as needed
9. Enter the provider's **First Name** and **Last Name**
10. Enter the provider's National Provider Identifier (**NPI**) if available
11. Select **Outside Provider** from the **Account Type** dropdown
12. Enter the provider's **E-mail** address and **Phone** number
13. The **User Name** field is automatically populated with the address entered in the **Email** field
14. Click **Generate** to have the system create the CCP's password
15. Users can manually enter a password that meets 6500 security compliance criteria ,then select the **Save** button

 Passwords are case-sensitive.

16. Record the **User Name** and **Password** as displayed
 - a. It is the responsibility of VA Staff to securely provide the CCP with his/her username and password for CV using VirtuPro or phone

17. Click Save

18. When the *Provider successfully created* message appears, there are two options:
 - a. Click **Assign Patients** and follow the steps outlined in [Section 3.2.6, Assigning and Unassigning Patients](#)

-OR-

- b. Click **OK** to return to the CCPM widget

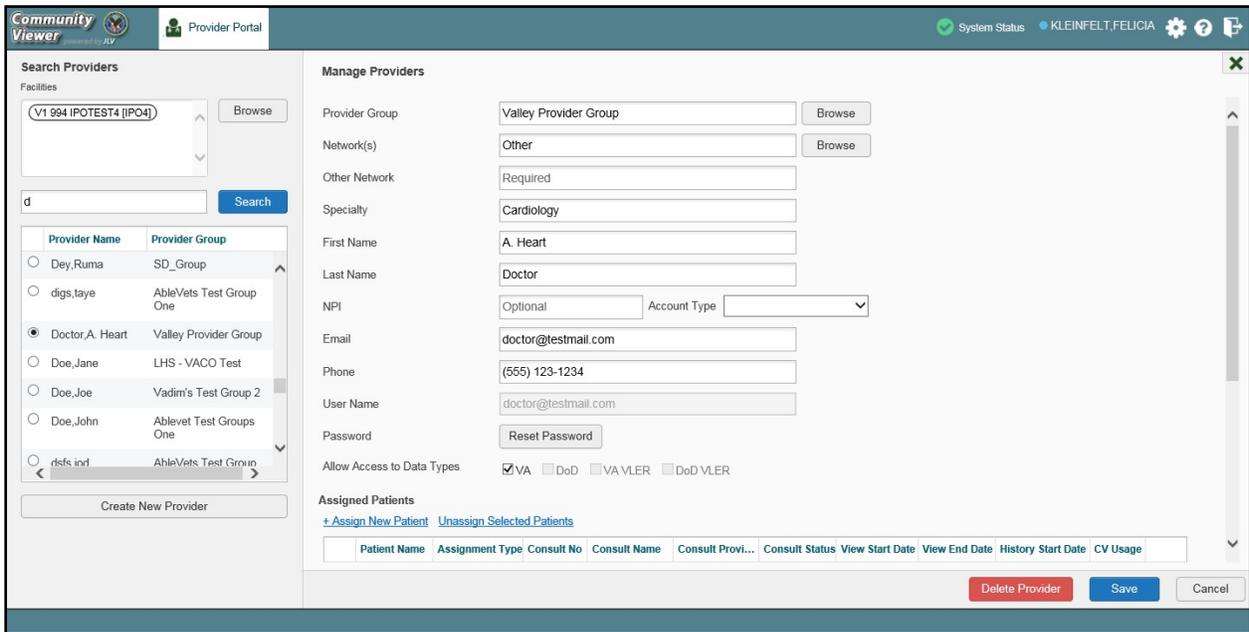
CCPs can now request access to CV from the CCP **Login** page. When a CCP clicks the **New User** link, s/he sees a message directing them to contact their local VA Medical Center for access. They are then given a link to a list of VA points of contact (POCs) from whom they can request access to the application.

3.2.3. Editing Provider Profiles

You can edit a CCP's profile using the CCPM widget. To edit a CCP's information in his/her profile:

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field, and click **Search**
3. Select the desired provider from the search results ([Figure 21](#))
4. Edit the provider information in the fields provided, as necessary
5. Click **Save**

Figure 21: Search Providers and Manage Providers Panes



If a provider is assigned to the wrong group, you can assign the provider to a different, existing group on this screen.

If the provider will be added to another practice group, users must click **Add New Provider** in the **Search Providers** pane and create the provider within the additional practice group. The provider name can be the same, but a different e-mail address must be used for each unique provider.

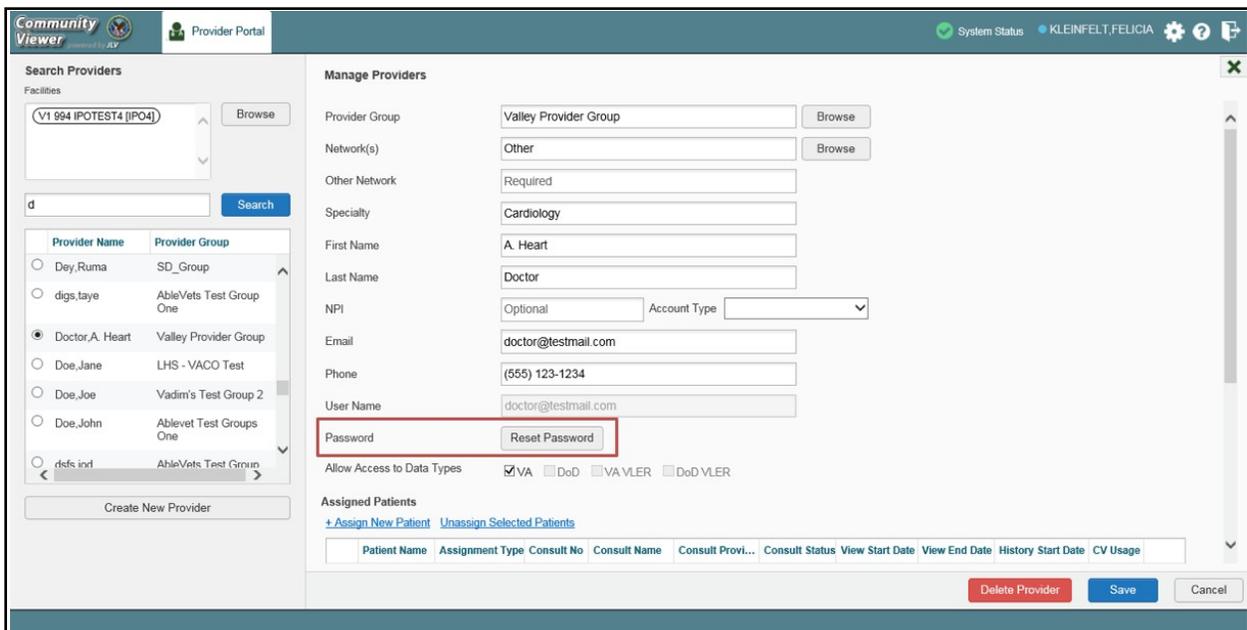
3.2.4. Resetting Provider Passwords

If a CCP user has forgotten his/her password, there is a **Forgot Password?** link on the **Login** page. Clicking the link opens a window that enables the user to send a password reset request directly to [Community Provider Technical Service Desk](#). Password resets can also be performed by VA Staff, using the **CCPM** widget.

To reset a CCP's password:

1. Click **the Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field
3. Click **Search**
4. Select the desired provider from the search results
5. Click **Reset Password** (highlighted in [Figure 22](#)) in the **Manage Providers** pane
6. Click **Generate** to allow the system to create a new, random password
7. Users can manually enter a password that meets 6500 security compliance criteria, then select the **Save** button
8. Record the new password
 - a. It is the responsibility of the VA Staff user to securely provide the CCP with his/her password for CV using VirtuPro or phone
9. Click **Save**

Figure 22: CCP Password Reset



3.2.5. Searching Within the CCPM Widget

CV's search feature is used to find a provider group, a provider, or a patient who will be assigned to a provider. There are two types of patient searches in CV:

- **My Site Search:** Searches the user’s local VistA; the patients listed in the search results are registered to that local VistA only
- **Enterprise Search:** Searches all VistAs across the Enterprise; the patients listed in the search results are registered to one or more VistAs

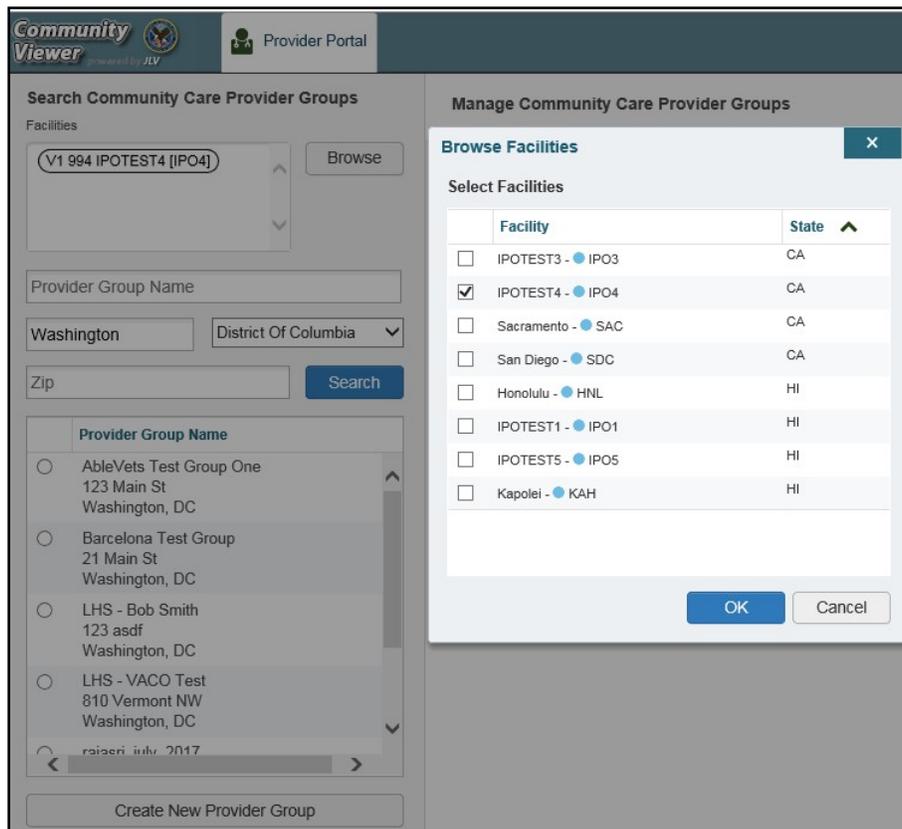


In this release, an Enterprise Search can only be performed by a CV Portal Administrator.

When using the Create/Edit Community Care Provider Groups feature, users can perform a detailed search within Search Community Care Provider Groups ([Figure 23](#)):

- Search by facility, or provider group name, or city and state, or zip code
- Search by facility name, facility short name, or site ID
- Sort the facilities list by state, when browsing for a facility

Figure 23: Browse Facilities Dialog Box–CCP Provider Groups



When searching for a Community Care Provider Group, users will:

- See the VISN, site ID, facility name, and facility short name within the search results
- Receive a notification to refine the search by inputting additional search criteria when a large number of results are returned ([Figure 24](#))



NOTE: Figures 23 and 24 depict searches within and information from test databases.

Figure 24: CV CCP Group Search Too Many Results Notification

The screenshot shows the 'Community Viewer' interface with the 'Provider Portal' header. The main section is titled 'Search Community Care Provider Groups'. Under the 'Facilities' section, there is a search input field containing 'V1 994 IPOTEST4 [IPO4]' and a 'Browse' button. Below this are fields for 'group', 'City', and 'Zip', along with a 'Search' button. A table with the header 'Provider Group Name' is present but empty. A message in the center of the page reads: 'Your search criteria has returned a large number of Provider Groups. Please enter additional search criteria to refine your search.' At the bottom, there is a 'Create New Provider Group' button.

When using the Patient search and the Patient Assignment search features, search results display with the ability to scroll through multiple pages or select a specific page.

Please see [Section 3.2.6, Assigning and Unassigning Patients](#), for detailed instructions on how to run a **My Site** search.

3.2.6. Assigning and Unassigning Patients

Once the CCP's account has been created, patients can be assigned to them.



If you chose **Assign Patients** immediately after creating the provider, the search pane is prepopulated with that provider's profile information, and no search is necessary.

To assign patient(s) to a CCP:

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider's name in the field to the left of the **Search** button within the **Search Providers** pane ([Figure 25](#))
3. Click **Search**

Figure 25: Search Providers Pane



In this release, the task of deleting a provider is performed by CV Portal Administrators. VA Staff users will not see the **Delete Provider** button. Instead, they must contact a CV Portal Administrator to request that a provider be deleted.

4. Select the Provider from the list of results
 - a. The **Manage Providers** pane opens with the provider's information
5. Click the **+ Assign New Patient** link (highlighted in [Figure 26](#))
 - a. The **Patient Search** dialog opens

Figure 26: Manage Providers Fields Detail

The screenshot shows a web form titled "Manage Providers". The form contains the following fields and controls:

- Provider Group: Text input with "Valley Provider Group" and a "Browse" button.
- Network(s): Text input with "Other" and a "Browse" button.
- Other Network: Text input with "Required".
- Specialty: Text input with "Cardiology".
- First Name: Text input with "A. Heart".
- Last Name: Text input with "Doctor".
- NPI: Text input with "Optional".
- Account Type: Dropdown menu.
- Email: Text input with "doctor@testmail.com".
- Phone: Text input with "(555) 123-1234".
- User Name: Text input with "doctor@testmail.com".
- Password: Text input with a "Reset Password" button.
- Allow Access to Data Types: Radio buttons for VA, DoD, VA VLER, and DoD VLER.
- Assigned Patients: Section with links for [+ Assign New Patient](#) and [Unassign Selected Patients](#).

6. Enter the patient name in the blank field at the top of the **Patient Search** dialog ([Figure 27](#))
7. Select the **My Site** search option and enter the search criteria:
 - a. The patient's last name, followed by a comma and either the first initial or full spelling of the patient's first name (Smith, J or Smith, John)
 - b. You may also enter the patient's full Social Security Number (SSN) (123456789), or first letter of the patient's last name followed by the last 4 digits of the patient's SSN (S6789)



In this release, only CV Portal Administrators can see the option for, and perform, an Enterprise patient search.

Figure 27: Patient Search Dialog Box

Patient Search

My Site Enterprise

Patient Name	SSN
--------------	-----

View Start Date: 10/24/2017 View End Date: 01/24/2018

History Start Date: 07/24/2017

8. Click Search

9. Select a patient from the search results list

10. Select the **Assignment Type** from the dropdown: 30 Day Wait, Consult, Distance-Eligible (40 mile), or Episode of Care

- a. If *Consult* is specified, select one consult record from the list for the selected patient. The consult status must be *Active* or *Scheduled* for the consult to appear in the list

11. If desired, adjust the default **View Start Date**, **View End Date**, and **History Start Date** fields to restrict the data seen by the CCP (See [Section 3.2.7, Setting Record Display Limits.](#))

12. Click Assign

CV uses the following rules to manage patient assignments:

- A specific Veteran may be assigned to multiple CCPs
- A Veteran may be assigned to more than one CCP for the following Assignment Types:
 - 30 Day Wait
 - Distance Eligible
 - Episode of Care
- A specific Veteran/consult combination may only be assigned to a single CCP

Table 2: Assignment Rules Examples

Veteran John Davis has multiple active referrals to be assigned:			
Referral 1	30 Day Wait for Dental	Assign to CCP A	A Veteran may have multiple, active assignments in a particular Assignment Type
Referral 2	30 Day Wait for Podiatry	Assign to CCP B	
Referral 3	30 Day Wait for Podiatry	Assign to CCP C	
Referral 4	Episode of Care for Optometry	Assign to CCP D	
Referral 5	Consult for Cardiology	Assign to CCP E	This specific consult can only be assigned to one CCP at a time
Referral 6	Consult for Chiropractic	Assign to CCP F	This specific consult can only be assigned to one CCP at a time

To unassign patient(s) from a CCP:

1. Repeat steps 1–4 from the **CCPM** widget or select the **Edit** link from the **Manage CCP Groups** pane ([Figure 16](#)) to navigate to the **Manage Providers** pane
2. Click the **Unassign Selected Patients** link (highlighted in [Figure 26](#))

3.2.7. Setting Record Display Limits

Users can limit the patient records made available to the assigned CCP. There are two settings that control access to patient data:

- **View Start Date** and **View End Date**: These fields set the length of time the CCP will have access to the patient records through CV
 - The default **View Start Date** is the date the patient is assigned to the CCP
 - The default **View End Date** is 3 months from the default start date
- **History Start Date**: This setting represents how far back in a patient's VA medical history the CCP is permitted to view
 - For example, if the history start date is set to 01/01/2012, the CCP has access to the patient's records from available VA facilities from 2012 to present

Data access controls are set by the user during the patient assignment process.

To set the **Data Access Controls**:

1. Click the **Calendar** icon  next to the **View Start Date** and the **View End Date** fields
2. Select the start and end dates ([Figure 28](#))
3. Alternatively, click the calendar icon next to the **History Start Date**
4. Select a date
5. Click **Assign**

Figure 28: Data Access Controls

Patient Search [X]

My Site Enterprise Assignment Type: 30 Day Wait

IPO [Search]

Patient Name	SSN
<input checked="" type="radio"/> IPOAADLAND, THADDE A 10/23/1944	xxx-xx-6540
<input type="radio"/> IPOAASEN, LUCIA A 04/29/1952	xxx-xx-3472
<input type="radio"/> IPOABOOD, EUGENE 11/03/1948	
<input type="radio"/> IPOABUD, B Invalid date	
<input type="radio"/> IPOACEVED DEAN 09/11/1946	

Calendar: Oct 2017

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

View Start Date: 10/24/2017 [Calendar Icon] View End Date: 01/24/2018 [Calendar Icon]

History Start Date: 07/24/2017 [Calendar Icon]

[Assign] [Cancel]

4. Widgets: What Community Providers See

Once the CCP has been granted access to CV, they can see their assigned patient's VA health information on the **Patient Portal**. Patient data is presented through widgets ([Figure 29](#)), each displaying data specific to an administrative or clinical domain. The **Encounter**, **Results**, **Medications**, **Documents**, **Consults**, and **Immunizations** tabs provide unique widget layouts.

Figure 29: Widget Display on the Patient Portal

The screenshot displays the 'Community Viewer' interface for a patient named IPOAADLAND, THADDEUS A. The interface is organized into several widgets:

- Patient Demographics:** Shows patient information such as SSN (101936540), Age (73), DOB (23 Oct 1944), Race (White), and PCP Name (SCARFI, GONZALO D).
- Problem List (14):** A table listing medical conditions with columns for ICD, Onset, Description, Updated, Status, and Site. Examples include 'FAMILY HISTORY' and 'SARCIDOSIS'.
- Allergies (10):** A table listing allergens with columns for Date Recorded, Allergen, and Site. Examples include 'CAFFEINE' and 'CHOCOLATE'.
- Consults (7):** A table listing medical consultations with columns for Date, Consult Order, Status, and Site. Examples include 'DENTAL' and 'OPHTHALMOLOGY'.
- Progress Notes (20):** A table listing medical progress notes with columns for Date, Document Type/Title, Provider, and Site. Examples include 'DIABETES NUTRITION MAP CL' and 'EYE - RETINA OPTICAL COHER'.
- Encounters (29):** A table listing medical encounters with columns for Date, Clinic, Provider, Diagnosis, and Site. Examples include 'CHY ANGIOAG' and 'CHY CHEYENH'.
- Lab Orders / Panel Results (7):** A table listing laboratory tests with columns for Collection Date, Order / Result, and Site. Examples include 'CYTOPATHOLOGY' and 'CYTOPATHOLOGY'.

**Primary Care Management (PCM)

All widgets available for display on the Patient Portal are housed in a horizontal tray at the bottom of the page, the **Widget Tray**. When customizing their view of CV, CCPs click the + icon in the lower right corner of the page ([Figure 29](#)) to open the **Widget Tray**.

The widgets that are available for display on the Patient Portal are:

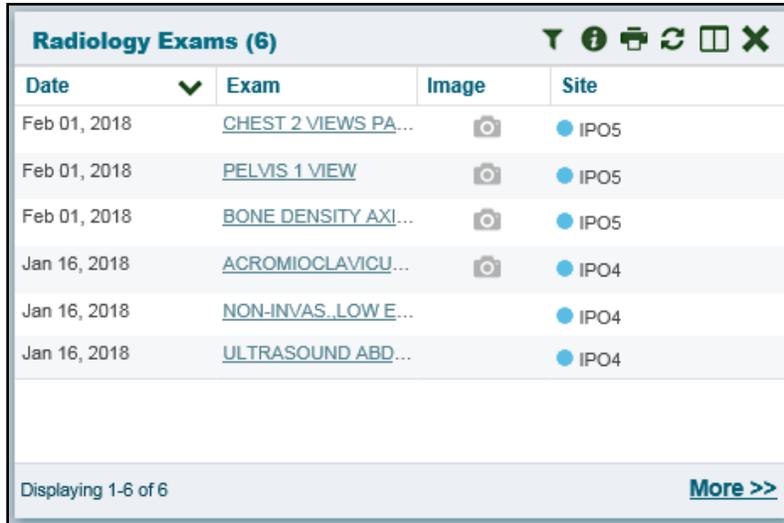
- Patient Demographics
- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Consults
- Discharge/Essentris Notes
- Encounters
- Immunizations
- Inpatient Medications
- Lab Panel Results
- Lab Results
- Outpatient Medications
- Orders
- Problem List
- Procedures
- Progress Notes
- Radiology Exams
- Vitals

4.1. Nondiagnostic Images

Nondiagnostic images are available in JPEG format from the **Encounters**, **Progress Notes**, and **Radiology Exams** widgets.

A **Camera** icon  in the **Image** column of a widget in minimized view indicates one or more images are associated with that record ([Figure 30](#)). Clicking the **Camera** icon in a supported widget opens the list of images associated with the record. See [Figure 32](#) and [Figure 33](#) below.

Figure 30: Radiology Exams Widget (Minimized View)–Nondiagnostic Images



Date	Exam	Image	Site
Feb 01, 2018	CHEST 2 VIEWS PA...		● IPO5
Feb 01, 2018	PELVIS 1 VIEW		● IPO5
Feb 01, 2018	BONE DENSITY AXI...		● IPO5
Jan 16, 2018	ACROMIOCLAVICU...		● IPO4
Jan 16, 2018	NON-INVAS..LOW E...		● IPO4
Jan 16, 2018	ULTRASOUND ABD...		● IPO4

Displaying 1-6 of 6 [More >>](#)

Clicking the **Click Image to open Viewer** link in the **Detail** view ([Figure 31](#)) of a widget opens the list of images associated with that record.

Figure 31: Radiology Exams Detail–Nondiagnostic Images



Radiology Exams Detail ~ ● IPO5 CHEST 2 VIEWS PA&LAT



[Click image to open viewer](#)

Priority:
CHEST 2 VIEWS PA&LAT

Exm Date: FEB 01, 2018@13:01

Req Phys: PETERSON,BILL

Pat Loc: W4U/04-23-2018@11:32

Img Loc: NHM/X-RAY

Service: PSYCHIATRY

Figure 32: Single Encounter Nondiagnostic Image

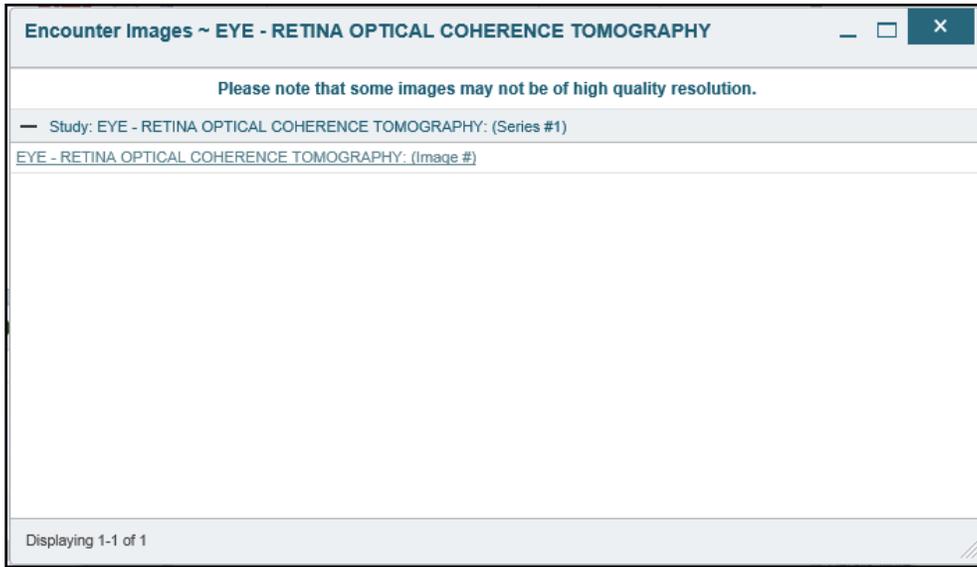
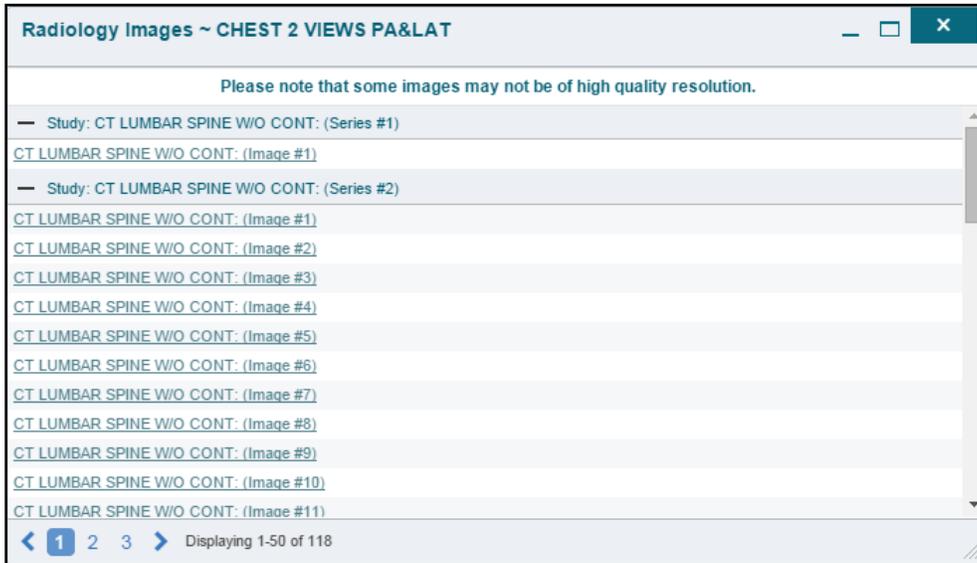
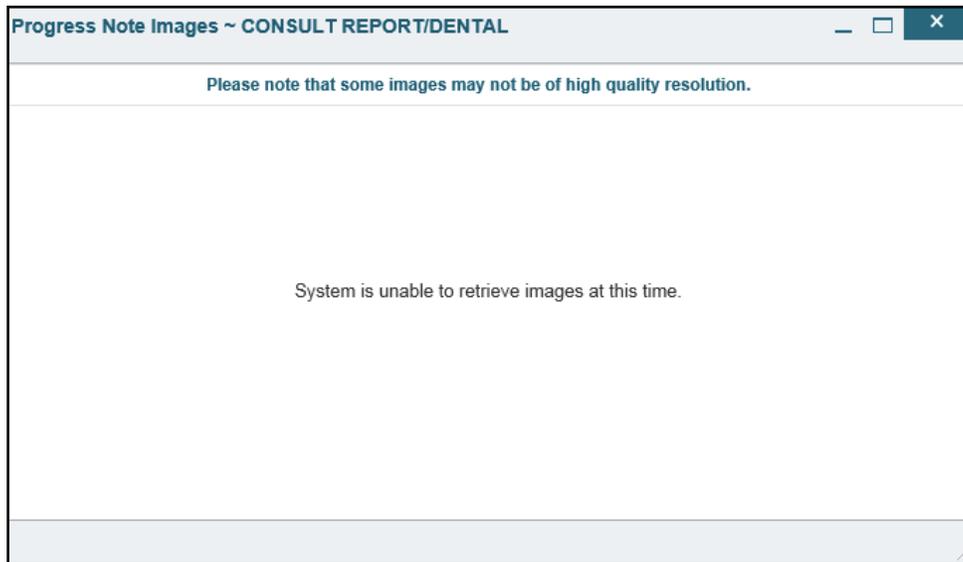


Figure 33: Multiple Radiology Nondiagnostic Images



If an image is temporarily unavailable, users will see a “*System is unable to retrieve images at this time*” message ([Figure 34](#)).

Figure 34: Progress Note Images–Unable to Retrieve Images Error



5. Troubleshooting

5.1. Special Instructions for Error Correction

Access to CV is limited to registered, authorized users. CV validates user access against information retrieved from your smart card. If you are experiencing trouble logging in to CV, please review [Table 3](#) before contacting the service desk.

Table 3: Login Page Error Message Troubleshooting

Error Message	Resolution Steps
Access denied. You are not an authorized user.	<p>WHAT? Error message indicating <i>Access Denied. You are not an authorized User.</i></p> <p>WHY? PIV card processing problem or invalid security certificate chosen.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close browser window. 2) Reinsert PIV card and relaunch the CV link. 3) Select a certificate that is not expired and specifies <i>Issued by: Veterans Affairs CA B1.</i> <p>If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.</p>
Could not save User Profile	<p>WHAT? Error message indicating <i>Could not save User Profile.</i></p> <p>WHY? Error occurred during PIV authentication for VA users. Typically, this is a PIV card processing problem, or an invalid security certificate chosen.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close your browser window. 2) Reinsert PIV card and relaunch the CV link. 3) Select a certificate that is not expired and specifies Issued by: Veterans Affairs CA B1. <p>If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.</p>
Not a valid ACCESS/VERIFY CODE pair	<p>WHAT? Receive Not a valid <i>ACCESS CODE/VERIFY CODE</i> pair error on the Login page.</p> <p>WHY? 1) CV could not match your Access and Verify codes to the Site selected in the dropdown or VA; or 2) A username and password were entered instead of Access/Verify codes.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Veterans Health Administration (VHA) users must select the parent VistA host site for their facility. 2) Reenter correct Access and Verify codes (Computerized Patient Record System (CPRS) or VistA codes for VHA users).

Error Message	Resolution Steps
Page cannot be displayed	<p>WHAT? You receive a <i>Page cannot be displayed</i> error when launching CV.</p> <p>WHY? The CV URL requires certain IE settings.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) With IE open, click the Tools menu or press ALT-X. 2) Select Internet Options. 3) When the dialog opens, select the Advanced tab. 4) Scroll down in the list until you see the settings below and ensure Secure Socket Layer (SSL) 2.0 is NOT checked and that Transport Layer Security (TLS) 1.0, 1.1, and 1.2 are checked. 5) Click OK, then relaunch CV and the page should load.
Smart Card required	<p>WHAT? Error Message <i>Smart Card Required</i>.</p> <p>WHY? Smart card not read by Windows Security and CV before launching CV link.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Close all browser sessions/browser-based applications. 2) Reinsert PIV card and relaunch CV link. 3) If this is unsuccessful, fully reboot your system to refreshes all connections. This resolves greater than 95% of any remaining problems.
VERIFY CODE must be changed before continued use	<p>WHAT? Receive <i>VERIFY CODE must be changed before continued use</i> error on the Login page.</p> <p>WHY? CPRS VERIFY CODE has expired.</p> <p>FIX IT:</p> <ol style="list-style-type: none"> 1) Open CPRS. 2) Select the Change Verify Code checkbox on the sign-on dialog before clicking OK. 3) You are prompted to create a new Verify Code. 4) Once your Verify Code is changed for CPRS, CV recognizes the new code immediately.

5.1.1. Patient Search Errors

The following error messages may appear when you are searching for a patient in the **CCPM** widget. If you are experiencing errors while searching for patients, please review [Table 4](#) before contacting the service desk.

Table 4: Patient Search Error Messages and Resolution Steps

Error Message	Resolution Steps
An invalid search criteria was entered. Please enter at least 2 characters.	Invalid patient name entered. Please try your search again. When searching by patient name, enter at least two characters of the patient's first and last name. Search results will display the closest match to the characters entered in the format of [last name], [first name].
An invalid SSN format was entered. Please enter a 9-digit SSN.	Invalid SSN entered. Please try your search again. When searching by patient SSN, you are required to enter the patient's full 9-digit SSN. Dashes are allowed (e.g., 123-45-6789).

Error Message	Resolution Steps
<p>An invalid last 5 format was entered. Please enter the first letter of the last name followed by the last 4-digits of the SSN.</p>	<p>Invalid patient name or SSN entered. Please try your search again. Patient search allows you to search for a patient using the first initial of the patient's last name and the last four digits of the patient's SSN. Please try your search again using the first initial of the patient's last name and the last four digits of the patient's SSN.</p>
<p>An error occurred during your search. Please try your search again.</p>	<p>This error may display when invalid patient identifiers were entered, or an error occurred at the service layer or with an external system. Please try your search again.</p>

6. Acronyms and Abbreviations

[Table 5](#) lists the acronyms and abbreviations used throughout this document and their descriptions.

Table 5: Acronyms and Abbreviations

Acronym	Description
BIM	Business Integration Manager
CCP	Community Care Provider
CCPM	Community Care Provider Management
CPRS	Computerized Patient Record System
CV	Community Viewer
ESD	Enterprise Service Desk
GUI	Graphical User Interface
IE	Internet Explorer
MVI	Master Veteran Index
OIT	Office of Information and Technology
PCM	Primary Care Management
PIN	Personal Identification Number
PIV	Personal Identification Verification
SSL	Secure Socket Layer
SSN	Social Security Number
TLS	Transport Layer Security
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VDS	VistA Data Service
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture