Community Viewer Version 2.8

User Guide for Community Care Providers

September 2018

Department of Veterans Affairs (VA)

Office of Information and Technology (OIT)

Table of Contents

1. Introduction 1
1.1. Purpose of the Guide 1
1.1.1. Guide Conventions 1
1.1.2. Terminology 2
1.2. Assumptions 2
1.3. System Requirements 2
1.4. Getting Help 2
2. Logging in to CV 3
2.1. Changing Your Password 6
2.2. The CV Portal Pages 9
2.2.1. Default View 9
2.2.2. Viewing System Status 10
2.2.3. Profile Settings 11
2.2.4. Using the Accessible Theme's Functionality 13
2.2.4.1. Keyboard Focus and Screen Navigation in Accessible Theme 14
2.3. Logging Out of the Current CV Session 15
3. Using CV 15
3.1. Accessing Patient Data 15
4. Widgets 17
4.1. Accessing and Opening Widgets 19
4.2. Widget Navigation and Display Options 20
4.3. Minimized vs. Expanded Widget View 21
4.4. Displaying Widgets on Custom Tabs 21
4.5. Refreshing Widget Data 22
4.6. Printing 22
4.7. Nondiagnostic Images 23
4.8. Examples of Widget Functionality 25
4.8.1. Patient Demographics 26
4.8.1.1. Viewing Detailed Patient Demographic Information 26
4.8.1.2. Viewing Third-Party Insurance Information 26
4.8.2. Pain Management 27
4.8.3. Outpatient Medications 28
4.8.3.1. Outpatient Medications Widget Data 29
4.8.3.2. Viewing Outpatient Medication Details 30
4.8.3.3. Outpatient Medication Display and Filter Options 30
4.8.4. Inpatient Medications 30
4.8.4.1. Inpatient Medications Widget Data 31
4.8.4.2. Viewing Inpatient Medication Details 32

4.8.4.3. Inpatient Medication Display and Filter Options **32**
4.8.5. Progress Notes **32**
4.8.5.1. Progress Notes Widget Data **33**
4.8.5.2. Progress Notes Display and Filter Options **34**
4.8.5.3. Viewing Progress Notes Details **34**
4.8.6. Lab Results **34**
4.8.6.1. Lab Results Widget Data **35**
4.8.6.2. Lab Results Display and Filter Options **36**
4.8.6.3. Viewing Abnormal Results in the Lab Results Widget **36**
4.8.6.4. Viewing Lab Results Details **36**
4.8.6.5. Table View **36**
4.8.6.6. Graph View **37**
4.8.7. Problem List **38**
4.8.7.1. Problem List Widget Data **39**
4.8.7.2. Viewing Problem List Details **40**
4.8.7.3. Problem List Display and Filter Options **40**

Table of Figures

Figure 1: Authorized Use Message 4
Figure 2: CCP User Login Page 4
Figure 3: CCP VA Privacy and Security Awareness Training Page 5
Figure 4: Password Expiration Notice on the Login Page 6
Figure 5: Password Reset Dialog Box 7
Figure 6: Confirmation of Request Sent to Reset Password 7
Figure 7: Password Reset E-mail 8
Figure 8: Password Reset Page 8
Figure 9: Password Reset Confirmation Message 9
Figure 10: CV Portal Tools 9
Figure 11: Default View 10
Figure 12: System Status Indicator on the Portal Pages 10
Figure 13: The CV Settings Dialog Box 11
Figure 14: Blue Theme 12
Figure 15: Gray Theme 12
Figure 16: Green Theme 13
Figure 17: Accessible (508-Compliant) Theme 13
Figure 18: Minimized View of the Assigned Patients Widget 16
Figure 19: Expanded View of the My Assigned Patients Widget 17
Figure 20: Widget Display on the Patient Portal 18
Figure 21: Widget Tray on the Patient Portal 20

Figure 22: Expanded View Widget Display 21
Figure 23: The Print Icon 22
Figure 24: Windows Print Dialog 23
Figure 25: Nondiagnostic Images in the Minimized View of the Radiology Exams Widget 24
Figure 26: Multiple Nondiagnostic Radiology Images 24
Figure 27: Nondiagnostic Images in the Radiology Exams Detail View 25
Figure 28: Progress Note Images—Unable to Retrieve Images Error 25
Figure 29: Patient Demographics Widget 26
Figure 30: Pain Management Widget 28
Figure 31: Outpatient Medications 29
Figure 32: Inpatient Medications Widget 31
Figure 33: Progress Notes Widget 33
Figure 34: Lab Results Widget 35
Figure 35: Problem List Widget 39

Table of Tables

Table 1: Accessible Keystrokes 14
Table 2: Widget Navigation Tool Descriptions 20

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 providers and provision their use within the CV system, allowing providers access to view consolidated patient data from multiple Veterans Information Systems and Technology Architecture (VistA) systems.

This user guide is written for CCPs who use CV to:

- Access and view patient data
- Request a password reset

Please read and bear in mind the following warning before using CV.

WARNINGWARNING**WARNING**

"This U.S. Government computer system is for official use only.
The files on this system include Federal records that contain sensitive information.

All activities on this system may be monitored to detect unauthorized access to, or misuse of, the system or individual files and utilities on the system, including personal use.

Further use of this system constitutes your consent to such monitoring.

Misuse of, or unauthorized access to, this system may result in criminal prosecution and disciplinary, adverse, or other appropriate action."

WARNINGWARNING**WARNING**

1.1. Purpose of the Guide

The purpose of this guide is to familiarize users with the important features and navigational elements of the CV application.

1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption. The following conventions are used throughout:

- Cross-references are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is conveyed by using **bold**, underlined, and *italicized* text

- The information icon is used to inform the reader of additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **Patient Portal:** The page that displays patient data via widgets
- **Provider Portal:** The landing page, or default view, of CV that opens after logging into the application; the **Provider Portal** displays widgets and the tools that enable quick access to basic features
- **Widget:** A component of the CV interface that enables a user to perform a function or access a service
- **Widget Tray:** The expandable and collapsible tray at the bottom of both portal pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

This user guide is written from the perspective of CCPs, assuming the following:

- You can open, navigate, and use the menu options of a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have received the required access credentials and the Uniform Resource Locator (URL) for the CV **Login** page
- You use CV to view VA patient data relevant to patient assignments

1.3. System Requirements

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

NOTE: This release does not support mobile devices.

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

- Chrome v64 or higher
- Microsoft Edge v41
- Firefox v58
- Internet Explorer (IE) v11
- Safari v11

1.4. Getting Help

If you are an authorized user in need of technical assistance, contact the Community Provider Technical Service Desk.

Prior to contacting support, please refer to Logging in to CV for detailed information about how to access CV.

Community Provider Technical Service Desk
REDACTED

If you are an authorized user and do not have your password, follow the steps outlined in Changing Your Password to request a password reset.

2. Logging in to CV

Before logging in to and utilizing the functionality of CV, please read the warning displayed below.

WARNINGWARNING**WARNING**

"This U.S. Government computer system is for official use only.
The files on this system include Federal records that contain sensitive information.

All activities on this system may be monitored to detect unauthorized access to, or misuse of, the system or individual files and utilities on the system, including personal use.

Further use of this system constitutes your consent to such monitoring.

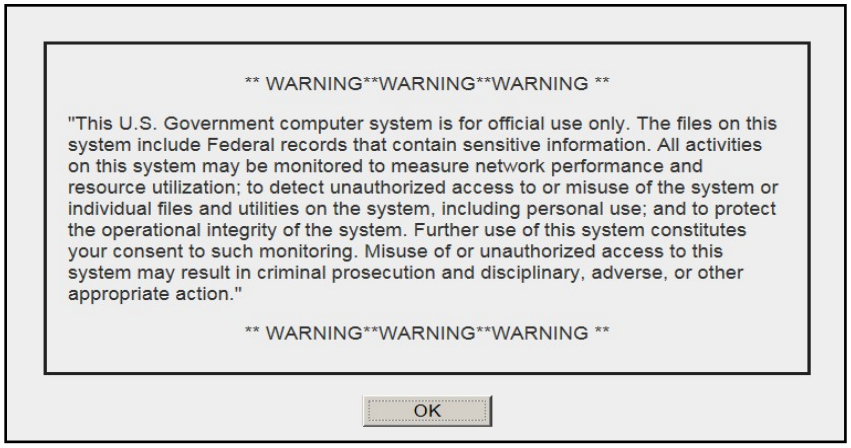
Misuse of, or unauthorized access to, this system may result in criminal prosecution and disciplinary, adverse, or other appropriate action."

WARNINGWARNING**WARNING**

During log in, CV authenticates all providers against a registered list, provisioned by VA Staff. If you have not received credentials to access CV, user can either request access through the Community Provider Technical Service Desk or by clicking the New User Request link on the **Login** page as highlighted in Figure 2.

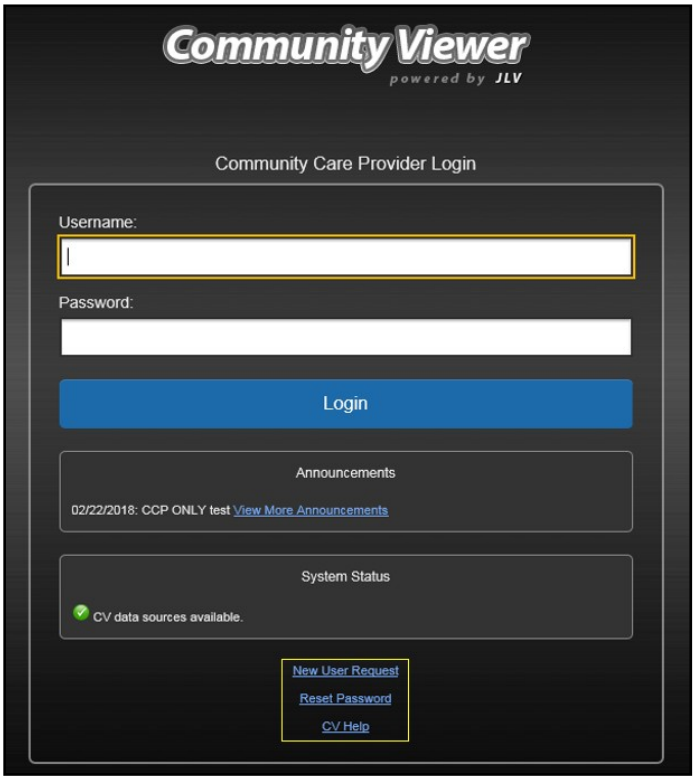
1. Open a supported Internet browser
2. Enter the web address: https://www.communityviewer.va.gov/Community, provided by VA Staff, in the address bar of the Internet browser
3. The **Authorized Use** message (Figure 1) a security and legal disclaimer, appears
4. Click **OK** to confirm that you are aware you are accessing a government information system that is provided for authorized users only

Figure 1: Authorized Use Message



5. Enter your user name and password, provided by VA Staff, in the fields on the **Login** page (Figure 2):
   a. Your user name is the e-mail address associated with your account
   b. If you have forgotten your password, click the **Reset Password** link
   c. If you are not already an authorized user, click on the **New User Request** link for guidance on obtaining access to CV

Figure 2: CCP User Login Page

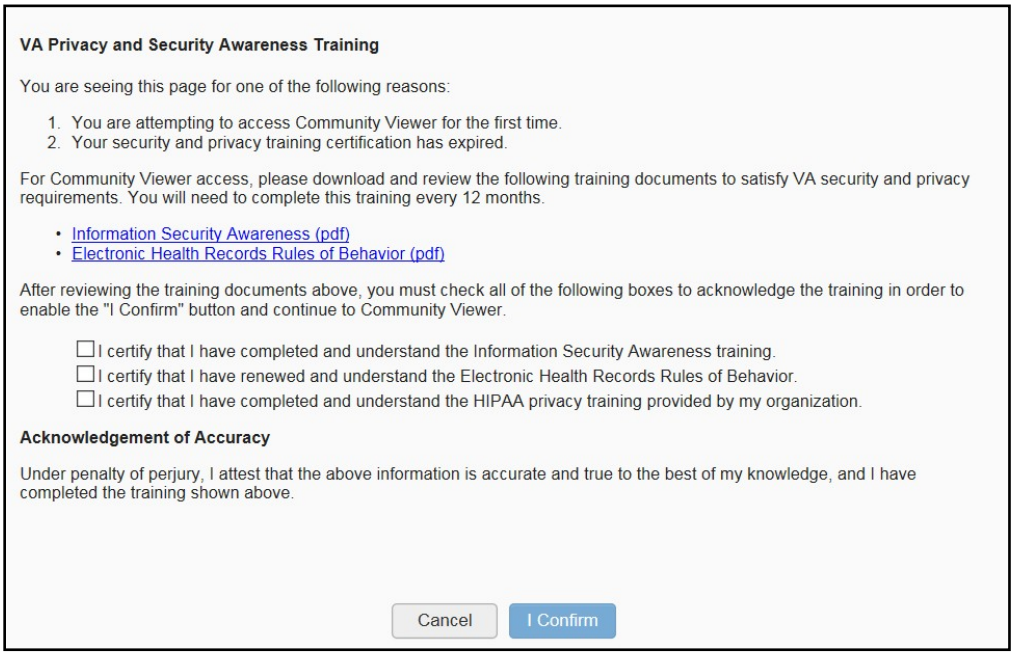


6. Click **Login**

7. If you are logging in to the CV application for the first time (or 365 days after your first log in), the **VA Privacy and Security Awareness Training** page (Figure 3) appears

NOTE: Users are required to perform **all** acknowledgement tasks before access to CV is granted.

Figure 3: CCP VA Privacy and Security Awareness Training Page



VA Privacy and Security Awareness Training

You are seeing this page for one of the following reasons:

1. You are attempting to access Community Viewer for the first time.
2. Your security and privacy training certification has expired.

For Community Viewer access, please download and review the following training documents to satisfy VA security and privacy requirements. You will need to complete this training every 12 months.

- Information Security Awareness (pdf)
- Electronic Health Records Rules of Behavior (pdf)

After reviewing the training documents above, you must check all of the following boxes to acknowledge the training in order to enable the "I Confirm" button and continue to Community Viewer.

☐ I certify that I have completed and understand the Information Security Awareness training.
☐ I certify that I have renewed and understand the Electronic Health Records Rules of Behavior.
☐ I certify that I have completed and understand the HIPAA privacy training provided by my organization.

Acknowledgement of Accuracy

Under penalty of perjury, I attest that the above information is accurate and true to the best of my knowledge, and I have completed the training shown above.

Cancel | I Confirm

NOTE: The **VA Privacy and Security Awareness Training** page appears the first time you access the CV application, and again every 365 days after the first successful log in, as training certification must be renewed each year.

ALL the acknowledgment tasks (Steps 8 - 13) must be completed to gain access to CV:

8. Download and read the Information Security Awareness Training PDF document
9. Download and read the Electronic Health Records Rules and Behavior PDF document
10. Click the checkbox to certify that you have completed and understand the Information Security Awareness training
11. Click the checkbox to certify that you have read and understand the Electronic Health Records Rules and Behavior
12. Click the checkbox to certify that you have completed and understand the HIPAA Privacy training through your organization
13. Click **I Confirm** to proceed to the application

After logging in to CV:

- Your user name is displayed in the upper right corner of the page

- The patients assigned to you are shown in the **Assigned Patients** widget, under the **My Assigned Patients** tab
- The patients assigned to your practice group are shown in the **Assigned Patients** widget, under the **Group Assigned Patients** tab
- You see the patients assigned to your practice group even if you do not have any active or scheduled patient assignments

2.1. Changing Your Password

Your user ID (user name) is the e-mail address associated with your account. It cannot be changed unless your e-mail address changes.

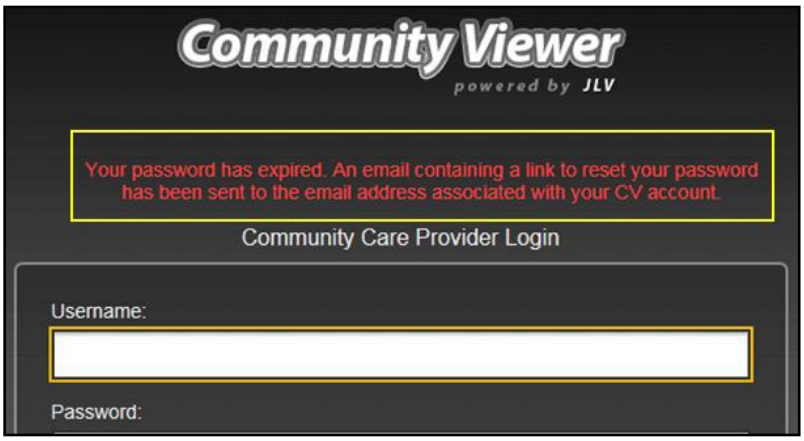
You are prompted to change your password every 90 days. Passwords are case-sensitive and must comply with the following structure guidelines:

1. Must be a minimum of 8 characters (no blank spaces can be used)
2. Must contain characters from 3 of these 4 categories:
   a. An uppercase letter
   b. A lowercase letter
   c. A number
   d. A special character (! @ # ? $ % &)
3. Six of the characters cannot occur more than once in the password

NOTE: Passwords cannot be reused within a 2-year period.

When your password has expired, you see the message highlighted in Figure 4 after an attempt to log in.

Figure 4: Password Expiration Notice on the Login Page

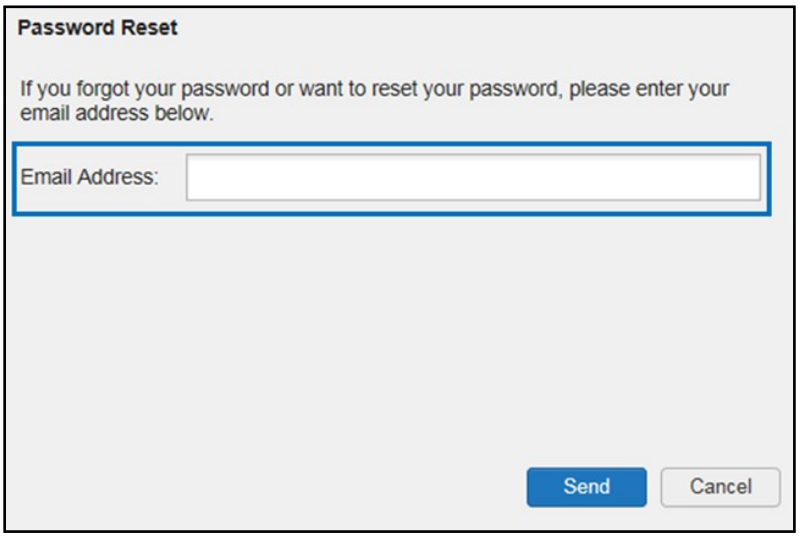


If you forgot or want to reset your password, you can request that a reset by using the **Reset Password** link on the **Login** page, highlighted in Figure 2.

Request a password reset:

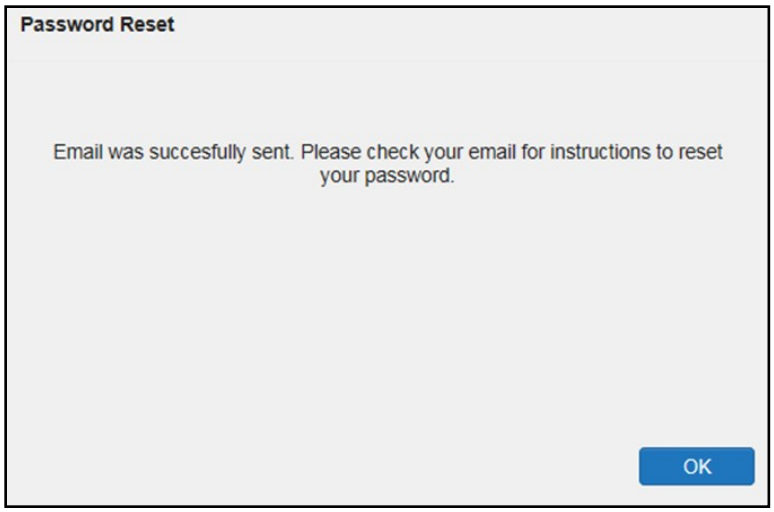
1. Click the Reset Password link
2. The Password Reset dialog box opens (Figure 5)

Figure 5: Password Reset Dialog Box



3. Enter your e-mail address in the field provided in the dialog box
4. Click **Send**
5. A confirmation message is displayed (Figure 6) and an e-mail message is generated to Community_Provider_Technical_Service_Desk@va.gov

Figure 6: Confirmation of Request Sent to Reset Password



6. A password reset link is sent to the e-mail address you provided

NOTE: The password reset link is active for 24 hours. After that, you must use the **Reset Password** link to reset your password.

Reset your password:

1. Click the link in the password reset e-mail (Figure 7)

Figure 7: Password Reset E-mail

We received a request to reset the password for the Community Care Provider account associated with this email. The following link will direct you to a Community Viewer (CV) page.

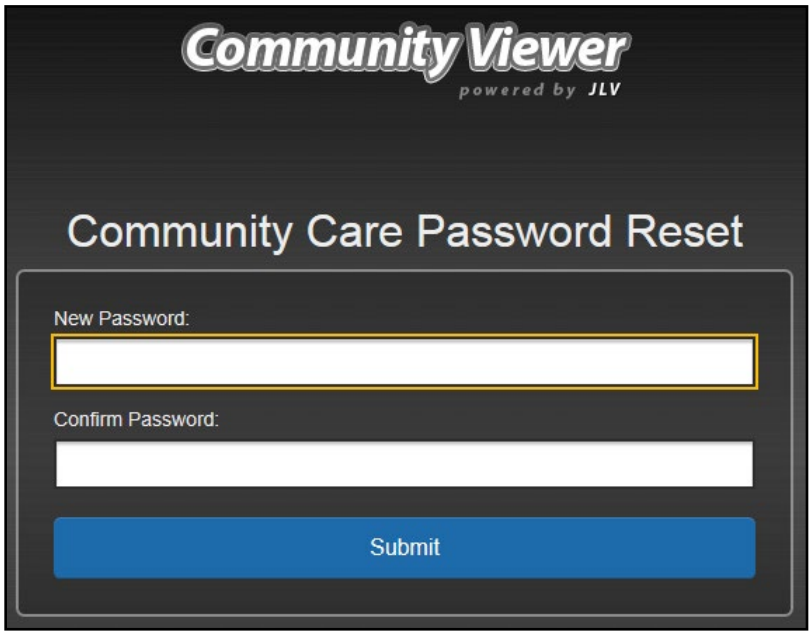
Reset Password

Please note, this link will expire in 24 hours

If you didn't make this password request, then ignore this email. No changes will be made to your account.

2. The **Password Reset** page opens (Figure 8)

Figure 8: Password Reset Page



3. Create a new password following the password guidelines, and enter it in the **New Password** field
4. Repeat the password in the **Confirm Password** field
5. You receive a confirmation message when your password has been successfully reset (Figure 9)

Figure 9: Password Reset Confirmation Message

2.2. 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 (detailed in Figure 10).

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

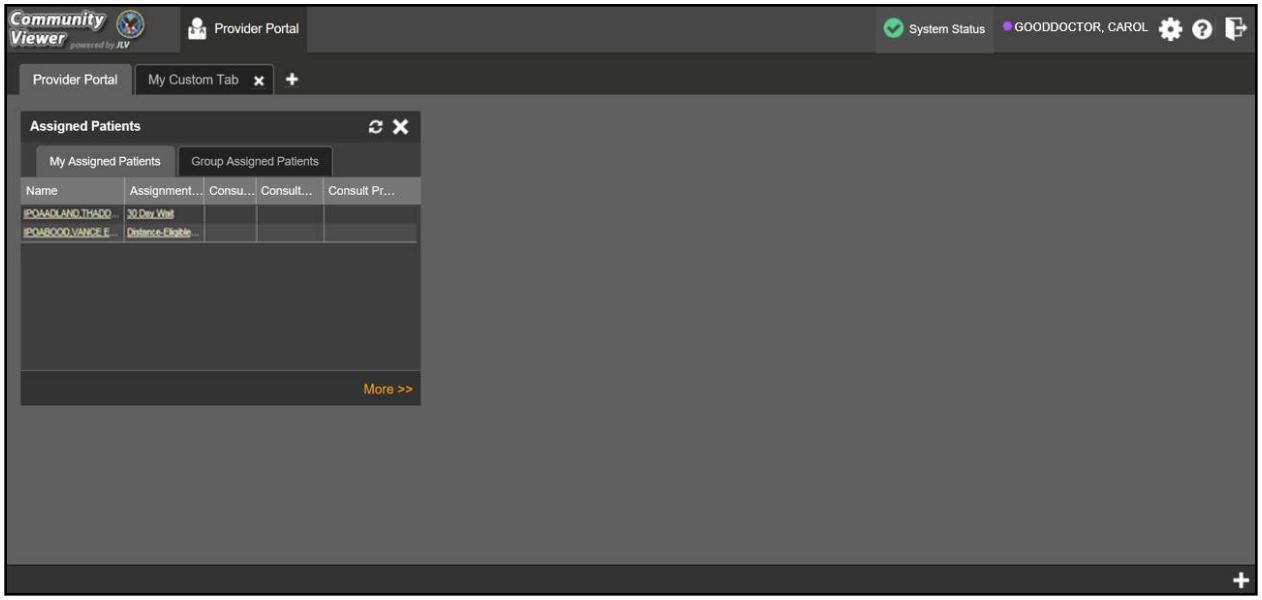
Figure 10: CV Portal Tools

2.2.1. Default View

The default view of CV includes the **Assigned Patients** widget (Figure 11).

> **NOTE:** If the **Assigned Patients** widget is not open, click the plus (+) sign in the lower right corner of the screen (Figure 11) to open the **Widget Tray**. Click, hold, and drag the widget icon from the tray to the screen, and drop it in the desired location. Click the minus (-) sign in the lower right corner of the screen to close the widget tray.

Figure 11: Default View



2.2.2. Viewing System Status

System status updates are received from CV's Health Monitor, which monitors the services that CV uses to connect to VA data sources.

There are two areas of CV where system status is displayed:

1. On the **Login** page (Figure 2)
2. On the portal pages (highlighted in Figure 12)

When all monitored systems and services are online and connected, a green icon appears beside **System Status**. The message *CV data sources are available* (Figure 12) appears when you hover over the **System Status**.

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 Getting Help for information on how to contact support.

Figure 12: System Status Indicator on the Portal Pages

2.2.3. Profile Settings

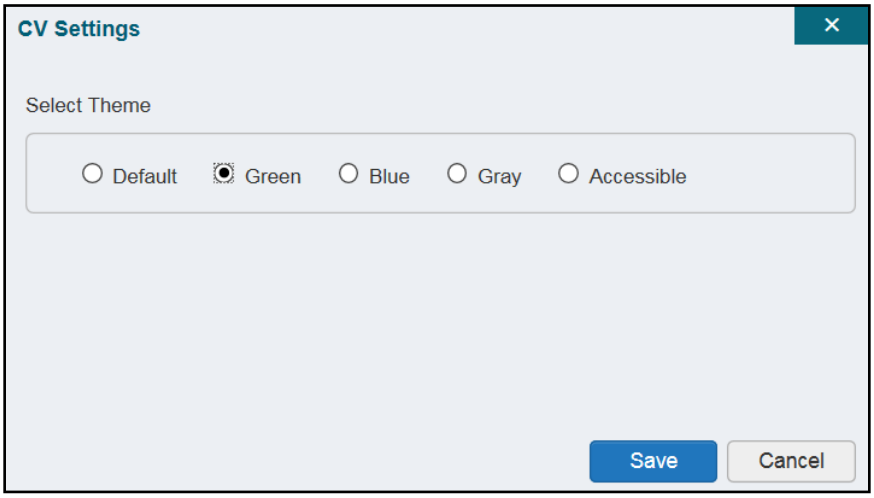
Profile settings are accessible within CV by clicking **Settings** in the upper right corner of the portal pages (Figure 11).

> **NOTE:** The configuration options are limited to choosing a UI theme in this release.

Selecting a **User Interface Theme** sets the font color, foreground color, and background color of CV. Themes apply to all application elements, including widgets, toolbars, and dialog boxes. The UI theme color choices are Default, Green, Blue, Gray, and Accessible. The Accessible theme (Figure 17) is 508-compliant and designed to work with the accessibility tools installed on a user's device.

1. Click **Settings** in the upper right corner of the application
2. The **CV Settings** dialog opens (Figure 13)
3. Click the radio button next to the desired theme
4. Click **Save**
5. After clicking **Save**, the selected theme is applied
   a. Click **Cancel** to exit the **CV Settings** dialog box and restore the previous theme

Figure 13: The CV Settings Dialog Box



Examples of the UI themes are displayed in the figures below. The Default theme was presented in Default View, Figure 11.

Figure 14: Blue Theme

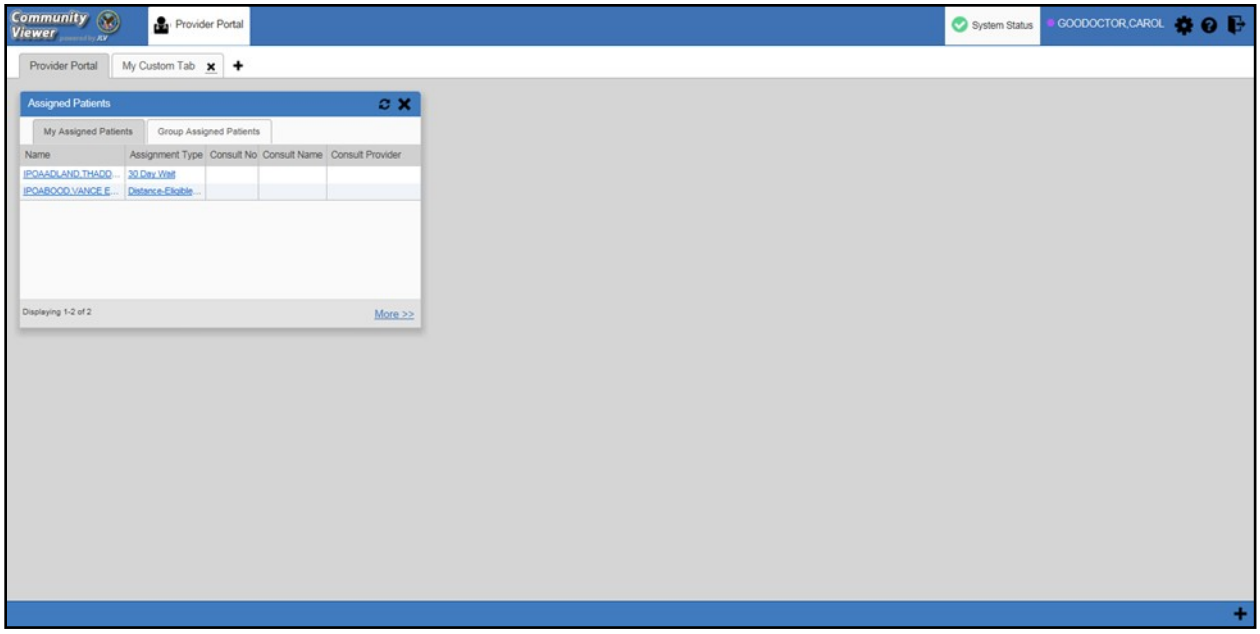


Figure 15: Gray Theme

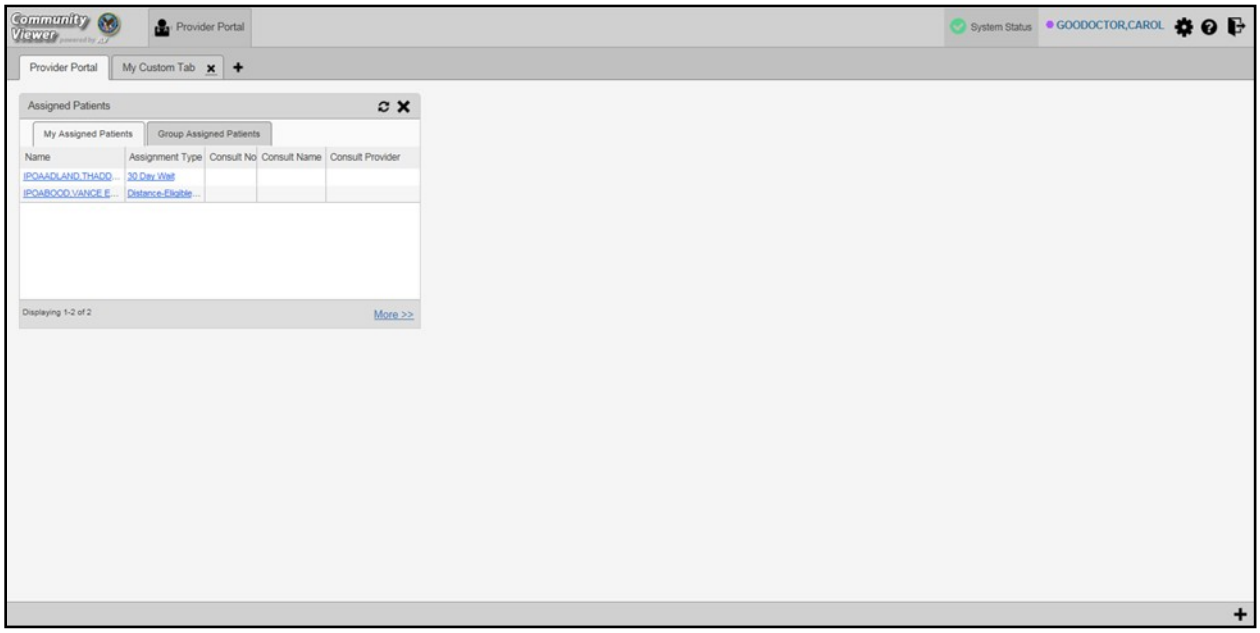


Figure 16: Green Theme

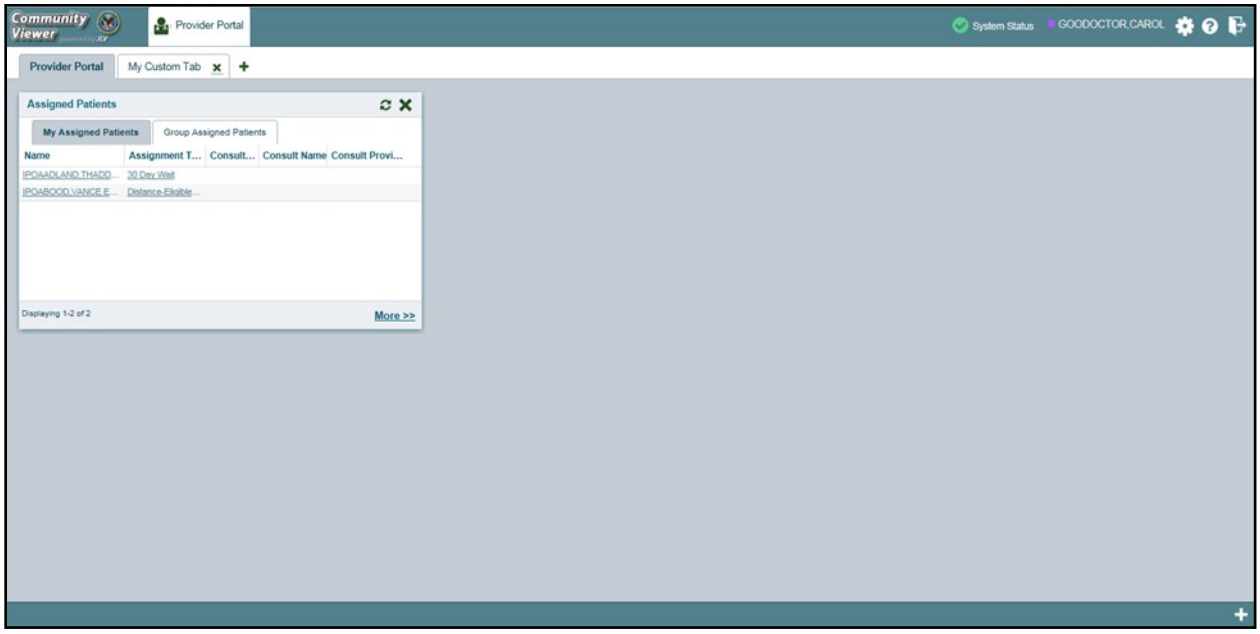
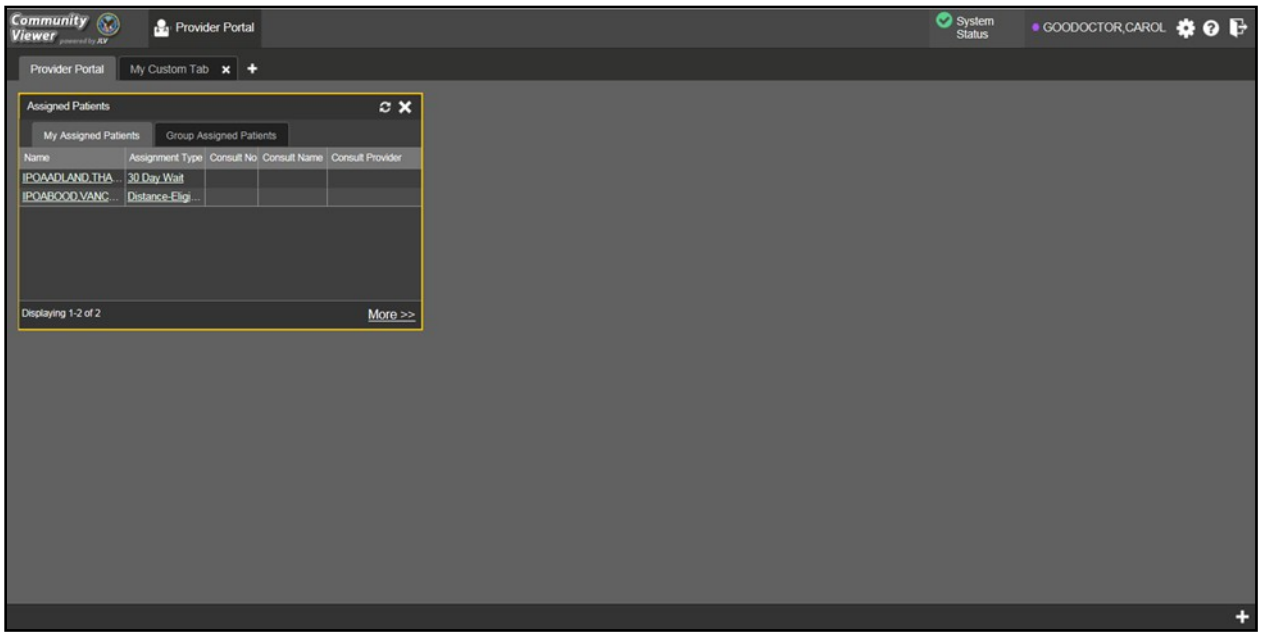


Figure 17: Accessible (508-Compliant) Theme



2.2.4. 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.

2.2.4.1. 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 17) as a visual indicator of keyboard focus.

CV uses standard 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 user interface items are accessible via the keyboard when using the Accessible theme.

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. Pressing **Enter** or the **Spacebar** when the **Settings** icon is in focus, for example, opens the **CV Settings** dialog box. The **Tab** or arrow keys allow 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: Accessible Keystrokes

Keystroke	Description
Application and Portal Navigation	
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).
ENTER	Press to transfer keyboard focus to the highlighted widget.
TAB	Press to transfer keyboard focus to other user interface items.
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus, or to exit a window, widget, or tab.
SPACEBAR	Press to activate any user interface 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 list, press the down arrow to view the list contents.
Portal Tabs	
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 Add Tab (+) in keyboard focus.
ENTER	Press while Add Tab (+) is in focus to add a new portal tab. A dialog box prompts you to enter a name for the tab.
ESC	Focus on a tab and press Esc to remove it.

Keystroke	Description
Windows and Dialog Boxes	
TAB	Press Tab to move keyboard focus through the items within the window.
Adding Widgets to the Portal Pages	
Alt + 1, 2, or 3	Add a widget to a Portal Page from the Widget Tray: 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.

2.3. 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, your session automatically terminates after 30 minutes of inactivity. You are redirected to the **Login** page when any new activity is attempted.

3. Using CV

3.1. Accessing Patient Data

Prior to accessing patient data in CV, please read the warning displayed in Introduction.

After you log in to CV, the Assigned Patients widget appears, displaying a list of your patient assignments. Click a patient's name in the list on the My Assigned Patients tab (Figure 18) to open their records in the **Patient Portal**.

> **NOTE:** If the **Assigned Patients** widget is not open, click the plus (+) sign in the lower right corner of the portal to open the **Widget Tray**. Click, hold, and drag the widget from the tray to the screen, and drop it in the desired location. Click the minus (-) sign in the lower right corner of the screen to close the widget tray.

The **Assigned Patients** widget also lists the active and scheduled assignments for all providers in the group to which you belong on the **Group Assigned Patients** tab. If there are two active assignments for one patient, the patient is listed twice.

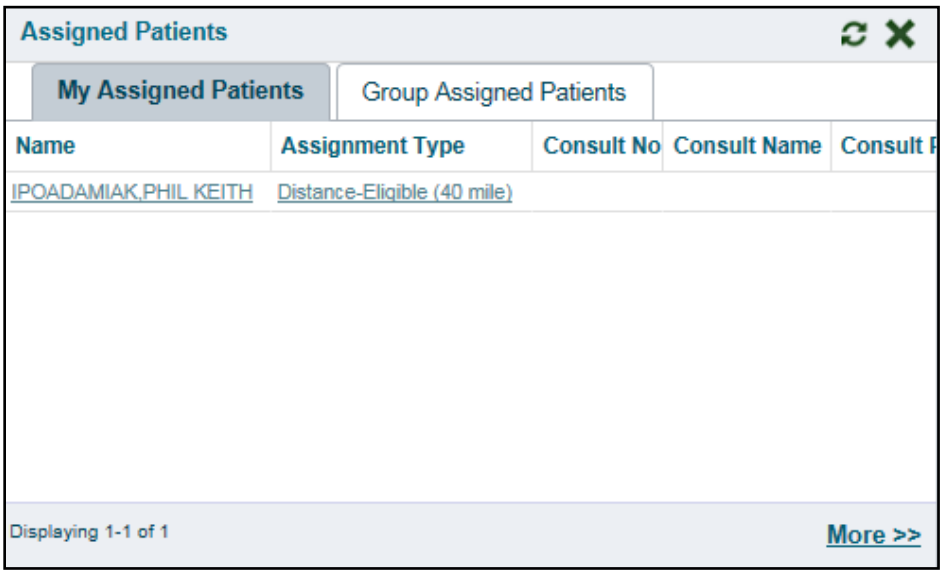
The following information is available for each assignment listed in the widget:

- **Name:** Click the entry to open the patient's record in the **Patient Portal**
- **Assignment Type:** The type of assignment that initiated the patient referral:
  - 30 Day Wait
  - Consult
  - Distance Eligible
  - Episode of care
- **Consult No.:** A number generated by the VA system for the patient consult

- Click the entry to open the patient's record in the **Patient Portal**
- This information is only shown for patients with a *Consult* assignment type

- **Consult Name:** A label generated by the VA system
  - Click the entry to open the patient's record in the **Patient Portal**
  - This information is only shown for patients with a *Consult* assignment type
- **Consult Provider:** The VA provider who ordered the consult
  - This information is only shown for patients with a *Consult* assignment type

Figure 18: Minimized View of the Assigned Patients Widget



NOTE: Figure 18 depicts the minimized view of the **Assigned Patients** widget. Because the widget is width-constrained, some of the column headings appear in an abbreviated manner.

The tab in the **Assigned Patients** widget that is active (currently selected) is highlighted. **My Assigned Patients** is the active tab, by default. Clicking the **More>>** link in the bottom right corner of the widget opens the expanded view of the active tab (Figure 19).

Figure 19: Expanded View of the My Assigned Patients Widget

My Assigned Patients (1)

Name	Assignment Type	Consult No	Consult Name	Consult Provider
IPOADAMIAK,PHIL KEITH	Distance-Eligible (40 mile)			

Displaying 1-1 of 1 Show All

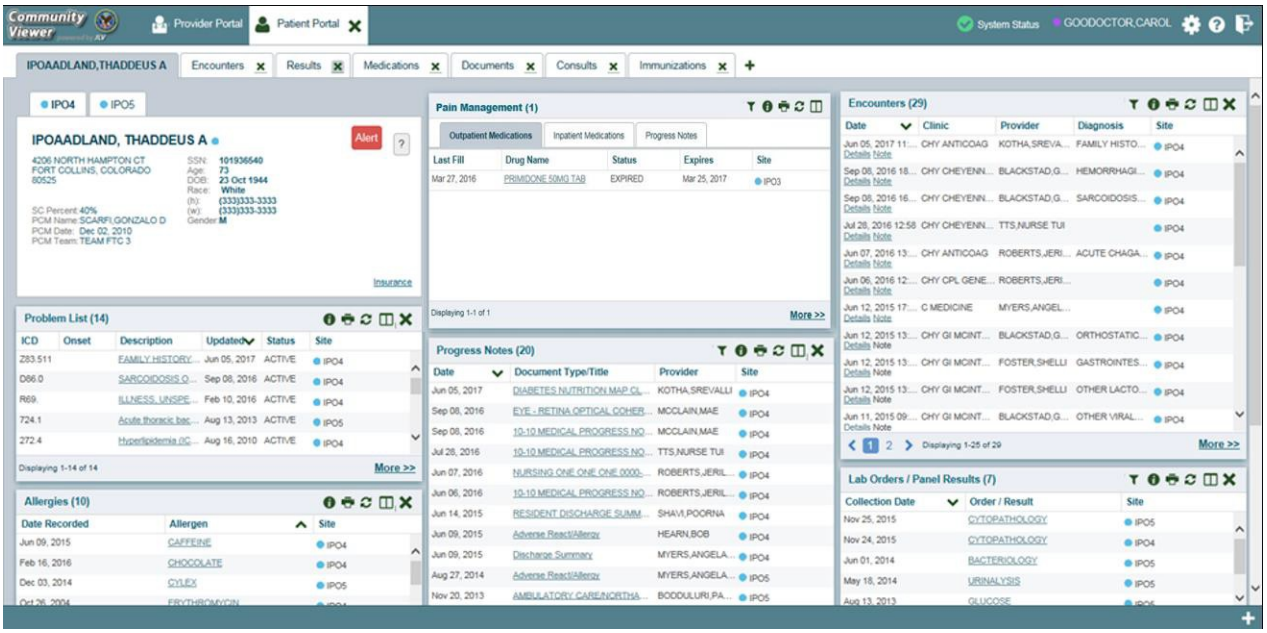
4. Widgets

Patient-centric information is displayed on the **Patient Portal** through widgets. Widgets are elements of CV that display data specific to an administrative or clinical domain. Data is generally displayed in reverse chronological order, by date.

NOTE: Widgets may take anywhere between 3 to 10 seconds to load.

The default layout of the **Patient Portal** for a first-time CV user is shown in Figure 20. The widgets presented are **Patient Demographics**, **Problem List**, **Allergies**, **Outpatient Medications**, **Pain Management**, **Consults**, **Progress Notes**, **Radiology Exams**, **Encounters**, **Lab Orders/Panel Results**, and **Vitals**.

Figure 20: Widget Display on the Patient Portal



First-time CV users see a default series of tabs, each providing a different widget layout, in addition to the default widget layout on the **Patient Portal**:

- **Encounters Tab:** Encounters, Appointments, and Progress Notes widgets
- **Results Tab:** Radiology Exams, Lab Orders/Panel Results, Procedures, Progress Notes, and Lab Results widgets
- **Medications Tab:** Allergies, Inpatient Medications, Orders, and Outpatient Medications widgets
- **Documents Tab:** Encounters, Discharge/Essentris Notes, and Progress Notes widgets
- **Consults Tab:** Consults, Discharge/Essentris Notes, and Progress Notes widgets
- **Immunizations:** Immunizations, Problem List, and Progress Notes widgets

The list of available widgets for display on the **Patient Portal** is presented in a horizontal tray at the bottom of the page (highlighted in Figure 21). Data from VA systems is available for the following VA clinical domains:

- Patient Demographics
- Pain Management
- 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

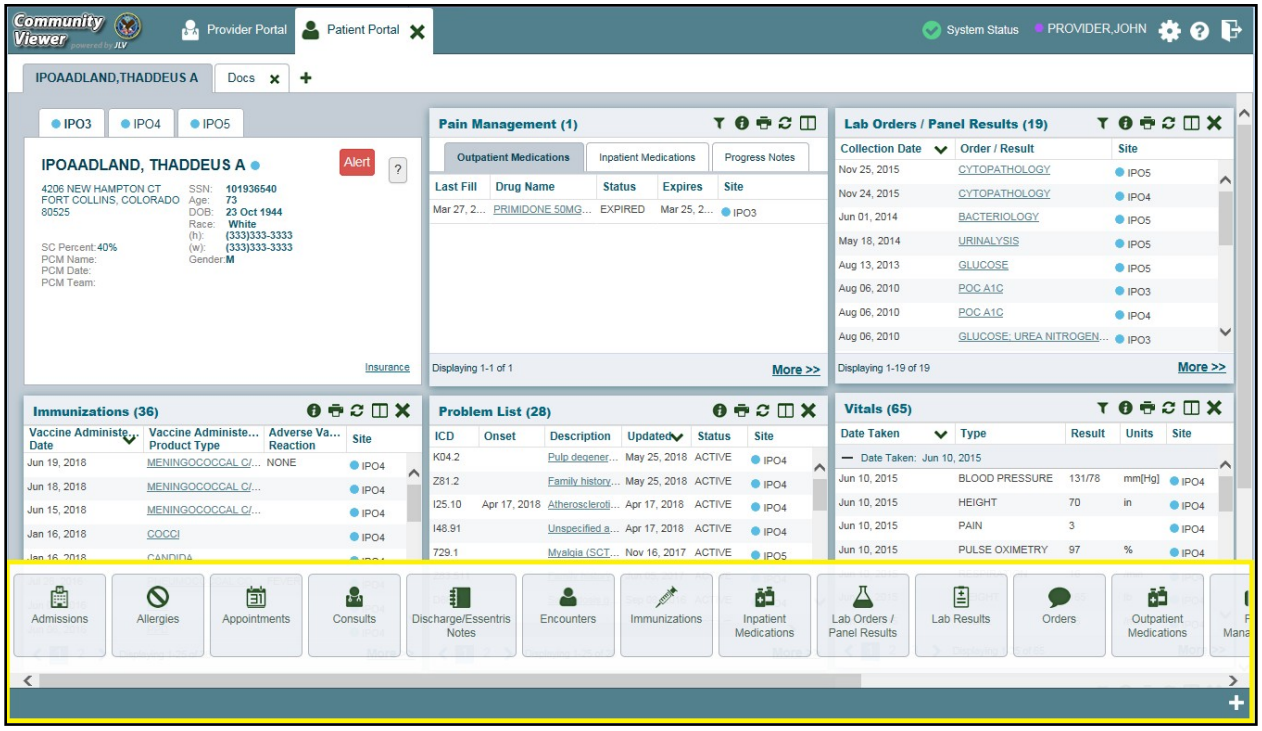
4.1. Accessing and Opening Widgets

Figure 21 depicts the **Patient Portal** with an open **Widget Tray**, highlighted at the bottom of the screen. Click the plus sign (+) in the lower right-hand corner to open the **Widget Tray**. Click, hold, and drag a widget from the tray to the portal. These actions dock the widget on the portal page. Once docked, the widget opens in minimized view.

Use the arrows (< or >) placed below the tray icons in the lower left- and right-hand corners of the screen to view all available clinical domains in the widget tray. Clicking the arrows scrolls left to right or right to left through the tray.

NOTE: Widgets can be removed from a portal page and placed back into the **Widget Tray** by clicking **Close** ✖ in the upper right corner of the docked widget.

Figure 21: Widget Tray on the Patient Portal



4.2. Widget Navigation and Display Options

Navigation tools and display options are provided within each widget (listed in Table 2).

Click **More >>** in the lower right corner of a widget in minimized view to open the widget in expanded view, as seen in Figure 22.

A widget in expanded view contains the **Show All** link which opens all records for a given widget in a scrollable window. Click the **Show Paged** link to return a display of records grouped by pages.

Table 2: Widget Navigation Tool Descriptions

Widget Element	Meaning	Description
<	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
1	Jump to Page	Changes the focus of the widget to the page number selected.
>	Go to Next Page	Changes the focus of the widget to the next group or page of records within the results display.
More >>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.

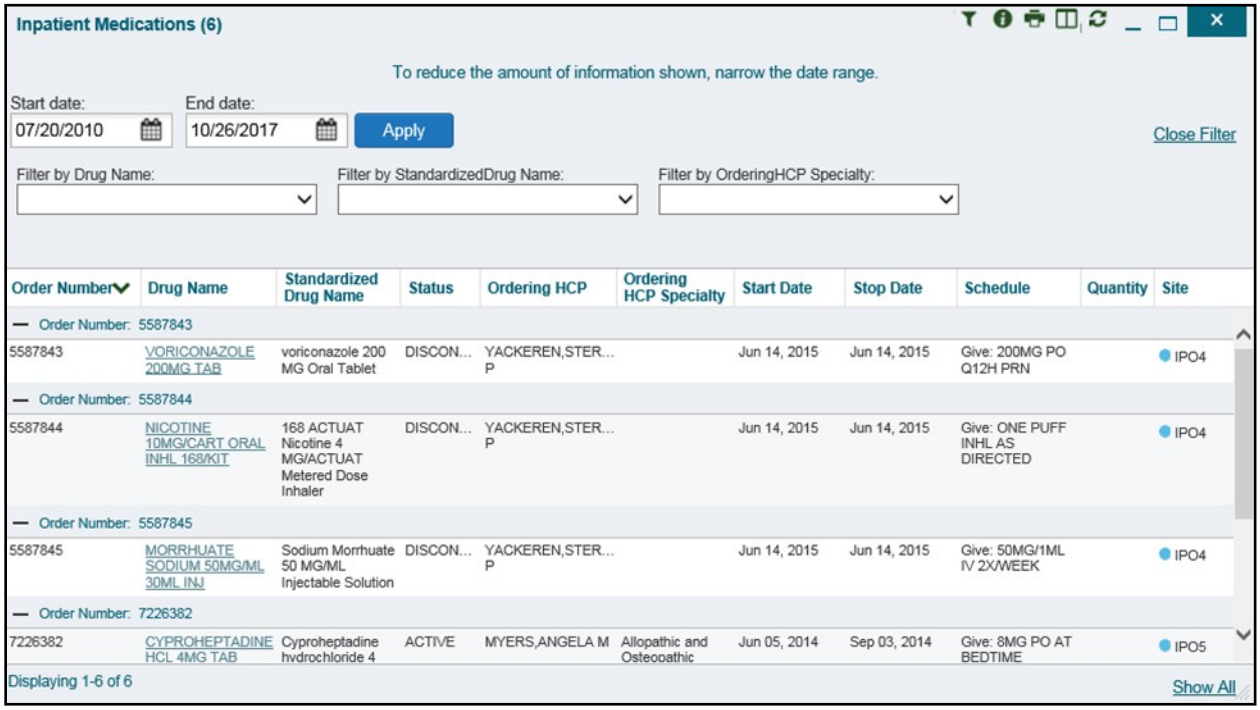
Widget Element	Meaning	Description
[variable] of #	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of records for that widget.
Show All/Show Paged	Display Setting	Click **Show All** to open all records for a given widget in a scrollable window. Click **Show Paged** to return to the display of records grouped by pages.

4.3. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized or expanded view. The default rendering of a widget is in minimized view (Figure 20). Click the **More >>** link at the bottom of the widget in minimized view to open the expanded view (Figure 22).

The expanded view of a widget provides additional display and, filtering options. Click **Configure Filter** from the widget toolbar if the additional display configuration options are not displayed in expanded view.

Figure 22: Expanded View Widget Display



4.4. Displaying Widgets on Custom Tabs

You can use the *custom tabs* feature to create additional widget configurations for ease of use and quick reference. Changes made to the **Patient Portal** display (widget layouts and custom tabs) are saved to the user profile and display in future CV sessions.

1. Click the plus sign + to the right of the tabs along the top of the **Patient Portal** (Figure 20)
   a. The **Add Tab** dialog box opens
2. Type a name for the new tab in the **Add Tab** dialog box and click **OK**
3. Open the **Widget Tray** within the new tab space, then click, hold, and drag each of the desired widgets to the portal page
4. Click between preset and custom tabs at any time without losing any of the configurations created on the custom tabs
   a. Tabs persist, even when a patient change is made

4.5. Refreshing Widget Data

Data in the widget display can be refreshed by clicking **Refresh** . This action updates the data in the widget.

4.6. Printing

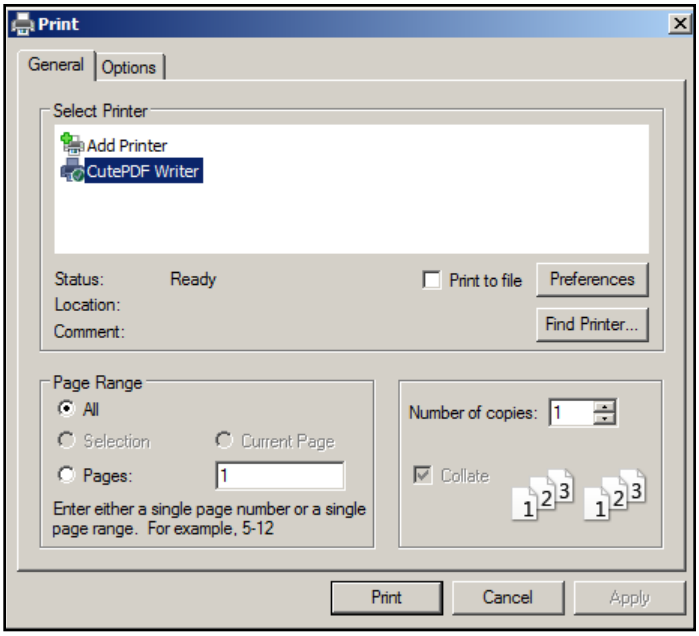
You can print the information within the CV widgets from either the minimized or expanded views. If printing from the minimized view of a widget, the information that is presented by default is captured for printing. If you have filtered the information in the widget, the filtered information is captured for printing.

Figure 23: The Print Icon

The following steps use the print function as accessed from IE to print information from a widget:

1. Click the **Print** icon (highlighted in Figure 23) at the top of either the minimized or expanded view of a widget
2. A new window opens and displays either the default or filtered widget information
3. The **Windows Print** dialog (Figure 24) opens and lists the available printers

Figure 24: Windows Print Dialog



4. Select the desired printer
5. Click **Print**

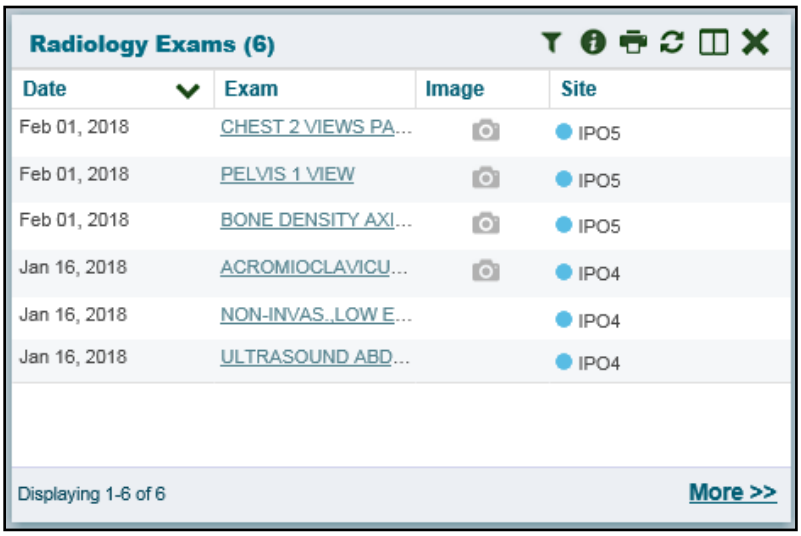
4.7. Nondiagnostic Images

Nondiagnostic images are available in JPEG and PDF formats in the **Encounters**, **Progress Notes**, and **Radiology Exams** widgets, in addition to the **Progress Notes** tab of the **Pain Management** widget.

When a **Camera** icon appears in the **Image** column (Figure 25), one or more images are associated with that record.

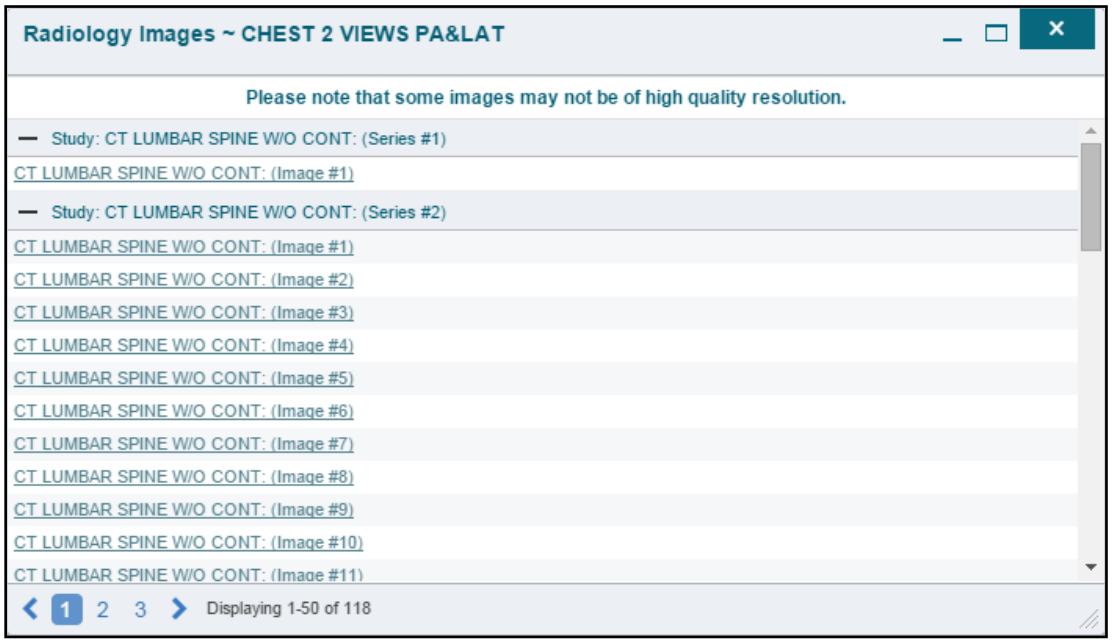
NOTE: Images are nondiagnostic and may not be of high-quality resolution.

Figure 25: Nondiagnostic Images in the Minimized View of the Radiology Exams Widget



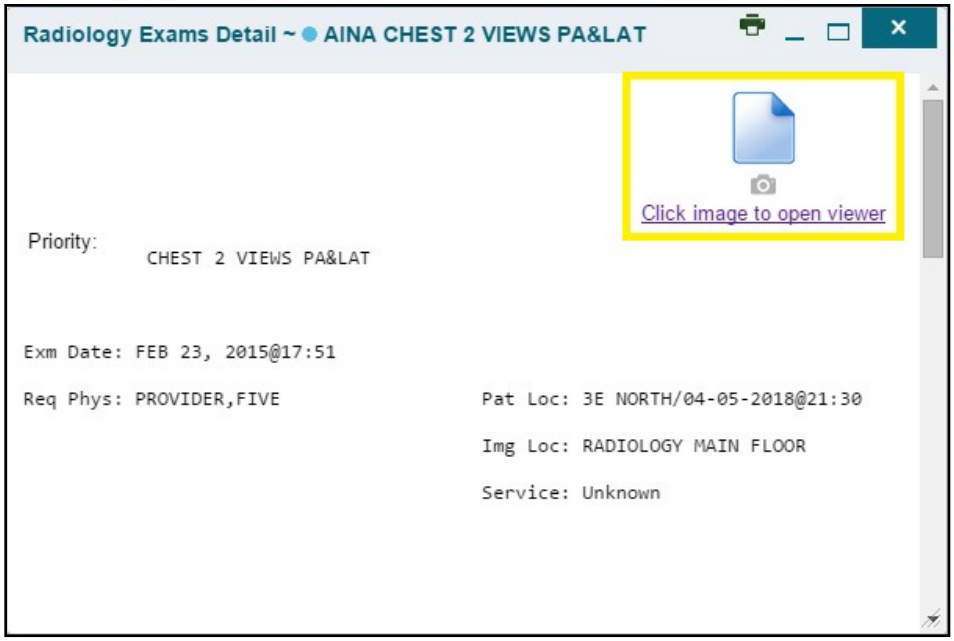
Click the **Camera** icon to display a list of link(s) to the image(s) (Figure 26). Click the hyperlinked name of the image to open it.

Figure 26: Multiple Nondiagnostic Radiology Images



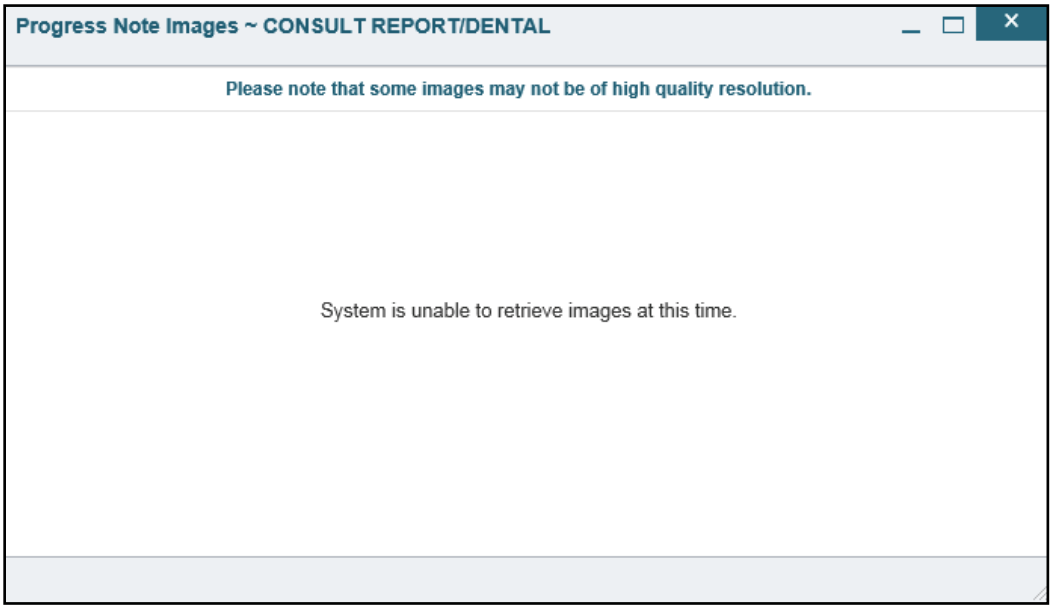
When in **Detail** view (Figure 27), click the **Click image to open viewer** link to open the associated image.

Figure 27: Nondiagnostic Images in the Radiology Exams Detail View



If an image is temporarily unavailable, users may see a *"System is unable to retrieve images at this time"* message (Figure 28).

Figure 28: Progress Note Images—Unable to Retrieve Images Error



4.8. Examples of Widget Functionality

The **Patient Portal** displays the selected patient's clinical records and other patient-centric information. The **Patient Demographics**, **Inpatient Medications**, **Lab Results**, and **Problem List** widgets, detailed in the following subsections, provide examples of widget functionality.

NOTE: Click **Help** in the upper right corner of the portal pages to see detailed information for all available widgets in CV.

4.8.1. Patient Demographics

A summary of the patient's demographics (personal data) appears in the upper left section of the **Patient Portal** (Figure 29). This static widget cannot be removed from the **Patient Portal** or moved to a different position. The tabs above the patient's name provide the patient's demographics summary at each VA site that the patient has visited.

The patient's name is displayed in color and is followed by a blue circle. The blue circle represents that the data was retrieved from a VA system.

NOTE: When the **Alert** icon Alert appears in the right corner of the Demographics widget (Figure 29). Click the **Alert** icon Alert to display information on the alert(s).

Figure 29: Patient Demographics Widget

4.8.1.1. Viewing Detailed Patient Demographic Information

Additional patient demographic information is available from the **Demographics** widget on the **Patient Portal**. Click the patient's name to open a separate window that provides a detailed list of demographic information for that patient.

4.8.1.2. Viewing Third-Party Insurance Information

Third-party payers and additional insurance information are available from a link within the **Demographics** widget on the **Patient Portal** (highlighted in Figure 29). Click the **Insurance** link in the **Demographics** widget. A separate window opens to display a detailed list of insurance information for the patient.

Use the horizontal scroll bar to view additional columns not seen within the default window size.

Data in the **Standardized Insurance Type** column is normalized to the X12 Health Insurance Type standard. Hover over entries in this column to display the standardized name and code for the insurance type.

4.8.2. Pain Management

The **Pain Management** widget (Figure 30) displays a patient's pain management treatment history, an up-to-date list of current and prior pain medications, and drugs that may interact with those pain medications. The **Progress Notes** tab of the **Pain Management** widget may have nondiagnostic images associated with a progress note record.

NOTE: Not all records displayed in the widget have associated images.

The **Pain Management** widget is a static widget permanently positioned to the right of the **Demographics** widget on the **Patient Portal** (Figure 20). The default instance of the **Pain Management** widget cannot be moved or removed.

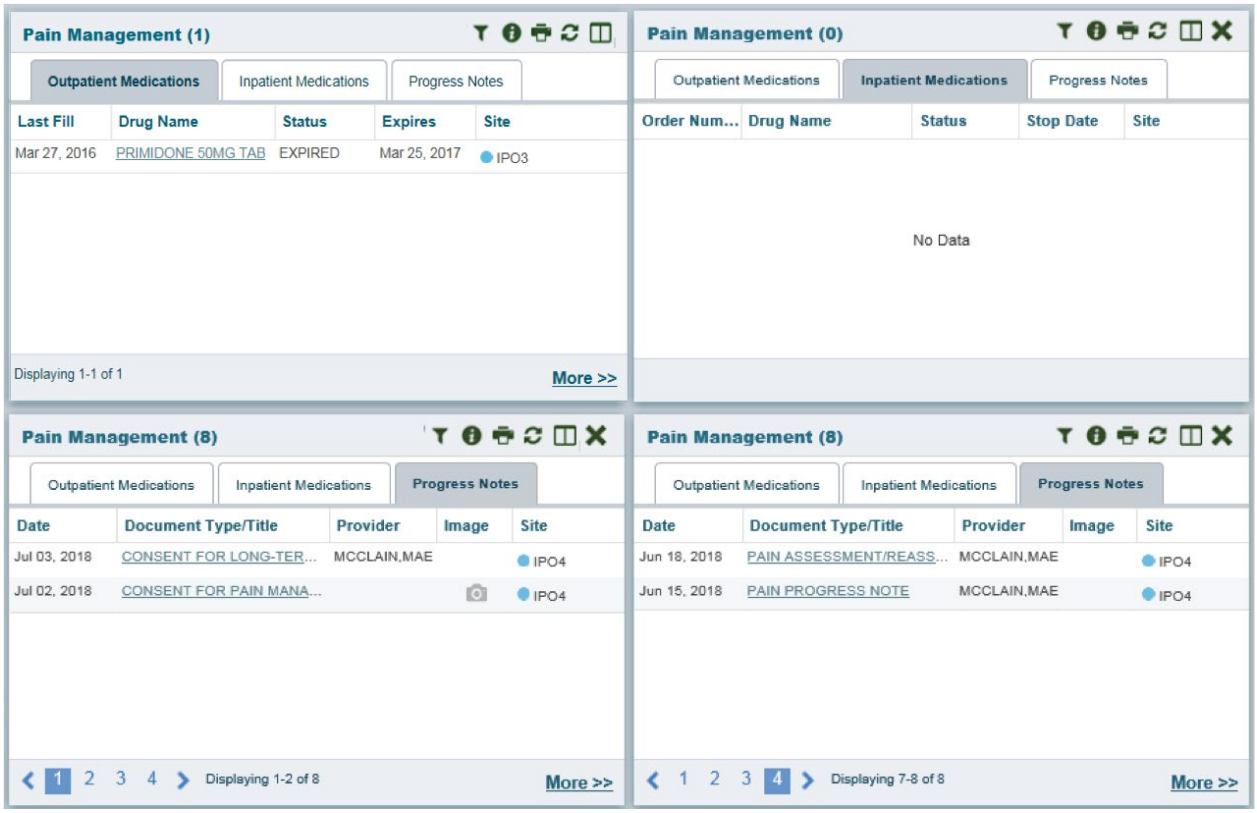
NOTE: Multiple instances of the **Pain Management** widget can be added to any tab, including the **Patient Portal**. This allows for multiple views of the same pain management data (Figure 30). These additional instances of the widget can be moved or removed.

The tabs of information in the minimized view of the **Pain Management** widget are a subset of the **Outpatient Medications**, **Inpatient Medications**, and **Progress Notes** widgets.

NOTE: Any tab of the **Pain Management** widget that does not have associated pain management records for the patient displays a "*No Data*" message.

Click **More >>** in the minimized view of the **Pain Management** widget to open an expanded view of each tab. The columns of information in the expanded view represent each clinical domain shown in the **Pain Management** widget (See Outpatient Medications, Inpatient Medications, and Progress Notes for more information).

Figure 30: Pain Management Widget



4.8.3. Outpatient Medications

The Outpatient Medications widget (Figure 31) displays active outpatient medication information. The information is displayed in reverse chronological order by the last fill order date.

Click and hold **Outpatient Medications** in the widget tray, drag it to the desired location on the screen, and drop it to open the widget.

Figure 31: Outpatient Medications

Outpatient Medications (22)

Last...	Drug Name	Status	Expi...	Site
Jul 0...	HYDROCODO...	DISC...	Jul 2...	IPO4
Jul 0...	IBUPROFEN 6...	EXPI...	Aug...	IPO4
Aug...	KETOROLAC T...	EXPI...	Aug...	IPO4
Jul 2...	ALBUTEROL 9...	EXPI...	Aug...	IPO4
Jul 2...	AMOXICILLIN...	EXPI...	Aug...	IPO4
Jul 2...	PHENAZOPYR...	EXPI...	Aug...	IPO4

Displaying 1-22 of 22 More >>

4.8.3.1. Outpatient Medications Widget Data

The columns of information in the minimized view of the **Outpatient Medications** widget are:

- Last Fill
- Drug Name
- Status
- Expires
- Site

Click **More >>** in the minimized view of the **Outpatient Medications** widget to open the expanded view. The columns of information in the expanded view are:

- Last Fill
- Drug Name
- Standardized Drug Name
- Sig
- Quantity
- Days Supply
- Refills
- Status
- Ordering Health Care Provider (HCP)
- Ordering HCP Specialty
- Expires
- Site

4.8.3.2. Viewing Outpatient Medication Details

Click the hyperlink in the **Drug Name** column of either view of the **Outpatient Medications** widget to open a separate window that displays detailed information about the medication.

4.8.3.3. Outpatient Medication Display and Filter Options

Display and filter options within the **Outpatient Medications** widget include:

- Click the column title to sort records according to data in that column
  - If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session
  - If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
  - When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget
- Click **Column Settings** in the widget toolbar to show or hide the columns within the widget
  - Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

> **NOTE:** CCPs have limited access to records and can only specify dates within the range set by the VA Staff user who created the patient assignment.

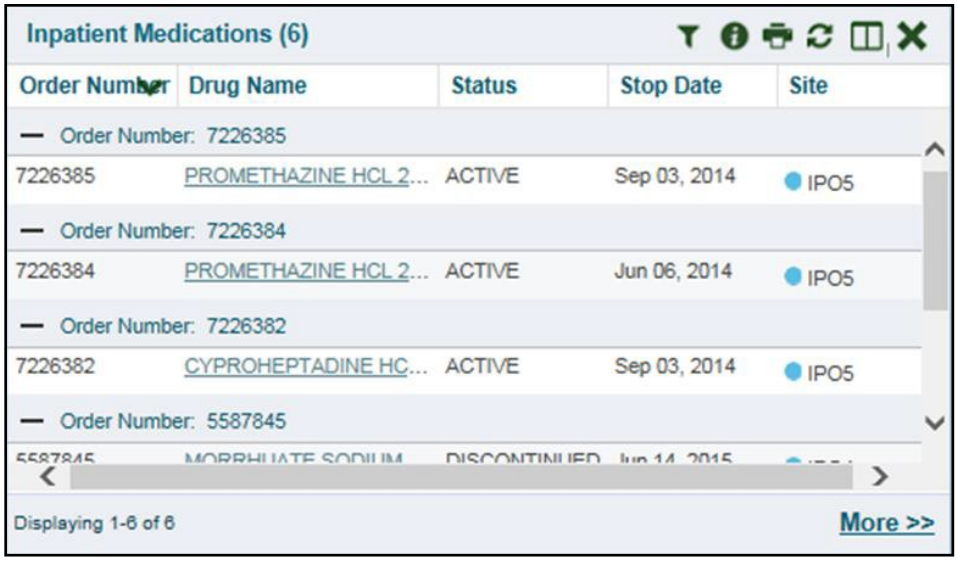
- Use the **Filter by Drug Name** dropdown to redraw the widget to show only the records for the selected medication
- Use the **Filter by Standardized Drug Name** dropdown to redraw the widget to show only the records for the selected medication
- Use the **Filter by Ordering HCP Specialty** dropdown to redraw the widget to show only the records for the ordering HCP

4.8.4. Inpatient Medications

The **Inpatient Medications** widget (Figure 32) displays inpatient medication information. The medications are grouped by the order number, where available.

Click and hold **Inpatient Medications** in the widget tray, drag it to the desired location on the screen, and drop it to open the widget.

Figure 32: Inpatient Medications Widget



NOTE: The sort arrow for the **Order Number** column overlaps the text in the minimized view.

4.8.4.1. Inpatient Medications Widget Data

The columns of information in the minimized view of the **Inpatient Medications** widget are:

- Order Number[1]
- Drug Name
- Status
- Stop Date
- Site

Click **More >>** in the minimized view of the **Inpatient Medications** widget to open the expanded view. The columns of information in the expanded view are:

- Order Number
- Drug Name
- Standardized Drug Name
- Status
- Ordering (HCP)
- Ordering HCP Specialty
- Start Date
- Stop Date
- Schedule

[1] When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget.

- Quantity
- Site

4.8.4.2. Viewing Inpatient Medication Details

Click the hyperlink in the **Drug Name** column of either view of the **Inpatient Medications** widget to open a separate window that displays detailed information about the medication.

4.8.4.3. Inpatient Medication Display and Filter Options

Display and filter options within the **Inpatient Medications** widget include:

- Click the column title to sort records according to data in that column
  - If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session
  - If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
  - When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget
- Click **Column Settings** in the widget toolbar to show or hide the columns within the widget
  - Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

> **NOTE:** CCPs have limited access to records and can only specify dates within the range set by the VA staff user who created the patient assignment.

- Use the **Filter by Drug Name** dropdown to redraw the widget to show only the records for the selected medication
- Use the **Filter by Standardized Drug Name** dropdown to redraw the widget to show only the records for the selected medication
- Use the **Filter by Ordering HCP Specialty** dropdown to redraw the widget to show only the records for the ordering HCP

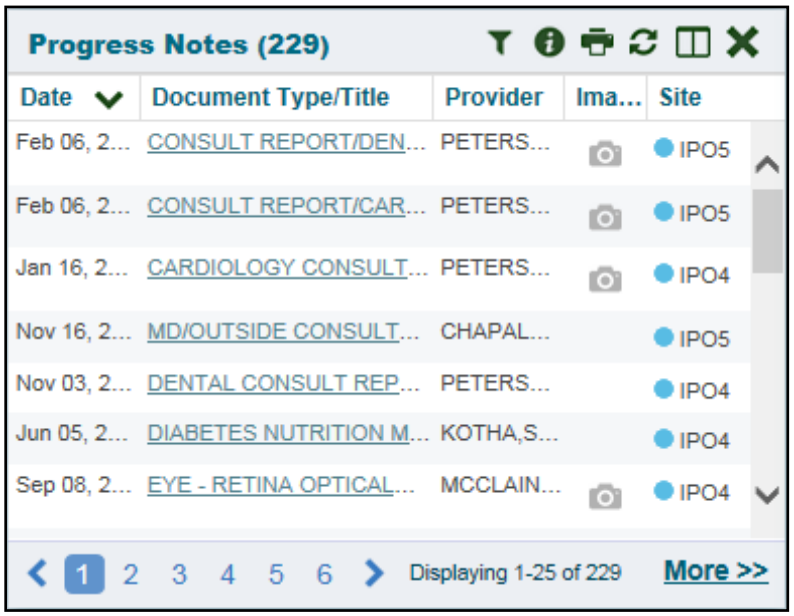
4.8.5. Progress Notes

The **Progress Notes** widget (Figure 33) displays the patient's progress notes information. The information is displayed in reverse chronological order by the note date.

Click and hold **Progress Notes** in the widget tray, drag it to the desired location on the screen, and drop it to open the widget.

When a **Camera** icon appears in the **Image** column, one or more images are associated with that record (See Nondiagnostic Images for more information).

Figure 33: Progress Notes Widget



4.8.5.1. Progress Notes Widget Data

The columns of information in the minimized view of the **Progress Notes** widget are:

- Date
- Document Type/Title
- Provider
- Image
- Site

Click **More >>** in the minimized view of the **Progress Notes** widget to open the expanded view. The columns of information in the expanded view are:

- Date
- Document Type/Title
- Standardized Document Type/Title
- Provider
- Provider Specialty
- Clinic
- Image
- Site

4.8.5.2. Progress Notes Display and Filter Options

Display and filter options within the **Progress Notes** widget include:

- Click the column title to sort records according to data in that column
  - If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session
  - If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
- Click **Column Settings** in the widget toolbar to show or hide the columns within the widget
  - Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range
- Use the **Filter by Document Type/Title** dropdown to redraw the widget to show only the records for the selected type
- Use the **Filter by Standardized Document Type** dropdown to redraw the widget to show only the records for the selected type
- Use the **Filter by Provider** dropdown to redraw the widget to show only the records for the selected provider
- Use the **Filter by Provider Specialty** dropdown to redraw the widget to show only the records for the selected provider

4.8.5.3. Viewing Progress Notes Details

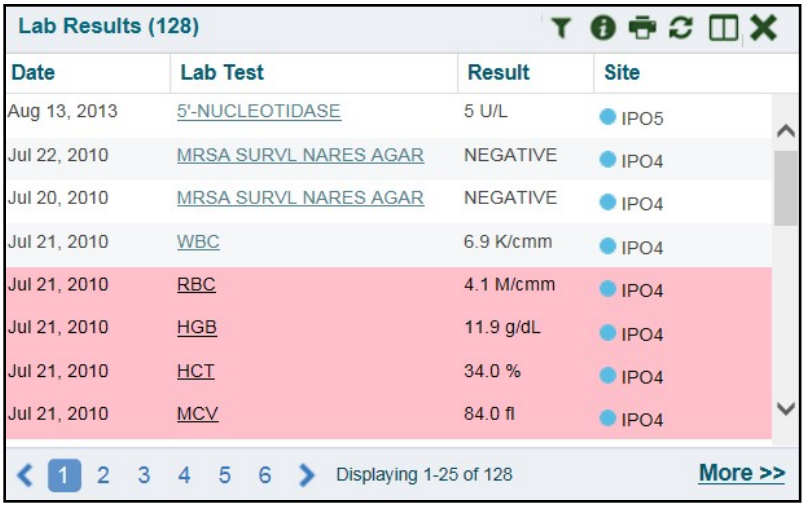
Click hyperlink in the **Document Type/Title** column of either view of the **Progress Notes** widget to open a separate window that displays detailed information about the record.

4.8.6. Lab Results

The **Lab Results** widget (Figure 34) displays the patient's lab result information, as well as skin test data and blood transfusion history, where available in the patient's record. The information is displayed in reverse chronological order, by the date of the last lab results.

Click and hold **Lab Results** in the widget tray, drag it to the desired location on the screen, and drop it to open the widget.

Figure 34: Lab Results Widget



Lab Results (128)

Date	Lab Test	Result	Site
Aug 13, 2013	5'-NUCLEOTIDASE	5 U/L	IPO5
Jul 22, 2010	MRSA SURVL NARES AGAR	NEGATIVE	IPO4
Jul 20, 2010	MRSA SURVL NARES AGAR	NEGATIVE	IPO4
Jul 21, 2010	WBC	6.9 K/cmm	IPO4
Jul 21, 2010	RBC	4.1 M/cmm	IPO4
Jul 21, 2010	HGB	11.9 g/dL	IPO4
Jul 21, 2010	HCT	34.0 %	IPO4
Jul 21, 2010	MCV	84.0 fl	IPO4

1 2 3 4 5 6 Displaying 1-25 of 128 More >>

4.8.6.1. Lab Results Widget Data

The columns of information in the minimized view of the **Lab Results** widget are:

- Date
- Lab Test
- Result
- Site

Click **More >>** in the minimized view of the **Lab Results** widget to open the expanded view. The columns of information in the expanded view are:

- Collection Date
- Order Number
- Status
- Ordering HCP
- Ordering HCP Specialty
- Lab Test
- Standardized Lab Test
- Type
- Specimen Source
- Result
- Interpretation
- Units
- Ref Range
- Site

4.8.6.2. Lab Results Display and Filter Options

Display and filter options within the **Lab Results** widget include:

- Click the column title to sort records according to data in that column
  - If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session
  - If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
- Click **Column Settings** in the widget toolbar to show or hide the columns within the widget
  - Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range
- Use the **Filter by Lab Test** dropdown to redraw the widget to show only the records for the selected test
- Use the **Filter by Standardized Lab Test** dropdown to redraw the widget to show only the records for the selected test
- Use the **Filter by Type** dropdown to redraw the widget to show only the records for the selected type
- Use **Graph View** to display multiple records of the same type in graph format (See Graph View for more information.)
- Use **Table View** to display multiple records of the same type in tabular format (See Table View for more information.)

4.8.6.3. Viewing Abnormal Results in the Lab Results Widget

CV highlights results whose values fall within a calculated reference range for abnormal in the minimized and expanded views of the widget.

Pink highlighting represents either H (high) or L (low) abnormal indicators. Red highlighting represents that the abnormal indicator has an asterisk (H* or L*) or the result is critical.

4.8.6.4. Viewing Lab Results Details

Clicking a hyperlinked entry in the **Lab Test** column opens a separate window that displays the detailed test report.

4.8.6.5. Table View

There is an option to display multiple records of the same type in a table (Figure 35). By default, the **Show Table** link in the expanded view of the **Lab Results** widget is disabled until the user narrows the data selection, using display filters.

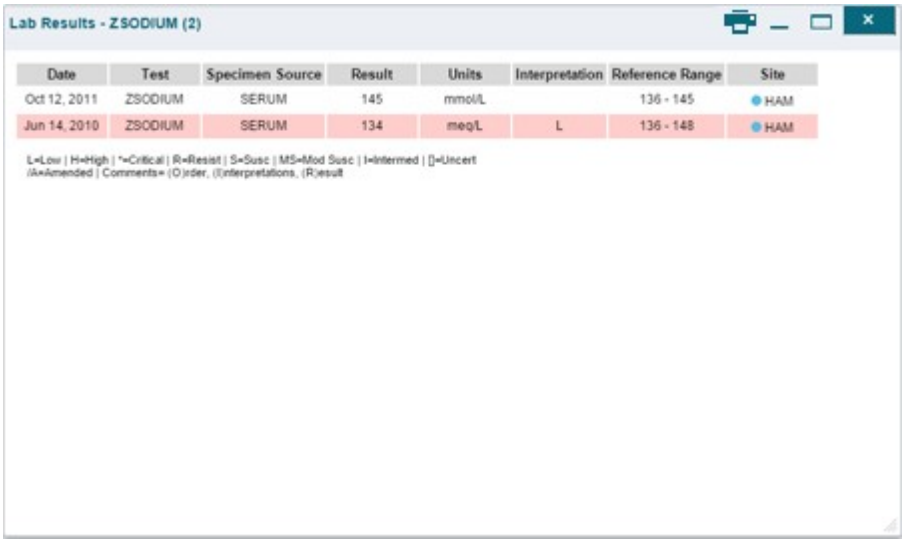
1. Click **More >>** in the minimized view of the **Lab Results** widget to open the expanded view

2. Select one entry from the **Filter by** dropdown (except for the **Filter by Type** option), which enables the **Show Graph** and **Show Table** links

> **NOTE:** The **Show Graph** and **Show Table** links are not enabled after selecting one lab type from the **Filter by Type** dropdown.

3. Click **Show Table**
4. A separate window opens, displaying the records of the type selected in the filter in a table

Figure 35: Table View



4.8.6.6. Graph View

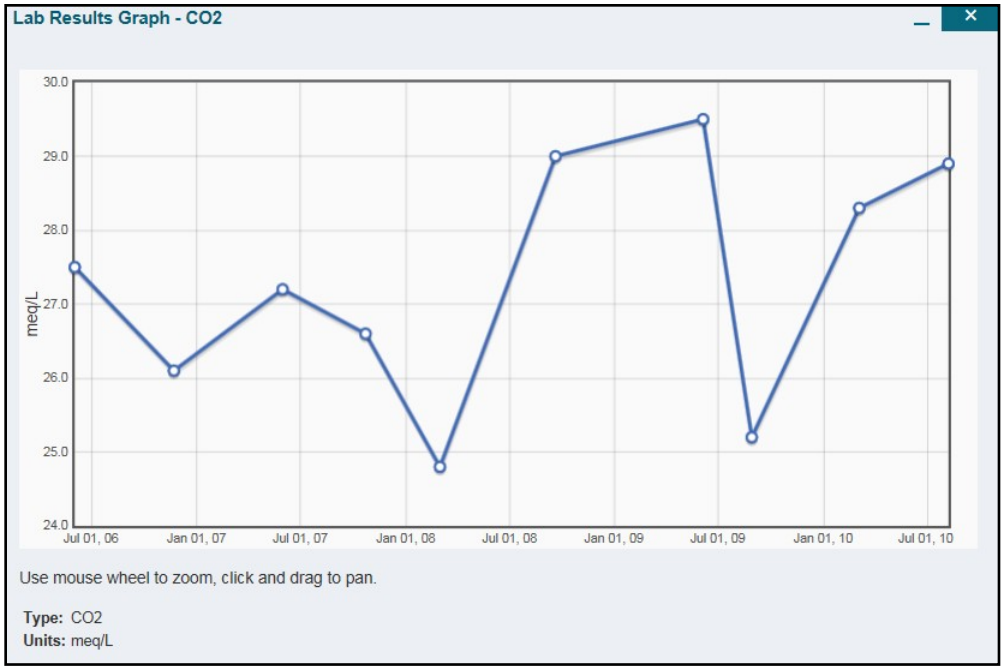
There is an option to display multiple records of the same type in a graph (Figure 36). By default, the **Show Graph** link in the expanded view of the **Lab Results** widget is disabled until the user narrows the data selection, using display filters.

1. Click **More >>** in the minimized view of the **Lab Results** widget to open the expanded view
2. Select an available filter from the **Filter by** dropdown (except for the **Filter by Type** option), which enables the **Show Graph** and **Show Table** links

> **NOTE:** The **Show Graph** and **Show Table** links are not enabled after selecting one lab type from the **Filter by Type** dropdown.

3. Click **Show Graph**
4. A separate window opens, displaying the records of the type selected in the filter in graph format

Figure 36: Graph View



4.8.7. Problem List

The ⚠ Problem List widget (Figure 37) displays a list of the patient's health issues. The information is displayed in reverse chronological order by the last modified date.

Click and hold **Problem List** in the widget tray, drag it to the desired location on the screen, and drop it to open the widget.

Figure 37: Problem List Widget

Problem List (14)

ICD	Onset	Description	Updated	Status	Site
Z83.511		FAMILY HISTO...	Jun 05, 2017	ACTIVE	IPO4
D86.0		SARCOIDOSIS...	Sep 08, 2016	ACTIVE	IPO4
R69.		ILLNESS, UNS...	Feb 10, 2016	ACTIVE	IPO4
724.1		Acute thoracic b...	Aug 13, 2013	ACTIVE	IPO5
272.4		Hyperlipidemia (...	Aug 16, 2010	ACTIVE	IPO4
530.81		Gastroesophag...	Sep 03, 2009	ACTIVE	IPO4
305.1		TOBACCO USE...	Sep 24, 2008	ACTIVE	IPO4
790.93		Elevated Prostat...	Sep 18, 2008	ACTIVE	IPO4
600.01		Hypertrophy (Be...	Nov 28, 2006	ACTIVE	IPO4
412.	2003	Old Myocardial I...	Jan 30, 2006	ACTIVE	IPO4
414.9		Coronary Artery...	Jan 30, 2006	ACTIVE	IPO4
401.9		Hypertension (I...	Jan 30, 2006	ACTIVE	IPO4
715.09		Osteoarthrosis,...	Jan 30, 2006	ACTIVE	IPO4
V15.2	Apr 12, 2005	Personal History...	May 10, 2005	ACTIVE	IPO4

Displaying 1-14 of 14 More >>

4.8.7.1. Problem List Widget Data

The columns of information in the minimized view of the **Problem List** widget are:

- International Classification of Diseases (ICD)
- Onset
- Description
- Updated
- Status
- Site

Click **More >>** in the minimized view of the **Problem List** widget to open expanded view. The columns of information in the expanded view are:

- ICD
- Onset
- Description
- Standardized Description
- Updated
- Severity
- Status
- Site

4.8.7.2. Viewing Problem List Details

Clicking a hyperlinked entry in the **Description** column in either the minimized or expanded views of the widget opens a separate window that displays a detailed report of the record.

4.8.7.3. Problem List Display and Filter Options

Display and filter options within the **Problem List** widget include:

- Click the column title to sort records according to data in that column
  - If a user sorts on a column that appears in both the minimized and expanded views, the sort is saved in the user profile and persists to the next user session
  - If a user sorts on a column that appears only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile
- Click **Column Settings** in the widget toolbar to show or hide the columns within the widget
  - Check or uncheck the column names that appear in the pop-up box and click **Apply**
- Use the **Filter by Description** dropdown to redraw the widget to show only the records for the selected problem
- Use the **Filter by Standardized Description** dropdown to redraw the widget to show only the records for the selected problem
- Use the **Filter by Status** dropdown to redraw the widget to show only the records with the selected status
- Specify the date range for the records displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars
  - If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range

Please open the **Online Help** index within CV for more information about the general functionality of CV and a complete list of the widgets available in the application. If you need technical assistance, please see Getting Help.