

**Community Viewer Version 3.0**  
**Community Care Provider User Guide**



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**Department of Veterans Affairs (VA)**

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

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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.

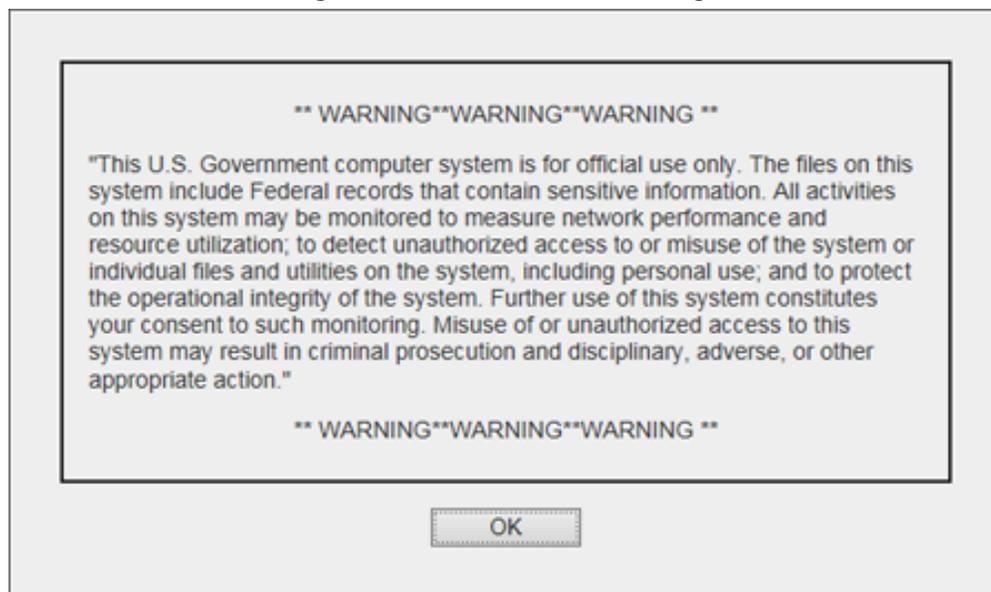
CV pulls information from VA health care systems in real time for viewing within a web browser. Through CV, VA Staff assign patients to providers and provision their use within the CV system, allowing providers access to view consolidated patient data from multiple Veterans Information Systems and Technology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

**Figure 1: Authorized Use Message**



## 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:

- **CCP:** You, an authorized non-VA provider
- **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 one of the supported browsers:

- Internet Explorer (IE) v11
- Chrome v73
- Microsoft Edge v44
- Safari v12

## 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.

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](#).

## 2. Logging in to CV

Before logging in to and utilizing the functionality of CV, please read the warning in [Figure 1](#).

During log in, CV authenticates all providers against a registered list, provisioned by VA Staff. If you have not received credentials to access CV, you 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](#).

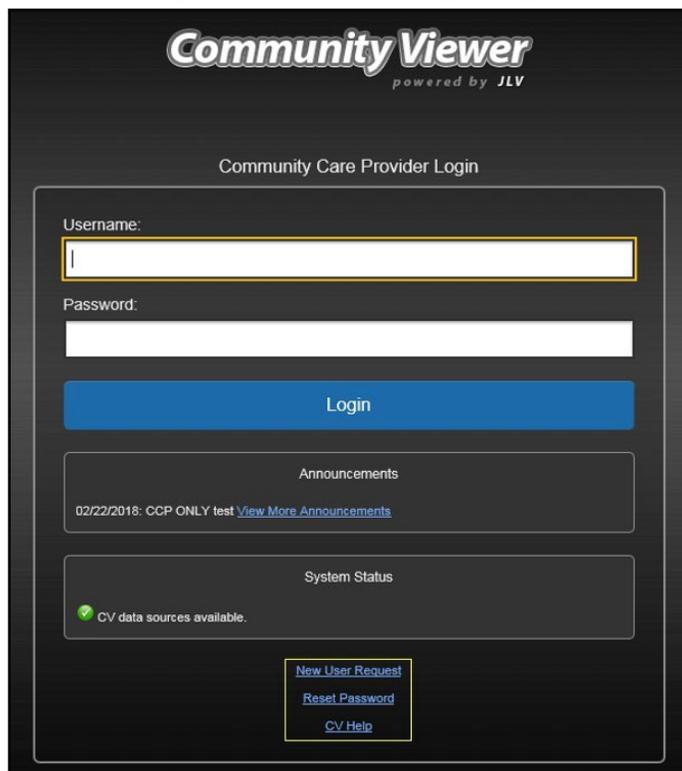
1. Open a supported Internet browser
2. Enter the CV URL, <https://www.communityviewer.va.gov/Community>, provided by VA Staff, in the address bar of the Internet browser
3. Review the **Authorized Use** message ([Figure 1](#))
4. Click **OK** to confirm that you are aware you are accessing a Government information system that is provided for authorized users only
5. Enter your username and password, provided by VA Staff, in the fields on the **Login** page ([Figure 2](#)):
  - a. Your username is the National Provider Identifier (NPI) number associated with your account



**NOTE:** If your username is not found or is not active the error message, *“There is an issue preventing your access to Community Viewer. Please contact your VA Contractor or your VA Medical Center for assistance.”* displays, and no further options appear.

- 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 login), the **VA Privacy and Security Awareness Training** page ([Figure 3](#)) appears

**i** **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.

**i** **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 since 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:

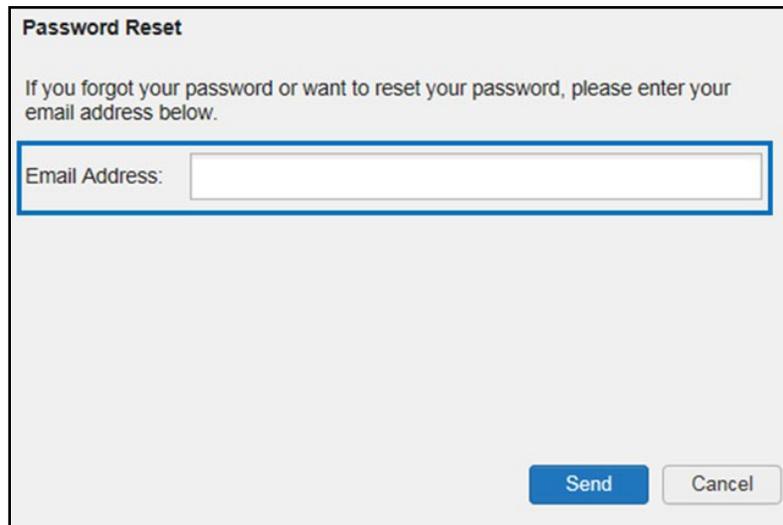
- Your username is displayed in the upper right corner of the page
- The patients assigned to you are shown in the **Assigned Patients** widget, under the **My Assigned Patients** tab
- The patients assigned to your practice group are shown in the **Assigned Patients** widget, under the **Group Assigned Patients** tab
- You can 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

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

1. Click the **Reset Password** link
2. The Password Reset dialog box opens ([Figure 4](#))

**Figure 4: Password Reset Dialog Box**



Password Reset

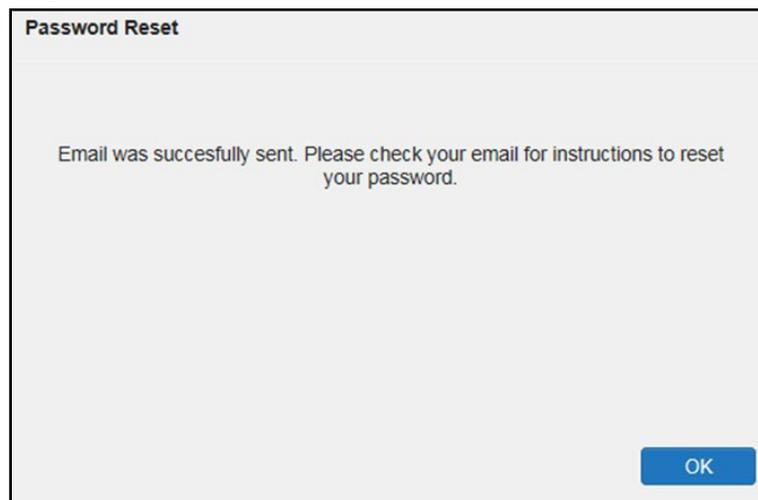
If you forgot your password or want to reset your password, please enter your email address below.

Email Address:

Send Cancel

3. Enter your e-mail address in the field provided in the dialog box
4. Click **Send**
5. A confirmation message displays ([Figure 5](#)) and an e-mail message is generated to [Community\\_Provider\\_Technical\\_Service\\_Desk@va.gov](mailto:Community_Provider_Technical_Service_Desk@va.gov)

**Figure 5: Confirmation of Request Sent to Reset Password**



Password Reset

Email was successfully sent. Please check your email for instructions to reset your password.

OK

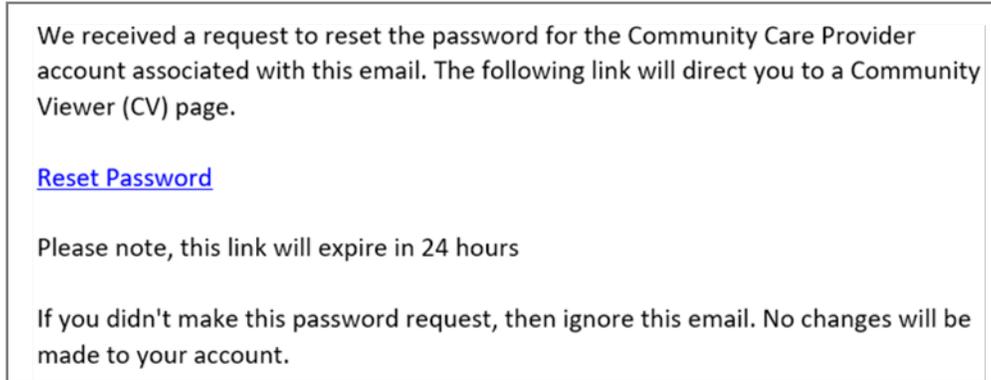
6. A password reset link is sent to the e-mail address you provided

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

Once you receive the password reset e-mail:

1. Click the link in the password reset e-mail ([Figure 6](#))

**Figure 6: Password Reset E-mail**



2. The **Password Reset** page opens ([Figure 7](#))

**Figure 7: Password Reset Page**

3. Create a new password following the password guidelines (See [Password Requirements](#)), 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 8](#))

**Figure 8: Password Reset Confirmation Message**



### 2.1.1. Password Requirements

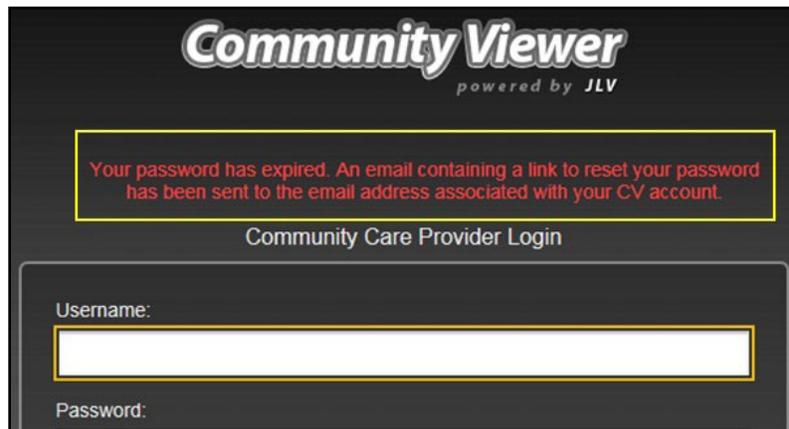
You are prompted to change your password every 90 days. Passwords are case sensitive and must comply with the following structure guidelines:

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

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

When your password has expired, you see the message highlighted in [Figure 9](#) after an attempt to log in.

Figure 9: Password Expiration Notice on the Login Page



## 2.2. The CV Portal Pages

After a successful login, your username is shown in the upper right corner of the application, and the CV portal pages are displayed. The CV portal pages are:

- The **Patient Portal** 
- The **Provider Portal** 

Upon login, you see the **Provider Portal** . The portal displays the **Assigned Patients** widget by default ([Figure 11](#)).

### 2.2.1. System Menu

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 User Interface (UI) theme:** Click the **Settings**  icon to configure the UI theme (See [Customizing CV](#))
- **Report Builder:** Click the **Report Builder** icon  on the **Patient Portal** to create custom reports
- **Access Online Help:** Click the **Help**  icon to open web-based help
- **Log out:** Click the **Logout**  icon to terminate the current CV session

Figure 10: CV Portal Tools

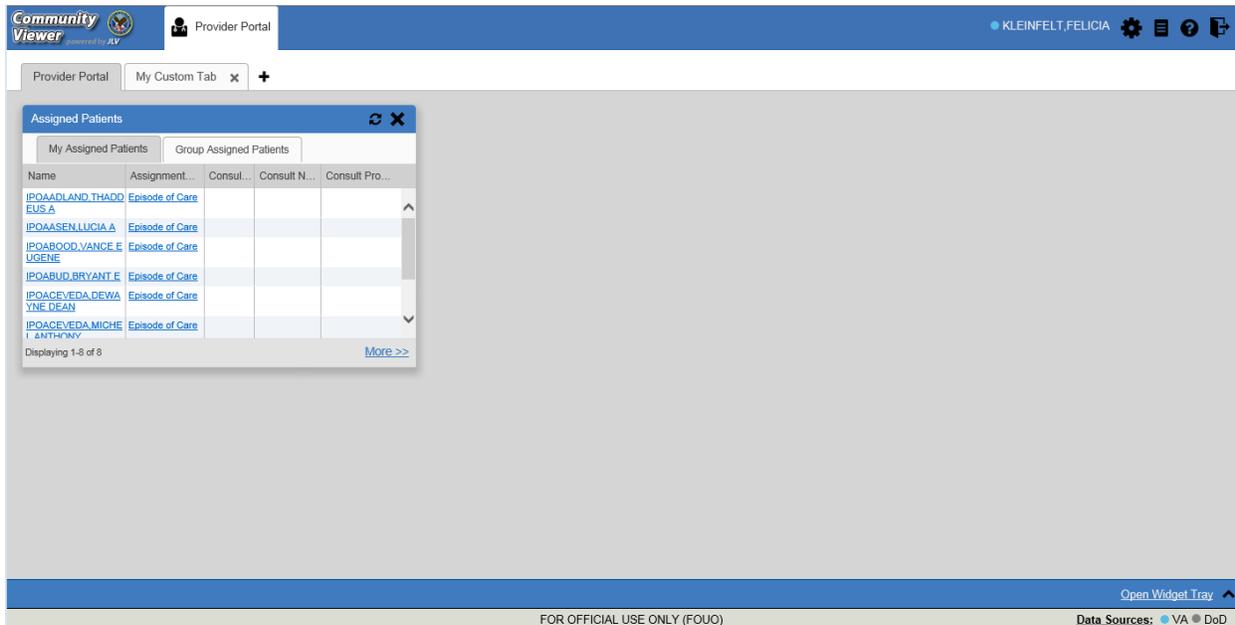


### 2.2.2. Default View

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

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

**Figure 11: Default View**



### 2.2.3. Customizing CV

Configuration options can be set within CV by clicking the **Settings**  icon in the upper right corner of the portal pages ([Figure 11](#)). The data source and UI settings are part of your user profile

**i** **NOTE:** Changing the data sources or UI theme requires you to reselect and reload the current patient.

Choosing a data source allows you to configure whether you see VA data, DoD data, or both. A circular, blue icon in the **Data Sources** pane indicates that VA data is enabled; a square, orange icon indicates that DoD data is enabled; and a circular, gray icon indicates either VA or DoD data is disabled. One primary data source is required. Once selected, the data source selection is stored in the user profile and remains set until changed.

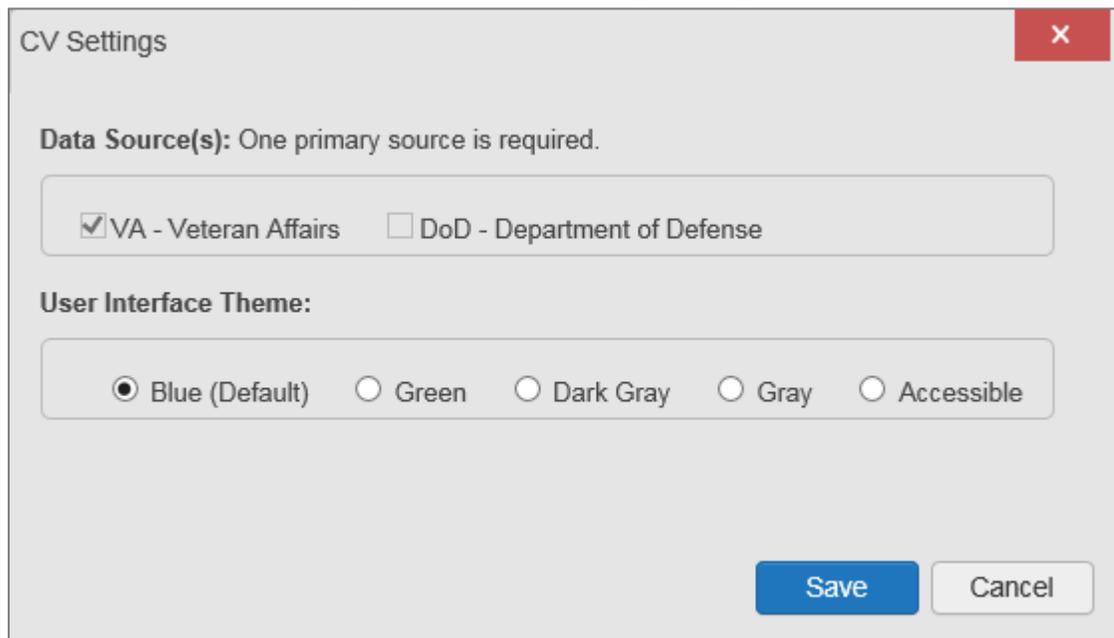
**i** **NOTE:** Data sources are restricted to VA for this release. The DoD data source option is disabled.

Choosing a **UI 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 12](#))
3. Select the desired data source
4. Click the radio button next to the desired theme
5. Click **Save** to apply the selected theme - OR-
6. Click **Cancel** to exit the **CV Settings** dialog box and restore the previous theme

**Figure 12: The CV Settings Dialog Box**



Examples of the UI themes are displayed in the figures that follow. The Default theme was presented in [Default View, Figure 11](#).

Figure 13: Blue Theme

Figure 14: Green Theme

Figure 15: Dark Gray Theme

Community Viewer powered by JLV

Provider Portal Patient Portal

KLEINFELT, FELICIA

IPOAADLAND, THADDEUS A

Flags AD

Encounters Results Medications Documents Consults Immunizations

IPO3 IPO4 IPO5

**IPOAADLAND, THADDEUS A**

4206 NEW HAMPTON CT  
FORT COLLINS, COLORADO  
80525

SSN: 101936540  
Age: 74  
DOB: 23 Oct 1944  
Race: White  
(h): (333)333-3333  
(w): (333)333-3333  
Birth Sex: M

SC Percent: 40%  
PCM Name:  
PCM Date:  
PCM Team:

Insurance

Problem List (29)

Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
Apr 18, 2019	illness_unspecified	R69.		ACTIVE	N/A	IPO4
Apr 10, 2019	Nonobstructive reflux-associat	N11.0		ACTIVE	N/A	IPO4
May 25, 2018	Pain (neuropathic)	K01.2		ACTIVE	N/A	IPO4

Outpatient Medications (5)  
Filtered date range: 1/1/84 - 5/7/19

Last Fill	Drug Name	Status	Expires	Site
Mar 27, 2016	PRIMIDONE 50MG TAB	EXPIRED	Mar 25, 2017	IPO3
Jan 24, 2005	BUPROPION HCL 75 MG TAB	EXPIRED	Oct 27, 2005	IPO4
Jan 24, 2005	BUPROPION HCL 75 MG TAB	EXPIRED	Oct 27, 2005	IPO3
Sep 27, 2004	BUPROPION HCL 75 MG TAB	DISCONTINUED	Sep 27, 2004	IPO4
Sep 27, 2004	BUPROPION HCL 75 MG TAB	DISCONTINUED	Sep 27, 2004	IPO3

Outpatient Encounters (243)  
Filtered date range: 1/1/84 - 5/7/19

Encounter Date	Clinic	Provider	Diagnosis	Image	Site
Apr 10, 2019 13:09	CHY GI MCINTYRE	BLACKSTAD, GONZALOW	Nonobstructive reflux-associated chronic pyelonephritis		IPO4
Apr 08, 2019 14:37	CHY CHEYENNE EYE CLINIC	TTS, OSGOOD			IPO4
Mar 05, 2019 15:41	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW			IPO4
Dec 18, 2018 00:00	NHM INPT OUT CLINIC GR	STRANGES, USAN J			IPO5
Jun 19, 2018 11:00	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW			IPO4
Jun 18, 2018 09:00	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW	Meningococcal infection, unspecified		IPO4

Consult Encounters (31)  
Filtered date range: 1/1/84 - 5/7/19

Date	Consult Order	Status	Site
Dec 20, 2018 08:58	DIABETIC TELERETINAL IMAGING FT COLLINS	COMPLETE	IPO3
Nov 18, 2018 09:20	DIABETIC RETINOPATHY SURVEILLANCE TESTING	COMPLETE	IPO3
Oct 22, 2018 09:14	EYEGLASS REQUEST	COMPLETE	IPO3
Oct 01, 2018 13:08	DIABETIC TELERETINAL IMAGING CHEYENNE	COMPLETE	IPO3
Oct 01, 2018 13:08	DIABETIC RETINOPATHY SURVEILLANCE TESTING	COMPLETE	IPO3

Lab Panel Results (884)  
Filtered date range: 1/1/84 - 5/7/19

Collection Date	Order / Result	Site
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FOR OFFICIAL USE ONLY (FOUO) Data Sources: VA DoD

Figure 16: Gray Theme

Community Viewer powered by JLV

Provider Portal Patient Portal

KLEINFELT, FELICIA

IPOAADLAND, THADDEUS A

Flags AD

Encounters Results Medications Documents Consults Immunizations

IPO3 IPO4 IPO5

**IPOAADLAND, THADDEUS A**

4206 NEW HAMPTON CT  
FORT COLLINS, COLORADO  
80525

SSN: 101936540  
Age: 74  
DOB: 23 Oct 1944  
Race: White  
(h): (333)333-3333  
(w): (333)333-3333  
Birth Sex: M

SC Percent: 40%  
PCM Name:  
PCM Date:  
PCM Team:

Insurance

Problem List (29)

Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
Apr 18, 2019	illness_unspecified	R69.		ACTIVE	N/A	IPO4
Apr 10, 2019	Nonobstructive reflux-associat	N11.0		ACTIVE	N/A	IPO4
May 25, 2018	Pain (neuropathic)	K01.2		ACTIVE	N/A	IPO4

Outpatient Medications (5)  
Filtered date range: 1/1/84 - 5/7/19

Last Fill	Drug Name	Status	Expires	Site
Mar 27, 2016	PRIMIDONE 50MG TAB	EXPIRED	Mar 25, 2017	IPO3
Jan 24, 2005	BUPROPION HCL 75 MG TAB	EXPIRED	Oct 27, 2005	IPO4
Jan 24, 2005	BUPROPION HCL 75 MG TAB	EXPIRED	Oct 27, 2005	IPO3
Sep 27, 2004	BUPROPION HCL 75 MG TAB	DISCONTINUED	Sep 27, 2004	IPO4
Sep 27, 2004	BUPROPION HCL 75 MG TAB	DISCONTINUED	Sep 27, 2004	IPO3

Outpatient Encounters (243)  
Filtered date range: 1/1/84 - 5/7/19

Encounter Date	Clinic	Provider	Diagnosis	Image	Site
Apr 10, 2019 13:09	CHY GI MCINTYRE	BLACKSTAD, GONZALOW	Nonobstructive reflux-associated chronic pyelonephritis		IPO4
Apr 08, 2019 14:37	CHY CHEYENNE EYE CLINIC	TTS, OSGOOD			IPO4
Mar 05, 2019 15:41	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW			IPO4
Dec 18, 2018 00:00	NHM INPT OUT CLINIC GR	STRANGES, USAN J			IPO5
Jun 19, 2018 11:00	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW			IPO4
Jun 18, 2018 09:00	CHY CHEYENNE MEDICAL SPEC	BLACKSTAD, GONZALOW	Meningococcal infection, unspecified		IPO4

Consult Encounters (77)  
Filtered date range: 1/1/84 - 5/7/19

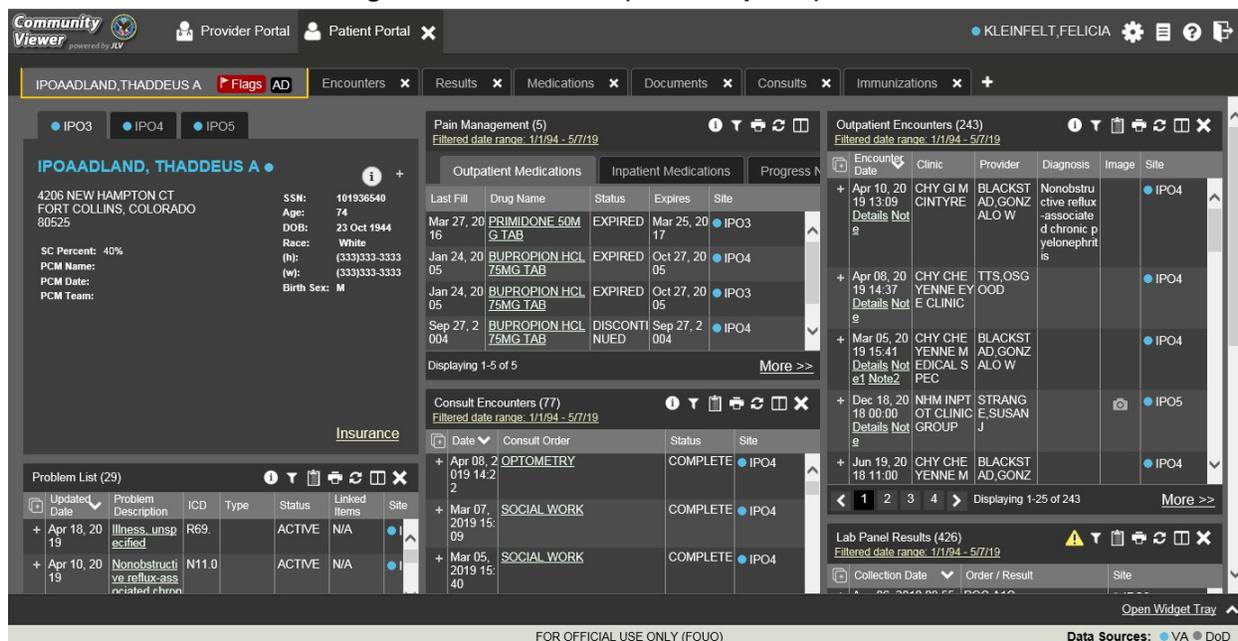
Date	Consult Order	Status	Site
Apr 08, 2019 14:22	OPTOMETRY	COMPLETE	IPO4
Mar 07, 2019 15:09	SOCIAL WORK	COMPLETE	IPO4
Mar 05, 2019 15:40	SOCIAL WORK	COMPLETE	IPO4
Mar 05, 2019 15:39	SOCIAL WORK	COMPLETE	IPO4
Dec 12, 2018 15:15	CP EGOPEG	SCHEDULED	IPO4

Lab Panel Results (426)  
Filtered date range: 1/1/84 - 5/7/19

Collection Date	Order / Result	Site
-----------------	----------------	------

FOR OFFICIAL USE ONLY (FOUO) Data Sources: VA DoD

Figure 17: Accessible (508-Compliant) Theme



## 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. A CV session ends automatically after 30 minutes of inactivity. You receive a warning that the current session is about to terminate after 25 minutes of inactivity. Automatic termination of a session logs you out of the application and displays the **Logout** page. Close and reopen the browser and return to the **Login** page to initiate a new session.

## 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 portal, and drop it in the desired location. Click the minus (-) sign in the lower right corner of the portal 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:
  - Consult
  - Episode of care
- Columns of information that only contain data for patients with a *Consult* assignment type ([Figure 19](#))
  - **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**
  - **Consult Name:** A label generated by the VA system
    - Click the entry to open the patient’s record in the **Patient Portal**
  - **Consult Provider:** The VA provider who ordered the consult

**Figure 18: Minimized View of the Assigned Patients Widget**

Assigned Patients				
My Assigned Patients		Group Assigned Patients		
Name	Assignment T...	Consult...	Consult Na...	Consult Prov...
<a href="#">IPOAADLAND,THADD EUS A</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOAASEN,LUCIA A</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOABOOD,VANCE EUGENE</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOABUD,BRYANT E</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOACEVEDA,DEWAYNE DEAN</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOACEVEDA,MICHAEL ANTHONY</a>	<a href="#">Episode of Care</a>			

Displaying 1-8 of 8 [More >>](#)

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 (8)				
Name	Assignment Type	Consult No	Consult Name	Consult Provider
<a href="#">IPOAADLAND, THADDEUS A</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOAASEN, LUCIA A</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOABOOD, VANCE EUGENE</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOABUD, BRYANT E</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOACEVEDA, DEWAYNE DEAN</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOACEVEDA, MICHEL ANTHONY</a>	<a href="#">Episode of Care</a>			
<a href="#">IPOBANGS, GUSTAVO W</a>	<a href="#">Consult</a>	<a href="#">486692</a>	<a href="#">OPHTHALMOLOGY</a>	MCCLAIN, MAE
<a href="#">IPOBANGS, GUSTAVO W</a>	<a href="#">Consult</a>	<a href="#">486694</a>	<a href="#">ENT</a>	MCCLAIN, MAE

Displaying 1-8 of 8 [Show All](#)

## 3.2. Viewing System Notifications

### 3.2.1. Viewing Announcements

System announcements are displayed on the **Login** page before you log in ([Figure 20](#)) and in a banner at the top of the portal ([Figure 21](#)). Announcements are provided by the VA and communicate upcoming system maintenance or other scheduled events that may impact you or CV system availability. An example announcement on the **Login** page is shown in the following figure. Where available, click the link to [View More Announcements](#) for additional information.

- i** **NOTE:** Announcements are separate from the System Status messages displayed on the **Login** page. System Status monitors the services that CV uses to connect to VA data sources. System Status updates continue to display on the **Login** page if there are no announcements when you access CV.

Figure 20: Announcements on the Login Page

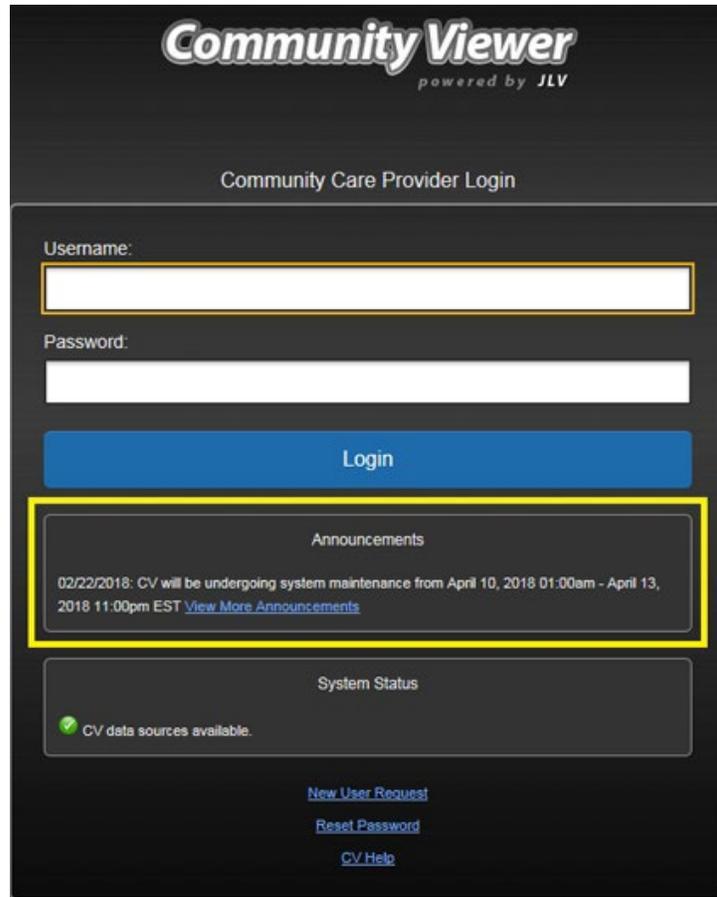
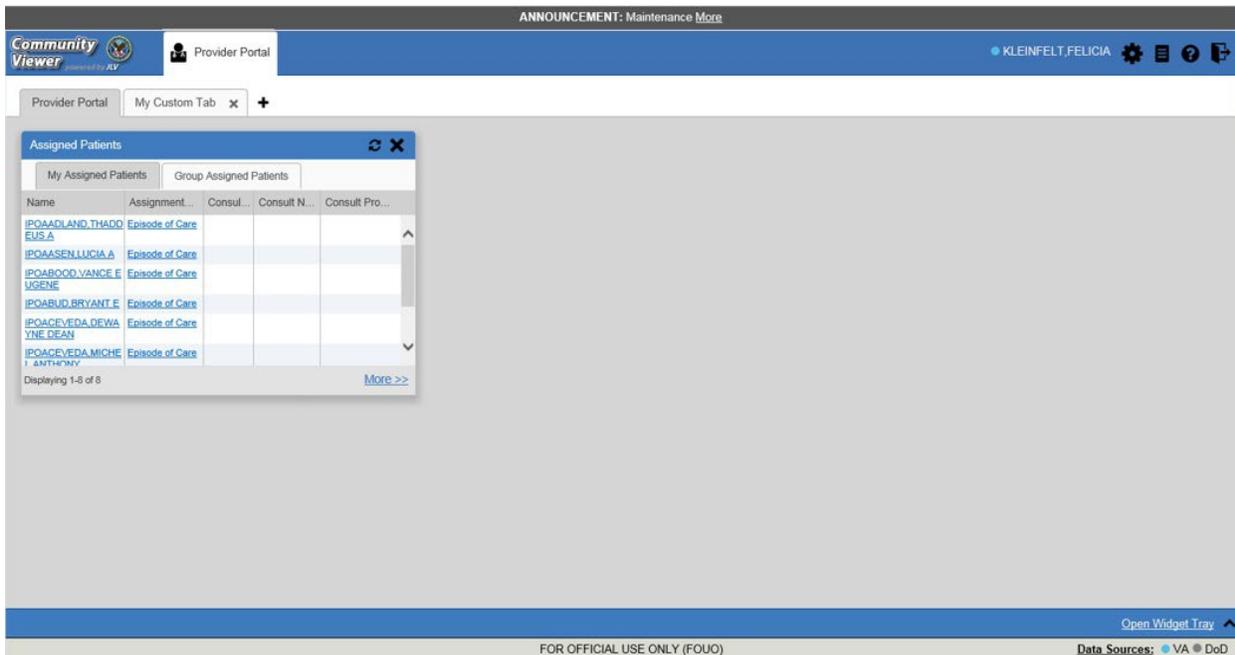


Figure 21: Announcements Banner



### 3.2.2. Viewing System Status

The system status reports the condition of the CV application. 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:

- On the **Login** page ([Figure 2](#))
- On the portal pages (highlighted in [Figure 22](#))

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 22](#)) appears on the **Login** page.

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 in to CV or view patient data until the connection is restored. See [Getting Help](#) for information on how to contact support.

**Figure 22: System Status Indicator on the Portal Pages**



### 3.2.3. Viewing Connection Status

CV widgets display the status of their connection to data sources. Connection status information is available for each widget.

-  **NOTE:** The Connection Status reports the condition of the connection between CV and its external resources, while System Status reports the overall condition of the CV application.

The **Connection Status** icon on a widget toolbar indicates the state of the connection to data sources. There are two status conditions:

-  all sources are connected (available)
-  one or more sources are not connected (unavailable)

[Figure 23](#) shows a connection status indicator icon displayed on the **Documents** widget toolbar.

**Figure 23: Connection Status Icon, Documents Widget**

Date	Description	Provider	Image	Site
Aug 17, 2017	<a href="#">HBPC MEDICATION RECONCILIATION QUARTERLY NOTE</a>	MYERS, ANGE LA M		IPO4
Aug 17, 2017	<a href="#">MHICM RECOVERY PLAN LIFE SKILLS CENTER</a>	MYERS, ANGE LA M		IPO4
Aug 17, 2017	<a href="#">HBPC PHYSICIAN NOTE</a>	MYERS, ANGE LA M		IPO4
Aug 17, 2017	<a href="#">10-10 MEDICAL PROGRESS NOTE</a>	MYERS, ANGE LA M		IPO4
Dec 20, 2016	<a href="#">UROLOGY</a>	LONGHOFER, ALISA K		IPO4

Clicking a **Connection Status** icon opens a standalone window with information about the connection to data sources. Clicking the [Hide All Active Interfaces](#) link in the Connection Status window ([Figure 24](#)) hides the detailed **All Active Connections** view and displays only the connection errors.

**Figure 24: Connection Status Details, Active Interfaces Shown**

**Connection Errors**

Connections from the following sources are currently unavailable. Most connection errors resolve themselves within a few hours.

Source	Name	Status	Data Domain
VA	IPOTEST3	Connection Unavailable	Progress Notes
VA	IPOTEST3	Connection Unavailable	Encounters
VA	IPOTEST3	Connection Unavailable	Consults
VA	IPOTEST3	Connection Unavailable	Radiology Exams
VA	IPOTEST3	Connection Unavailable	Discharge Summaries

[< Hide All Active Interfaces](#)

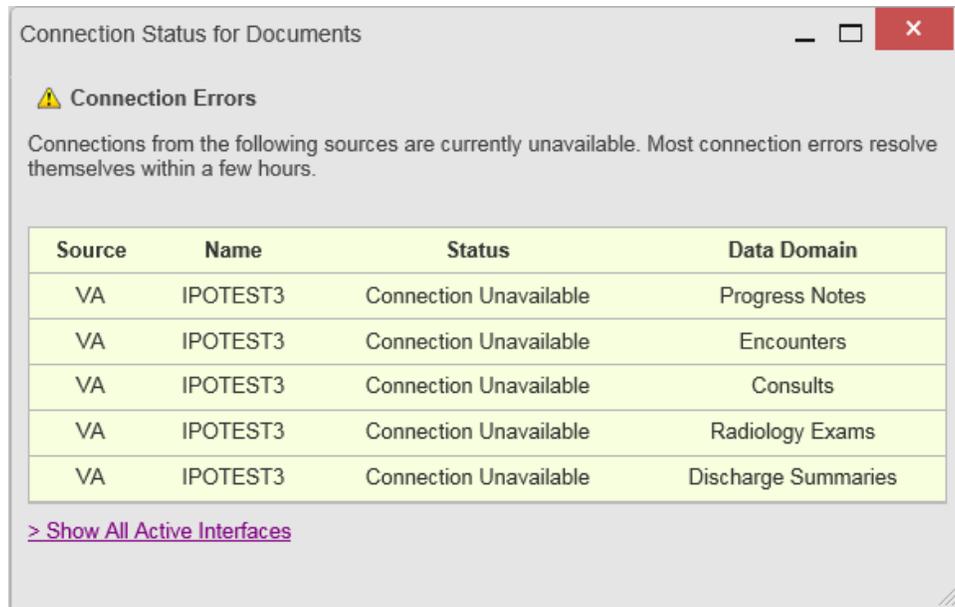
**All Active Connections**

Connections to the source systems are successful. Successful status connections are not an indicator that clinical data is being returned to the widget from the source system.

Source	Name	Status	Data Domain
VA	IPOTEST4	SUCCESS	Progress Notes
VA	IPOTEST4	SUCCESS	Encounters

Clicking the [>Show All Active Interfaces](#) link in the **Connection Status** window ([Figure 25](#)) opens a **Connection Status Details** view.

**Figure 25: Connection Status Details View, Active Interfaces Hidden**



**i** **NOTE:** Connection status is not related to the *system status* CV reports for systems used to connect to data sources.

### 3.3. Using Report Builder

#### 3.3.1. About Report Builder

The **Report Builder** feature is used to create custom PDF reports using patient data and records displayed in CV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the toolbar in the upper right corner of the **Patient Portal** ([Figure 10](#)).

The **Report Builder** pane is comprised of the **Current Report** tab and the **Patient Reports** tab. When open, the **Report Builder** appears over the left side of the CV portal window. Click the left (collapse) **<** or right (expand) **>** arrow buttons to collapse or expand the **Report Builder**. Any report configurations in progress are saved when collapsing or closing the Report Builder and restored when the Report Builder is displayed again.

The **Current Report** tab ([Figure 26](#)) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

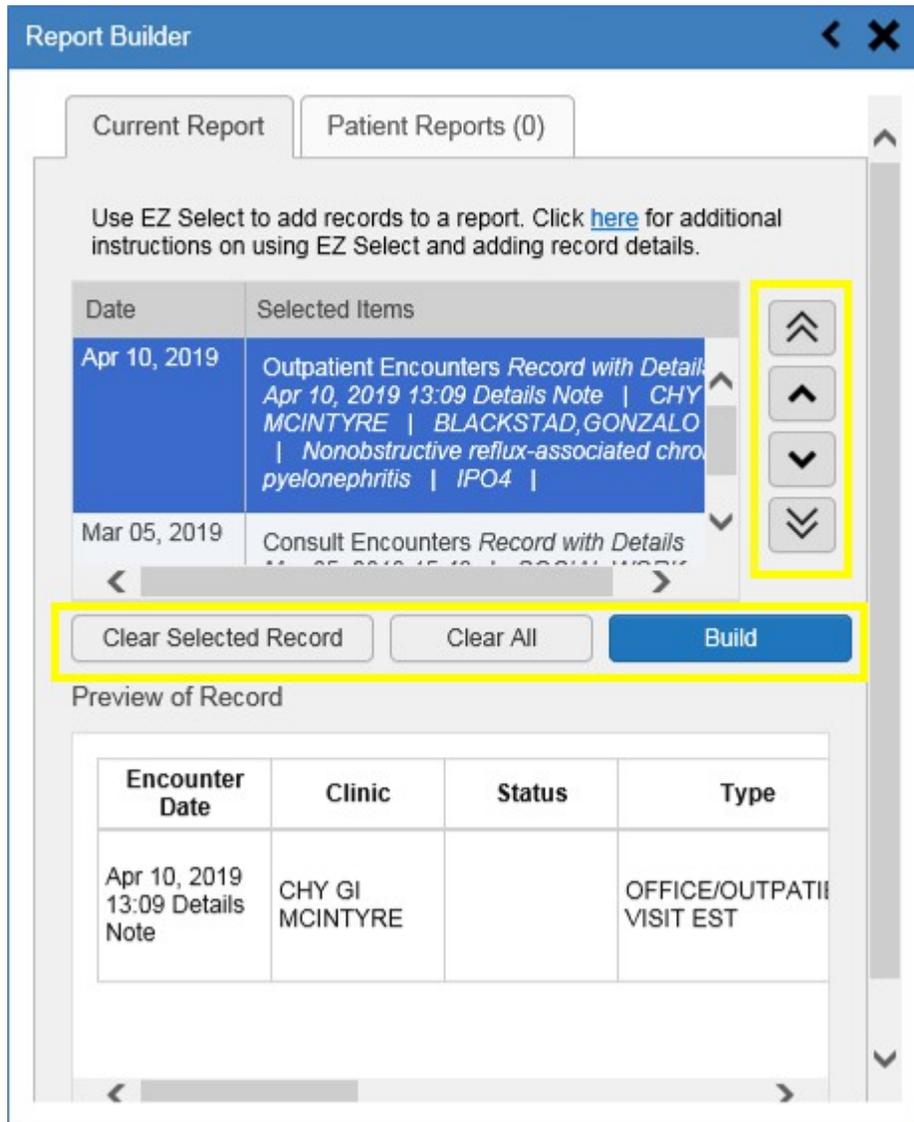
The **Patient Reports** tab ([Figure 28](#)) presents a list of all completed reports, the status of the report generation progress, the date the report expires, and a hyperlink to the contents of the completed report.

Actions within widgets to add patient data can be performed when the Report Builder is open on the Patient Portal or when it is closed. CV enforces a maximum number of 50 records per report.

### 3.3.2. Generating a Report

The selected records appear in the **Report Builder** pane ([Figure 26](#)).

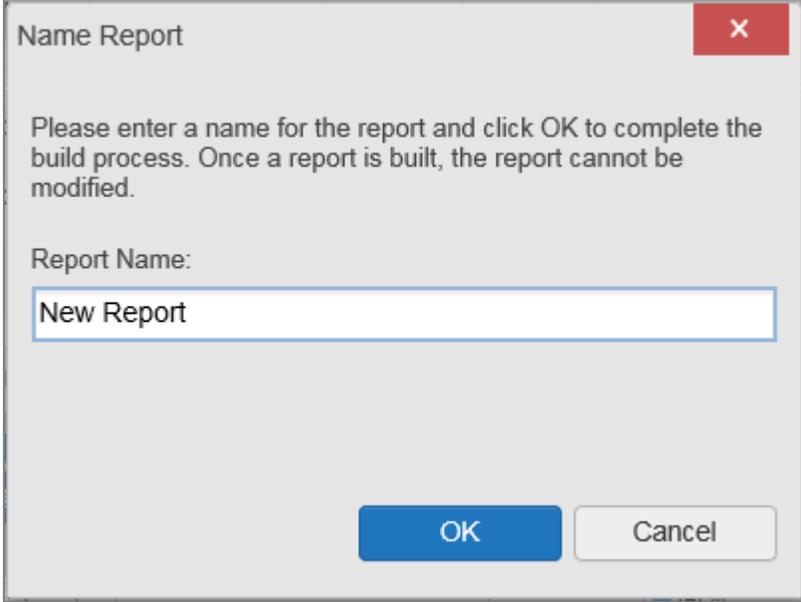
**Figure 26: Report Builder Current Report Tab**



1. Use the navigation arrows to the right of the listed records to arrange the records in the desired order in the generated report
  - a. Records can be removed by clicking **Clear Selected Record** or **Clear All**
2. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane
3. Click **Build** to validate the selected records and prepare the report

- a. If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column
  - b. If a record cannot be added to the report, an **Error** notation appears next to the record
4. Name the report when prompted and click **OK**

**Figure 27: Report Builder Name Report Dialog**



Name Report

Please enter a name for the report and click OK to complete the build process. Once a report is built, the report cannot be modified.

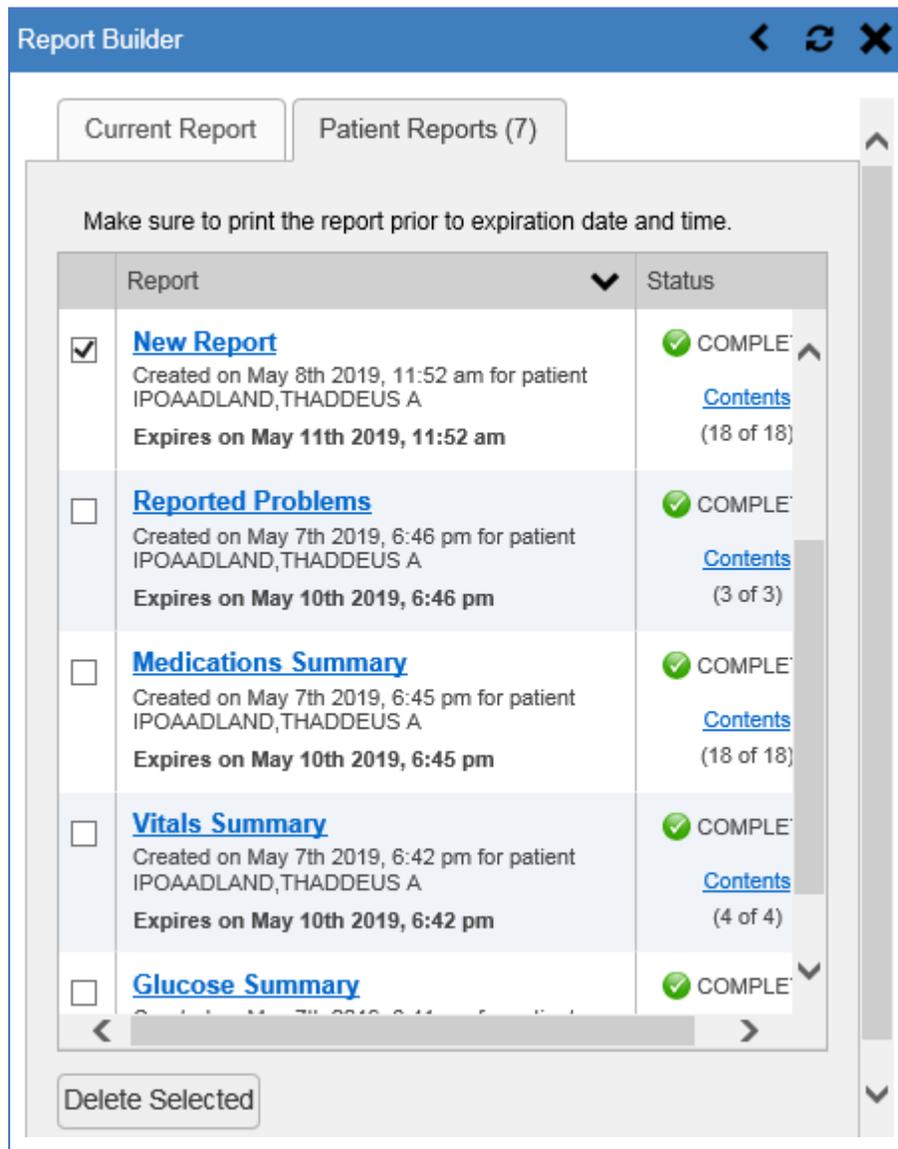
Report Name:

New Report

OK Cancel

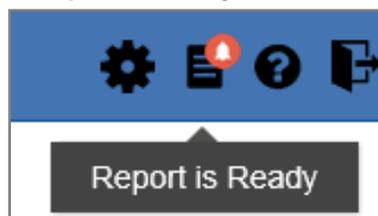
5. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column ([Figure 28](#))
6. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR*
  - a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
  - b. Both the *COMPLETED* and *ERROR* entries include a **Contents** link, which provides a list of the records that appear in the generated report

Figure 28: Report Builder Patient Reports Tab



- c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed
- d. A red icon appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed ([Figure 29](#))

Figure 29: Report is Ready Indicator on Toolbar

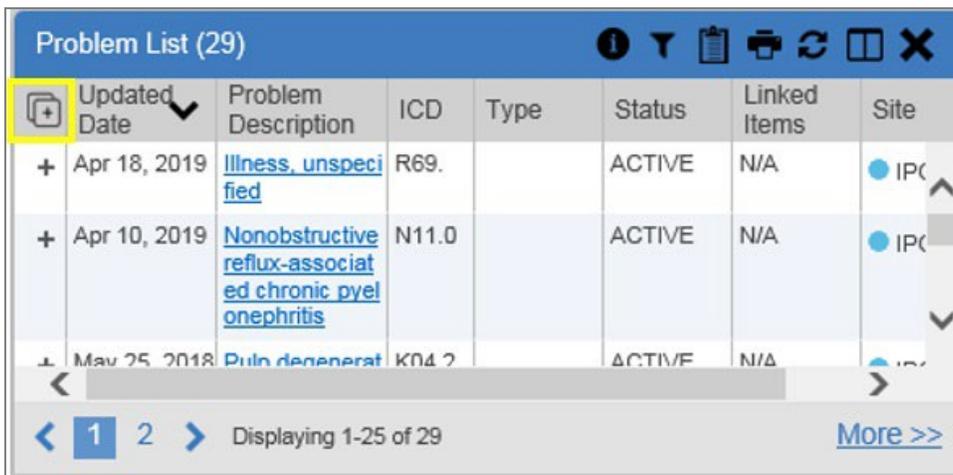


**i** **NOTE:** Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

### 3.3.2.1. Adding Multiple Records with EZ Select

EZ Select allows you to add all records displayed on a single page of a single widget to the Report Builder with one click. Click the **Select All**  icon at the top of the left column ([Figure 30](#)) to add data from all records shown in the widget's page display to the Report Builder, including the details and notes associated with the record. EZ Select is available from the minimized and expanded views as well as the **Patient Flags and Postings** dialog box.

**Figure 30: Report Builder Select All Icon**

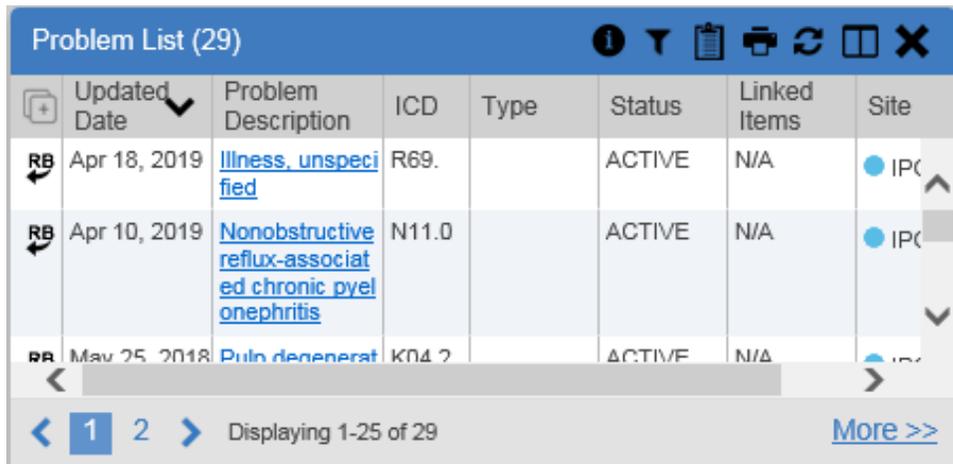


	Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
+	Apr 18, 2019	<a href="#">Illness, unspecified</a>	R69.		ACTIVE	N/A	IPC
+	Apr 10, 2019	<a href="#">Nonobstructive reflux-associated chronic pyelonephritis</a>	N11.0		ACTIVE	N/A	IPC
+	May 25, 2018	<a href="#">Pulmonary degeneration</a>	K04.2		ACTIVE	N/A	IPC

Displaying 1-25 of 29 [More >>](#)

The **Add to Report Builder**  icon in each row changes to the **Added to Report Builder**  icon to confirm the record has been added ([Figure 31](#)).

**Figure 31: All Records on a Single Widget Page Added to Report Builder**



	Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
	Apr 18, 2019	<a href="#">Illness, unspecified</a>	R69.		ACTIVE	N/A	IPC
	Apr 10, 2019	<a href="#">Nonobstructive reflux-associated chronic pyelonephritis</a>	N11.0		ACTIVE	N/A	IPC
	May 25, 2018	<a href="#">Pulmonary degeneration</a>	K04.2		ACTIVE	N/A	IPC

Displaying 1-25 of 29 [More >>](#)

### 3.3.2.2. Adding One Record

Click the **Add to Report Builder** **+** icon next to a record in a widget to add data from that record to the Report Builder, including the details and notes associated with the record. The **Add to Report Builder** **+** icon in the row changes to the **Added to Report Builder** **RB** icon to confirm the record has been added to the Report Builder ([Figure 32](#)). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

Figure 32: Single Record Added to Report Builder



	Date Record	Allergen	Site
+	Feb 16, 2016	<a href="#">CHOCOLATE</a>	● IPO4
RB	Jun 09, 2015	<a href="#">PEANUTS</a>	● IPO4
+	Jun 09, 2015	<a href="#">CAFFEINE</a>	● IPO4
+	Dec 03, 2014	<a href="#">CYLEX</a>	● IPO5
+	Dec 02, 2014	<a href="#">TYLENOL</a>	● IPO5

Displaying 1-13 of 13 [More >>](#)

### 3.3.2.3. Adding Only Record Details or Notes

When adding records to a report using the **Select All** **+** icon or the **Add to Report Builder** **+** icon in the widget, CV adds the data displayed in the widget, as well as any details and notes associated with the record by default. This applies to both the minimized and expanded widget views, and the **Patient Flags and Postings** dialog box. If you would like to add just the details and notes or the record row data:

1. Select and hold the **Add to Report Builder** **+** icon to access these options
1. Select **Add Detail** or **Add Detail/Note** to add the details and/or notes associated with the record as well as the record row data to the Report Builder ([Figure 33](#))
2. Select the **Add Record Row** option to add only the data displayed in the widget display for that record and not the information provided in the details and/or notes

**Figure 33: Add Detail and Add Record Row Dropdown**

Encounter Date	Clinic	Provider	Diagnosis	Image	Site
Mar 03, 2003	ZZHAYNES	LEMLE, ANTHONY	HEALTH EXAMINATION OF DEFINED SUBPOPULATIONS		IPO3
Apr 03, 2003 13:30	CHY UROLOGY	MCBROWN, REUBEN M	NOCTURIA		IPO3
Apr 03, 2003 14:08	ZZCHY PHARMACY	SCANTLIN, RENAJA	OTHER SPECIFIED COUNSELING		IPO3
Apr 10, 2003 13:30	ZZCHY C&P	ESCHRICH, CORINNE L	HEALTH EXAMINATION		IPO3

**i** **NOTE:** Once you add a record to Report Builder using either the **Add to Report Builder +** icon, **Add Detail/Note**, or **Add Record Row** option, you cannot change the record data included in the report without first clearing the record from the report and adding it again.

### 3.3.2.4. Adding Patient Demographics

Clicking the **Add to Report Builder +** icon in the upper right corner of the **Demographics** widget adds the patient's demographics details for that site to the Report Builder ([Figure 34](#)). The **Add to Report Builder +** icon changes to the **Added to Report Builder** icon to confirm the demographics data has been added. Click additional site tabs within the **Demographics** widget and repeat as desired to add demographics details from other sites within the patient's health record.

Figure 34: Demographics Widget's Add to Report Builder Icon



### 3.3.3. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab ([Figure 28](#)) -OR-
2. Click the **Contents** link in the **Status** column of the **Patient Reports** tab to open a list of the records included in the report in the **Report Contents** window ([Figure 28](#)) -OR-
3. Click the blue, hyperlinked report name in the **Report Contents** window ([Figure 35](#))

Figure 35: Report Contents Dialog

Record	Status
Lab Panel Results <i>Record with Details</i> Oct 03, 2018 18:06   GLUCOSE   IPO4	✓ READY
Lab Panel Results <i>Record with Details</i> May 18, 2014 23:30   UA GLUCOSE   IPO5	✓ READY
Lab Panel Results <i>Record with Details</i> Aug 13, 2013 22:44   GLUCOSE   IPO5	✓ READY
Lab Panel Results <i>Record with Details</i> Aug 06, 2010 09:55   GLUCOSE   IPO3	✓ READY

- i** **NOTE:** The Report Builder prints the report content to a file in PDF format. It is recommended that you have the latest Adobe Reader installed on the system from which you access CV to utilize the Report Builder and other CV features.

The report opens in a standalone browser tab. Reports are available until the expiration date and time shown. If necessary, print the report before the report expires.

- i** **NOTE:** If you closed the Report Builder while a report was *IN PROGRESS*, a report ready indicator (📄) appears over the Report Builder icon in the top corner of the CV portal when the report is available. Clicking 📄 opens the Report Builder.
- i** **NOTE:** Clicking **Synchronize Available Reports** (🔄) in the upper right corner of the Report Builder (when open to the **Patient Reports** tab) synchronizes the list of reports shown with the Report Builder Service so that all available reports are displayed.

### 3.3.4. Deleting a Report

1. Select the checkbox to the left of the report name on the **Patient Reports** tab ([Figure 28](#))
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion

## 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.

### 3.4.1. Keyboard Focus and Portal Navigation in the Accessible Theme

Keyboard focus is the highlighting of portal elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The portal 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 UI 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 portal elements. A complete list of accessible keystrokes is provided in [Table 1](#).

**Table 1: Accessible Keystrokes**

Keystroke	Description
<b><i>Application and Portal Navigation</i></b>	
<b>Alt + 4</b>	Press to transfer keyboard focus to the main or top portal element: Focus is transferred to the <b>Provider Portal</b> 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 <b>Close (X)</b> icon.
<b>ENTER</b>	Press to transfer keyboard focus to the highlighted widget.
<b>TAB</b>	Press to transfer keyboard focus to other UI items.
<b>ESC</b>	Press to return keyboard focus to the pane containing the UI item with keyboard focus, or to exit a window, widget, or tab.
<b>SPACEBAR</b>	Press to activate any UI item (for example, click an icon).
<b>Arrow Keys</b>	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.
<b><i>Portal Tabs</i></b>	
<b>Arrow Keys</b>	Use the left and right arrow keys to navigate between tabs.

<b>TAB</b>	Press one or more times when focus is on a portal tab to place <b>Add Tab (+)</b> in keyboard focus. Add a Tab: 1) Press <b>Tab</b> until <b>Add Tab (+)</b> is in focus. 2) Press <b>Enter</b> . 3) The new tab dialog box opens and prompts you to enter a name for the new tab. 4) Tab to the <b>Add</b> button to confirm the new tab name or tab to the <b>Cancel</b> button to discard the new tab.
<b>ENTER</b>	Press while <b>Add Tab (+)</b> is in focus to add a new portal tab. A dialog box prompts you to enter a name for the tab.
<b>ESC</b>	Focus on a tab and press <b>Esc</b> to remove it.
<b>Windows and Dialog Boxes</b>	
<b>TAB</b>	Press <b>Tab</b> to move keyboard focus through the items within the window.
<b>Adding Widgets to the Portal Pages</b>	
<b>Alt + 1, 2, or 3</b>	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 <b>Alt + 1, 2, or 3</b> , depending on the desired column.

### 3.4.2. Using Report Builder in the Accessible Theme

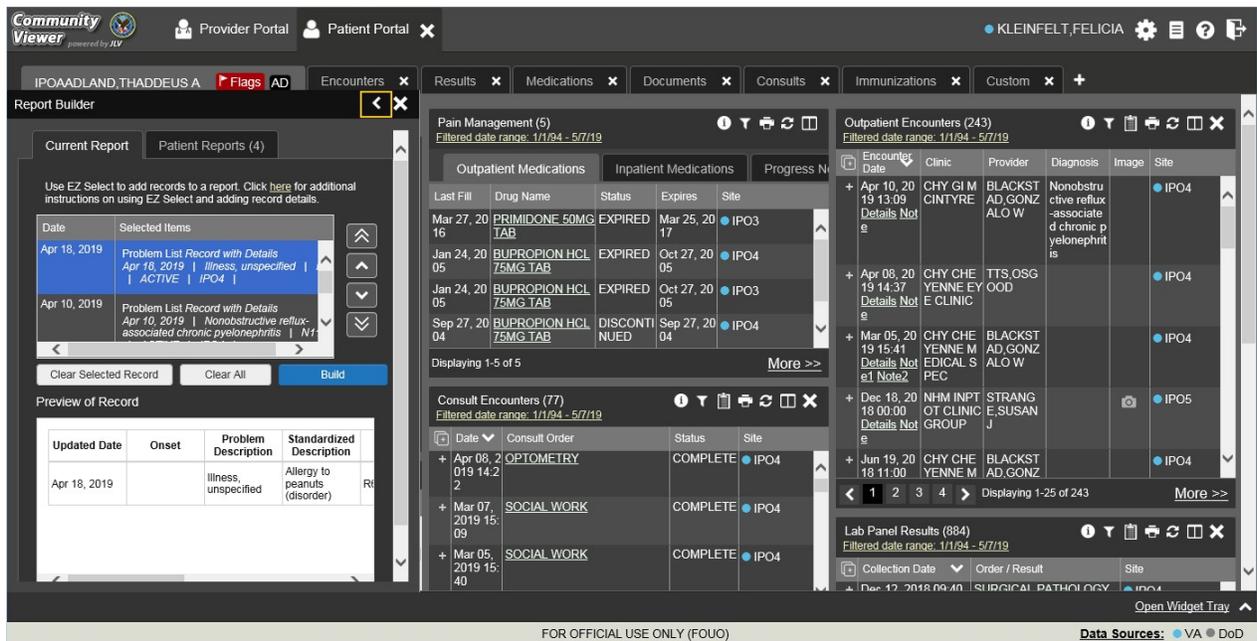
The **Report Builder**  allows you to build a custom report of multiple patient records displayed in CV (including patient demographics, supported documents, record details, and record notes) and exports the contents of the records to a single report. Use keystroke navigation to place the **Report Builder**  button in focus and press **Enter** to open the Report Builder.

There are multiple ways to add records and other patient data to a report. Actions can be performed within the widgets to add patient data when the Report Builder is open on the Patient Portal ([Figure 36](#)) or when the Report Builder is closed or minimized on the Portal. The Report Builder can be minimized by pressing **Enter** when the **left arrow** button is in focus, as shown in the example below. This action collapses the Report Builder on the left side of the portal.

Closing the window with the **Close**  button removes the Report Builder from the portal.

Use keystrokes to navigate between elements on the **Current Report** tab (open in the following example). When an element is in focus, press **Enter** to perform the action.

Figure 36: Report Builder in Accessible Theme



Jump between the **Current Report** tab and the **Patient Reports** tab using the left and right arrow keys when either tab is in focus. Tasks performed on the **Patient Reports** tab include:

- Open reports by pressing **Tab** until focus is on the report name within the **Report** column and press **Enter**. This action opens a report in a standalone window
- View report contents by pressing **Tab** until focus is placed on the **Contents** link in the **Status** column; once the link is in focus, press **Enter** to open an additional window detailing report content
- Delete reports by pressing **Tab** until the focus is placed on the checkbox in the left column of a report; check the box and then press **Tab** until the **Delete Selected** button is in focus and press **Enter**

### 3.5. Printing

The data list of a widget in either minimized or expanded view, the details window of a widget, and reports created in **Report Builder** can be printed.

Click the **Print** icon  on the desired widget's toolbar to print the data list of a widget in either minimized or expanded view.

Click the **Print** icon  on the details window's toolbar to print the details window of a widget.

Click the (PDF) **Print** icon within the report window to print a report created in **Report Builder**.

**i** **NOTE:** Each report generated using **Report Builder** includes this disclaimer: *The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws.*

## 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.

**i** **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 37](#). The widgets presented are **Patient Demographics**, **Problem List**, **Allergies**, **Outpatient Medications**, **Pain Management**, **Consult Encounters**, **Progress Notes**, **Outpatient Encounters**, **Lab Panel Results**, and **Vitals**.

Figure 37: Widget Display on the Patient Portal

The screenshot displays the Patient Portal interface for patient IPOAADLAND, THADDEUS A. The interface is organized into several widgets and tabs. The top navigation bar includes the Community Viewer logo, user information (KLEINFELT, FELICIA), and various utility icons. Below the navigation bar, there are tabs for Encounters, Results, Medications, Documents, Consults, and Immunizations. The main content area is divided into several sections:

- Patient Demographics:** Displays patient information including address (4206 NEW HAMPTON CT, FORT COLLINS, COLORADO 80525), SSN (101936540), Age (74), DOB (23 Oct 1944), Race (White), PCN Name, PCN Date, and Birth Sex (M).
- Pain Management (5):** A table showing medication history with columns for Last Fill, Drug Name, Status, Expires, and Site. Medications listed include PRIMIDONE 50MG TAB, BUPROPION HCL 75 MG TAB, and BUPROPION HCL 75 MG TAB.
- Outpatient Medications:** A table showing medication history with columns for Last Fill, Drug Name, Status, Expires, and Site. Medications listed include BUPROPION HCL 75 MG TAB and BUPROPION HCL 75 MG TAB.
- Outpatient Encounters (243):** A table showing encounter history with columns for Encounter Date, Clinic, Provider, Diagnosis, Image, and Site. Encounters listed include visits to CHY GI MCI NTYRE, CHY CHEYE NNE EYE CL D, CHY CHEYE NNE MEDIC AL SPEC, NHM INPT O T CLINIC GR OUP, CHY CHEYE NNE MEDIC AL SPEC, and CHY CHEYE NNE MEDIC AL SPEC.
- Problem List (29):** A table showing problem list items with columns for Updated Date, Problem Description, ICD, Type, Status, Linked Items, and Site. Problems listed include illness, unspecified and Nonobstructive reflux-associate d chronic pyloro sphincteritis.
- Consult Encounters (77):** A table showing consult encounter history with columns for Date, Consult Order, Status, and Site. Consults listed include OPTOMETRY, SOCIAL WORK, SOCIAL WORK, SOCIAL WORK, and CP EGDPEG.
- Lab Panel Results (426):** A table showing lab panel results with columns for Collection Date, Order / Result, and Site.

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:** Outpatient Encounters, Appointments, and Progress Notes widgets
- **Results Tab:** Radiology Reports, Lab Panel Results, Procedures, Progress Notes, and Lab Results widgets
- **Medications Tab:** Allergies, Inpatient Medications, Orders, and Outpatient Medications widgets
- **Documents Tab:** Outpatient Encounters, Inpatient Summaries, and Progress Notes widgets
- **Consults Tab:** Consult Encounters, Inpatient Summaries, and Progress Notes widgets
- **Immunizations Tab:** Immunizations, Problem List, and Progress Notes widgets

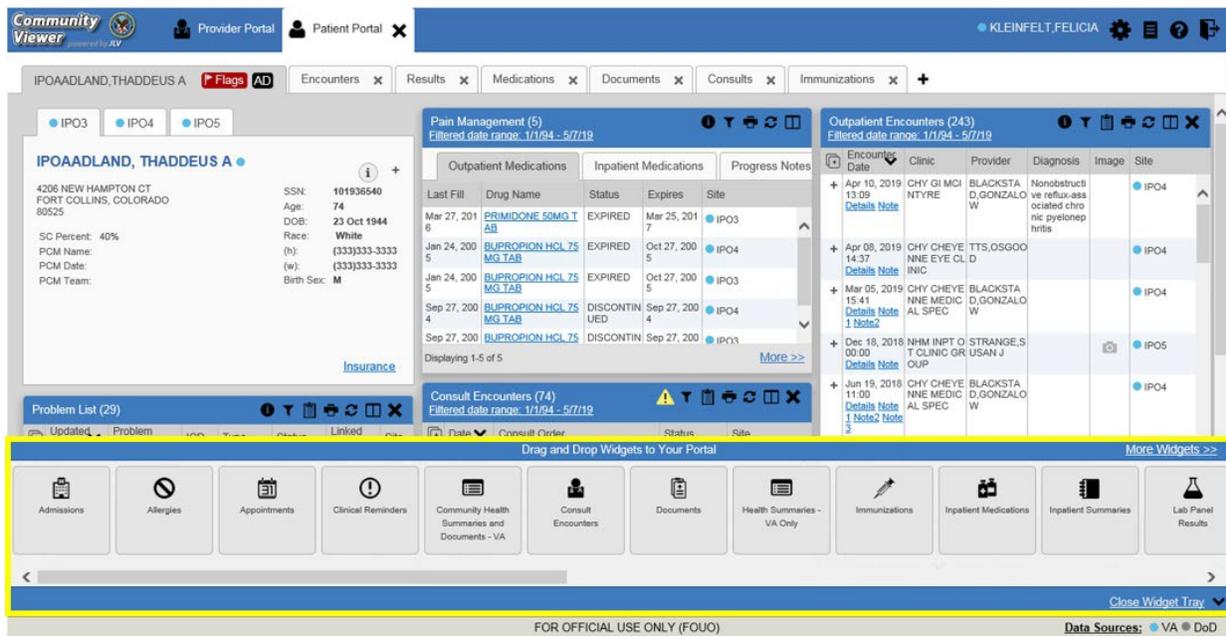
## 4.1. Accessing and Opening Widgets

[Figure 38](#) depicts the **Patient Portal** with an open **Widget Tray**, highlighted at the bottom of the portal. Click the **Open Widget Tray** link 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 tray navigation tools (**<< More Widgets** or **More Widgets >>**) placed above the tray or the arrows (**<** or **>**) placed below the tray icons in the lower left and right corners of the portal to view all available clinical domains in the widget tray. Clicking the arrows scrolls left to right or right to left through the tray.

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

**Figure 38: Widget Tray on the Patient Portal**



The list of widgets available for display on the **Patient Portal** is presented in a horizontal tray at the bottom of the portal (highlighted in [Figure 38](#)). Data from VA systems is available for the following VA clinical domains:

- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Community Health Summaries and Documents\*
- Consult Encounters
- Documents
- Health Summaries
- Immunizations
- Inpatient Medications
- Inpatient Summaries
- Lab Panel Results
- Lab Results
- MHS GENESIS\*
- Orders
- Outpatient Encounters
- Outpatient Medications
- Pain Management
- Problem List
- Procedures
- Progress Notes
- Questionnaires and Deployment Assessments\*
- Radiology Reports
- Social, Family, and Other Past Histories\*
- Surgery/Procedure Reports
- Vitals

#### 4.1.1. Sort and Filter Options

Widgets have a variety of methods to sort and filter data:

- Click a column title to sort records according to data in that column; an **up** or **down** arrow appearing next to the column title provides a visual indicator that a sort is applied to that column
  - If you sort a column that appears in both minimized and expanded views of the widget, the sort saves in your user profile and persists
  - If you sort a column that is only in the expanded view of the widget, your next session restores the default widget sort, or the last sort saved to your user profile.
  - If you sort a **Date** column that has some partial or missing date values, understand:
    - Dates that have month and year but lack a day are treated as though the day were “00” (e.g., July 2018 sorts between June 30, 2018 and July 01, 2018)
    - Dates that have a year only are treated as though the month is January and the day is “00” (e.g., 2018 sorts between December 31, 2017 and January 01, 2018)
- Click **Column Settings**  in the widget toolbar to hide or show the columns within the widget; check/uncheck the column names that appear in the pop-up box, and click **Apply**
- 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

Sort and filter capabilities are specific to the data presented in each widget and may vary between the minimized and expanded views of an individual widget or between widgets. Select **All** from the **Filter by...** dropdown to undo an individual filter, or click the **Remove All Filters** link shown in each widget to undo all filters.

Some widgets also have the capability to configure data to display multiple records of the same type in a graph or table view. See [Lab Results Table View](#) and [Lab Results Graph View](#) for more information.

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\* While available in the widget tray, some widgets display “*Data source not enabled*” or a connectivity error until data sources are connected in a future release.

### 4.1.1.1. Setting Multiple Filters in Widgets

CV supports the application of multiple filters in any of the widgets with two or more *Filter by* options in the expanded view. The sequence in which the filters are applied impacts the data that displays in the widget. The second or subsequent filter selected is applied to the subset of data from the previous filter.

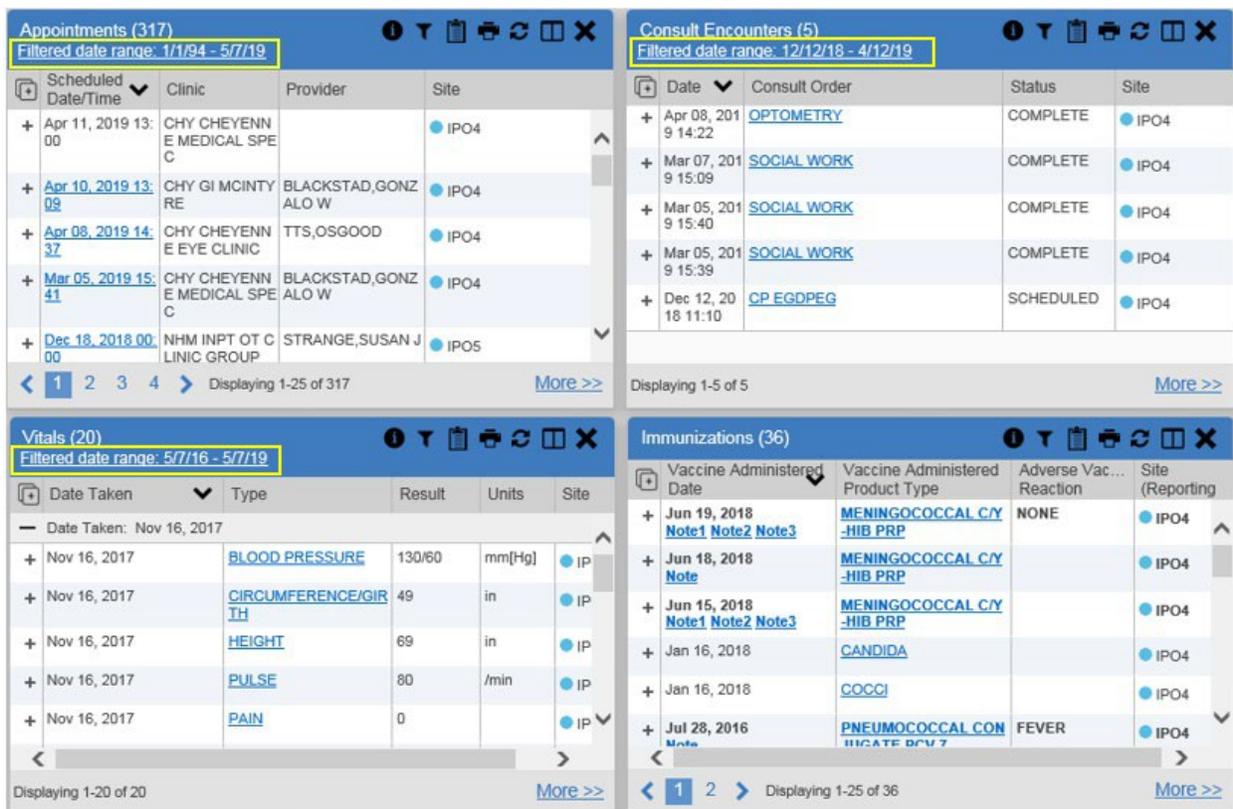
### 4.1.1.2. Date Range Filters

Patient data displayed within a widget can be filtered by date range, if date filters are available on the widget.

**i** **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.

If a date range filter is applied, the selected range is indicated in the widget header, below the title ([Figure 39](#)). Click the **Configure Filter** icon  or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed.

**Figure 39: Filtered Date Range Examples**



There are two ways to filter the date range of data displayed in a widget: The **Quick Date Range** filter and the **Start and End Date** filter. If the expected information does not appear in the widget display, use the date filter options to change the date range.

- i** **NOTE:** Changes made to the date range in a widget persist from minimized to expanded view, patient to patient, and session to session, until the widget is either removed or the date range is changed.
- i** **NOTE:** When looking for Essentris information associated with a specific admission in the Inpatient Summaries widget, expand your search date ranges to include additional days before and after the admission where possible. This includes preadmission notes as well as notes signed after the patient was discharged in the filtered widget display.

#### 4.1.1.2.1. Quick Date Range Filter

Use the preset, **Quick Date Range** filter to set or limit the display of patient records within a widget. This option is available by clicking the **Filtered Date Range** link, or by clicking the **Configure Filter** icon  in a widget on the **Patient Portal**.

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. The options represent time counting back from the present day (for example, selecting 2y displays only records within the last 2 years). Examples of preset date ranges include 1w (last 7 days), 6m (last 6 months), and 3y (last 3 years).

- i** **NOTE:** The **Quick Date Range** filter is contextual. If today is February 2, 2017, the preset filter counts backwards using that date. If today is April 16, 2017, the preset filter counts backwards using that date.

[Figure 40](#) highlights the **Quick Date Range** filter options in the expanded view of the **Appointments** widget.

**Figure 40: Quick Date Range Filters**

Appointments (7)  
 Filtered date range: 1/1/19 - 5/7/19

If the information you expect does not appear, expand the date range.

Start date: 01/01/2019 End date: 05/07/2019 Apply

1w 2w 1m 3m 6m 1y 2y 3y

Filter by Clinic Filter by Provider Specialty Filter by Site

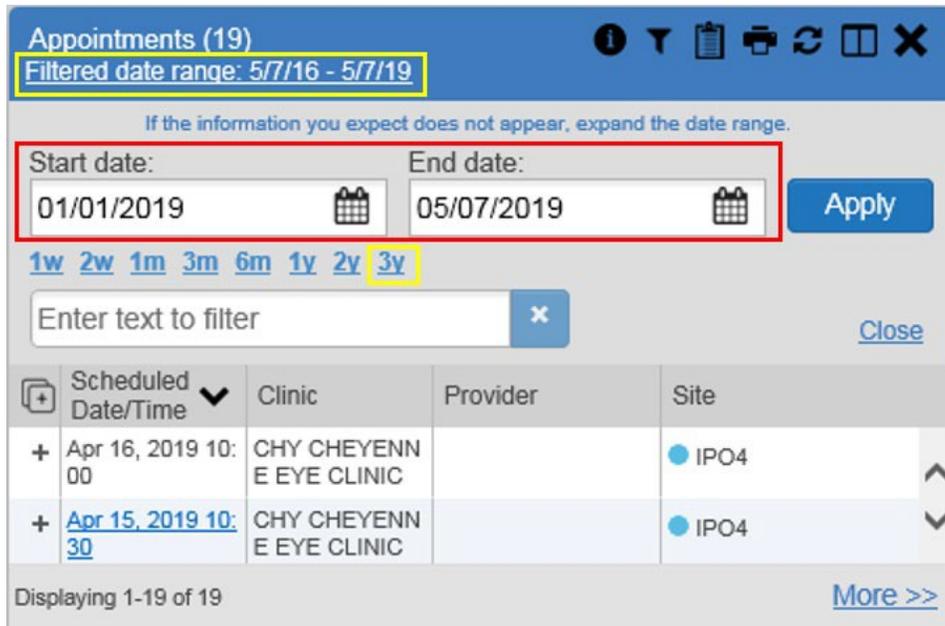
Enter text to filter Remove All Filters Close Filter

Scheduled Date/Time	Clinic	Provider	Provider Speci...	Appointment Status	Type	Reason	Site
+ Apr 16, 2019 10:00	CHY CHEYENNE EYE CLINIC						IPO4
+ Apr 15, 2019 10:30	CHY CHEYENNE EYE CLINIC				CHY CHEYENNE EYE CLINIC VISIT		IPO4
+ Apr 15, 2019 09:30	CHY GI MCINTYRE						IPO4
+ Apr 12, 2019 14:43	CHY CHEYENNE MEDICAL SPEC	SNYDER, JENNIFER L	Allopathic & Osteopathic Physicians		CHY CHEYENNE MEDICAL SPEC VISIT		IPO4
+ Apr 10, 2019 08:00	CHY GI MCINTYRE	BLACKSTAD, GONZALO W		NO-SHOW	REGULAR		IPO4
+ Mar 04, 2019 11:00	CHY GI MCINTYRE				CHY GI MCINTYRE VISIT		IPO4
+ Mar 04, 2019 0	CHY GI MCINTYRE	BLACKSTAD, GONZALO W		NO-SHOW	REGULAR		IPO4

Displaying 1-7 of 7 Show All

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. [Figure 41](#) shows a CCP restricted to records from 01/01/2019 to present, in this case 05/07/2019, which is shown by default in the **Start Date** and **End Date** fields. When the 3y **Quick Date Range** filter is applied, the **Filtered Date Range** shows the entire 3-year period (05/07/16 – 05/07/19), which includes the date range history the CCP is permitted to view. However, records between the **Filtered Date Range** start date and the day before the CCP’s permitted history start date (05/07/16–12/31/2018) will not display.

**Figure 41: Quick Date Range Filter (3y) Outside CCP's Permitted History Dates**



#### 4.1.1.2.2. Start and End Date Filter

VA Staff set a date filter to control the records within widgets seen by the CCP. The CCP can set additional display filters within the set range by clicking **Filter**  from the widget's toolbar. Use the **Start Date and End Date** filter to display data for a specific time range ([Figure 42](#)). The start and end date fields are available at the top of multiple widgets by clicking the **Filtered Date Range** link or the **Configure Filter** icon .

**i** **NOTE:** The **Start and End Date** filter is static. If the start date is set to June 2, 2018 and the end date is set to June 2, 2019, the data in that date range displays, no matter what today's date is.

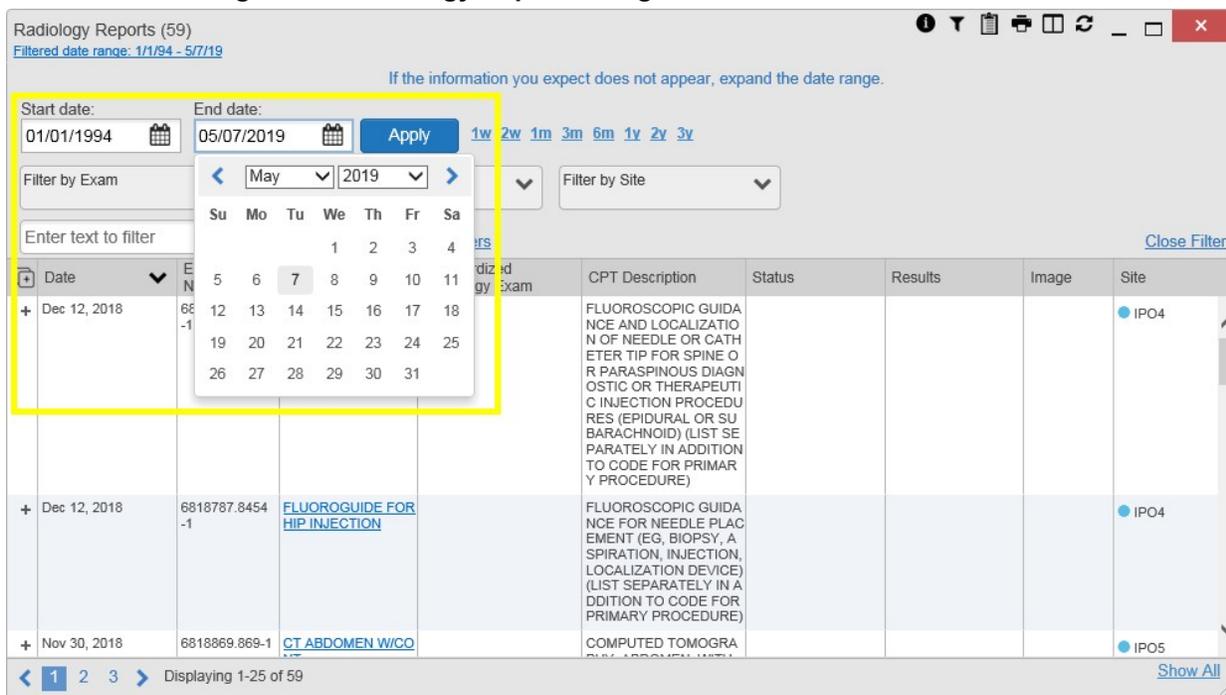
Figure 42: Lab Panel Results Widget Start and End Date Filters

The screenshot shows the 'Lab Panel Results (16)' widget. The header bar is blue and contains the title 'Lab Panel Results (16)', a subtitle 'Filtered date range: 6/2/18 - 6/2/19', and several icons (info, filter, clipboard, printer, refresh, expand, close). Below the header, a message reads: 'If the information you expect does not appear, expand the date range.' The date filter section is highlighted with a yellow box and contains two input fields: 'Start date:' with the value '06/02/2018' and 'End date:' with the value '06/02/2019'. Each field has a calendar icon to its right. An 'Apply' button is located to the right of these fields. Below the date filters are time range options: '1w', '2w', '1m', '3m', '6m', '1y', '2y', and '3y'. A search bar with the placeholder 'Enter text to filter' and a close button is also present. The main content is a table with the following columns: 'Collection Date', 'Order / Result', and 'Site'. The table contains three rows of data, with the first two rows expanded. The first row shows 'Dec 12, 2018 09:40' for the collection date, 'SURGICAL PATHOLOGY' for the order/result, and 'IPO4' for the site. The second row shows 'Oct 03, 2018 18:06' for the collection date, 'TOT. BILIRUBIN' for the order/result, and 'IPO4' for the site. The third row is partially visible, showing 'Oct 03, 2018 18:06' for the collection date and 'SGPT (ALT)' for the order/result. At the bottom of the table, it says 'Displaying 1-16 of 16' and a 'More >>' link.

Collection Date	Order / Result	Site
Dec 12, 2018 09:40	<a href="#">SURGICAL PATHOLOGY</a>	● IPO4
Oct 03, 2018 18:06	<a href="#">TOT. BILIRUBIN</a>	● IPO4
Oct 03, 2018 18:06	<a href="#">SGPT (ALT)</a>	● IPO4

[Figure 43](#) provides an example of the start and end date filter fields in the expanded view of the **Radiology Reports** widget.

**Figure 43: Radiology Reports Widget Start and End Date Calendar**



1. Click the **Calendar** icon  next to **Start Date**
2. Select a month, day, and year start date for the display filter

**i** **NOTE:** The custom date range option requires that a specific day is selected within the calendar. The custom date range does not apply if no day is selected.

3. Click the **Calendar** icon  next to **End Date**
4. Select the month, day, and year end date for the display filter
5. When both a start and end date have been chosen, click **Apply**

The widget refreshes and displays only the records that fall within the custom date range. The date range in use is displayed in the widget header.

#### 4.1.1.3. Text Filter

Clinical data widgets on the **Patient** portal and the **Patient Flags and Postings** dialog box provide a text search filter option, allowing you to quickly locate relevant patient data using keywords or characters ([Figure 44](#)). Text filters are performed on the information displayed in all columns within a widget, including hidden columns. Searches are not performed on notes, attachments, or details associated with patient records.

Figure 44: Vitals Widget Text Filter

Vitals (9)  
Filtered date range: 9/1/17 - 5/7/19

If the information you expect does not appear, expand the date range.

Start date: 09/01/2017 End date: 05/07/2019 Apply

1w 2w 1m 3m 6m 1y 2y 3y

Enter text to filter x Close

Date Taken	Type	Result	Units	Site
Nov 16, 2017	BLOOD PRESSURE	130/60	mm[Hg]	IP

Displaying 1-9 of 9 More >>

Click the **Configure Filter**  icon in the minimized view of a widget to display the **Enter text to filter** field. If the filter options are not displayed in the expanded view of the widget, clicking the **Configure Filter**  icon also opens the filter options. Keep in mind:

- Text filtering applies only to one widget
- Text filters are performed within the subset of filtered data if a date range filter or other dropdown filters are applied within the widget
- Text filters are performed on the information displayed in all columns within a widget, including columns that are hidden in minimized view; thus, filter terms entered in minimized view may display results from column data that is visible only in expanded view
- All records across the widget pages are filtered if the widget has multiple page views
- The **Enter text to filter** field is not case sensitive and allows up to 25 characters, including numeric and special characters
- Text filtering is not available in the **Demographics** widget

## 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 45](#).

**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.
	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.
<b><u>More &gt;&gt;</u></b>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.
<b>[record range] of [record total]</b>	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of records for that widget.
<b>Show All/Show Paged</b>	Display Setting	Click <b>Show All</b> to open all records for a given widget in a scrollable window. Click <b>Show Paged</b> 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 37](#)).

 **NOTE:** Some of the column headings appear in an abbreviated manner in minimized view because the widgets are width-constrained. Click and drag the column header to resize the columns in minimized or expanded view

Click the **More >>** link at the bottom of the widget in minimized view to launch the expanded view ([Figure 45](#)), which 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 45: Expanded View Widget Display**

Order Number	Order Start Date	Order Stop Date	Drug Name	Standardized Drug Name	Status	Ordering HCP	Ordering HCP Specialty	Schedule	Quantity	Site
- Order Number: 7226631										
+ 7226631	Nov 16, 2017 2 1:30	Feb 14, 2018 0 0:00	<a href="#">NIIACIN (SLO-NIACI N) 500MG TAB_SA</a>		PENDING	CHAPALAMADUG U,SIREESHA	Allopathic and Os teopathic Physi cians	Give: 500MG PO TID		IPOS
- Order Number: 7226588										
+ 7226588	Nov 15, 2017 2 1:00		<a href="#">ACETAMINOPHEN 325MG TAB</a>	Acetaminophen 325 MG Oral Tablet	PENDING	CHAPALAMADUG U,SIREESHA	Allopathic and Os teopathic Physi cians	Give: 325MG PO BID		IPOS
- Order Number: 7226587										
+ 7226587	Nov 15, 2017 2 1:00		<a href="#">ACARBOSE 25MG TAB</a>	Acarbose 25 MG Oral Tablet	PENDING	CHAPALAMADUG U,SIREESHA	Allopathic and Os teopathic Physi cians	Give: 25MG PO BID		IPOS
- Order Number: 7226586										
+ 7226586	Nov 15, 2017 1 1:13	Feb 13, 2018 0 0:00	<a href="#">ACETAZOLAMIDE 250MG TAB</a>	Acetazolamide 250 MG Oral Tablet	ACTIVE: H OLD	CHAPALAMADUG U,SIREESHA	Allopathic and Os teopathic Physi cians	Give: 250MG PO TID		IPOS

#### 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 37](#))
  - 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.

**i** **NOTE:** Records previously added to a report remain in the Report Builder after a widget refresh. Clicking **Refresh**  in the widget refreshes the widget data display and resets the state of the **Added to Report Builder**  icon in the left column **Add to Report Builder**  icon, even if the record has been added to the Report Builder.

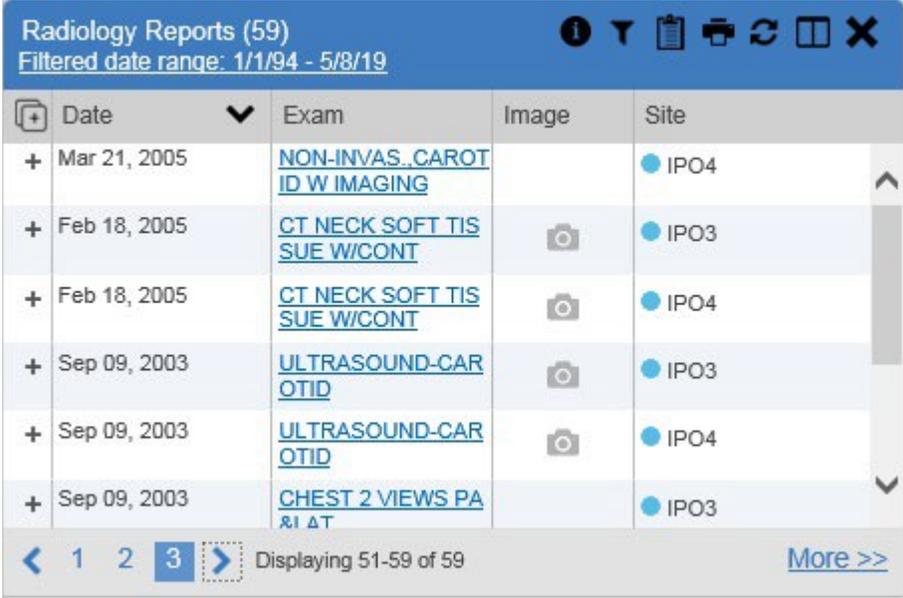
## 4.6. Nondiagnostic Images

Nondiagnostic images are available in JPEG and PDF formats in the **Documents, Outpatient Encounters, Procedures, Progress Notes, Radiology Reports, and Surgery/Procedure Reports** widgets, in addition to the **Progress Notes** tab of the **Pain Management** widget.

When a **Camera** icon  appears in the **Image** column ([Figure 46](#)), one or more images are associated with that record.

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

**Figure 46: Nondiagnostic Images in the Minimized View of the Radiology Reports Widget**

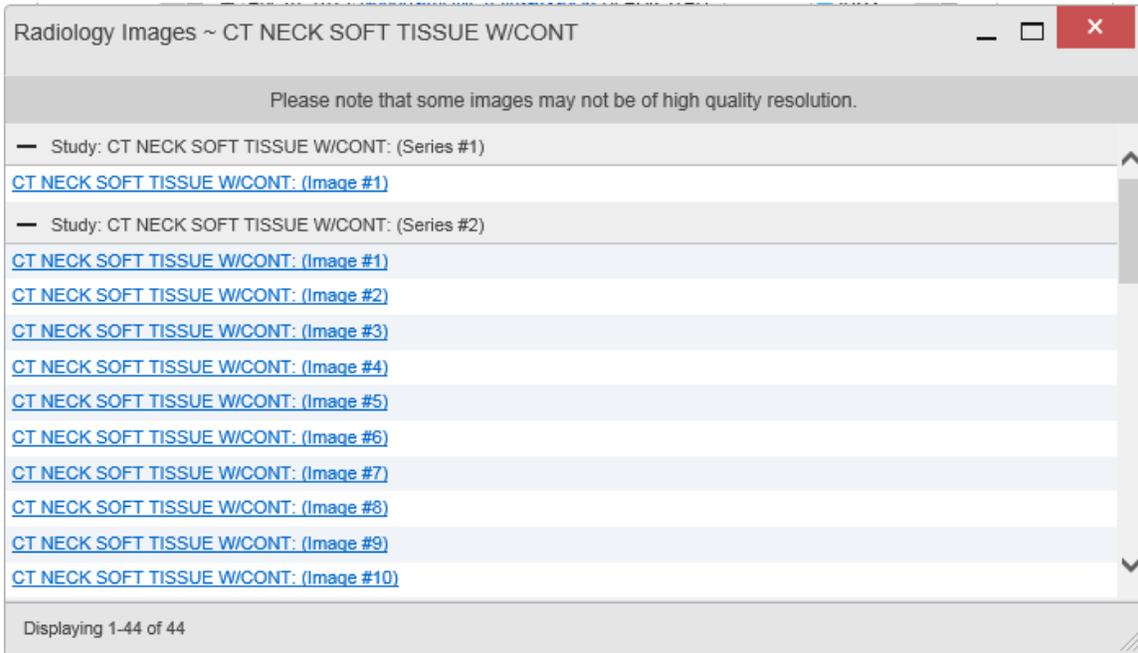


Radiology Reports (59) Filtered date range: 1/1/94 - 5/8/19					
	Date	Exam	Image	Site	
+	Mar 21, 2005	<a href="#">NON-INVAS_CAROT ID W IMAGING</a>		● IPO4	^
+	Feb 18, 2005	<a href="#">CT NECK SOFT TIS SUE W/CONT</a>		● IPO3	
+	Feb 18, 2005	<a href="#">CT NECK SOFT TIS SUE W/CONT</a>		● IPO4	
+	Sep 09, 2003	<a href="#">ULTRASOUND-CAR OTID</a>		● IPO3	
+	Sep 09, 2003	<a href="#">ULTRASOUND-CAR OTID</a>		● IPO4	
+	Sep 09, 2003	<a href="#">CHEST 2 VIEWS PA &amp; L AT</a>		● IPO3	v

1 2 3 > Displaying 51-59 of 59 [More >>](#)

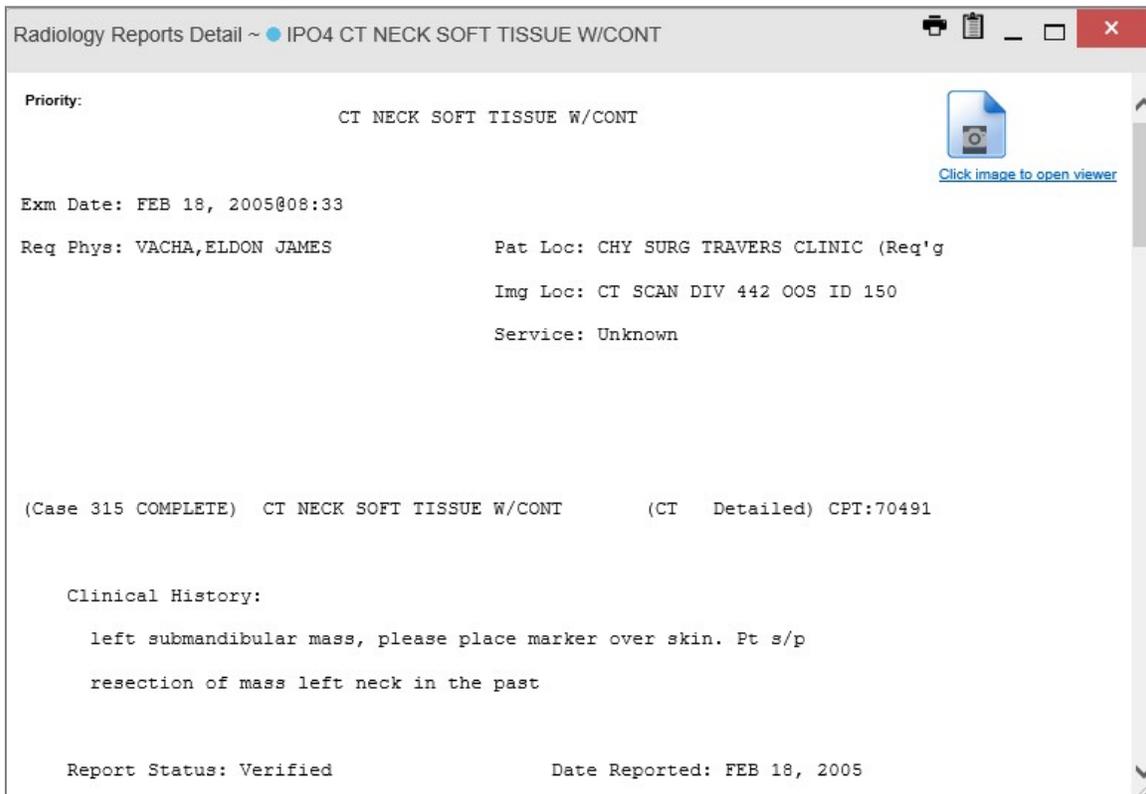
Click the **Camera** icon  to display a list of link(s) to the image(s) ([Figure 47](#)). Click the hyperlinked name of the image to open it.

**Figure 47: Multiple Nondiagnostic Radiology Images**



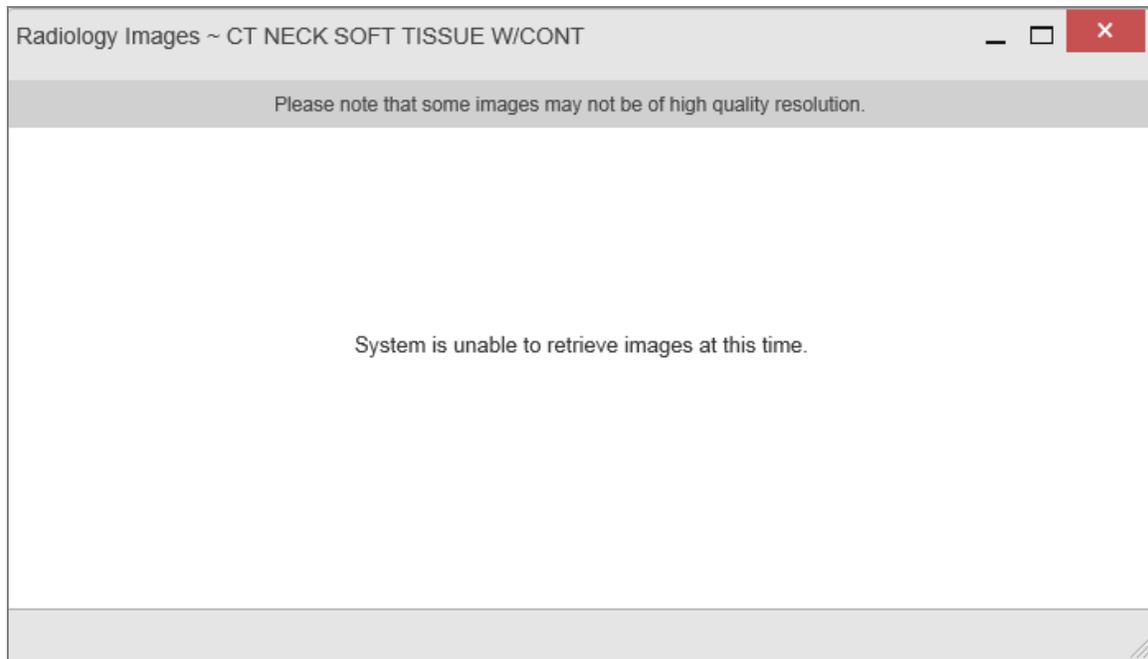
When in **Detail** view ([Figure 48](#)), click the **Click image to open viewer** link to open the associated image.

**Figure 48: Nondiagnostic Images in the Radiology Reports Detail View**



If an image is temporarily unavailable, users may see the message: “System is unable to retrieve images at this time” (Figure 49).

**Figure 49: Radiology Images Unable to Retrieve Images Error**



## 4.7. 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.

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

### 4.7.1. Patient Demographics

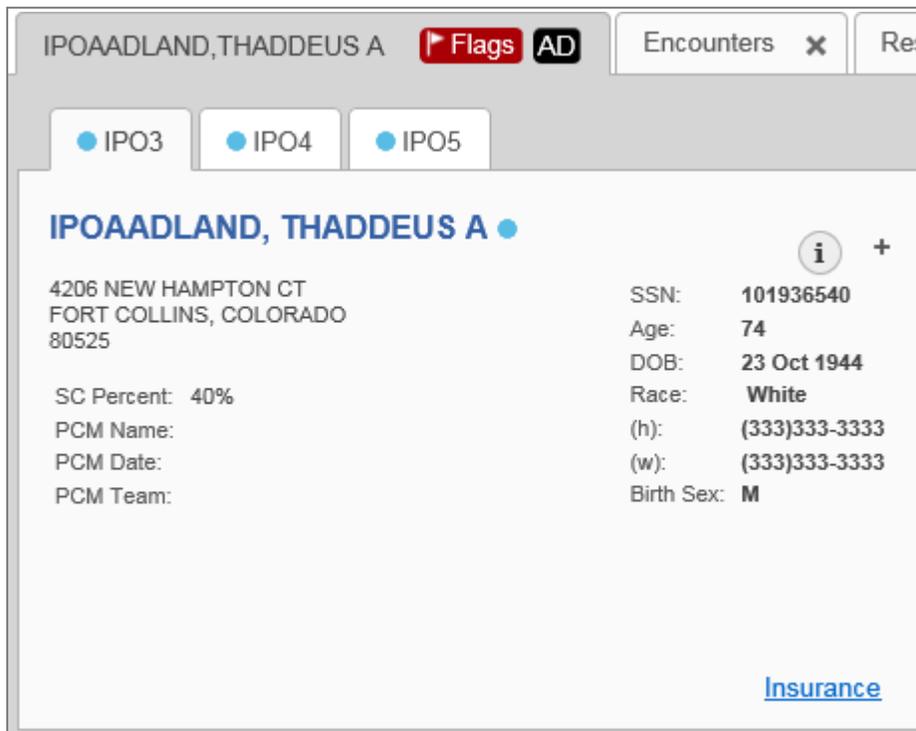
A summary of the patient's demographics (personal data) appears in the upper left section of the **Patient Portal** (Figure 50). This static widget cannot be removed from the **Patient Portal** or moved to a different position. The tabs above the patient's name provide the patient's demographics summary 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.

When the **Flags** icon appears in the right corner of the **Demographics** widget, click the **Flags** icon to display information on the **Patient Flags and Postings** dialog, which only displays if there are alerts on the patient's record.

The **Advanced Directives** icon launches the **Advanced Directives** dialog. The icon displays gray and does not launch the **Advanced Directives** dialog if there are no advanced directives on the patient’s record.

**Figure 50: Patient Demographics Widget**



#### 4.7.1.1. 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.

#### 4.7.1.2. 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 50](#)). Click the **Insurance** link in the **Demographics** widget to open a separate window that displays detailed 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.

## 4.7.2. Pain Management

The **Pain Management** widget ([Figure 51](#)) 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 **Pain Management** widget is a static widget permanently positioned to the right of the **Demographics** widget on the **Patient Portal** ([Figure 37](#)). The default instance of the **Pain Management** widget cannot be moved or removed.

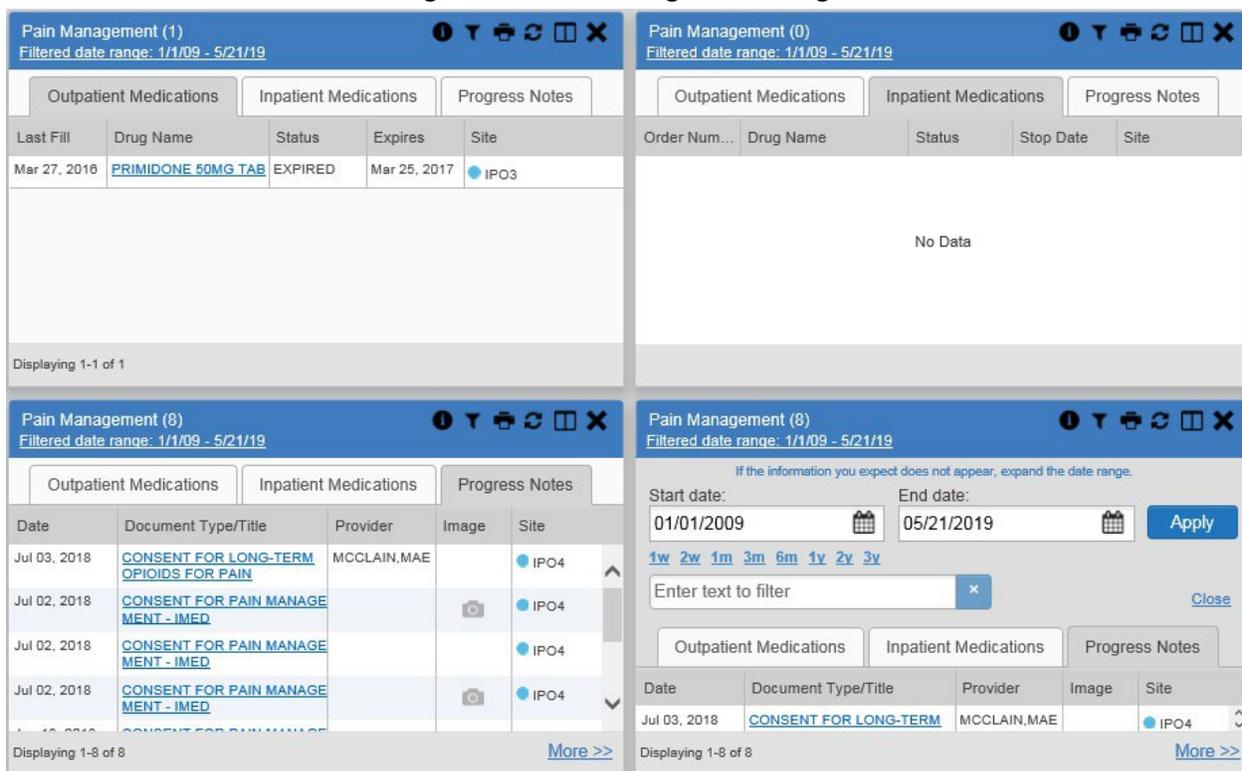
**i** **NOTE:** Multiple instances of the **Pain Management** widget can be added to any tab, including the **Patient Portal**. This allows for multiple views of the same pain management data ([Figure 51](#)). These additional instances of the widget can be moved or removed.

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

**i** **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 51: Pain Management Widget**



### 4.7.3. Outpatient Medications

The **Outpatient Medications** widget ([Figure 52](#)) displays active outpatient medication information. The information is displayed in reverse chronological order by the last fill order date. Click the **Outpatient Medications** icon in the widget tray, drag it to the desired location on the portal, and drop it to open the widget.

Click **Rx** () from the widget toolbar in minimized or expanded view to convert the active medications data within the widget to text for display within a separate window.

**Figure 52: Outpatient Medications**

Last Fill	Drug Name	Status	Expires	Site
Apr 16, 2019	<a href="#">ACETAMINOPHEN 160MG/5ML ALC-F LIQUID</a>	DISCONTINUED	Apr 16, 2019	IPC
Apr 16, 2019	<a href="#">ACETAMINOPHEN 160MG/5ML ALC-F LIQUID</a>	ACTIVE	Apr 16, 2020	IPC
Feb 14, 2019	<a href="#">SIMVASTATIN 10MG TAB</a>	ACTIVE: NON-VERIFIED	Feb 15, 2020	IPC
Jun 19, 2018	<a href="#">MENINGOCOCCAL POLY (MENOMUNE) INJ</a>	DISCONTINUED	Jun 19, 2018	IPC

#### 4.7.3.1. 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
- Prescription Number
- Sig
- Quantity
- Days' Supply
- Refills Left
- Status
- Ordering Health Care Provider (HCP)
- Ordering HCP Specialty
- Expires

- Site

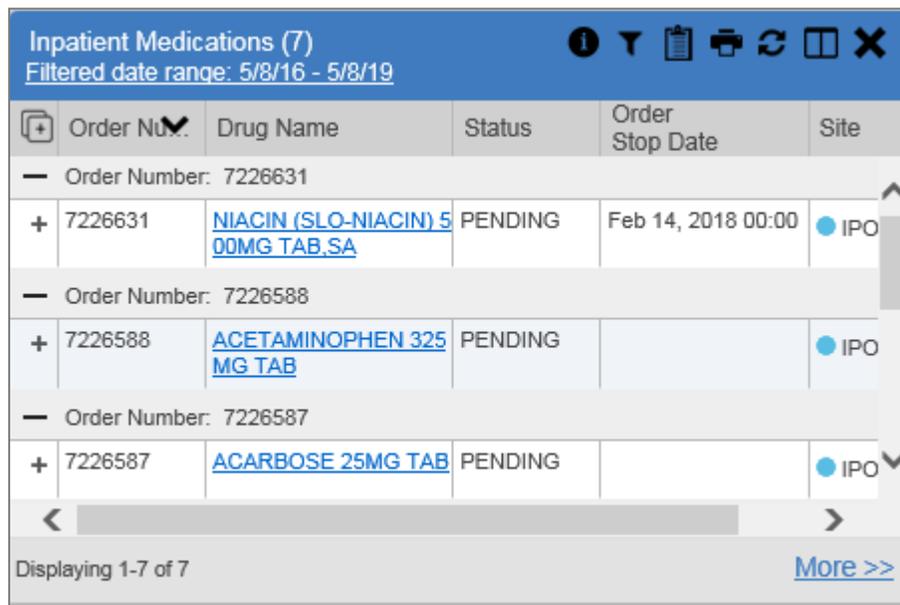
#### 4.7.3.2. Viewing Outpatient Medication Details

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.

#### 4.7.4. Inpatient Medications

The  **Inpatient Medications** widget ([Figure 53](#)) displays inpatient medication information. The medications are grouped by the order number, where available. Click the **Inpatient Medications** icon in the widget tray, drag it to the desired location on the portal, and drop it to open the widget.

**Figure 53: Inpatient Medications Widget**



Order Nu	Drug Name	Status	Order Stop Date	Site
- Order Number: 7226631				
+ 7226631	<a href="#">NIACIN (SLO-NIACIN) 500MG TAB,SA</a>	PENDING	Feb 14, 2018 00:00	● IPO
- Order Number: 7226588				
+ 7226588	<a href="#">ACETAMINOPHEN 325MG TAB</a>	PENDING		● IPO
- Order Number: 7226587				
+ 7226587	<a href="#">ACARBOSE 25MG TAB</a>	PENDING		● IPO

Displaying 1-7 of 7 [More >>](#)

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

#### 4.7.4.1. Inpatient Medications Widget Data

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

- Order Number<sup>†</sup>
- Drug Name
- Status
- Order Stop Date
- Site

<sup>†</sup> 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 **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<sup>†</sup>
- Order Start Date
- Order Stop Date
- Drug Name
- Standardized Drug Name
- Status
- Ordering HCP
- Ordering HCP Specialty
- Schedule
- Quantity
- Site

#### 4.7.4.2. 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.

CV inserts Medication Administration History report text at the bottom of the **Details** view of all VA records in the **Inpatient Medications** widget. By default, the history report displays the previous 7 days.

#### 4.7.5. Progress Notes

The  **Progress Notes** widget ([Figure 54](#)) displays the patient's progress notes information, displayed in reverse chronological order by the note date. Click the **Progress Notes** icon in the widget tray, drag it to the desired location on the portal, 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 54: Progress Notes Widget**

Progress Notes (91) Filtered date range: 1/1/09 - 5/9/19					
	Date	Document Type/Title	Provider	Image	Site
+	Apr 10, 2019	<a href="#">GI (GASTROINTESTINAL) PROCEDURE NOTE</a>	MCCLAIN, MAE		● IPO4
+	Apr 08, 2019	<a href="#">OPTOMETRY EYE CONSULT REPORT</a>	MCCLAIN, MAE		● IPO4
+	Mar 05, 2019	<a href="#">ADVANCE DIRECTIVE CONSULT REPORT</a>	MCCLAIN, MAE		● IPO4
+	Mar 05, 2019	<a href="#">RESCINDED ADVANCE DIRECTIVE</a>	MCCLAIN, MAE		● IPO4
+	Dec 18, 2018	<a href="#">INFORMED CONSENT - CARDIAC SURGERY</a>	CSIPO, DEZSO		● IPO5
+	Dec 12, 2018	<a href="#">SURGERY CONSULT REPORT</a>	KOTHA, SREVA		● IPO4

1 2 3 4 > Displaying 1-25 of 91 [More >>](#)

#### 4.7.5.1. 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
- Provider
- Provider Specialty
- Clinic
- Image
- Site

#### 4.7.5.2. Viewing Progress Notes Details

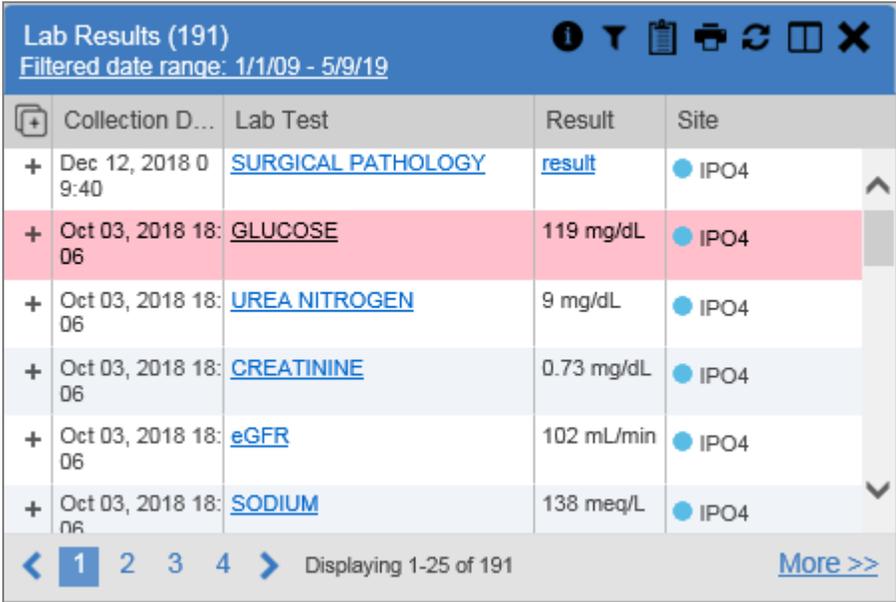
Click hyperlink in the **Document Type/Title** column of either view of the **Progress Notes** widget to open a separate window that displays detailed information about the record.

## 4.7.6. Lab Results

The  **Lab Results** widget ([Figure 55](#)) displays the patient's lab result information for chemistry, anatomic pathology, microbiology labs, 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. Click the **Lab Results** icon in the widget tray, drag it to the desired location on the portal, and drop it to open the widget.

-  **NOTE:** The **Lab Results** widget is separate from the **Lab Panel Results** widget, which is not detailed in this user guide. See **Online Help** for additional information.

Figure 55: Lab Results Widget



The screenshot shows the Lab Results Widget interface. At the top, there is a blue header bar with the text "Lab Results (191)" and "Filtered date range: 1/1/09 - 5/9/19". To the right of the header are several icons: an information icon, a funnel, a clipboard, a printer, a refresh icon, a window icon, and a close icon. Below the header is a table with the following columns: "Collection D...", "Lab Test", "Result", and "Site". The table contains six rows of data, with the second row highlighted in pink. At the bottom of the table, there is a pagination bar with the text "Displaying 1-25 of 191" and a "More >>" link.

Collection D...	Lab Test	Result	Site
+ Dec 12, 2018 09:40	<a href="#">SURGICAL PATHOLOGY</a>	<a href="#">result</a>	● IPO4
+ Oct 03, 2018 18:06	<a href="#">GLUCOSE</a>	119 mg/dL	● IPO4
+ Oct 03, 2018 18:06	<a href="#">UREA NITROGEN</a>	9 mg/dL	● IPO4
+ Oct 03, 2018 18:06	<a href="#">CREATININE</a>	0.73 mg/dL	● IPO4
+ Oct 03, 2018 18:06	<a href="#">eGFR</a>	102 mL/min	● IPO4
+ Oct 03, 2018 18:06	<a href="#">SODIUM</a>	138 meq/L	● IPO4

### 4.7.6.1. Lab Results Widget Data

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

- Collection 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

#### 4.7.6.2. 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.

#### 4.7.6.3. Viewing Lab Results Details

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

#### 4.7.6.4. Lab Results Table View

The **Lab Results** widget provides the option to display multiple records of the same type in a table ([Figure 56](#)). 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 a single value from the **Filter by Lab Test** or **Filter by Standardized Lab Test** dropdown boxes to enable the **Show Table** link

**i** **NOTE:** The **Show Table** link is not enabled after selecting one lab type from the **Filter by Type** dropdown. The link also remains disabled if you attempt to filter by more than one **Lab Test** or **Standardized Lab Test** value.

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

Figure 56: Table View

Date	Test	Specimen Source	Result	Units	Interpretation	Reference Range	Site
Oct 02, 2018	SODIUM	SERUM	139	meq/L		136 - 145	IPO4
Jun 12, 2015	SODIUM	SERUM	135	meq/L	L	136 - 145	IPO4
Sep 28, 2010	SODIUM	SERUM	134	meq/L	L	136 - 145	IPO4
Sep 28, 2010	SODIUM	SERUM	134	meq/L	L	136 - 145	IPO3
May 03, 2010	SODIUM	SERUM	136	meq/L		136 - 145	IPO4
May 03, 2010	SODIUM	SERUM	136	meq/L		136 - 145	IPO3
Dec 01, 2009	SODIUM	SERUM	138	meq/L		136 - 145	IPO4
Dec 01, 2009	SODIUM	SERUM	138	meq/L		136 - 145	IPO3
Oct 05, 2009	SODIUM	SERUM	139	meq/L		136 - 145	IPO4
Oct 05, 2009	SODIUM	SERUM	139	meq/L		136 - 145	IPO3
Feb 09, 2009	SODIUM	SERUM	138	meq/L		136 - 145	IPO4
Feb 09, 2009	SODIUM	SERUM	138	meq/L		136 - 145	IPO3
Feb 09, 2009	SODIUM	SERUM	134	meq/L	L	136 - 145	IPO4
Feb 09, 2009	SODIUM	SERUM	134	meq/L	L	136 - 145	IPO3
Jan 22, 2009	SODIUM	SERUM	139	meq/L		136 - 145	IPO4
Jan 22, 2009	SODIUM	SERUM	139	meq/L		136 - 145	IPO3
May 10, 2008	SODIUM	SERUM	135	meq/L	L	136 - 145	IPO4

#### 4.7.6.5. Lab Results Graph View

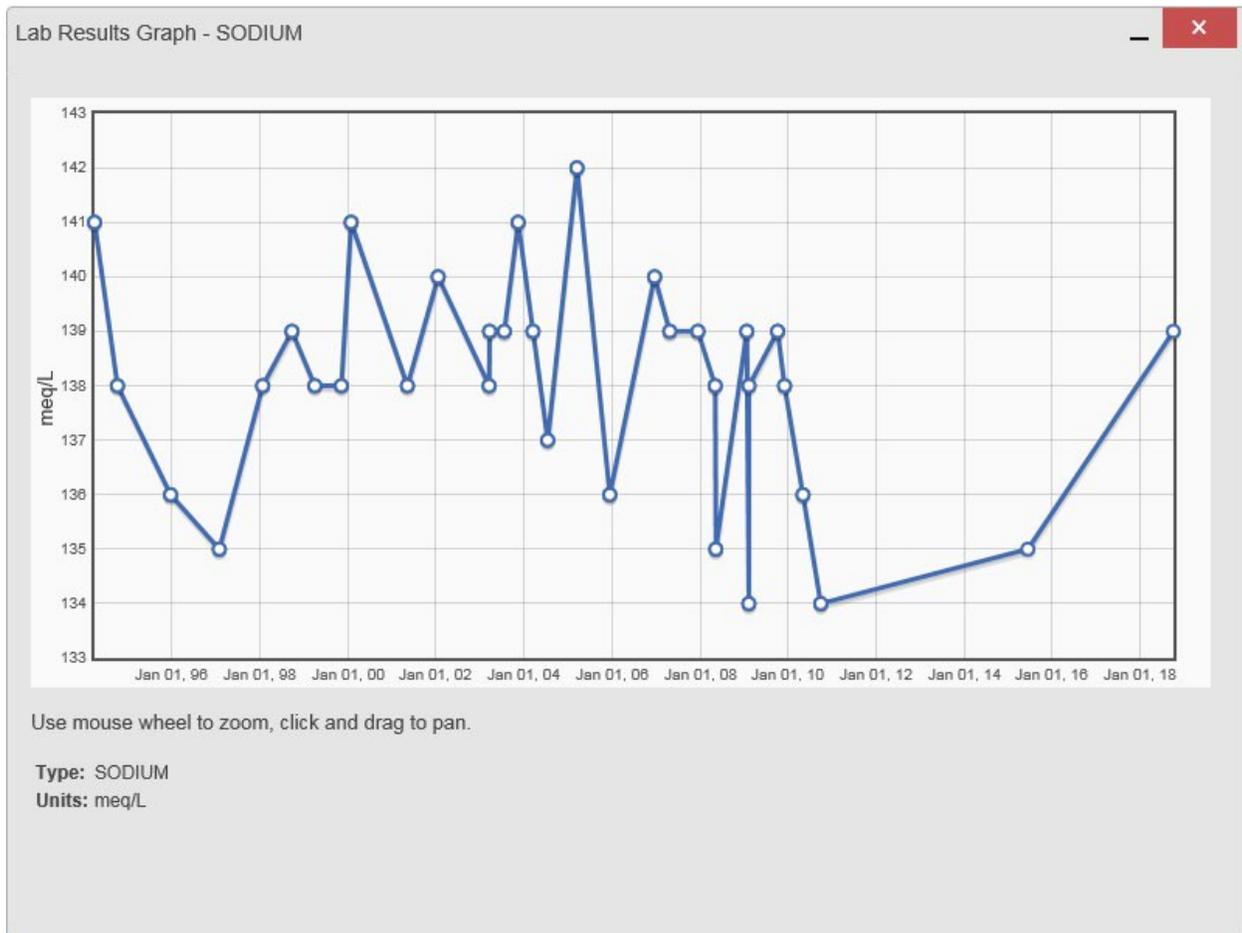
The **Lab Results** widget provides the option to display multiple records of the same type in a graph (Figure 57). By default, the **Show Graph** link in the expanded view of the **Lab Results** widget is disabled until the user narrows the data selection, using display filters.

1. Click **More >>** in the minimized view of the **Lab Results** widget to open the expanded view
2. Select a single value from the **Filter by Lab Test** dropdown, to enable the **Show Graph** link

**i** **NOTE:** The **Show Graph** link is not enabled after selecting a value from the **Filter by Type** or **Standardized Lab Test** dropdown boxes. The link also remains disabled if you attempt to filter by more than one **Lab Test** value. Lab results with unparsed values (e.g., Blood Bank Report) will also disable this link.

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

Figure 57: Graph View



#### 4.7.7. Problem List

The  Problem List widget ([Figure 58](#)) displays a list of the patient's health issues. The information is displayed in reverse chronological order by the last modified date. Click the **Problem List** icon in the widget tray, drag it to the desired location on the portal, and drop it to open the widget.

Figure 58: Problem List Widget

Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
Apr 18, 2019	<a href="#">Illness, unspecified</a>	R69.		ACTIVE	N/A	
Apr 10, 2019	<a href="#">Nonobstructive reflux-associated chronic pyelonephritis</a>	N11.0		ACTIVE	N/A	
May 25, 2018	<a href="#">Pulp degeneration</a>	K04.2		ACTIVE	N/A	
May 25, 2018	<a href="#">Family history of tobacco abuse and dependence</a>	Z81.2		ACTIVE	N/A	
Apr 17, 2018	<a href="#">Atherosclerotic he</a>	I25.10		ACTIVE	N/A	

#### 4.7.7.1. Problem List Widget Data

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

- Updated Date
- Problem Description
- International Classification of Diseases (ICD)
- Type
- Status
- Linked Items
- Site

**i** **NOTE:** Linked items are available for DoD records only and will be blank until DoD data is added to CV. CV inserts **N/A** in the **Linked Items** column for all records from VA VistA sites.

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

- Updated Date
- Onset
- Problem Description
- Standardized Description
- ICD
- Severity
- Type

- Status
- Linked Items
- Site

#### **4.7.7.2. 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.