Community Viewer (CV) Version 2.0 User Guide

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1. Introduction

Community Viewer (CV) is a browser-based software application built on the Joint Legacy Viewer (JLV) system. CV facilitates the secure exchange of data between Department of Veterans Affairs (VA) systems and non-VA providers, known as Community Care Providers (CCPs). The exchange of data improves care coordination 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 Administrative Staff (VAS) can assign patients to CCPs and provision CCP use within the CV system, allowing CCPs access to view consolidated patient data from multiple Veterans Health Information Systems and Technology Architecture (VistA) systems.

The data retrieved and viewed through CV is limited to VA only. In this release, the retrieval and display of VA Virtual Lifetime Electronic Record (VLER), DoD, and DoD VLER data is not supported.

VAS users use the Community Care Provider Management (CCPM) module in CV to perform the following tasks:

- Create Providers
- Assign Patients
- Restrict Data Access

CCP users can perform the following tasks:

- Request Password Reset
- Access/View Patient Data

Please read and bear the following warning in mind before using Community Viewer:

**** WARNING**WARNING**WARNING ****

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

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

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

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

**** WARNING**WARNING**WARNING ****

1.1. Purpose of the Guide

The purpose of the User Guide is to familiarize VAS and CCP 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.

- Cross References are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- The conventions used in this document for emphasis are **bold** and *italicized* text
- The information symbol is used to inform the reader of additional information

1.2. Intended Audience

The User Guide is written from the perspective of VAS and CCP users, with the following assumed experience/skills:

- Users have basic knowledge of accessing and using web-based applications (such as a web browser, including onscreen commands, menu options, and navigation tools)
- Users have been provided the appropriate access credentials, Uniform Resource Locator (URL) for the login page, system user names, access/verify codes (for VAS users), and passwords (for CCP users), required for launching the CV web application
- VAS users utilize CV to assign patients to providers outside the VA network
- CCPs use CV to view VA patient data relevant to assignments

1.3. System Requirements

The CV application interface is a front-end web application, designed to run in a web browser. If you are accessing CV through a browser or device that is not fully compatible with the application, certain features may not work as expected. Mobile devices are not supported with this release.

It is recommended that CV is accessed from a desktop PC using one of the following supported browsers:

- Chrome v54
- Firefox v50
- Edge v25
- Internet Explorer v11
- Safari v10

1.4. Getting Help

1.4.1. VAS Users

If you are an authorized VAS user, having trouble logging in to CV, or experiencing other application issues, please contact the Enterprise Service Desk (ESD) for assistance.

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

VA Enterprise Service Desk

REDACTED

1.4.2. CCP Users

If you are an authorized CCP user in need of technical assistance, contact Veterans Health Administration (VHA) Community Support.

VHA Community Support

REDACTED

If you are an authorized CCP user and do not have your password, follow the steps outlined in Section 2.2.1, Changing User ID and Password to request a password reset.

2. Logging in to CV

Before logging in to and utilizing the functionality of Community Viewer, please read the following:

**** WARNING**WARNING**WARNING ****

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

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

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

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

**** WARNING**WARNING**WARNING ****

2.1. VAS User Login

Authorized, registered users within the VA are provided access information to log on to the CCPM module in CV. If you have not received credentials to access CV, you must first request access through the appropriate service lead or facility.

CV authenticates all VA users against a list of authorized, registered users in combination with the user's Personal Identification Verification (PIV) card and credentials. During login, first-time CV users are prompted to enter their agency, site, and user settings. This data is used to create a CV user profile, and is utilized during future login sessions.

To log in to CV:

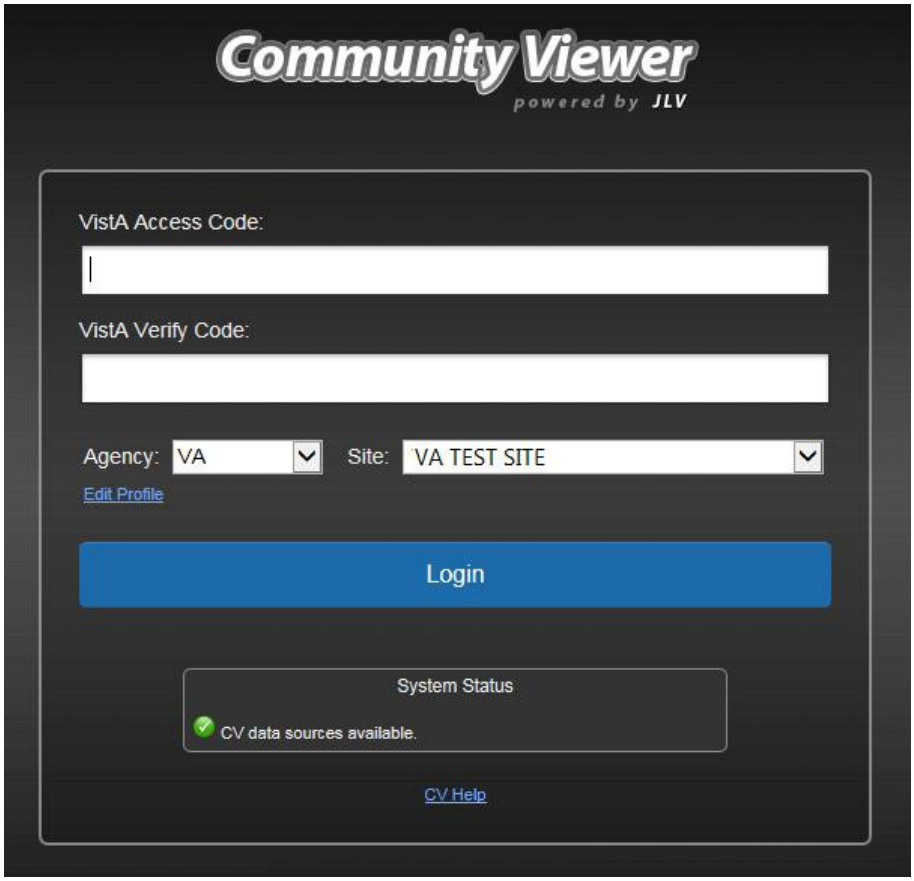
1. Insert your PIV card into your computer or card reader.
2. Open a supported Internet browser.
3. Enter the URL for the CV web application into the address bar of the browser.
4. When prompted, select the appropriate, current digital certificate.
5. When prompted, enter your PIV Personal Identification Number (PIN).
6. Click **I Accept** after reading the important user consent information regarding accessing a government information system.
7. Enter the following information in the fields on the login page. (Example shown in Figure 1):
    a. Enter your VistA Access Code.
    b. Enter your VistA Verify Code.

c. Select **VA** from the Agency field.

d. Select your local VistA host site from the Site field.

8. Click **Login**.

Figure 1: Login Page for VAS Users



NOTE: VA users who are not authorized to access CV see an *Access denied* message. Access to CV is limited to authorized users, and is configured by System Administrators. If you believe you have received the message in error, please contact the ESD.

2.1.1. Changing User ID and Password

CV authenticates all VA users against an authorized, registered list of VHA/VAS users, in combination with the user's PIV card and VistA credentials. User Identification (ID) and access code/verify code changes or resets are not performed in CV for the VAS user.

For more information and troubleshooting tips, see Section 5, Troubleshooting.

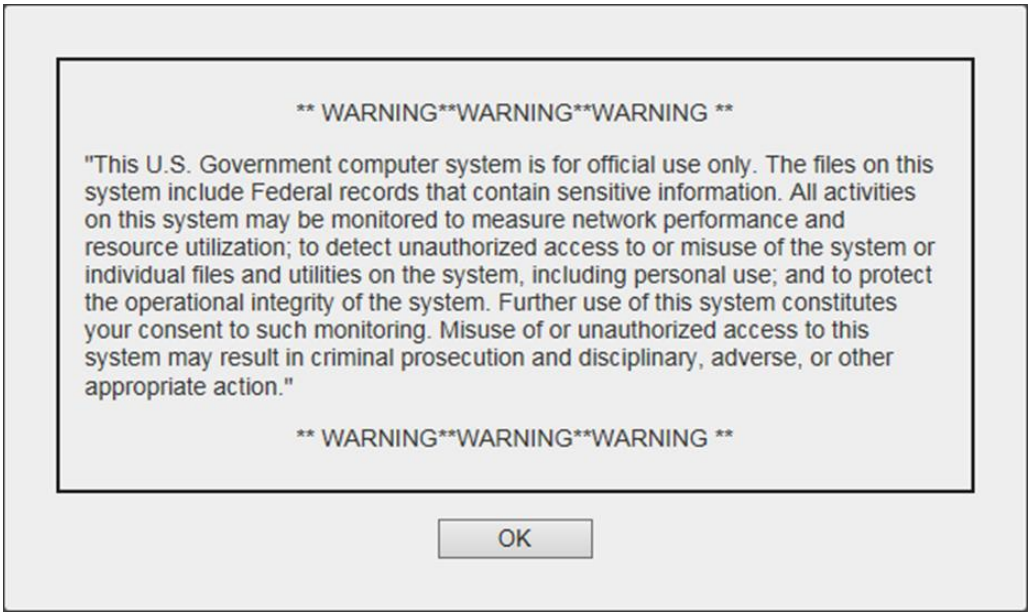
2.2. CCP User Login

During login, CV authenticates all CCPs against a registered list of users provisioned by VAS. If you have not received credentials to access CV, you must first request access through the appropriate VAS liaison.

NOTE: Prior to accessing the functionality of the CV application for the first time, (or 365 days after the date of their first login), CCP users are required to perform acknowledgement tasks.

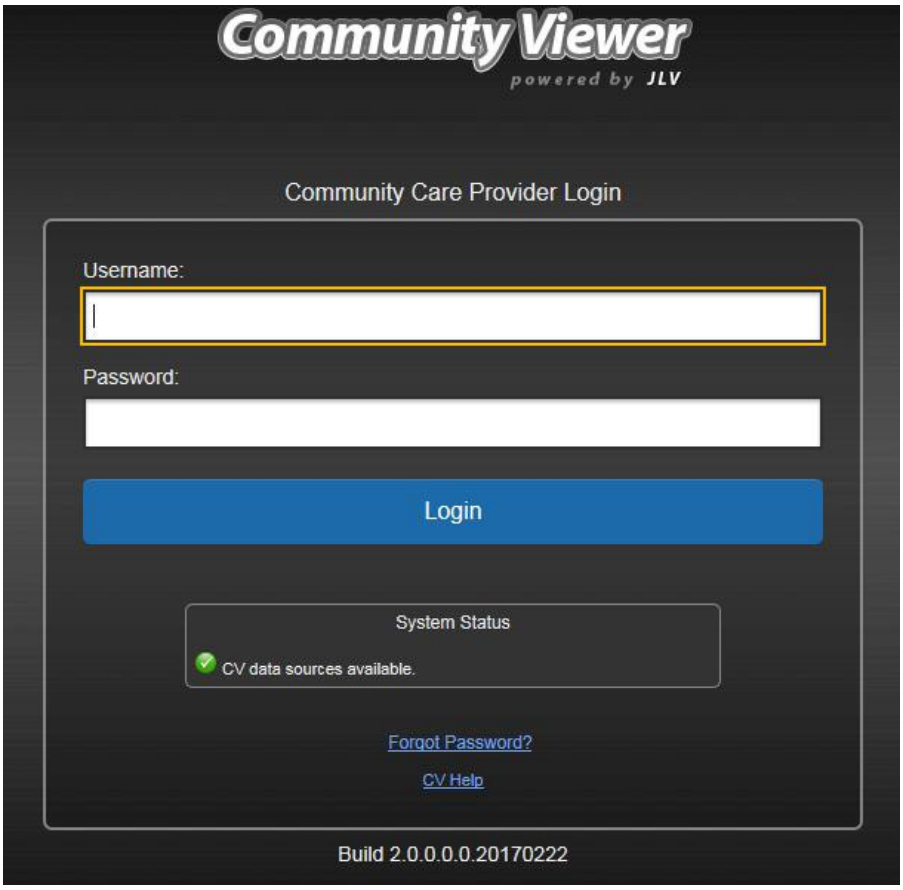
1. Open a supported Internet browser.
2. Enter the URL for the CV web application, provided by VAS, in the address bar of an approved Internet browser.
3. The Authorized Use message (Figure 2), a security and legal disclaimer, appears.
4. Click **OK** to confirm that you are aware you are accessing a government information system that is provided for authorized users only.

Figure 2: Authorized Use Message



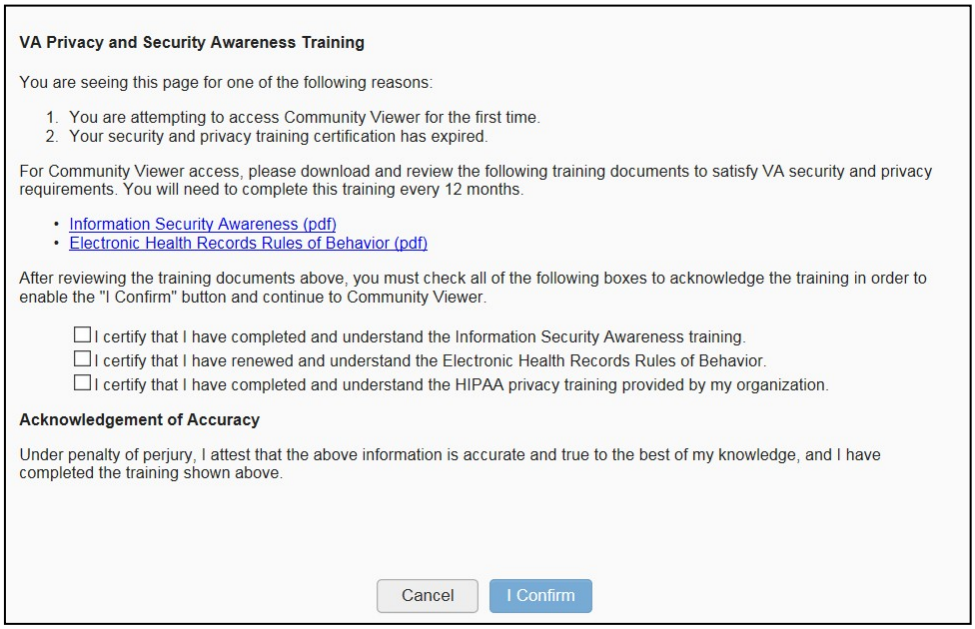
5. Enter the user name and password, provided by VAS, in the fields on the Login page (Figure 3):
    a. The user name is the e-mail address associated with your account.
    b. If you do not have, or have forgotten your password, click the **Forgot Password?** link on the Login page.

Figure 3: 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 4) appears.

Figure 4: CCP VA Privacy and Security Awareness Training Page



NOTE: The VA Privacy and Security Awareness Training page appears the first time the CCP user accesses the CV application, and again every 365 days after the first successful login, as training certification must be renewed each year.

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 Health Insurance Portability and Accountability Act (HIPAA) Privacy training through your organization.
13. Click **I Confirm** to proceed to the application.

After logging in to CV:

- Your user name is displayed in the top-right corner of the page.
- Any patient consults assigned to you are shown in the Assigned Patients widget.
- You will be able to view consults assigned to your Provider Group, even if you do not have any active or scheduled consult assignments.

2.2.1. Changing User ID and Password

The user ID (user name) for CCP users is the e-mail address associated with their account. It cannot be changed unless the provider's e-mail address changes. CCP users have the option to request a password reset.

To request a password reset:

1. Enter the URL for the CV web application, provided by VAS, in the address bar of an approved Internet browser.
2. Click the **Forgot Password?** link.
3. Enter your name, e-mail address, and phone number in the fields provided in the dialog box.
4. Click **Send**.
5. An e-mail message is generated to VHA Community Support requesting that an associate contact you, at the phone number you provide, with a new password.

2.3. Editing Your User Profile at Login

Both VAS and CCP users can customize their user profiles from the login page.

2.3.1. VAS User Customizations

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

UI theme preferences can also be set after logging in to CV. See Section 2.4.4, Configuring Your User Profile.

To edit the user profile at login:

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

2.3.2. CCP User Customizations

CCP users can customize the UI theme from the login page. UI theme preferences can also be set after logging in to CV. See Section 2.4.4, Configuring Your User Profile.

To edit the user profile at login:

1. Click the **Edit Profile** link on the login page. Profile options are presented.
2. Select the desired UI theme.
3. Click **Save and Login**.

2.4. The CV Portal Pages

The CV portal pages have tools that enable quick access to basic features. These tools appear in the top-right corner of the portal pages (Figure 5).

- **View the status of data source connections.** See Section 2.4.3, Viewing System Status.
- **Configure your user profile.** Click the **cog wheel** in the top-right corner of the portal pages to configure user settings, including the UI theme. See Section 2.4.4, Configuring Your User Profile.
- **Access online help.** Click **Help** in the top-right corner of portal pages to open web-based, online help.
- **Access widgets from the widget tray.** See Section 4.1, Accessing and Opening Widgets.
- **Log out.** Click **Logout** to terminate the current CV session.

NOTE: The symbol seen to the right of the *System Status* indicator represents clinical context management through the Clinical Context Object Workgroup (CCOW). CCOW is disabled in Community Viewer.

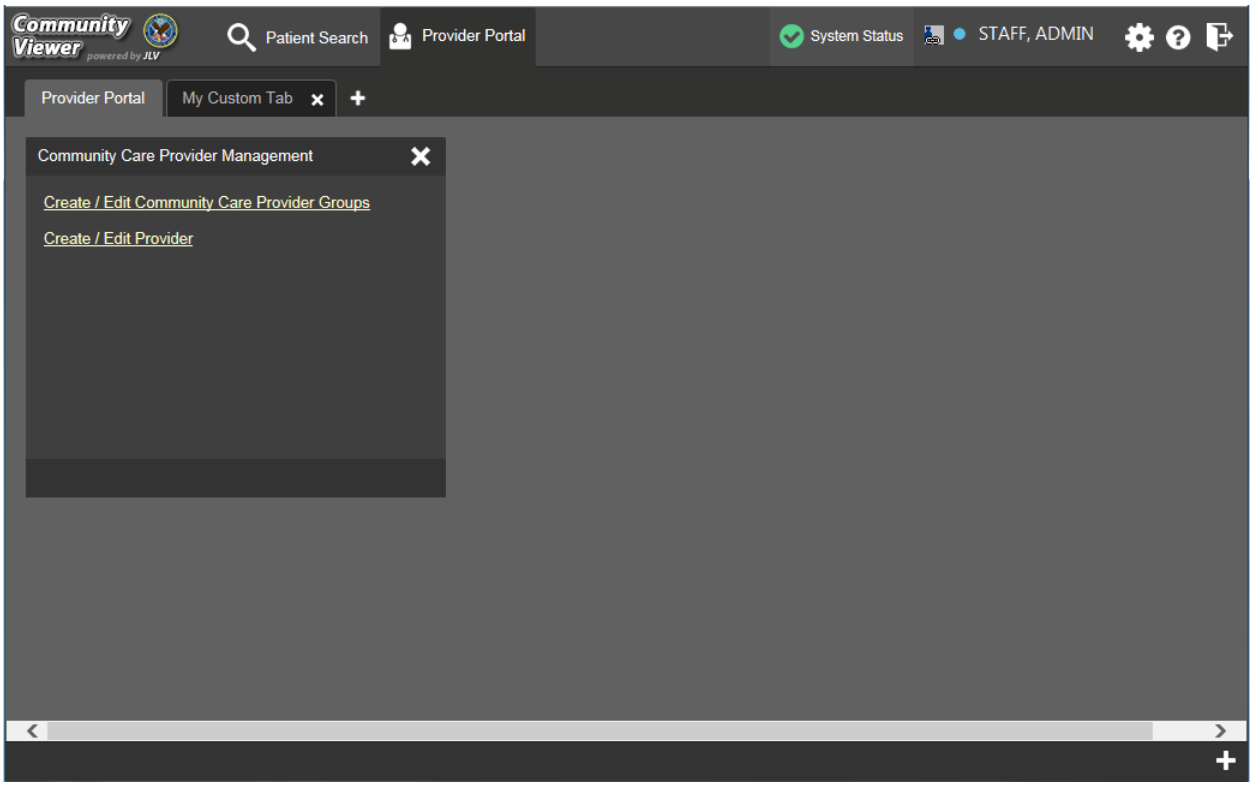
Figure 5: CV Portal Tools

2.4.1. VAS User Default View

The default view for a VAS user includes the **CCPM** module (Figure 6).

NOTE: If the **CCPM** module is not displayed on the provider portal, click the plus + sign in the lower-right corner of the screen, (Figure 6) to open the widget tray. Click and drag the icon from the widget tray to the screen, and drop the widget in the desired location.

Figure 6: VAS User Default View

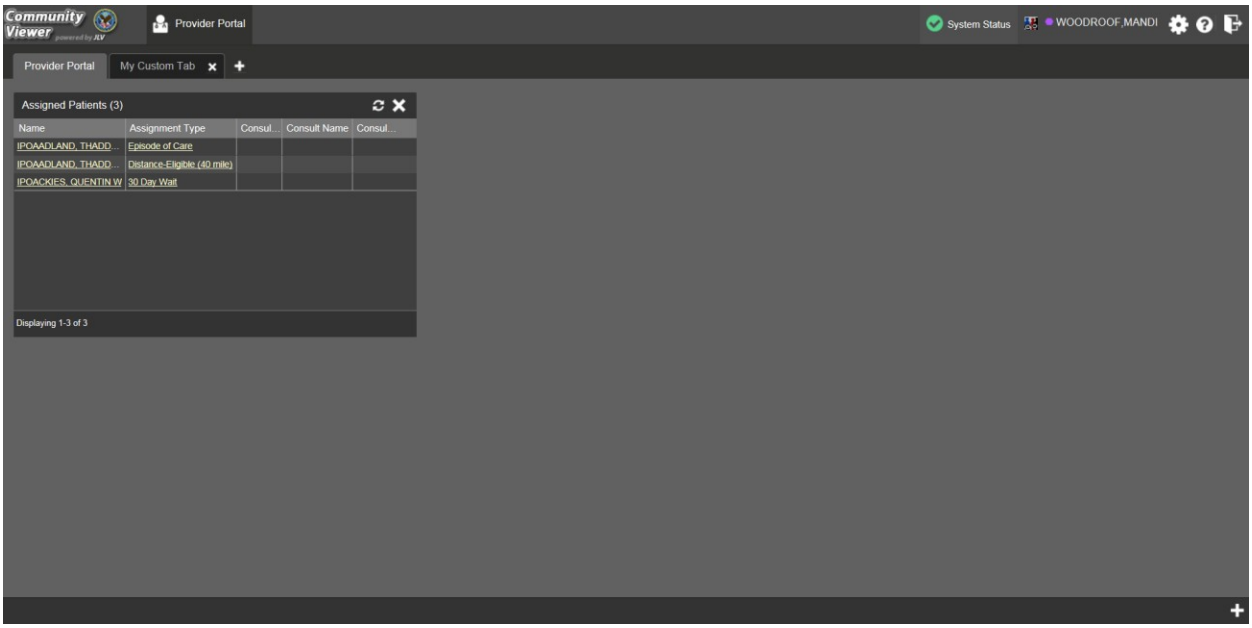


2.4.2. CCP User Default View

The default view for a CCP user includes the Assigned Patients widget (Figure 7).

NOTE: If the **Assigned Patients** widget is not already open on the screen, click the plus + sign in the lower-right corner of the screen, (Figure 7) to open the widget tray. Click and drag the icon from the widget tray to the screen, and drop the widget in the desired location.

Figure 7: CCP User Default View



2.4.3. Viewing System Status

System status updates are received from CV's Health Monitor, which monitors the services that CV uses to connect to VA data sources. Monitored services include: Master Veteran Index (MVI), VistA Data Service, and jMeadows Data Service.

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

1. On the login page
2. On the portal pages (highlighted in Figure 8)

When all monitored systems and services are online and connected, a green icon appears next to the status, with the message *CV data sources are available* (Figure 8).

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*. Users may not be able to log into CV or view patient data until the connection is restored.

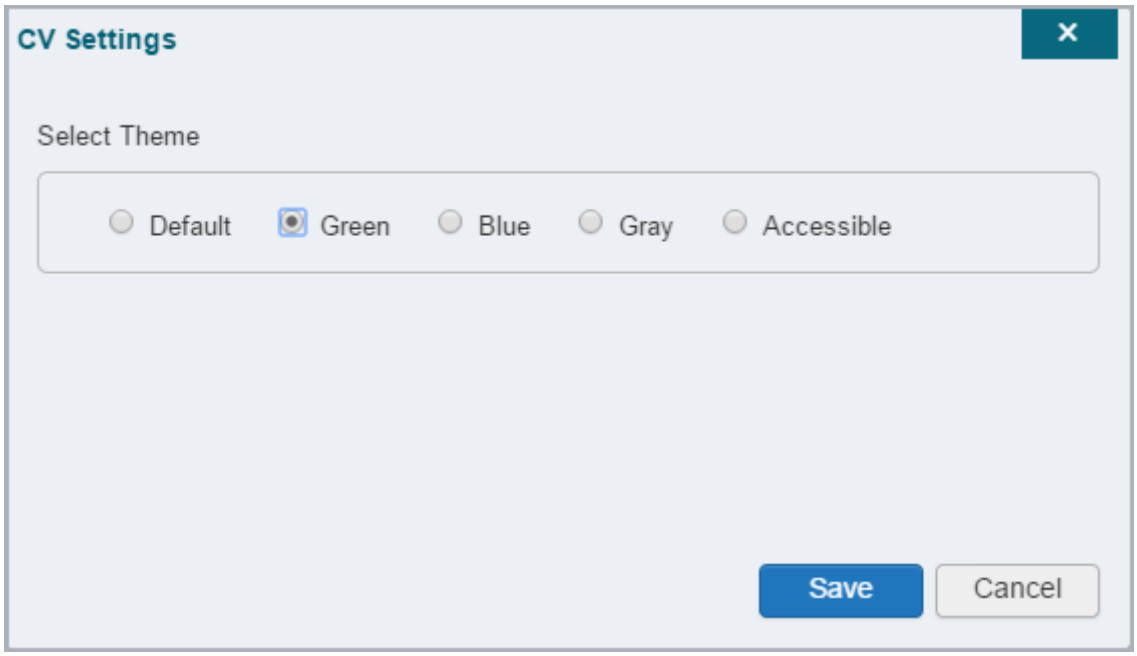
Figure 8: System Status Indicator on the Portal Pages

2.4.4. Configuring Your User Profile

Profile settings are accessible within CV by clicking the **cog wheel** located in the top-right corner of the portal pages (Figure 9).

In this release, the configuration options are limited to theme. See Section 2.4.5, Setting the User Interface Theme.

Figure 9: The CV Settings Dialog



2.4.5. Setting the User Interface Theme

Selecting the **User Interface Theme** sets the font color, foreground, and background colors of the CV Graphical User Interface (GUI). Themes apply to all onscreen elements, including widgets, toolbars, and dialog boxes. Theme choices are Default, Green, Blue, Gray, and Accessible.

To set the UI theme on the CV portal pages:

1. Click the **cog wheel** in the top-right corner of the portal pages
2. The **CV Settings** dialog opens (Figure 9)
3. Click the radio button next to the desired theme
4. Click **Save**
5. After clicking Save, you are asked whether or not to save the configuration. Click **Yes** to reload the application and apply the selected theme **-OR-**
6. Click **Cancel** to exit the CV Settings dialog and restore the previous theme

Examples of the UI themes are displayed in the figures below. The Default theme was presented in Section 2.4.1, VAS User Default View, and in Section 2.4.2, CCP User Default View.

Figure 10: Blue UI Theme

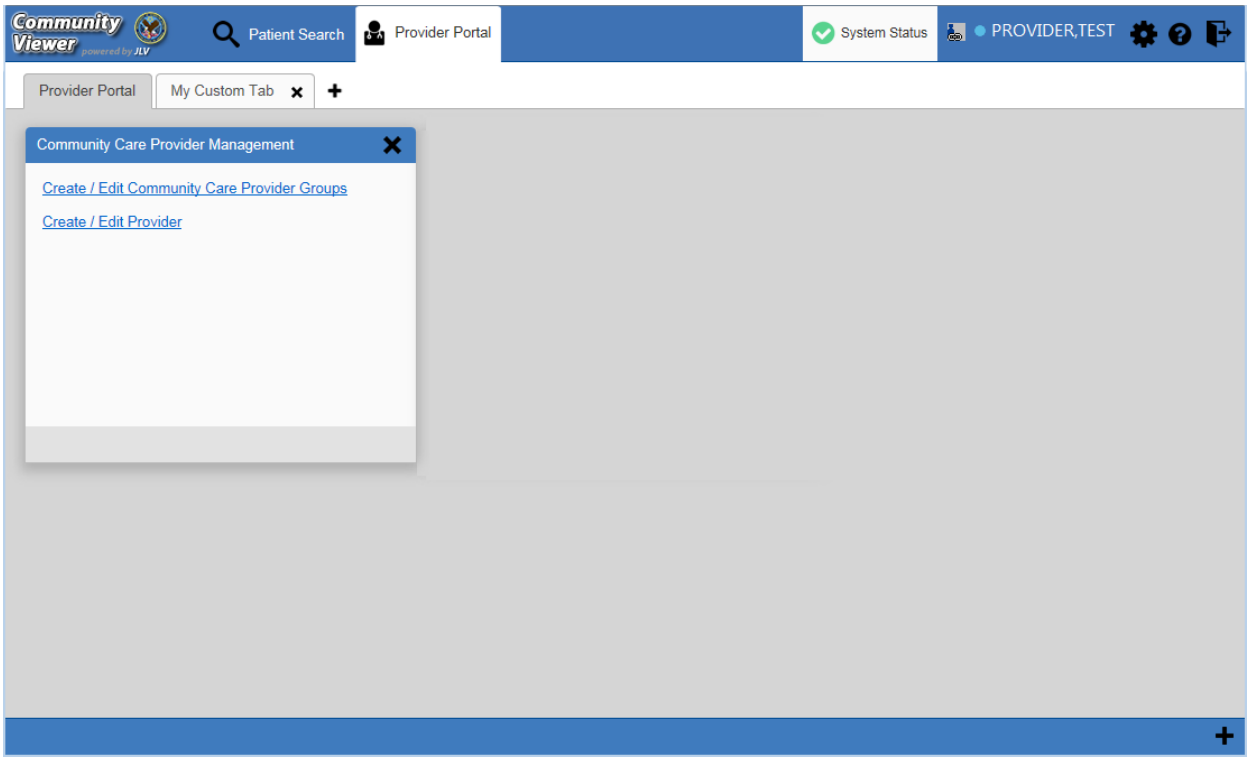


Figure 11: Green UI Theme

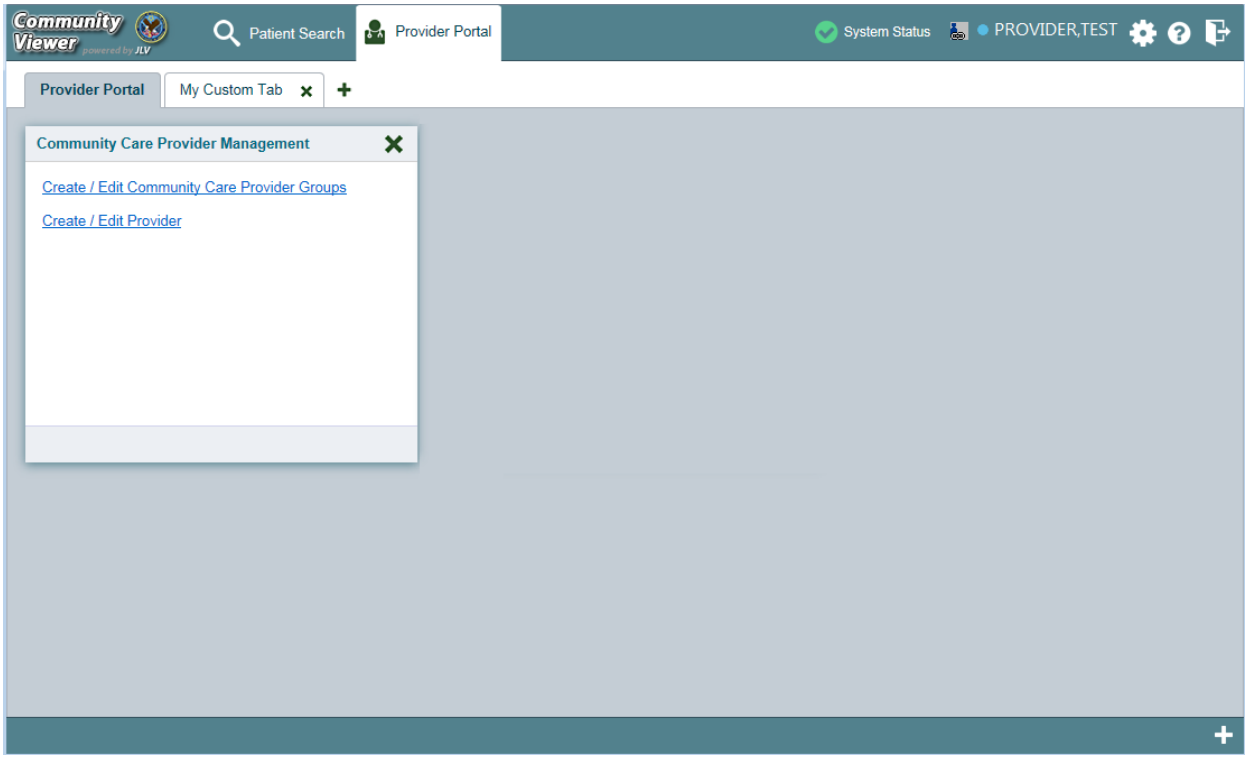
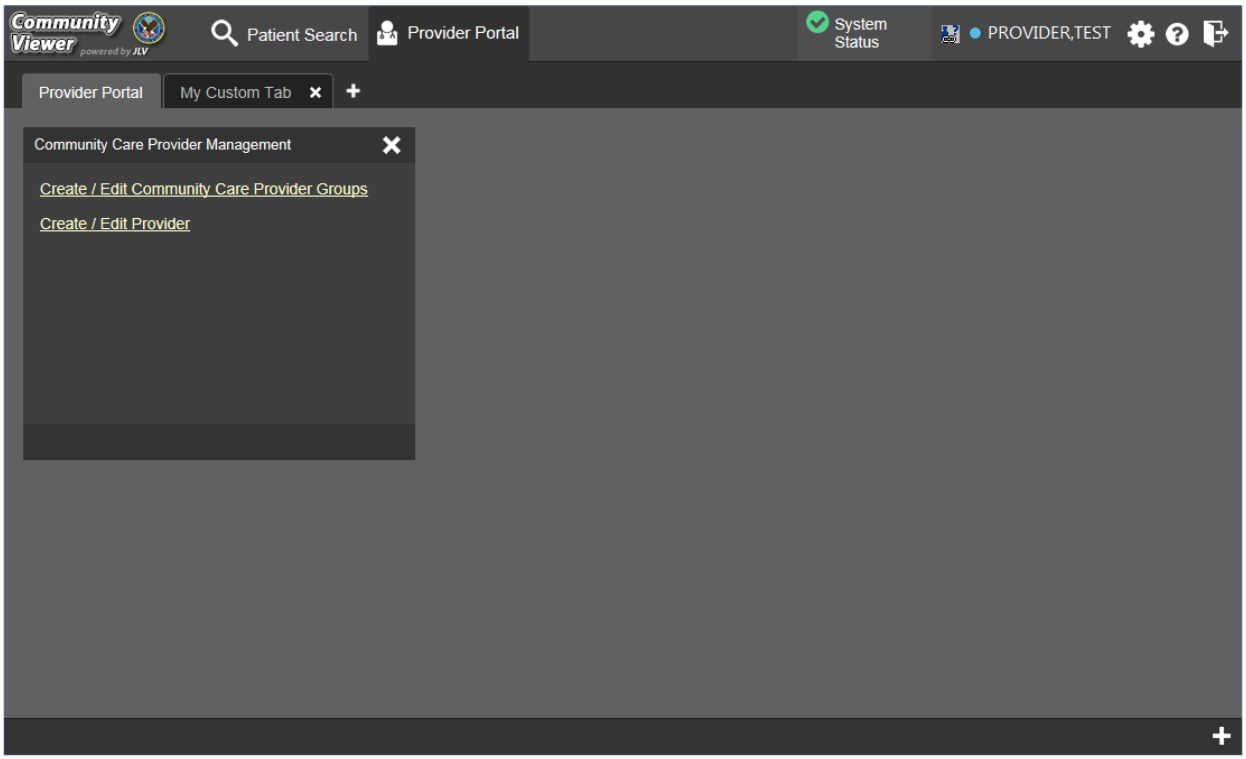


Figure 12: Accessible UI Theme



2.4.6. Using the Accessible Theme's Functionality

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

2.4.6.1. Keyboard Focus and Screen Navigation in Accessible Theme

Keyboard focus is the highlighting of on-screen elements that enables the interaction with, and navigation of, the web application through the keyboard and keystrokes. The on-screen item that currently has keyboard focus is outlined. The CV web application uses a gold-colored outline as a visual indicator of the element with keyboard focus.

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

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

Table 1: Keyboard Accessible Keystrokes

Keystroke	Description
Application and Portal Navigation	
ENTER	Press to transfer keyboard focus to the highlighted widget.
TAB	Press to transfer keyboard focus to other user interface items.
ESC	Press to return keyboard focus to the panel containing the user interface item with keyboard focus or to exit a window or widget.
SPACEBAR	Press to activate any user interface item (for example, click a button).
Arrow Keys	When keyboard focus is on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a dropdown list, press the down arrow to view the contents.
Tab Panels	
Arrow Keys	Use the left and right arrow keys to change tab panels. To add a tab panel, press the right arrow key until the last tab (+) is selected. A dialog prompts the user to enter the tab name.
Ctrl + x	To close a tab, focus on the tab panel and press Ctrl + x.
Windows and Dialog Boxes	
TAB	Press the Tab key to move the keyboard focus to other user interface items within the window.
Adding Widgets to the Portal Pages	
SHIFT + (Number position)	To add a widget from the widget tray using keystrokes: 1. Determine which column (1, 2, or 3) to place the widget on the portal page. 2. Focus the desired widget icon in the widget tray and press the Shift key along with the 1, 2, or 3 key, depending on the desired column placement.

2.5. Exit the System

You may intentionally log off to end a CV session by clicking **Logout** at any time. If you fail to log out, your session will terminate automatically after five (5) minutes of inactivity. You will be redirected to the login page when any new activity is attempted.

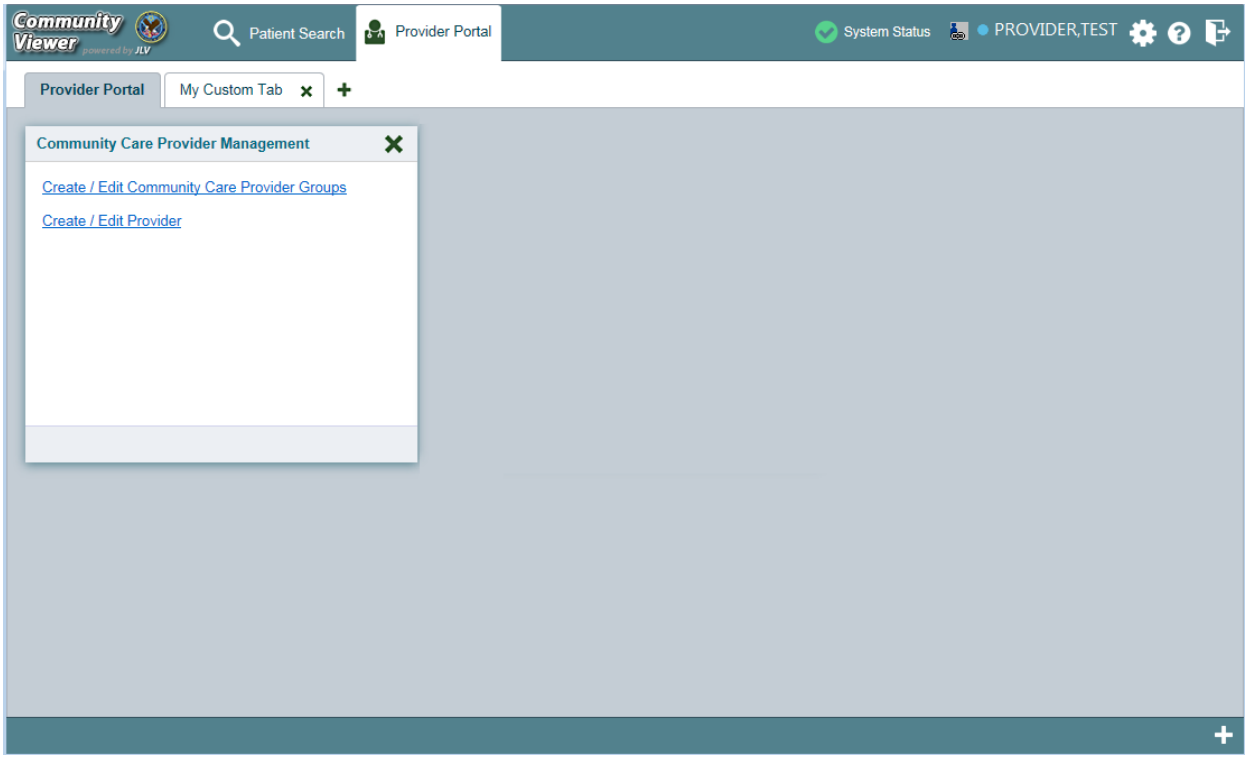
3. Using CV: VAS Users

3.1. Working with the CCP Management Module

After logging in, VAS users see the **CCPM** module on the portal pages by default.

NOTE: If the **CCPM** module is not open on the screen, click the plus + sign in the lower-right corner of the screen, (Figure 13) to open the widget tray. Click and drag the icon from the widget tray to the screen, and drop the widget in the desired location on the portal page.

Figure 13: Default VAS User Portal Pages (Green Theme)

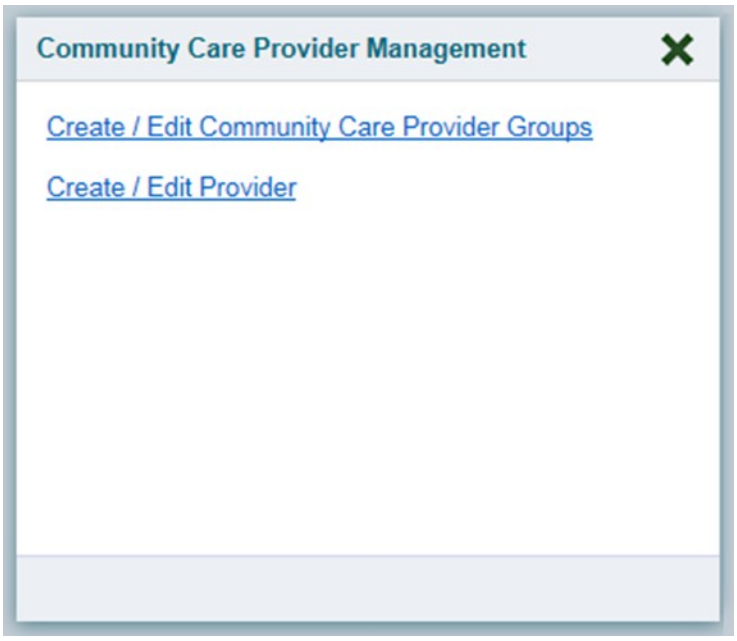


A VAS user creates providers, assigns patients to CCPs, and grants the CCP limited access to patient records within the **CCPM** module.

There are two workflow options (Figure 14) within the **CCPM**:

- Create/Edit Community Care Provider Groups
- Create/Edit Provider

Figure 14: The CCPM Module



3.1.1. About VA Facilities and Provider Groups

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

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

EXAMPLE 2: Dr. Woodroof, the *Provider*, is a sole practitioner. The *Group* name for a sole practitioner is also the provider's name; in this case, Dr. Woodroof.

CV has been pre-populated with over 200,000 groups and providers. VAS users can edit existing groups, but in this release, the task of creating provider groups is performed by Tier 2 Administrators. VAS users should contact the ESD to request the creation of a new group.

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

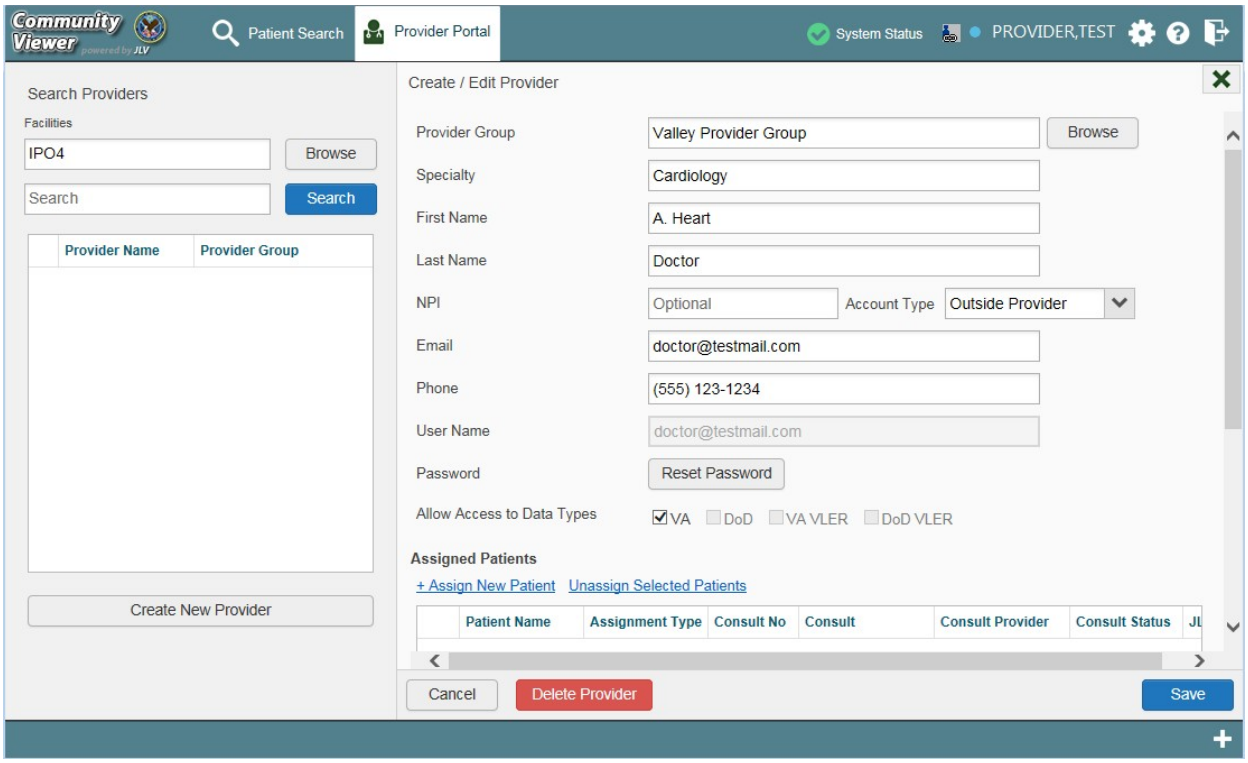
3.1.2. Creating Providers

All CCP accounts are created by VAS users in the **CCPM** module. Creating a CCP creates the provider's associated account and user profile. A VAS user can assign consults to CCPs after their account has been created.

To create a provider:

1. Click the **Create/Edit Provider** link (Figure 14) in the **CCPM** module
2. Click **Create New Provider** in the **Search Providers** pane, shown in Figure 15
3. Click **Browse** to the right of the **Provider Group** field to search for an existing group
4. Select the desired group from the list of results and click **OK**

Figure 15: Search Provider and Create/Edit Provider Panes



5. Enter the provider information in each of the fields on the **Create/Edit Provider** pane (Figure 15). Required fields are noted
6. Select **Outside Provider** from the **Account Type** list
7. The **User Name** field is automatically populated with the address entered in the **E-mail** field.
8. Enter a password in the **Password** field, or click **Generate** for the system to create a random password. CCP user passwords must be at least 8 characters long. Passwords must also include:
   - At least one uppercase letter and one lowercase letter
   - At least one number
   - At least one special character, such as ! @ # ? $ % &

NOTE: Passwords are case-sensitive.

9. Record the **User Name** and **Password** as displayed. It is the responsibility of the VAS user to provide the CCP with his/her user name and password for CV
10. Click **Save**
11. When the *Provider successfully created* message appears, there are two options:
    a. Click **Assign Patients** and follow the steps outlined in Section 3.1.3, Assigning Patient Consults **-OR-**

b. Click **OK** to return to the **CCPM** module

3.1.3. Assigning Patients

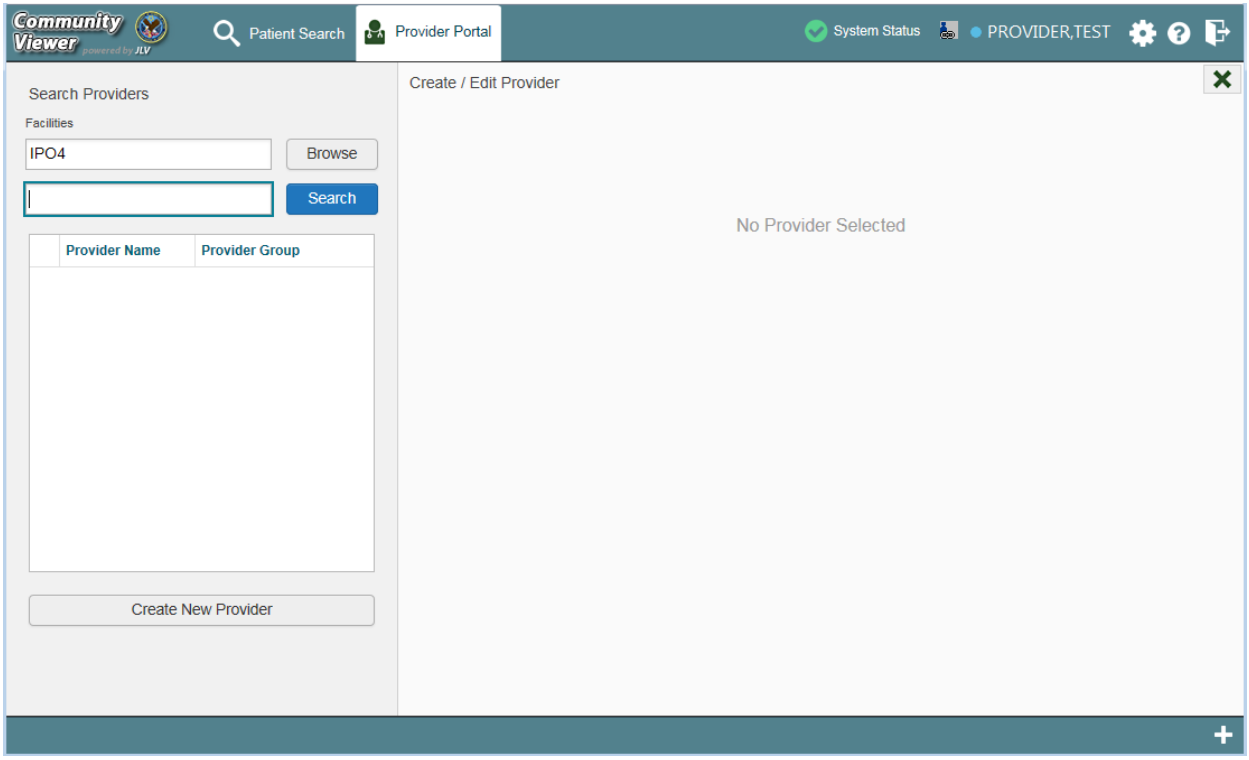
Once a CCP user's account is created, a VAS user can assign patients to the CCP.

To assign patient(s) to a CCP:

1. Click the **Create/Edit Provider** link in the **CCPM** module
2. Enter the provider's name in the field to the left of the **Search** button within the Search Providers pane (Figure 16)
3. Click **Search**

NOTE: If you've entered this screen immediately after creating a provider, the screen is pre-populated with the provider's profile information. No search is necessary.

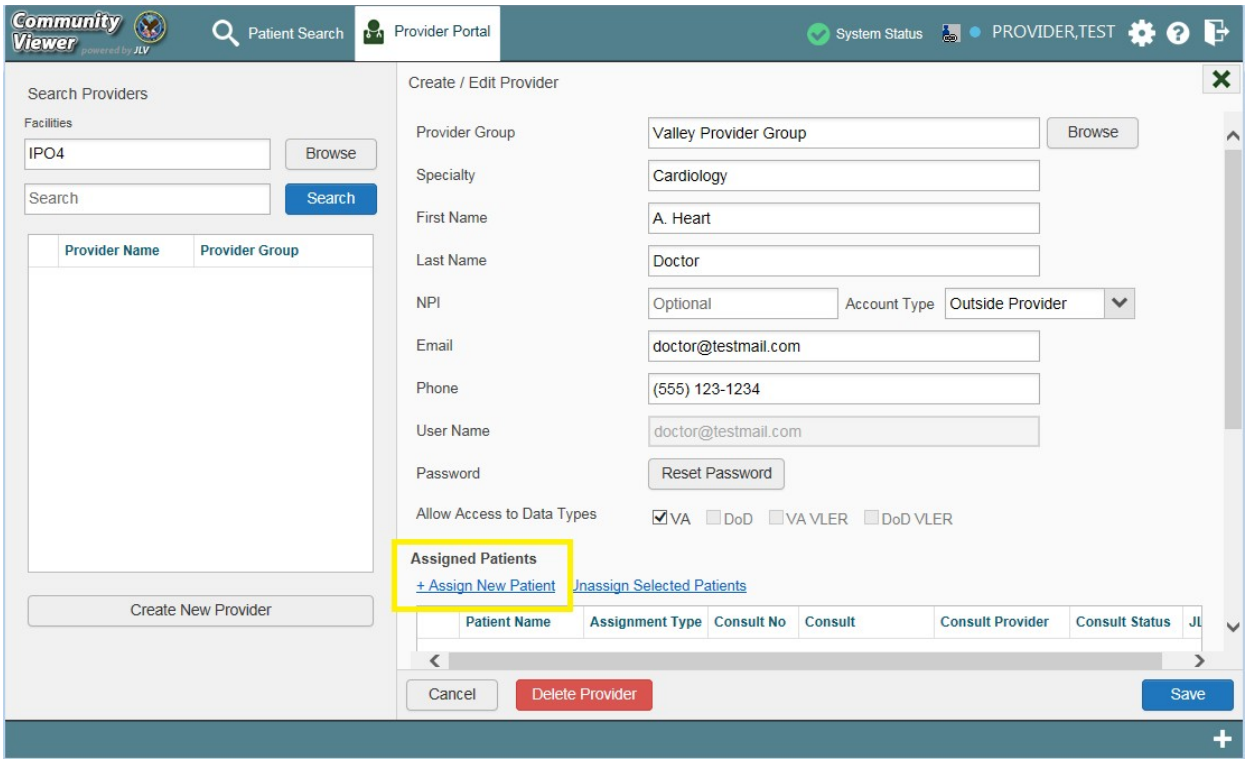
Figure 16: Search Providers Pane



NOTE: In this release, the task of deleting a provider is performed by Tier 2 Administrators. VAS users will not see the **Delete Provider** button. Instead, they must contact the ESD to request that a provider be deleted.

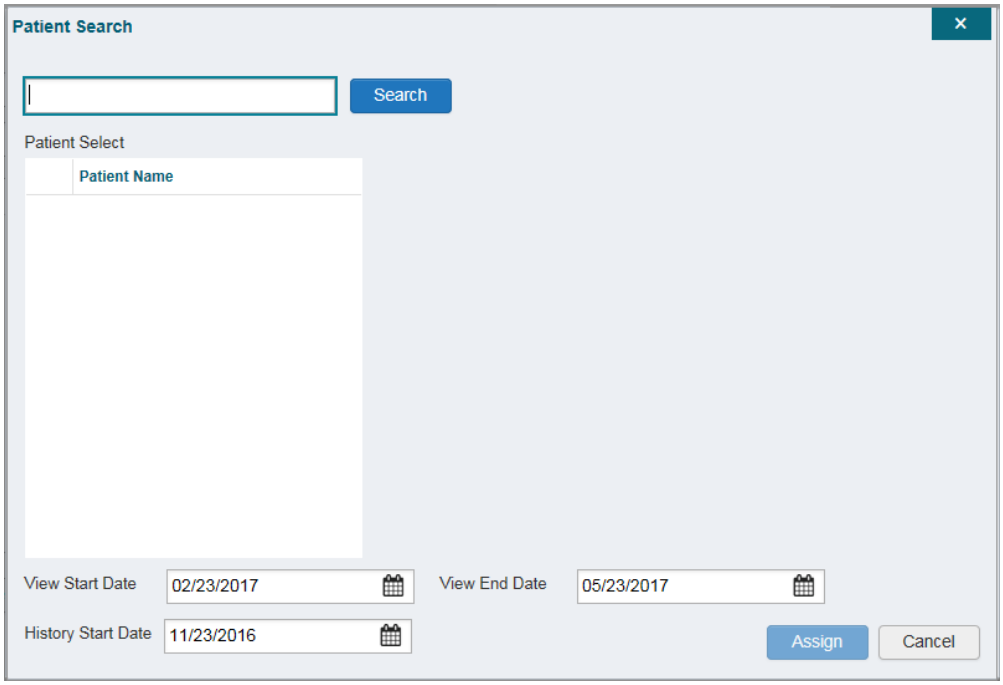
4. Select the Provider from the list of results
5. Click the **+ Assign New Patient** link in **Create/Edit Provider** pane (Figure 17)

Figure 17: Edit Provider Fields



6. Enter the patient name in the blank field at the top of the Patient Search dialog (Figure 18)

Figure 18: Patient Search Dialog



7. Click **Search**

8. Select a patient from the search results (Figure 18)
9. Select the Assignment Type from the dropdown list: 30 Day Wait, Consult, Distance-Eligible (40 mile), or Episode of Care
    a. If *Consult* is specified, select one consult record from the list for the selected patient. The consult status must be *Active* or *Scheduled* for the consult to appear in the list
10. If desired, adjust the default View Start/End and History dates to restrict the data seen by the CCP. (See Section 3.1.4, Setting Record Display Limits)
11. Click **Assign**

CV uses the following rules to manage patient assignments:

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

Table 2: Assignment Rules Examples

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

NOTE: Alternatively, patient consults can be removed using the **Unassign Selected Patients** link (Figure 17).

3.1.4. Setting Record Display Limits

A VAS user has the ability to limit the patient records available to the assigned CCP. The default setting is three (3) months prior to the date of the assignment. There are two settings that control access to patient data:

- **View Start Date** and **View End Date:** These fields represent how long the CCP user will have access to the patient records through CV. The default start date is the date the

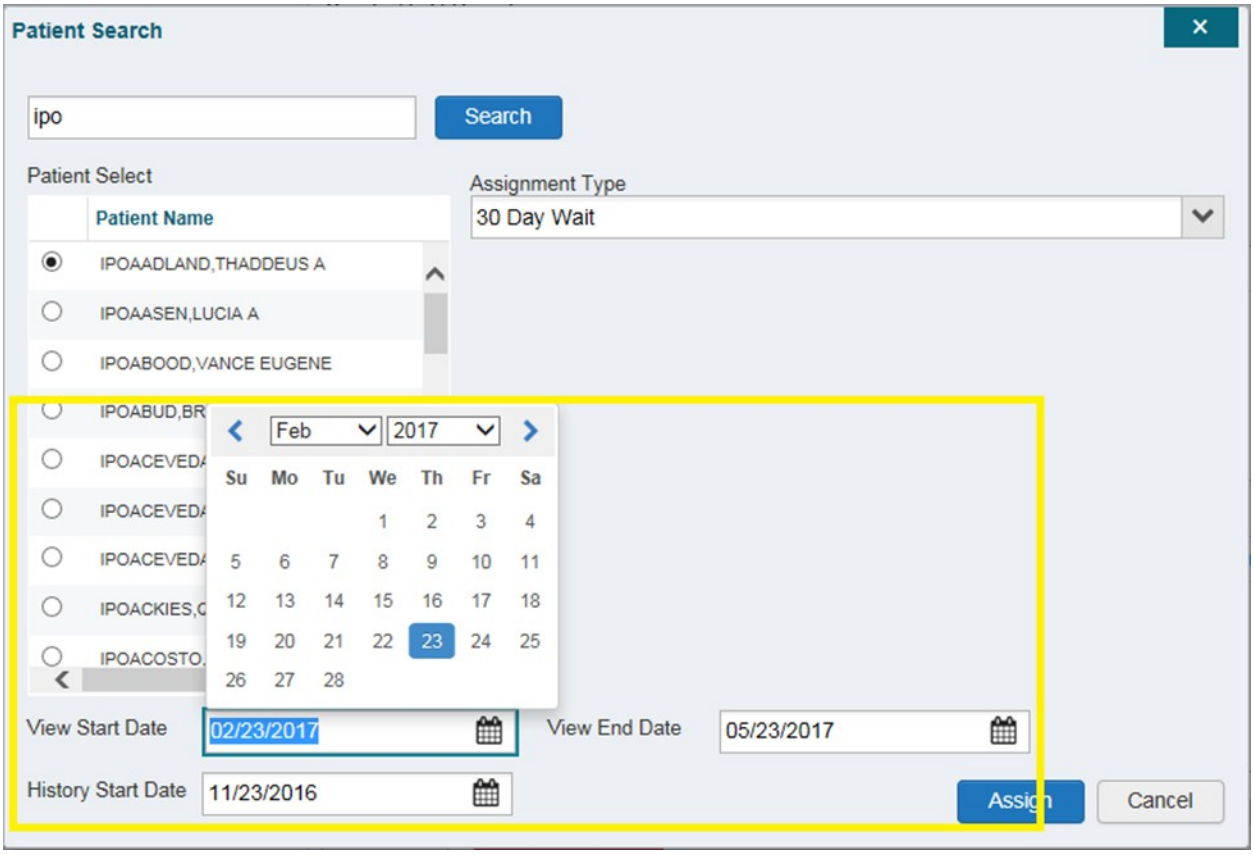
patient is assigned to the CCP. The default end date is three (3) months from the start date.

- **History Start Date:** This setting represents how far back in a patient's VA medical history the CCP is permitted to view. For example, if the history start date is set to 01/01/2012, the CCP has access to the patient's records from available VA facilities from 2012 to present.

Data access controls are set by the VAS user during the patient assignment process prior to completing the assignment.

1. Click the **calendar** next to the **View Start Date** and the **View End Date** fields
2. Select the start and end dates (Figure 19)
3. Alternatively, click the calendar icon next to the **History Start Date**
4. Select a date
5. Click **Assign**

Figure 19: Data Access Controls



3.2. Editing Provider Groups and Profiles

Provider groups and provider profiles can be edited through the CCPM module.

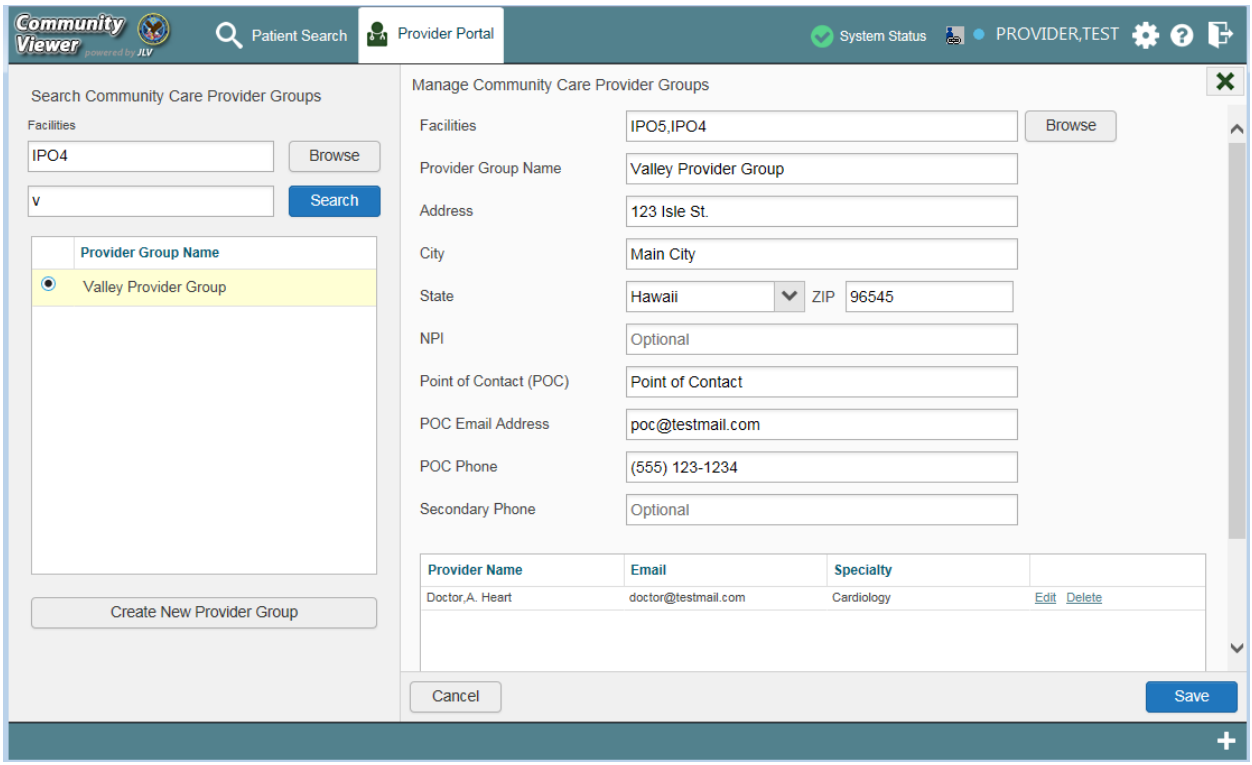
3.2.1. Editing Provider Groups

Provider groups can be edited through the CCPM.

To edit a provider group:

1. Click the **Create/Edit Community Care Provider Groups** link in the CCPM module
2. Enter the provider group name in the **Search** field
3. Click **Search**
4. Select the desired provider group from the search results (Figure 20)
5. Edit the provider group fields as needed

Figure 20: Search and Manage CCP Groups Panes

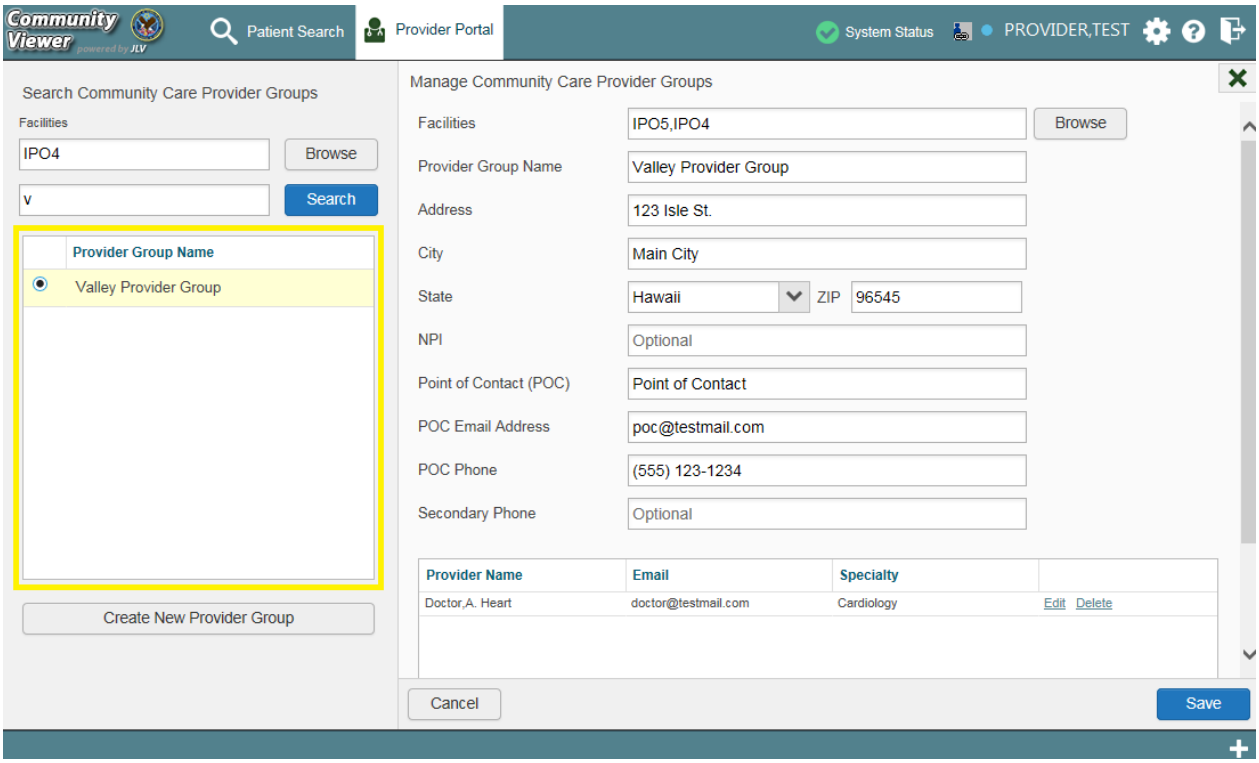


To add or edit a facility

1. Click **Browse** next to the **Facilities** field, and select the desired facility from the list
2. Providers assigned to the provider group are listed in the lower-right portion of the screen. Edit provider profiles or remove providers from the group using the **Edit** link within the **Assigned Providers** list (Figure 21)
3. Click **Save**

NOTE: In this release, the task of deleting a provider is performed by Tier 2 Administrators. VAS users will not see a **Delete** link, and should contact the ESD to request that a provider be deleted.

Figure 21: Add or Remove Providers from a Group



3.2.2. Editing Provider Profiles

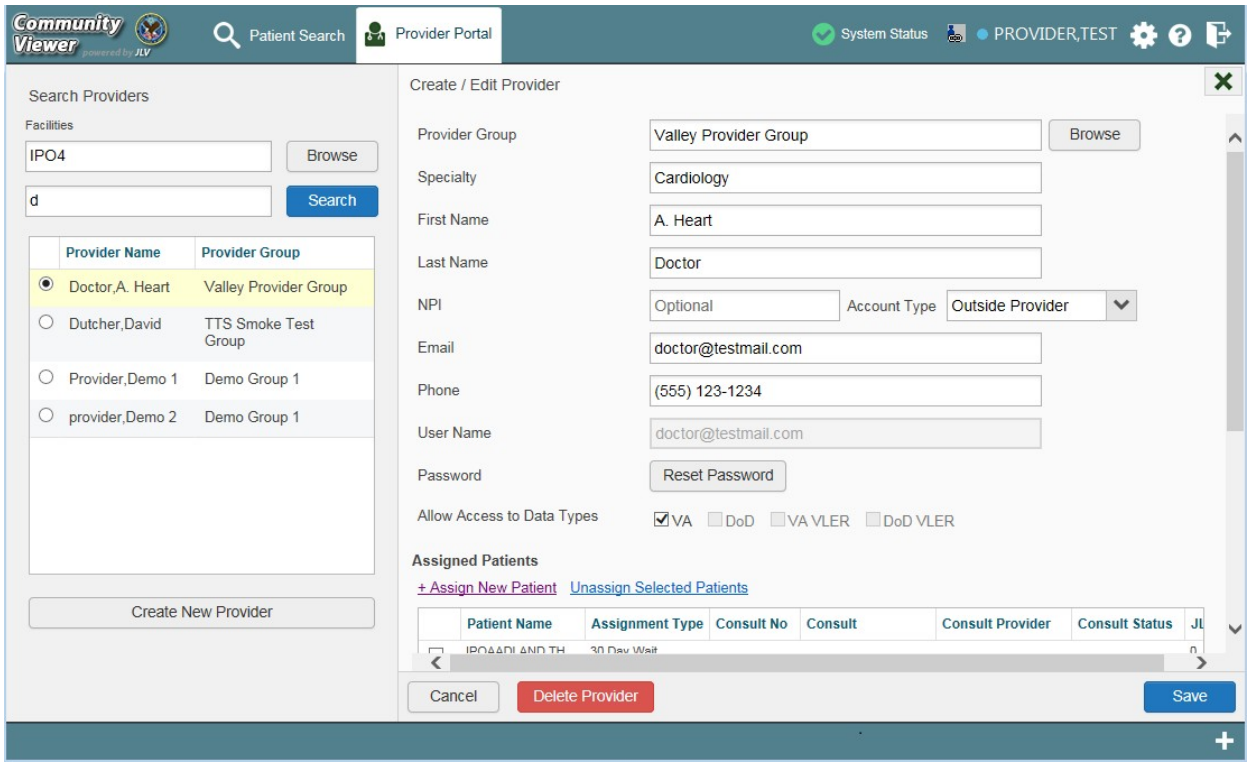
VAS users can edit a CCP's profile within the **CCPM** module.

To edit a CCP's information in his/her profile:

1. Click the **Create/Edit Provider** link in the **CCPM** module
2. Enter the provider name in the **Search** field
3. Click **Search**
4. Select the desired provider from the search results (Figure 22)
5. Edit the provider information in the fields provided, as necessary
6. Click **Save**

NOTE: If a provider is assigned to the wrong group, VAS users can change the group on this screen. If the provider will be added to an additional group, VAS users must click **Add New Provider** in the **Search Providers** pane and create the provider within the new group. The provider name can be the same, but a different e-mail address must be used.

Figure 22: Search and Create/Edit Provider Panes



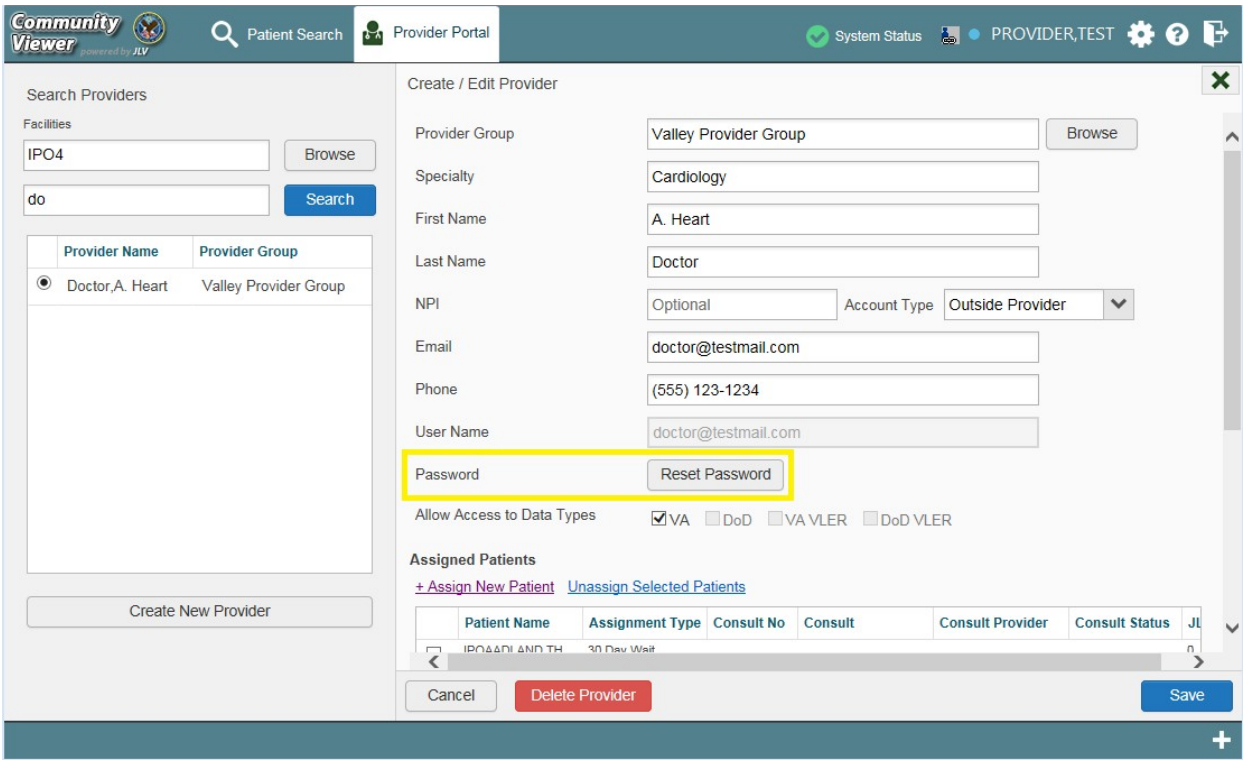
3.2.3. Resetting Provider Passwords

If a CCP user has forgotten his/her password, there is a **Forgot Password?** link on the log in page (Figure 3). Clicking the link opens a window that enables the user to send a password reset request directly to VHA Community Support. Password resets are performed in the **CCPM** module.

To reset a CCP's password:

1. Click the **Create/Edit Provider** link in the CCPM module
2. Enter the provider name in the **Search** field
3. Click **Search**
4. Select the desired provider from the search results
5. Click **Reset Password** (Figure 23) in the **Create/Edit Provider** pane
6. Enter a password in the field provided. You may also generate a new, random password by clicking **Generate**
7. Record the new password. It is the responsibility of the VAS user to provide the CCP with his/her password for CV
8. Click **Save**

Figure 23: CCP Password Reset



3.3. CCP Access to Patient Data

Prior to accessing patient data in Community Viewer, please read the following:

> **** WARNING**WARNING**WARNING ****
>
> "This U.S. Government computer system is for official use only.
> The files on this system include Federal records that contain sensitive information.
>
> **All activities on this system may be monitored to detect unauthorized access to or misuse of the system or individual files and utilities on the system, including copying, printing, or personal use.**
>
> Further use of this system constitutes your consent to such monitoring.
>
> Misuse of or unauthorized access to this system may result in criminal prosecution and disciplinary, adverse, or other appropriate action."
>
> **** WARNING**WARNING**WARNING ****

CCP users can access a patient record using the **Assigned Patients** widget to open the record in the **Patient Portal**.

After a CCP user logs in, the **Assigned Patients** widget appears with a list of patient consults. Clicking a hyperlink in the **Assigned Patients** widget, (Figure 24) opens the **Patient Portal**.

NOTE: If the **Assigned Patients** widget is not open after logging in, click the plus (+) sign in the lower-right corner of the screen to open the widget tray. Click and drag the widget icon from the tray to the screen, and drop in the desired location.

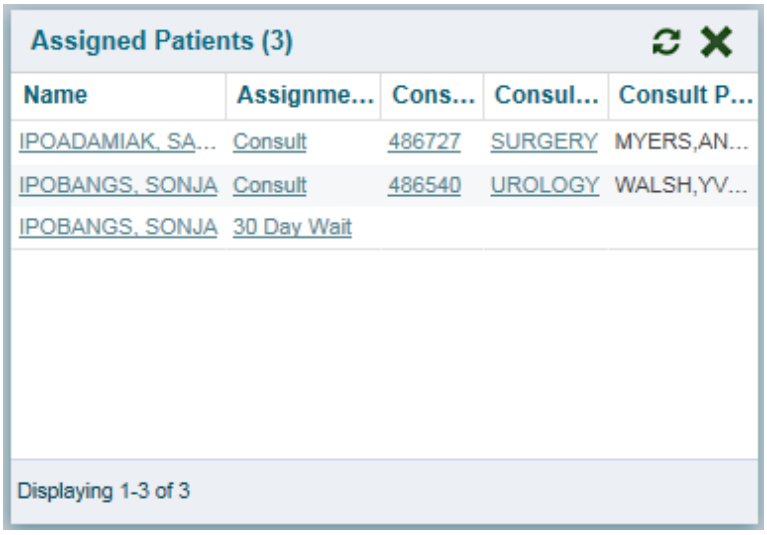
The **Assigned Patients** widget lists active and scheduled assignments for all providers in the group the provider belongs to. If there are two active assignments for one patient, the patient is listed twice.

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

- **Patient Name:** Click the entry to open the patient's record in the Patient Portal.
- **Assignment:** This is the assignment type.
- **Consult No.:** This is a number generated by the VA system. Click the entry to open the patient's record in the Patient Portal. This information is only shown for patients with a *Consult* assignment type.
- **Consult Name:** This is a label generated by the VA system. Click the entry to open the patient's record in the Patient Portal. This information is only shown for patients with a *Consult* assignment type.
- **Consult Provider:** The assigned VA Provider, or the provider who ordered the consult. This information is only shown for patients with a *Consult* assignment type.

NOTE: VAS users do not see the **Assigned Patients** widget, and do not have access to patient data through this point of access.

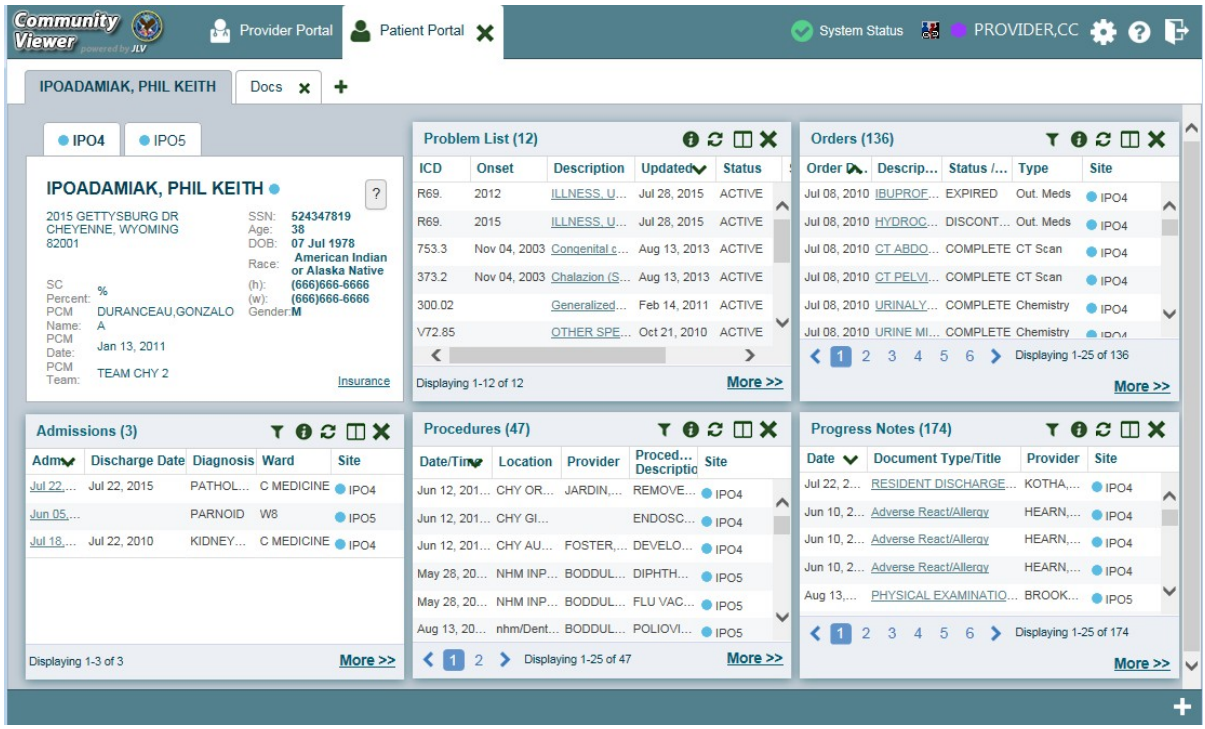
Figure 24: Assigned Patients Widget



4. Widgets

Patient-centric information is displayed in the Patient Portal through widgets for both CCPs and VAS users (Figure 25). Widgets are elements within the CV portal pages that display data specific to an administrative or clinical domain. Widget data is generally displayed in reverse chronological order, by date.

Figure 25: Widget Display on the Patient Portal



The list of available widgets on the Patient Portal is provided in a horizontal tray at the bottom of the page (Figure 26). To open the widget tray, click the + in the lower-right corner of the portal page. When accessing the Patient Portal for the first time, a preset widget display opens.

The Patient Portal displays the patient's clinical records and other patient-centric information from VA systems for the following clinical domains:

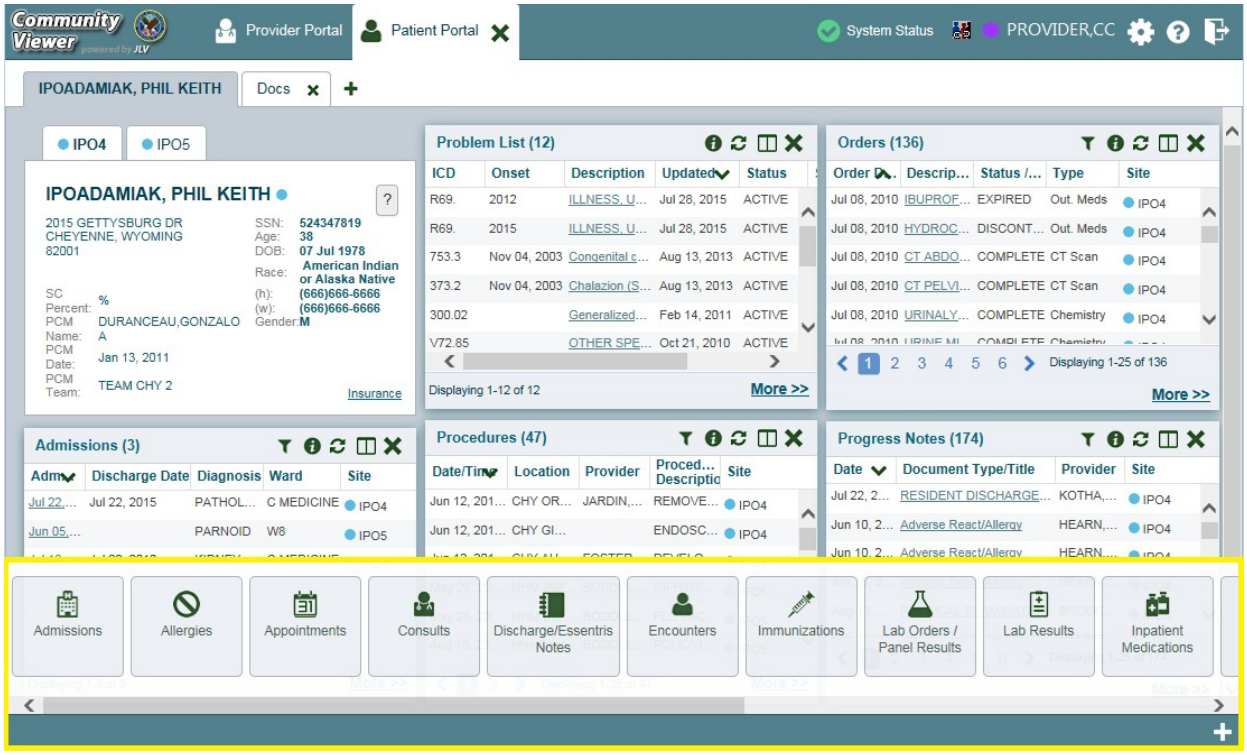
- Patient Demographics
- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Consults
- Discharge/Essentris Notes
- Encounters
- Immunizations
- Inpatient Medications
- Lab Panel Results
- Lab Results
- Outpatient Medications
- Orders
- Problem List
- Procedures
- Progress Notes
- Radiology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

NOTE: Widgets may take anywhere between three (3) and ten (10) seconds to load.

4.1. Accessing and Opening Widgets

To view a widget in the Patient Portal, locate the widget name in the horizontal tray displayed at the bottom of the portal (Figure 26). To open the widget tray, click the + in the lower-right corner of the portal page. Click and drag the selected widget from the tray to the portal screen. This action opens the widget in minimized view, and docks it on the portal.

Figure 26: Widget Tray on the Patient Portal



The example in Figure 26 displays the Patient Portal with an open widget tray highlighted at the bottom of the screen. If the widget tray is not open, click the plus sign (+) in the lower right-hand corner of the portal screen. This button opens the tray on the portal.

To view all clinical domains available in the Patient Portal in the widget tray, use the arrows (< or >) placed below the tray buttons in the lower left-hand and right-hand corners of the portal screen to scroll left to right or right to left through the tray.

NOTE: Widgets can be removed from the portal page and placed back into the widget tray by clicking **Close** ✖ in the top-right corner.

4.2. Widget Navigation and Display Options

Navigation tools and display options are provided within each widget (Table 3).

Click **More >>** in the lower-right corner of a widget in minimized view to open the widget in expanded view, as seen in Figure 27.

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

Table 3: Widget Navigation Tool Descriptions

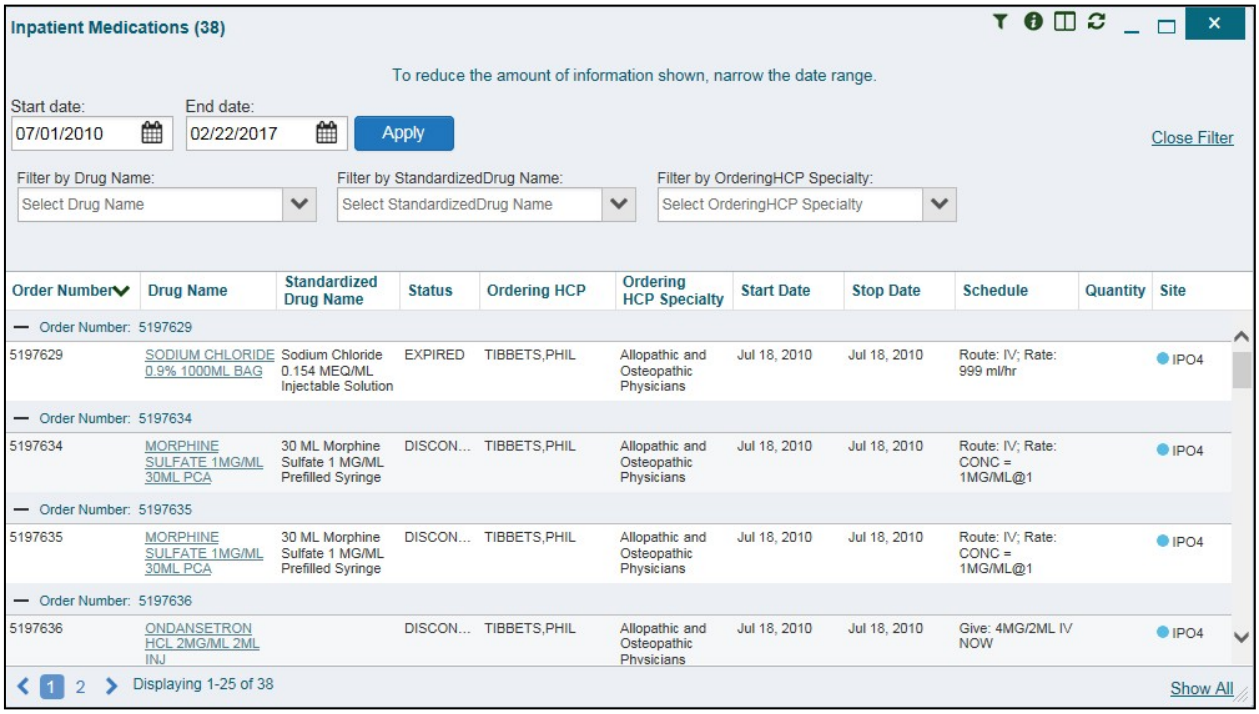
Widget Element	Meaning	Description
<	Go to Previous Page	Changes the focus of the widget to the previous group or page of records within the results display.
1	Jump to Page	Changes the focus of the widget to the page number selected.
>	Go to Next Page	Changes the focus of the widget to the next group or page of records within the results display.
More >>	Go to Expanded View	Available in minimized views only. Opens the expanded view of the widget in a secondary window.
[*variable*] of #	Record Display Indicator	Indicates the number of records displayed in that widget page out of the total number of results for that widget.
Show All/Show Paged	Display Setting	Click **Show All** to open all records for a given widget in a scrollable window. Click **Show Paged** to return to the display of records grouped by pages.

4.3. Minimized vs. Expanded Widget View

Each widget can be displayed in either minimized view or expanded view. The default rendering of a widget is in minimized view (Figure 25). Click the **More >>** link at the bottom of the widget in minimized view to open the expanded view (Figure 27).

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

Figure 27: Expanded View Widget Display



4.4. Displaying Widgets on Custom Tabs

For ease of use and quick reference, use the custom tabs function to create additional widget configurations on the portal pages. Changes made to the patient portal display (widget layouts and custom tabs) are saved to the user profile, and are displayed in future sessions.

To set up a customized tab:

1. Click the tab with the plus sign + in the top-left corner of the screen (Figure 25).
2. In the **Add Tab** dialog box, type in a name for the new tab and click **OK**.
3. Within the new tab space, access the widget tray, and click and drag the desired widgets to the screen.
4. Click between tabs at any time, without losing any of the configurations created in the tabs. Tabs persist when a patient change is made.

4.5. Refreshing Widget Data

Data in the widget display can be refreshed by clicking **Refresh** . This action refreshes the widget and displays the data within CV.

4.6. Examples of Widget Functionality

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

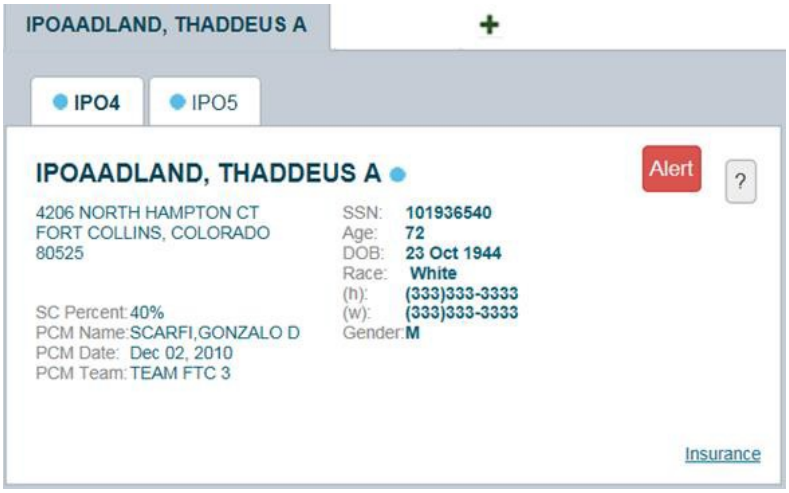
NOTE: To see detailed information for any of the widgets available in CV, click **Help** in the top-right corner of the portal pages.

4.6.1. Patient Demographics

A summary of the patient's demographics (personal data) appears in the top-left section of the Patient Portal. 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 followed by an icon. The blue circle represents data retrieved from a VA system. Click the patient's name to open a separate window that provides patient demographics details.

Figure 28: Patient Demographics Summary



4.6.1.1. 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. Click the **Insurance** link in the **Demographics** widget to open a separate window with a detailed list of insurance information for the patient. Displayed insurance information includes:

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- Subscriber Date of Birth
- Subscriber's Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information

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

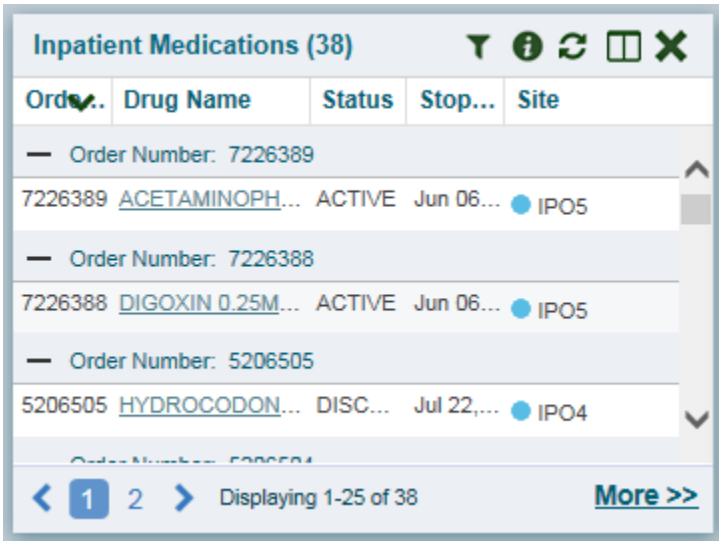
Data in the **Standardized Insurance Type** column is normalized to the X12 Health Insurance Type standard. Hover over entries in this column to display the standardized name and code for the insurance type.

4.6.2. Inpatient Medications

The **Inpatient Medications** widget displays the patient's inpatient medication information. The medications are grouped by the order number where available.

To open the widget, click **Inpatient Medications** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

Figure 29: Inpatient Medications



4.6.2.1. Inpatient Medications Widget Data

In the minimized view of the **Inpatient Medications** widget, the inpatient medication information includes:

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

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

Click **More >>** from the minimized view of the **Inpatient Medications** widget to open an expanded view of the widget. In the expanded view, the inpatient medication information includes:

- Order Number
- Order Start Date
- Order Stop Date
- Drug Name
- Standardized Drug Name
- Status
- Ordering Health Care Provider (HCP)
- Ordering HCP Specialty
- Schedule
- Quantity
- Site

4.6.2.2. 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 containing the detail of the medication.

4.6.2.3. Inpatient Medication Display and Filter Options

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

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile. When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records are displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range. CCP users may have limited access to records, depending on the date range set when the consult was assigned by the VAS user.
- Use the **Filter by Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication.
- Use the **Filter by Standardized Drug Name** drop-down box to re-draw the widget to show only the records for the selected medication.

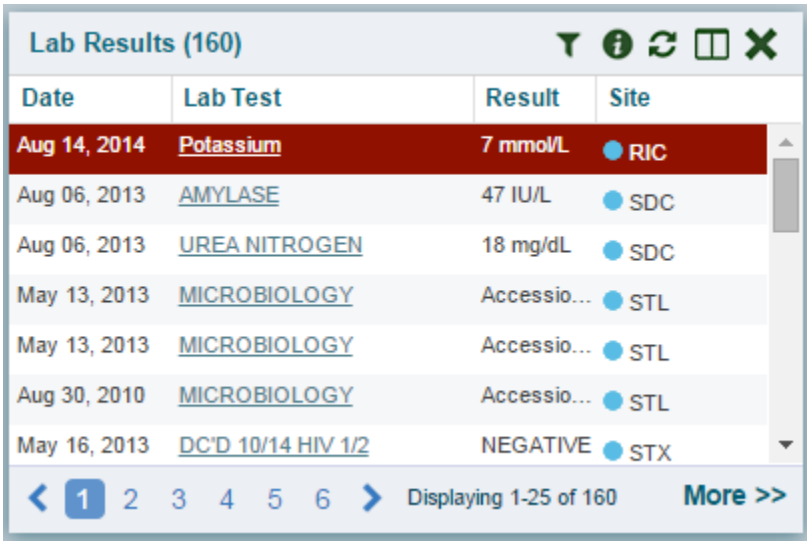
- Use the **Filter by Ordering HCP Specialty** drop-down box to re-draw the widget to show only the records for the ordering HCP.

4.6.3. Lab Results

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

To open the widget, click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

Figure 30: Lab Results



4.6.3.1. Lab Results Widget Data

In the minimized view of the **Lab Results** widget, the lab result information includes:

- Collection Date
- Lab Test
- Result
- Site

Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget. In the expanded view, the lab result information includes:

- Collection Date
- Order Number
- Status
- Ordering HCP
- Ordering HCP Specialty
- Lab Test

- Standardized Lab Test
- Type
- Specimen Source
- Result
- Interpretation
- Units
- Ref Range
- Site

4.6.3.2. Lab Results Display and Filter Options

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

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile.
- Click **Column Settings** in the widget toolbar to hide or show the columns within the widget. Check/uncheck the column names that appear in the pop-up box and click **Apply**.
- Specify the date range for which records are displayed in the widget using the **Quick Date Range Selector** or the **Start Date** and **End Date** calendars. If the information you expect does not appear in the widget display, use the **Start Date** and **End Date** filter options to expand the date range. CCP users may have limited access to records, depending on the date range set when the consult was assigned by the VAS user.
- Use the **Filter by Lab Test** drop-down box to re-draw the widget to show only the records for the selected test.
- Use the **Filter by Standardized Lab Test** drop-down box to re-draw the widget to show only the records for the selected test.
- Use the **Filter by Type** drop-down box to re-draw the widget to show only the records for the selected type.
- Use **Graph View** to display multiple records of the same type in a graph. Refer to Section 4.6.3.6, Graph View in the Lab Results Widget for more information.
- Use **Table View** to display multiple records of the same type in a tabular format. Refer to Section 4.6.3.5, Table View in the Lab Results Widget for more information.

4.6.3.3. Viewing Abnormal Results in the Lab Results Widget

For records in the **Lab Results** widget where result values fall within a calculated reference range for abnormal within the originating source system, CV highlights the row for that record 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 (i.e., H* or L*) or the result is critical.

4.6.3.4. Viewing Lab Results Details

Clicking a hyperlinked entry in the Lab Test column of the Lab Results widget opens a separate window containing a report of the record.

4.6.3.5. Table View in the Lab Results Widget

The **Lab Results** widget provides the option to display multiple records of the same type in a table. 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.

To view lab results in Table View:

1. Click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget.
3. In the expanded view, select one entry from the **Filter by** drop down boxes (except for the Filter by Type filter option). This action enables the **Show Graph** and **Show Table** links.

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

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

4.6.3.6. Graph View in the Lab Results Widget

The **Lab Results** widget provides the option to display multiple records of the same type in a graph. 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.

To view lab results in Graph View:

1. Click **Lab Results** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.
2. Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget.
3. In the expanded view, select an available filter from the **Filter by** drop down boxes (except for the Filter by Type filter option). This action enables the **Show Graph** and **Show Table** links.

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

4. Click **Show Graph**.

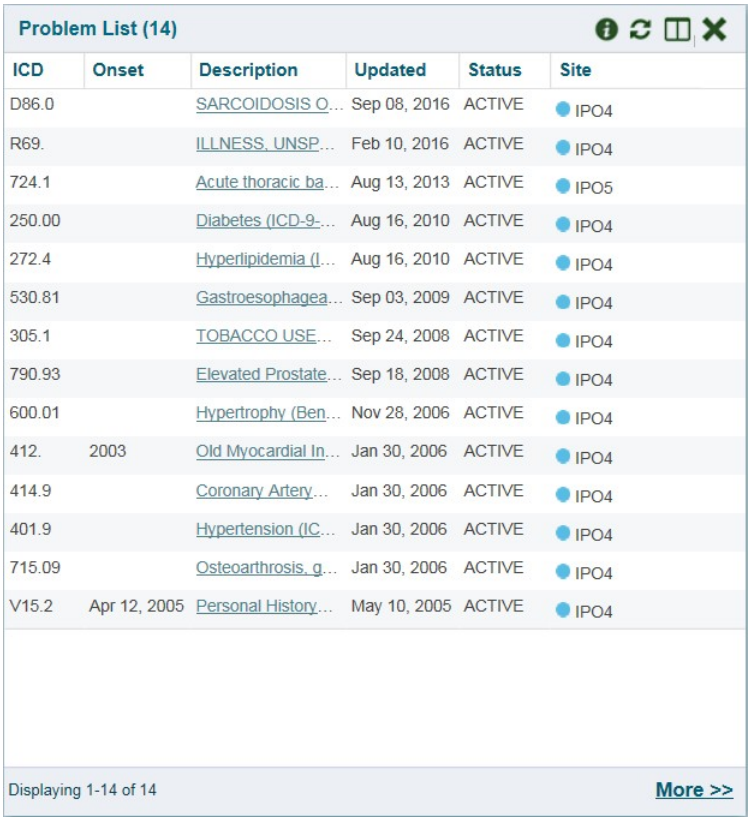
5. A separate window opens, displaying a graph of the multiple records of the type selected in the filter.

4.6.4. Problem List

The **Problem List** widget displays the patient's problem list information. The information is displayed in reverse chronological order by the last modified date.

To open the widget, click **Problem List** from the widget tray that appears at the bottom of the Patient Portal, drag the icon to the screen, and drop where desired on the portal.

Figure 31: Problem List Widget



4.6.4.1. Problem List Widget Data

In the minimized view of the **Problem List** widget, the problem list information includes:

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

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.6.4.2, Viewing Problem List Details for more information.

Click **More >>** from the minimized view of the **Problem List** widget to open an expanded view of the widget. In the expanded view, the problem list information includes:

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

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the widget to open a separate window containing the detailed report of the record. Refer to Section 4.6.4.2, Viewing Problem List Details for more information.

4.6.4.2. Viewing Problem List Details

Click a hyperlinked entry in the Description column in either the minimized or expanded views of the **Problem List** widget to open a separate window containing the detailed report of the record.

4.6.4.3. Problem List Display and Filter Options

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

- Click the column title to sort records according to data in that column. If a user sorts on a column that appears in both minimized and expanded views of the widget, the sort is saved in the user profile and persists to the next user session. If a user sorts on a column that is only in the expanded view of the widget, the next user session restores the default widget sort, or the last sort saved to the user profile.
- Use the **Filter by Description** drop-down box to re-draw the widget to show only the records for the selected problem.
- Use the **Filter by Standardized Description** drop-down box to re-draw the widget to show only the records for the selected problem.
- Use the **Filter by Status** drop-down box to re-draw the widget to show only the records with the selected status.

5. Troubleshooting

5.1. Special Instructions for Error Correction

NOTE: The following information applies **only** to VAS users.

Access to CV is limited to registered, authorized users. CV validates user access against information retrieved from that user's smart card. If you are experiencing trouble logging in to CV, please review Table 4 before contacting the service desk.

Table 4: Login Page Error Message Troubleshooting

Error Message	Resolution Steps
Access denied. You are not an authorized user.	***WHAT?*** Error message indicating *Access Denied. You are not an authorized User*. ***WHY?*** PIV card processing problem or invalid security certificate chosen. ***FIX IT:*** 1. Close browser window. 2. Re-insert PIV card and re-launch the CV link. 3. Select a certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*. If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.
Could not save User Profile	***WHAT?*** Error message indicating *Could not save User Profile*. ***WHY?*** Error occurred during PIV authentication for VA users - typically a PIV card processing problem or an invalid security certificate chosen. ***FIX IT:*** 1. Close your browser window. 2. Re-insert PIV card and re-launch the CV link. 3. Select a certificate that is not expired and specifies *Issued by: Veterans Affairs CA B1*. If this is unsuccessful, fully reboot your system. This refreshes all connections and resolves greater than 95% of any remaining problems.
Not a valid ACCESS/VERIFY CODE pair	**WHAT?** Not a valid ACCESS CODE/VERIFY CODE pair" error at login screen. **WHY?** 1) CV could not match your access and verify codes to the Site selected in the drop down or VA, or 2) Username and password were entered instead of access/verify codes. ***FIX IT:*** 1. VHA users must select the **parent VistA host site** for their facility (e.g., Wichita uses *Kansas City, Missouri [MO]*). 2. Re-enter correct **Access** and **Verify codes** (Computerized Patient Record System (CPRS) or VistA codes for VHA users).

Error Message	Resolution Steps
Page cannot be displayed	**WHAT?** You receive a *Page cannot be displayed* error when launching CV. **WHY?** The CV URL requires certain internet explorer settings **FIX IT:** 1. With Internet Explorer open, click the **Tools menu** or press ALT-X. 2. Select Internet Options. 3. When the dialog opens, select the **Advanced tab**. 4. Scroll down in the list until you see the settings below and assure Secure Socket Layer (SSL) 2.0 is NOT checked and that Transport Layer Security (TLS) 1.0, 1.1 and 1.2 are checked. 5. Click **OK**, then re-launch CV and the page should load.
Smart Card required	**WHAT?** Error Message *Smart Card Required*. **WHY?** Smart card not read by Windows Security and CV before launching CV link. **FIX IT:** 1. Close all browser sessions/browser-based applications. 2. Re-insert PIV card and re-launch CV link. 3. If this is unsuccessful, fully reboot your system to refreshes all connections. This resolves greater than 95% of any remaining problems.
VERIFY CODE must be changed before continued use	**WHAT?** Receive V*ERIFY CODE must be changed before continued use* error at login screen. **WHY?** CPRS VERIFY CODE has expired. **FIX IT:** 1. Open CPRS. 2. Select the **Change Verify Code** checkbox on the sign-on dialog before clicking **OK**. 3. You are prompted to create a new Verify Code. 4. Once your Verify Code is changed for CPRS, CV recognizes the new code immediately.

5.1.1. Patient Search Errors

The following error messages may appear when a VAS user is searching for a patient in the CCPM module. If you are experiencing errors while searching for patients, please review Table 5 before contacting the service desk.

Table 5: Patient Search Error Messages and Resolution Steps

Error Message	Resolution Steps
An invalid search criteria was entered. Please enter at least 2	Invalid patient name entered. Please try your search again. When searching by patient name, enter at least two characters of the patient's first and last name. Search results will display the closest match to the

Error Message	Resolution Steps
characters.	characters entered in the format of [*last name*], [*first name*].
An invalid Social Security Number (SSN) format was entered. Please enter a 9-digit SSN.	Invalid SSN entered. Please try your search again. When searching by patient SSN, you are required to enter the patient's full 9-digit SSN. Dashes are allowed (e.g., 123-45-6789).
An invalid last 5 format was entered. Please enter the first letter of the last name followed by the last 4-digits of the SSN.	Invalid patient name or SSN entered. Please try your search again. Patient search allows you to search for a patient using the first initial of the patient's last name and the last 4 digits of the patient's SSN. Please try your search again using the first initial of the patient's last name and the last 4 digits of the patient's SSN.
An error occurred during your search. Please try your search again.	This error may display when invalid patient identifiers were entered or an error occurred at the service layer or with an external system. Please try your search again.

6. Acronyms and Abbreviations

Table 6 lists the acronyms and abbreviations used throughout this document, and their descriptions.

Table 6: Acronyms and Abbreviations

Acronym	Description
CCOW	Clinical Context Object Workgroup
CCP	Community Care Provider
CCPM	Community Care Provider Management
CPRS	Computerized Patient Record System
CV	Community Viewer
ESD	Enterprise Service Desk
GUI	Graphical User Interface
HCP	Health Care Provider
HIPAA	Health Insurance Portability and Accountability Act
ICD	International Classification of Diseases
ID	Identification
IE	Internet Explorer
JLV	Joint Legacy Viewer
MVI	Master Veteran Index
OI&T	Office of Information and Technology
PIN	Personal Identification Number
PIV	Personal Identification Verification
SSL	Secure Socket Layer
SSN	Social Security Number
TLS	Transport Layer Security
UI	User Interface
URL	Uniform Resource Locator
VA	Department of Veterans Affairs
VAS	VA Administrative Staff
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VLER	Virtual Lifetime Electronic Record