**Community Viewer (CV) Version 2.7 User Guide for VA Staff**



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# Introduction

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

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

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

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

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

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

**IMPORTANT:**

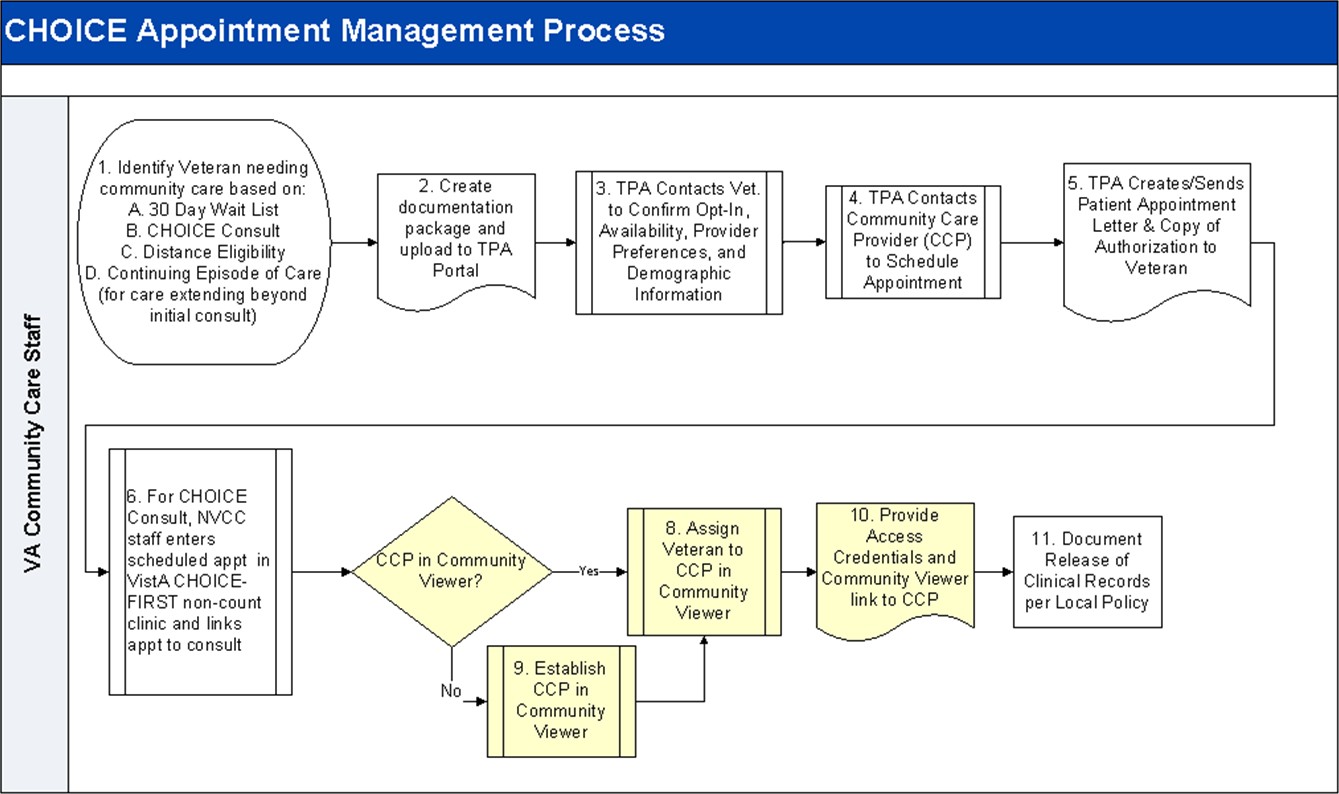
CV is designed to improve the community providers’ ability to

view comprehensive VA health information for Veterans.

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

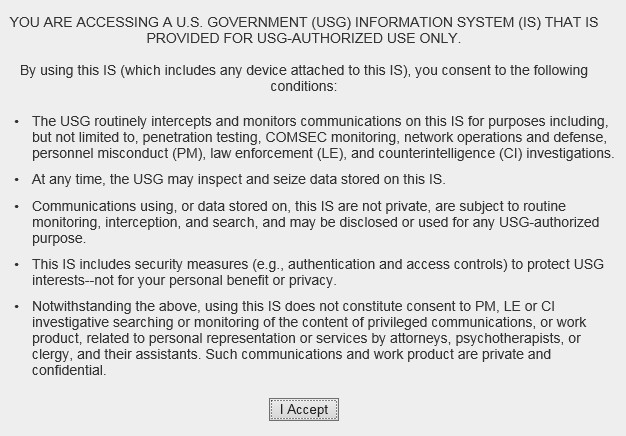
VA Administrative Staff must continue to create and upload documentation packages as specified in the current SOP.

[Figure 2](#_bookmark2) depicts the typical user workflow.

**Figure 2: User Workflow**

Please read and bear in mind the warning displayed in [Figure 3](#_bookmark3) before using CV.

**Figure 3: CV Authorized Use Only Warning**



## Purpose of the Guide

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

* + 1. **Guide Conventions**

This document is designed for both online and hardcopy consumption.

* Cross-References are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
* Emphasis is expressed by **bold**, underlined, and *italicized* text
* The information symbol Symbol for additional information - lowercase, white letter "i" inside a blue circle. calls the reader’s attention to additional information
  + 1. **Terminology**

The following standard terms are used throughout this guide:

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

## Assumptions

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

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

## System Requirements

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

 This release does not support mobile devices.

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

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

## Getting Help

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

Small image of the official seal of the VA**IT Enterprise Service Desk**

REDACTED

Prior to contacting the ESD for support, please refer to [Section 2, Logging in to CV,](#_bookmark10) for detailed information about how to access CV, and to [Section 5, Troubleshooting](#_bookmark65), for suggested resolution steps and troubleshooting information.

# Logging in to CV

Before logging in to and utilizing the functionality of the **CCPM** widget, please read the

**Sensitive Information** warning in [Figure 1](#_bookmark1).

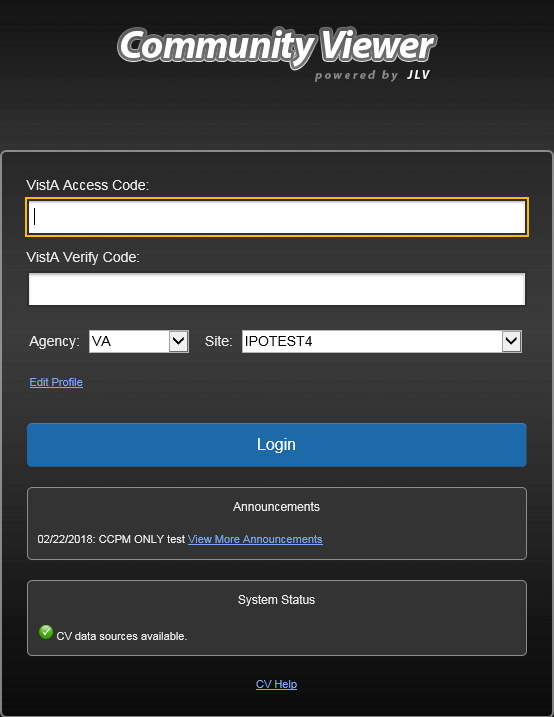
If you have not received an access confirmation e-mail, you must first request access through your facility Community Care lead or your VISN Business Integration Manager (BIM).

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

To log in to CV:

1. Ensure your PIV card is inserted into your computer or card reader
2. Open a supported Internet browser
3. Enter the URL for the [CV web application](https://communityviewer.med.va.gov/VACV) into the address bar of the browser
4. When prompted with a certificate list, select the PIV Authentication certificate
5. When prompted, enter your PIV Personal Identification Number (PIN)
6. Click **I Accept** after reading the important user consent information regarding accessing a government information system ([Figure 3](#_bookmark3))
7. Enter the following information in the fields on the **Login** page ([Figure 4](#_bookmark11)):
   1. VistA Access Code
   2. VistA Verify Code
   3. Select **VA** from the **Agency** field
   4. Select your local VistA host site from the **Site** dropdown
8. Click **Login**

**Figure 4: Login Page**



Users who are not authorized to access CV receive an *Access denied* message. Access to CV is limited to authorized users and is configured by System Administrators. If you believe you have received the message in error, please contact the ESD. See [Section 1.4, Getting Help](#_bookmark9), for details.

## System Notifications

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

## Editing Your User Profile at Log in

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

UI theme preferences can also be set within CV. See [Section 2.3.3, Profile Settings](#_bookmark20). To edit the user profile at log in:

1. Click the **Edit Profile** link on the **Login** page
   1. 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**

## The CV Portal Pages

The CV portal pages have tools that enable quick access to basic features. These tools appear in the upper right corner of the application window (highlighted in [Figure 5](#_bookmark15)).

* **Select the UI theme:** Click Settings Image of the Cog Wheel icon to select the UI theme (See [Section 2.3.3, Profile Settings](#_bookmark20))
* **Access online help:** Click Help Image of the Help icon to open web-based, online help
* **Log out:** Click Logout Image of the Logout icon to terminate the current CV session

**Figure 5: CV Portal Tools**



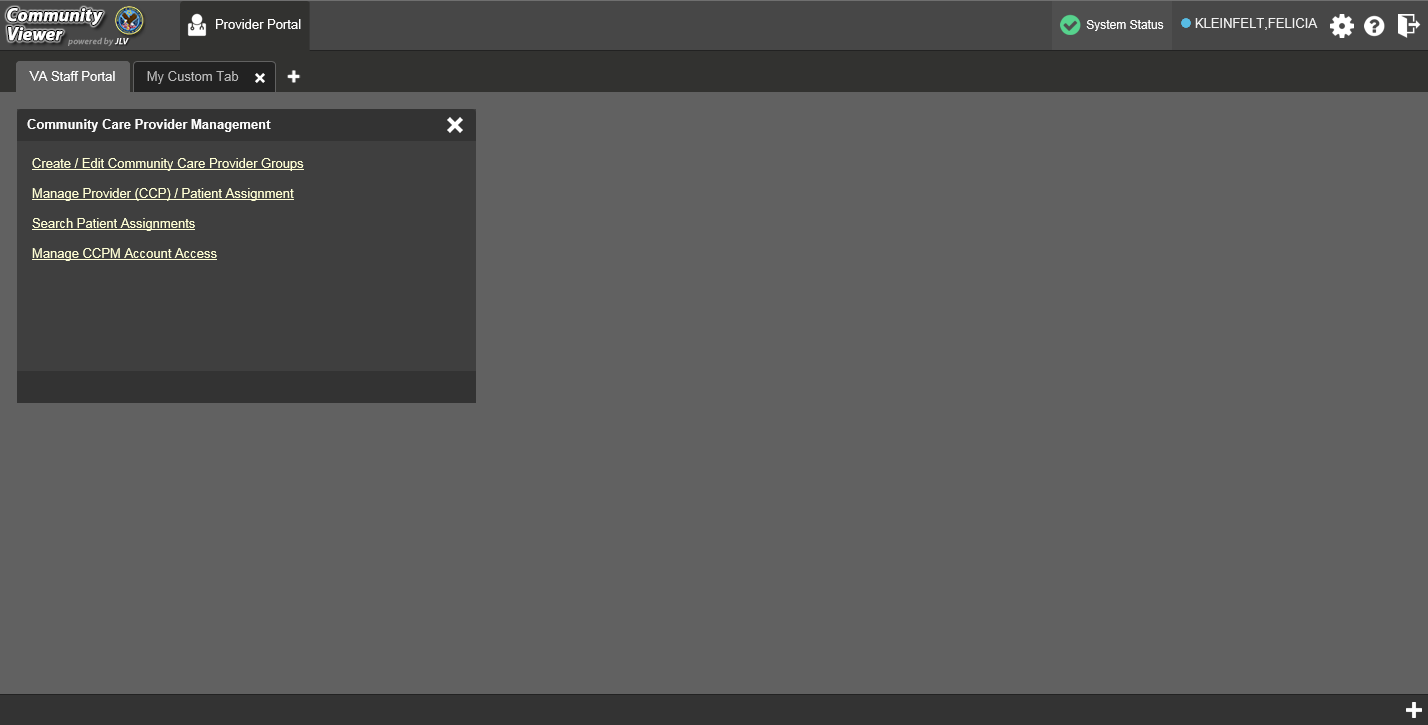
* + 1. **Default View**

After logging in to CV, the **VA Staff Portal** opens. The default view of the **VA Staff Portal**

includes the **CCPM** widget ([Figure 6](#_bookmark17)).

|  |  |
| --- | --- |
| Image of the information icon. | If the **CCPM** widget is not displayed, click the plus + sign in the lower right corner of the screen, ([Figure 6](#_bookmark17)) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the screen, and drop the widget  in the desired location. |

**Figure 6: Default View**



* + 1. **Viewing System Status**

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

The system status is displayed in two areas:

1. On the **Login** page ([Figure 4](#_bookmark11))
2. Atop the **VA Staff Portal** page (highlighted in [Figure 7](#_bookmark19))

When all monitored systems and services are online and connected, a green icon Image of the green system status icon. appears next to the status, with the message, *“CV data sources available”* ([Figure 4](#_bookmark11)).

When one or more monitored systems or services are offline or unavailable, a yellow warning icon Image of the yellow system status icon. appears with the message, *“CV is having problems.”*

Image of the red system status icon.When CV’s health monitor is unable to retrieve and report system status information, a red icon appears with the message, *“System status is unavailable.”* When this status appears, you may

not be able to log into CV or view patient data until the connection is restored. See [Section 1.4,](#_bookmark9) [Getting Help,](#_bookmark9) for information on how to contact the ESD.

**Figure 7: System Status Indicator**



* + 1. **Profile Settings**

Profile settings are accessible within CV by clicking **Settings Image of the Cog Wheel icon** located in the upper right corner of the portal pages ([Figure 6](#_bookmark17)).

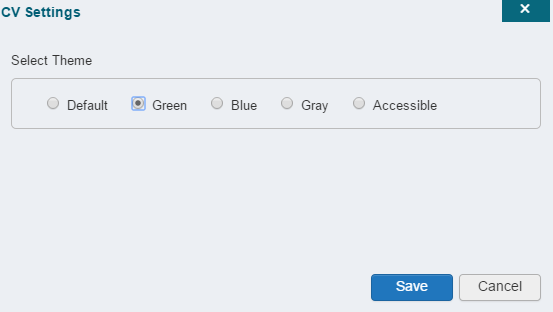
In this release, the configuration options are limited to choosing a UI theme.

Selecting a **UI Theme** sets the font color, foreground, and background colors of the CV Graphical User Interface (GUI). Themes apply to all application elements, including widgets, toolbars, and dialog boxes. Theme choices are Default, Green, Blue, Gray, and Accessible. The Accessible theme ([Figure 12](#_bookmark25)) is 508-compliant, and it is designed to work with the accessibility tools installed on a user’s device.

To set the UI theme:

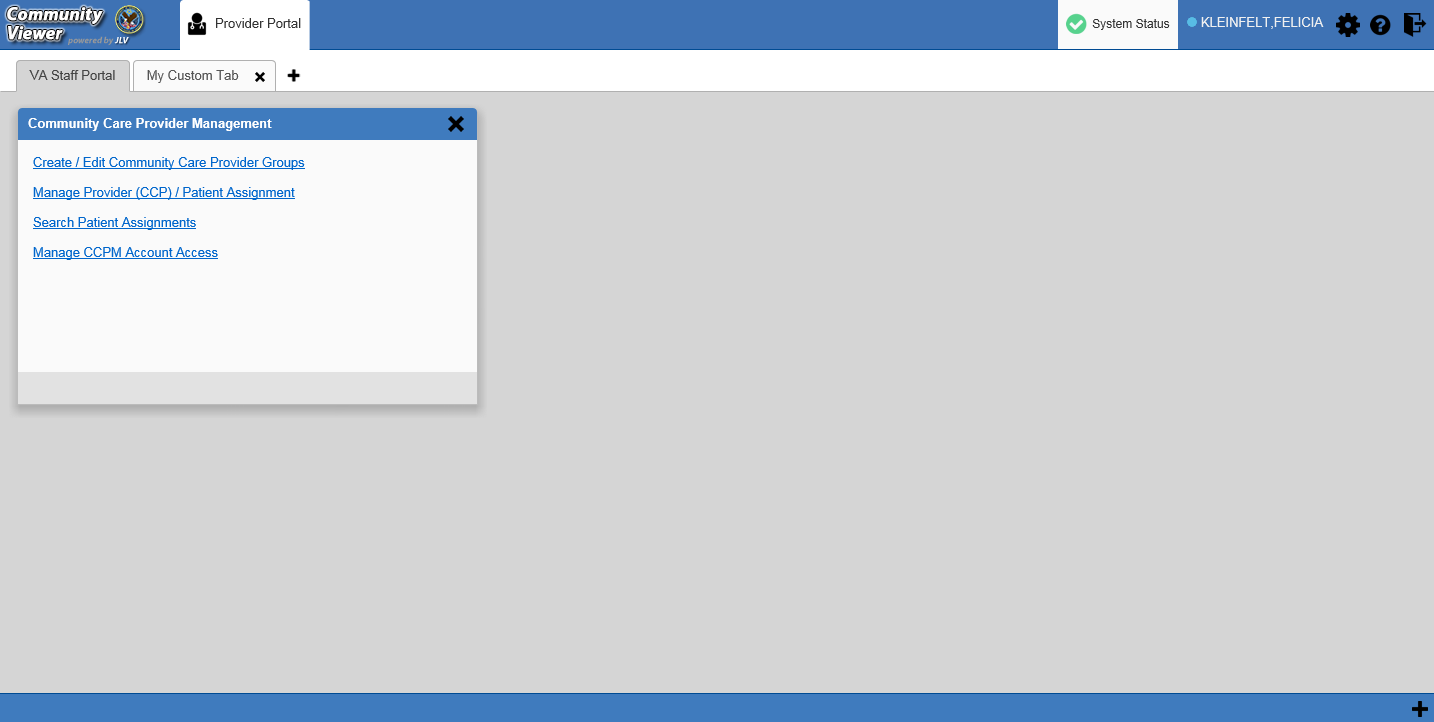
1. Click **Settings Image of the cog wheel icon.** in the upper right corner of the portal pages
2. The **CV Settings** dialog opens ([Figure 8](#_bookmark21))
3. Click the radio button next to the desired theme
4. Click **Save**
5. Click **Cancel** to exit the **CV Settings** dialog and restore the previous theme

**Figure 8: The CV Settings Dialog**

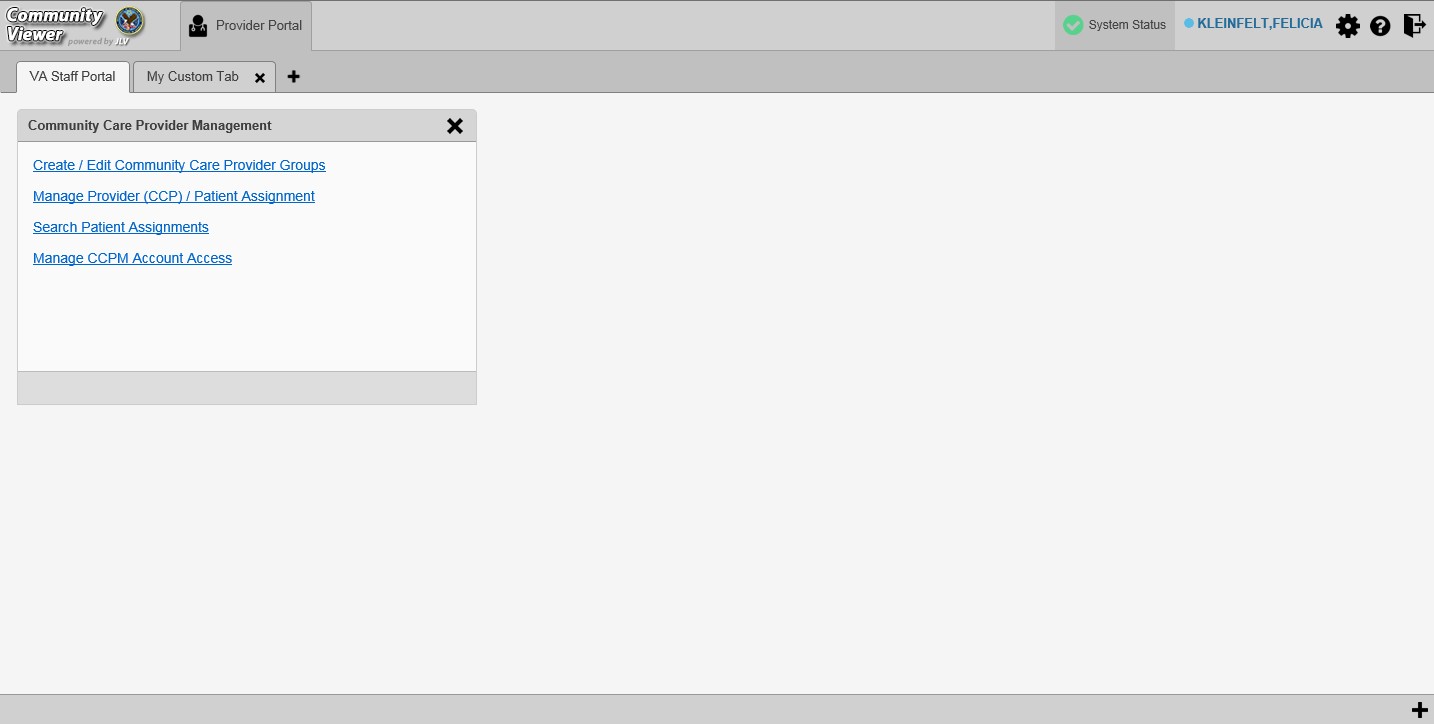


UI theme choices are displayed in the figures below. The Default theme was presented in [Section](#_bookmark16) [2.3.1, Default View](#_bookmark16), [Figure 6.](#_bookmark17)

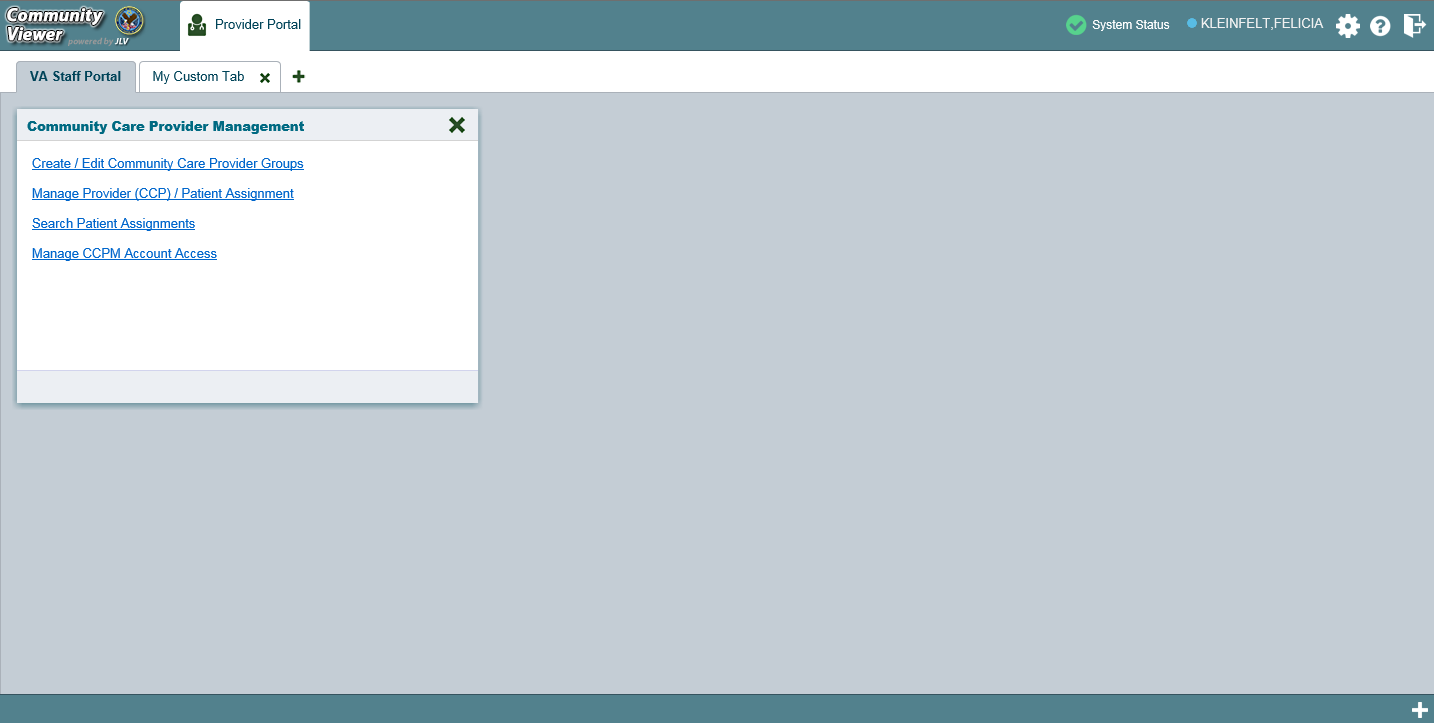
**Figure 9: Blue UI Theme**



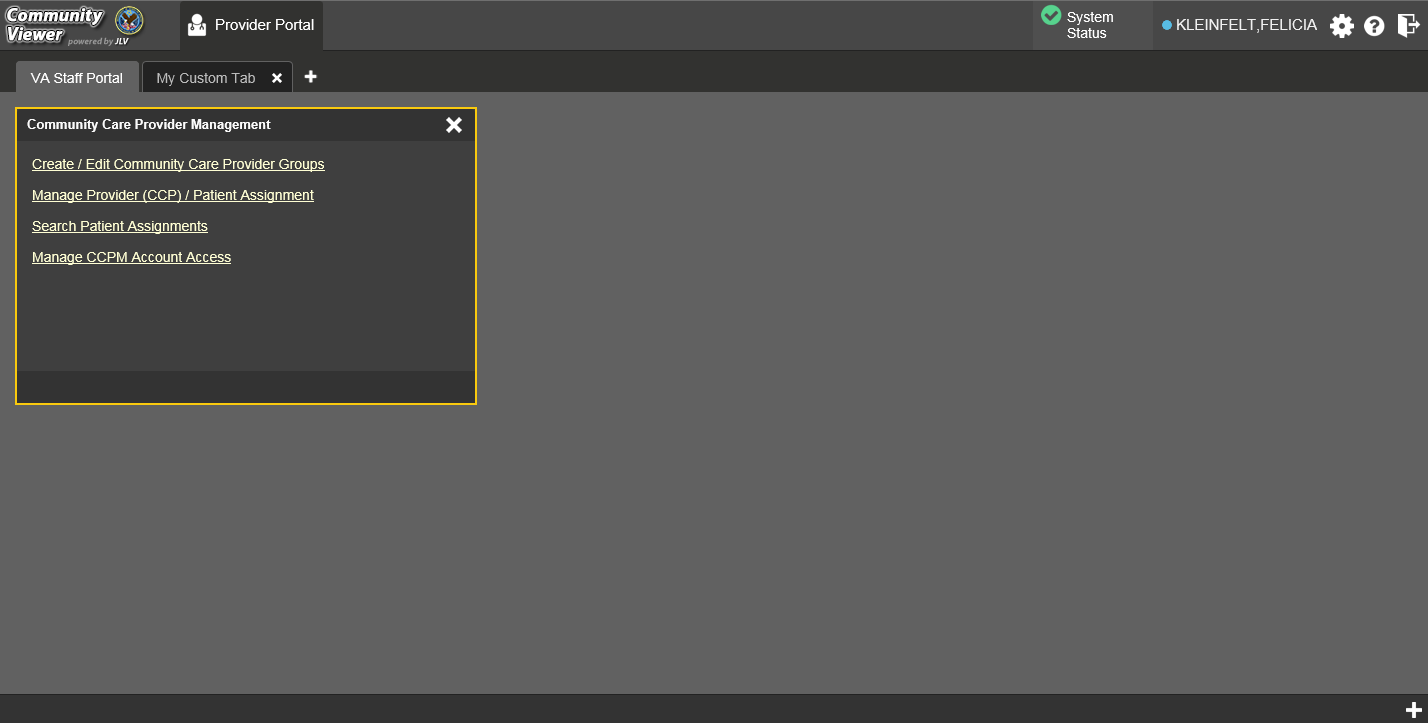
**Figure 10: Gray UI Theme**



**Figure 11: Green UI Theme**



**Figure 12: Accessible (508-Compliant) UI Theme**



* + 1. **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.

* + - 1. **Keyboard Focus and Screen Navigation in Accessible Theme**

Keyboard focus is the highlighting of screen elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The screen element in focus is outlined in gold ([Figure 12](#_bookmark25)) as a visual indicator of keyboard focus.

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

Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. For example, pressing **Enter** or the **Spacebar** when the **Settings** icon Image of the Cog Wheel icon is in focus opens the CV Settings dialog. Using the arrow keys or the **Tab** key allows a user to move between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in [Table 1](#_bookmark28).

**Table 1: Keyboard Accessible Keystrokes**

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

|  |  |
| --- | --- |
| **Keystroke** | **Description** |
| ***Adding Widgets to the Portal Pages*** | |
| **Alt + 1, 2, or 3** | Add a widget to a Portal Page from the Widget Tray:   1. Determine which column (1, 2, or 3) of the Portal Page you want to place the widget. 2. Focus on the desired widget icon in the Widget Tray. 3. Press Alt + 1, 2, or 3, depending on the desired column. |

## 2.4. Logging Out of the Current CV Session

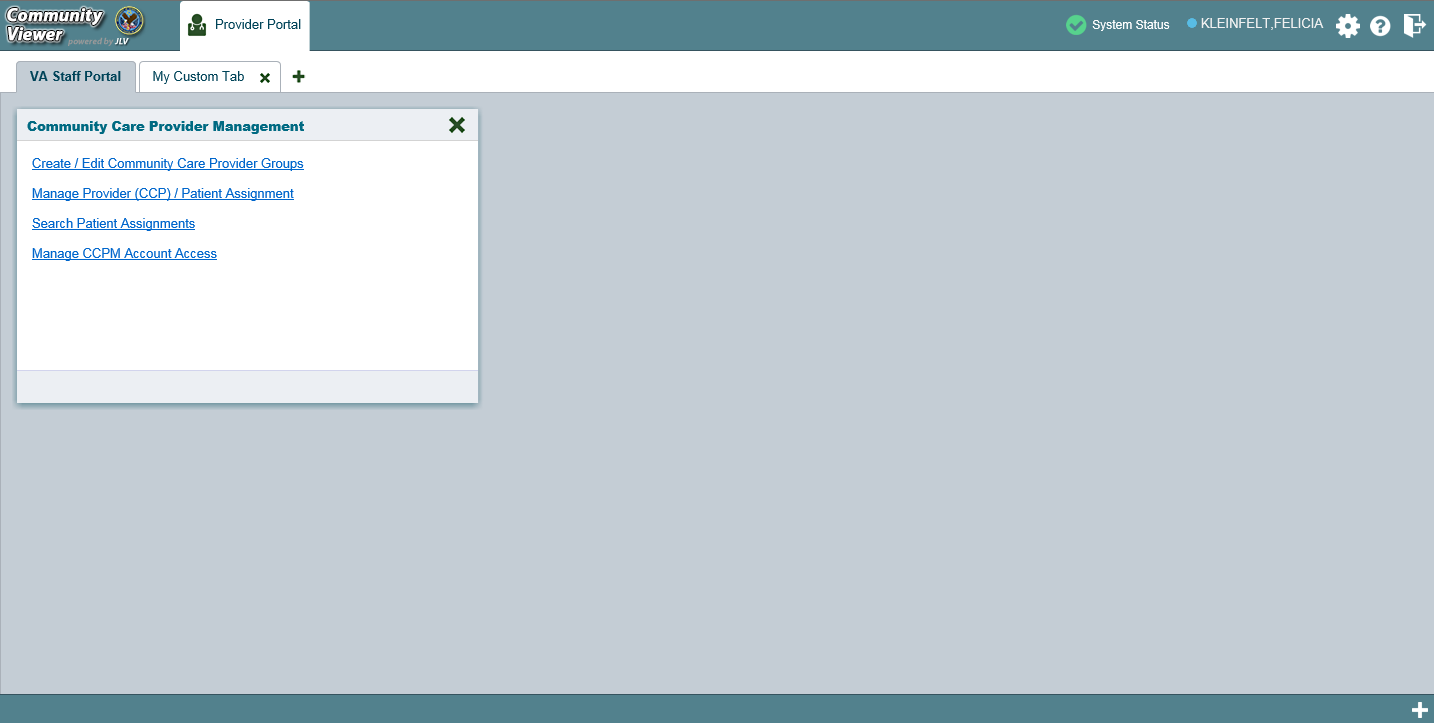
You may intentionally log out to end a CV session by clicking **Logout Image of the log out icon.** at any time. If you fail to log out, the current session will terminate automatically after 30 minutes of inactivity. You will be redirected to the **Login** page when any new activity is attempted.

# Using CV

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

If the **CCPM** widget is not displayed, click the plus + sign in the lower right corner of the portal page ([Figure 13](#_bookmark31)) to open the **Widget Tray**. Click, hold, and drag the icon from the **Widget Tray** to the portal page, and drop it in the desired location.

**Figure 13: Default Portal Page (Green Theme)**



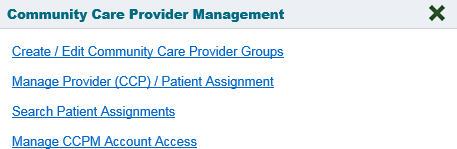
VA Staff create providers, assign patients to CCPs, and grant the CCP limited access to patient records within the **CCPM** widget.

There are four workflow options ([Figure 14](#_bookmark32)) within the **CCPM**:

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

|  |  |
| --- | --- |
| Image of the information icon. | The Manage CCPM Account Access link is available only to CV Portal  Administrators. |

**Figure 14: The CCPM Widget**



## About Provider Groups and Facilities

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

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

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

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

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

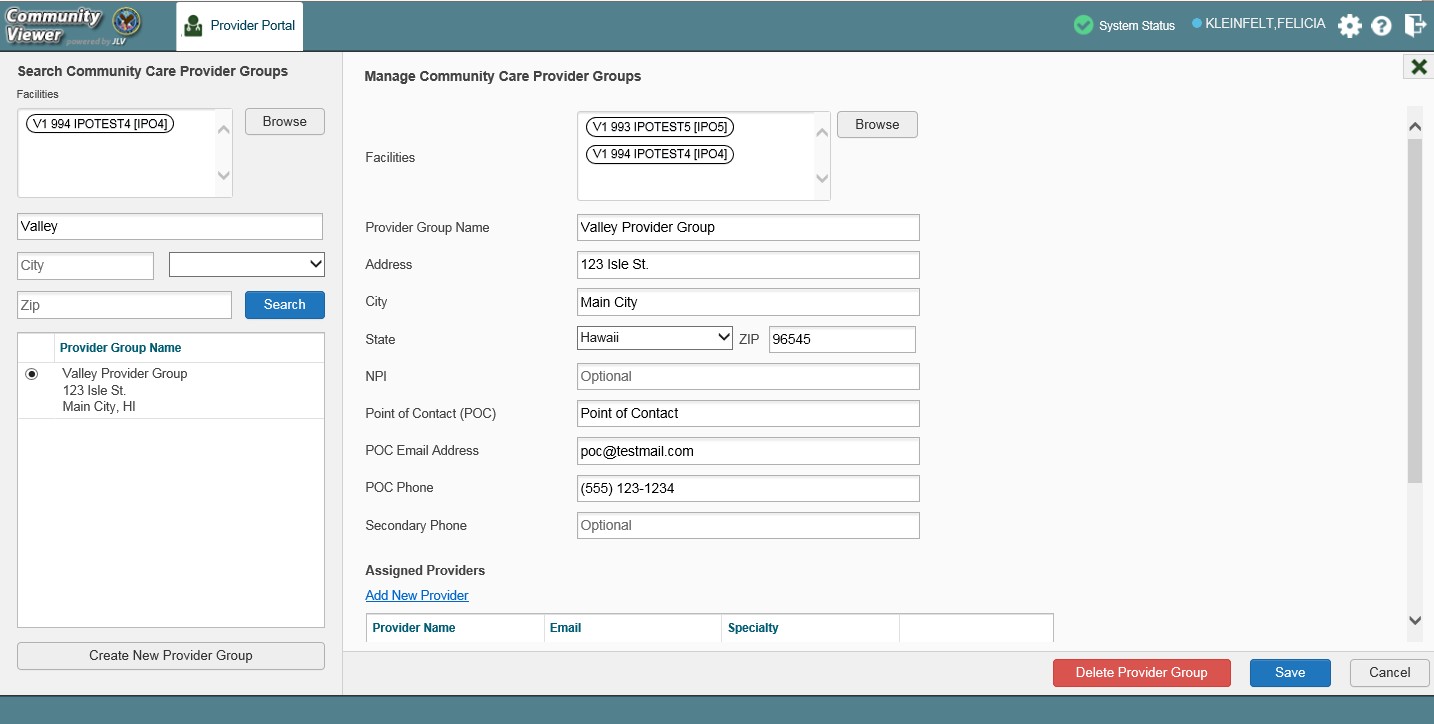
**EXAMPLE 2:** Dr. Woodroof, the *Provider*, is a sole practitioner. The *Provider Group* name for a sole practitioner may be a business name or can be the provider’s name; in this example, Dr.

Woodroof.

## Editing Provider Groups

Provider groups can be edited through the CCPM widget ([Figure 15](#_bookmark35)).

**Figure 15: Search and Manage CCP Groups Panes**



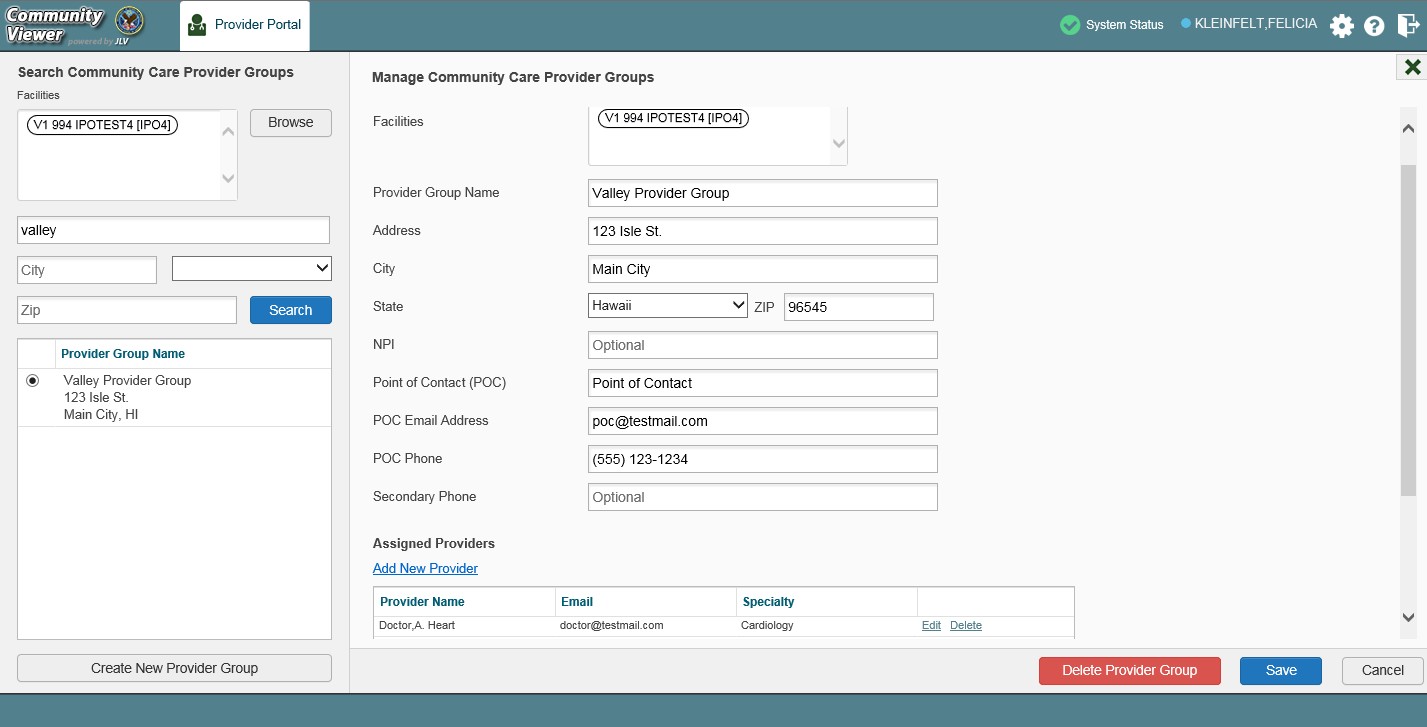
To edit a provider group ([Figure 15](#_bookmark35)):

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

**Assigned Providers** list ([Figure 16](#_bookmark36))

1. Click Save

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

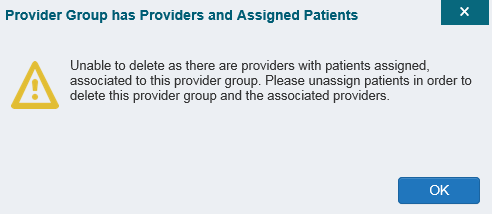


In this release, the tasks of adding new groups and deleting providers are performed by CV Portal Administrators. VA Staff users will not see the **Create New Provider Group** button, the **Delete Provider** button, or the **Delete** link. Contact a CV Portal Administrator for assistance with these tasks.

* + 1. **Deleting a Provider Group**

CV Portal Administrators may only delete a provider group when the individual providers within that group have no patient assignments. If any patients are assigned to a provider within the provider group, the error message in [Figure 17](#_bookmark38) will display. [Section 3.2.6, Assigning and](#_bookmark50) [Unassigning Patients](#_bookmark50), details steps to unassign patients from an individual provider.

**Figure 17: Provider Group Deletion Error Message**

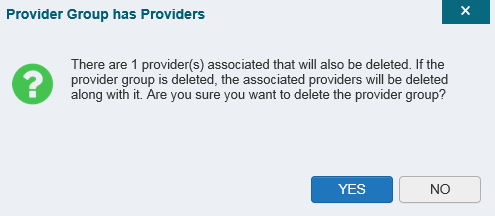


To delete a provider group:

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

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

**Figure 18: Provider Group Has Providers Without Patient Assignments**



* + 1. **Creating Provider Accounts**

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

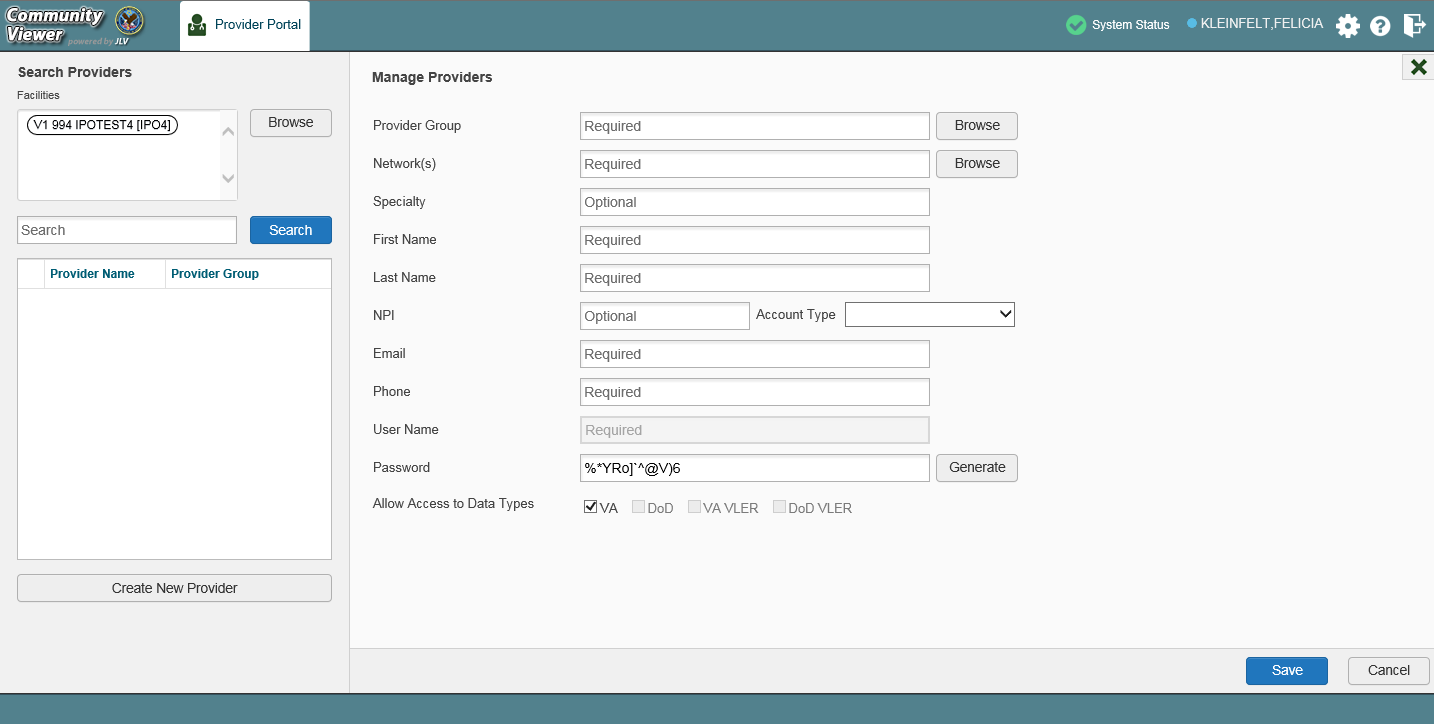
To create a provider:

1. Click the **Manage Provider (CCP)/Patient Assignment** link ([Figure 14](#_bookmark32)) in the **CCPM**

widget

1. Click **Create New Provider** in the Search Providers pane, on the left side of the application window, as shown in [Figure 19](#_bookmark41)
   1. The Create/Edit Provider pane opens on the right side of the application window
2. Click **Browse** to the right of the **Provider Group** field to search for an existing group
3. Select the desired group from the list of results and click **OK**

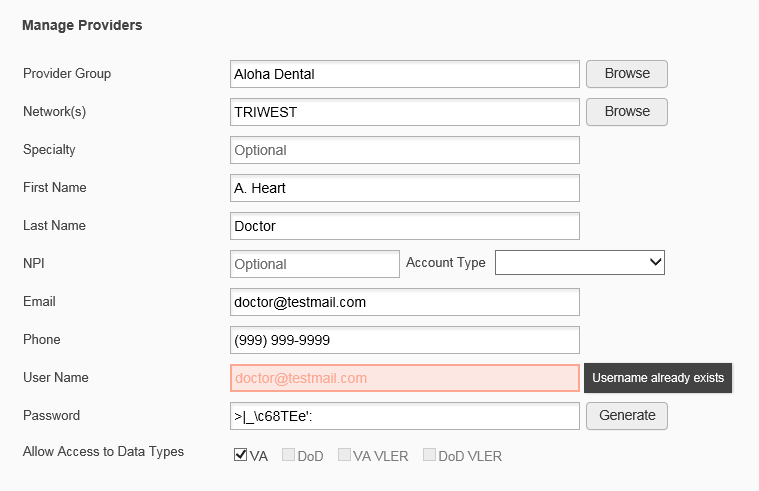
**Figure 19: Search Providers and Manage Providers Panes**



1. Enter the provider information in each of the required fields on the **Manage Providers** pane ([Figure 19](#_bookmark41))

|  |  |
| --- | --- |
| Image of the information icon. | Providers are differentiated by their e-mail address. When a new provider is created, the e-mail address, which also serves as the provider’s username, is validated in order to avoid the creation of duplicates. If an e-mail address is already associated with a provider in CV, a, *“Username already exists”*  message displays ([Figure 20](#_bookmark42)). |

**Figure 20: Username Already Exists Error Message**



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

 Passwords are case-sensitive.

1. Record the **User Name** and **Password** as displayed
   1. It is the responsibility of VA Staff to securely provide the CCP with his/her user name and password for CV using VirtuPro or phone
2. Click **Save**
3. When the *Provider successfully created* message appears, there are two options:
   1. Click **Assign Patients** and follow the steps outlined in [Section 3.2.6, Assigning and Unassigning Patients](#_bookmark50)

**-OR-**

* 1. Click **OK** to return to the CCPM widget

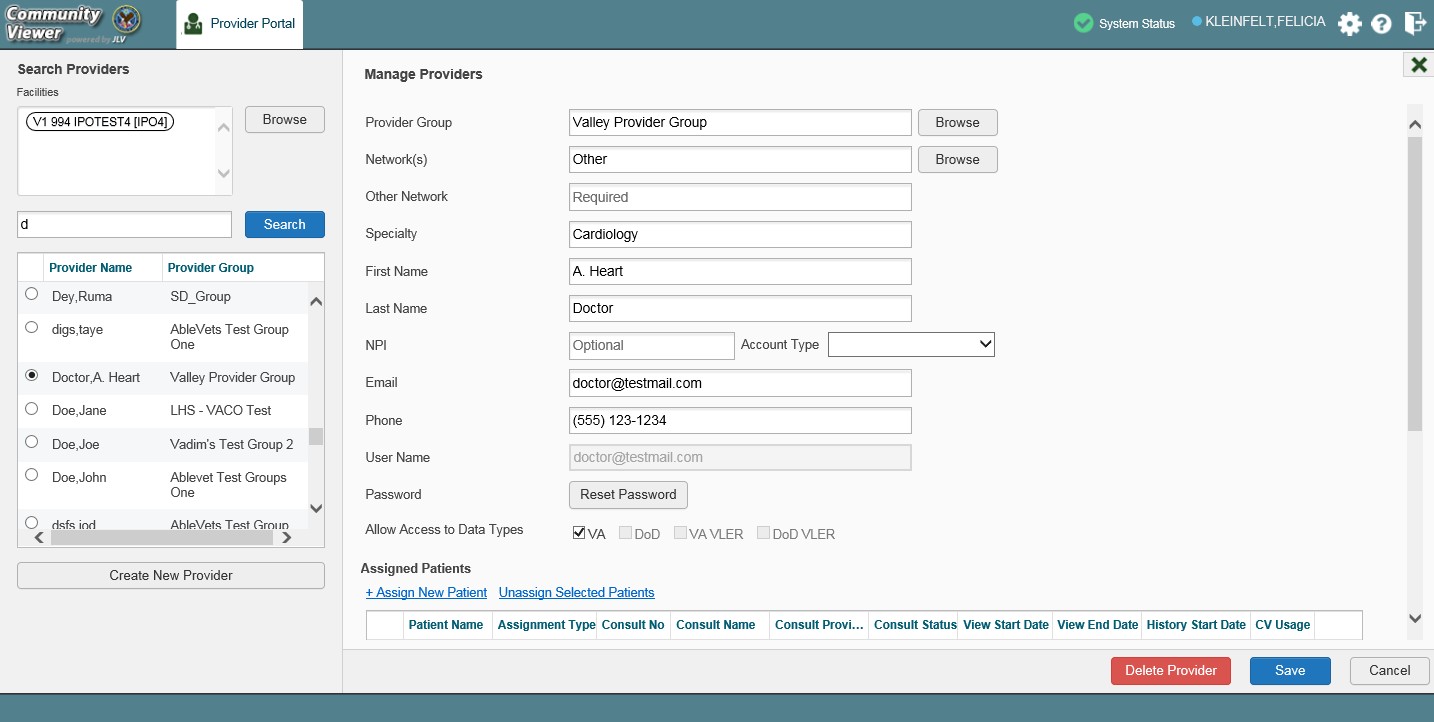
CCPs can now request access to CV from the CCP **Login** page. When a CCP clicks the **New User** link, s/he sees a message directing them to contact their local VA Medical Center for access. They are then given a link to a list of VA points of contact (POCs) from whom they can request access to the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

* + 1. **Editing Provider Profiles**

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

1. Click the **Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field, and click **Search**
3. Select the desired provider from the search results ([Figure 21](#_bookmark44))
4. Edit the provider information in the fields provided, as necessary
5. Click **Save**

**Figure 21: Search Providers and Manage Providers Panes**



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

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

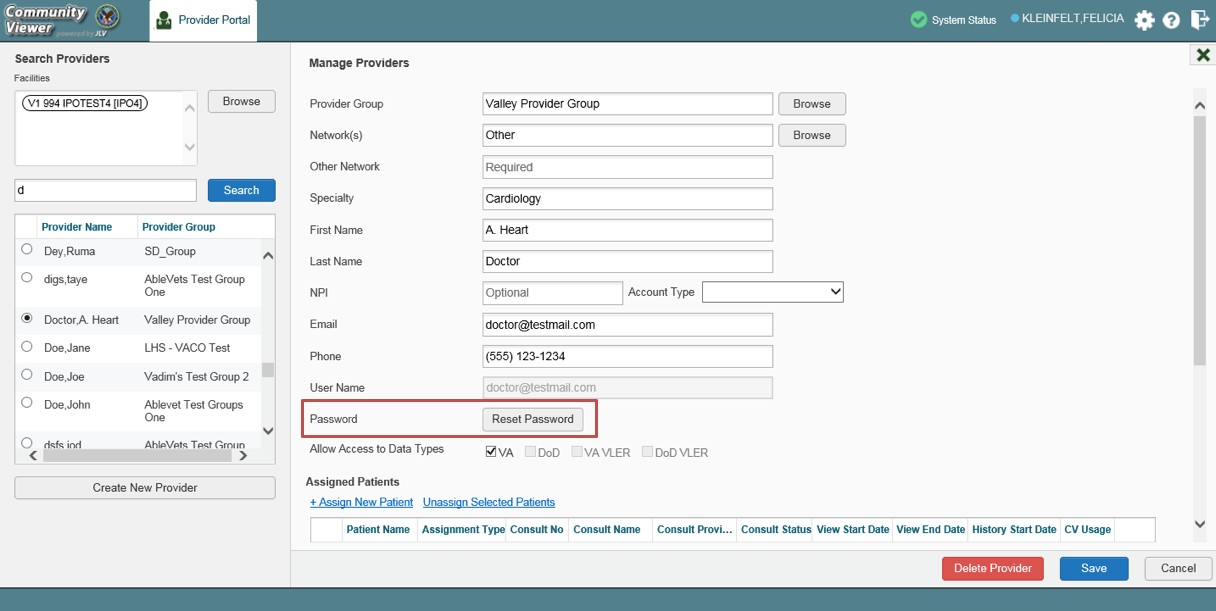
* + 1. **Resetting Provider Passwords**

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

To reset a CCP’s password:

1. Click **the Manage Provider (CCP)/Patient Assignment** link in the **CCPM** widget
2. Enter the provider name in the **Search** field
3. Click **Search**
4. Select the desired provider from the search results
5. Click **Reset Password** (highlighted in [Figure 22](#_bookmark46)) in the **Manage Providers** pane
6. Click **Generate** to allow the system to create a new, random password
7. Users can manually enter a password that meets 6500 security compliance criteria, then select the **Save** button
8. Record the new password
   1. It is the responsibility of the VA Staff user to securely provide the CCP with his/her password for CV using VirtuPro or phone
9. Click **Save**

**Figure 22: CCP Password Reset**



* + 1. **Searching Within the CCPM Widget**

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

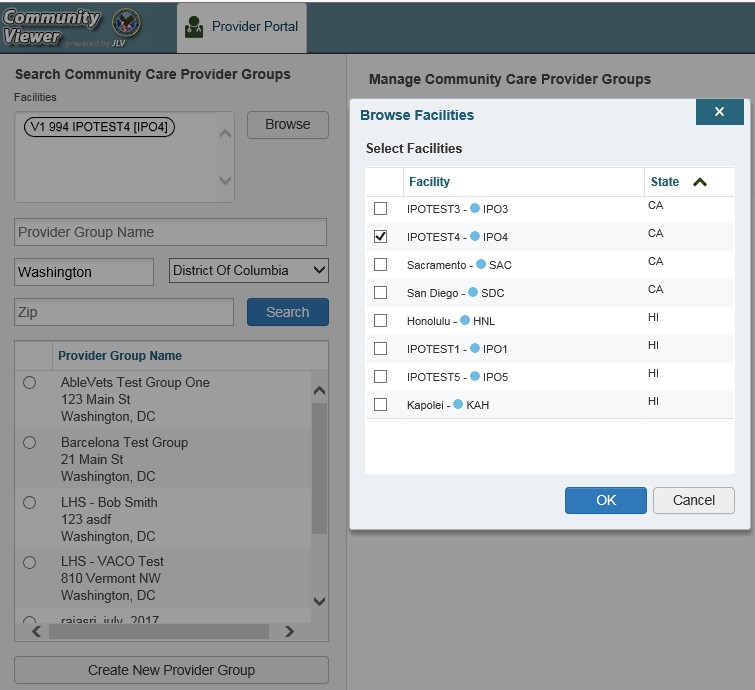
* **My Site Search:** Searches the user’s local VistA; the patients listed in the search results are registered to that local VistA only
* **Enterprise Search:** Searches all VistAs across the Enterprise; the patients listed in the search results are registered to one or more VistAs

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

When using the Create/Edit Community Care Provider Groups feature, users can perform a detailed search within Search Community Care Provider Groups ([Figure 23](#_bookmark48)):

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

**Figure 23: Browse Facilities Dialog Box–CCP Provider Groups**

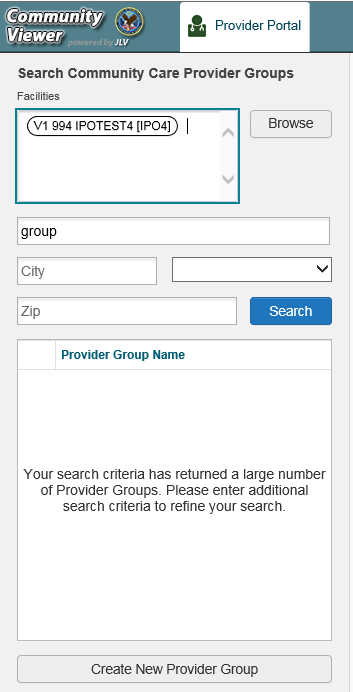


When searching for a Community Care Provider Group, users will:

* See the VISN, site ID, facility name, and facility short name within the search results
* Receive a notification to refine the search by inputting additional search criteria when a large number of results are returned ([Figure 24](#_bookmark49))

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

**Figure 24: CV CCP Group Search Too Many Results Notification**



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

Please see [Section 3.2.6, Assigning and Unassigning Patients](#_bookmark50), for detailed instructions on how to run a **My Site** search.

* + 1. **Assigning and Unassigning Patients**

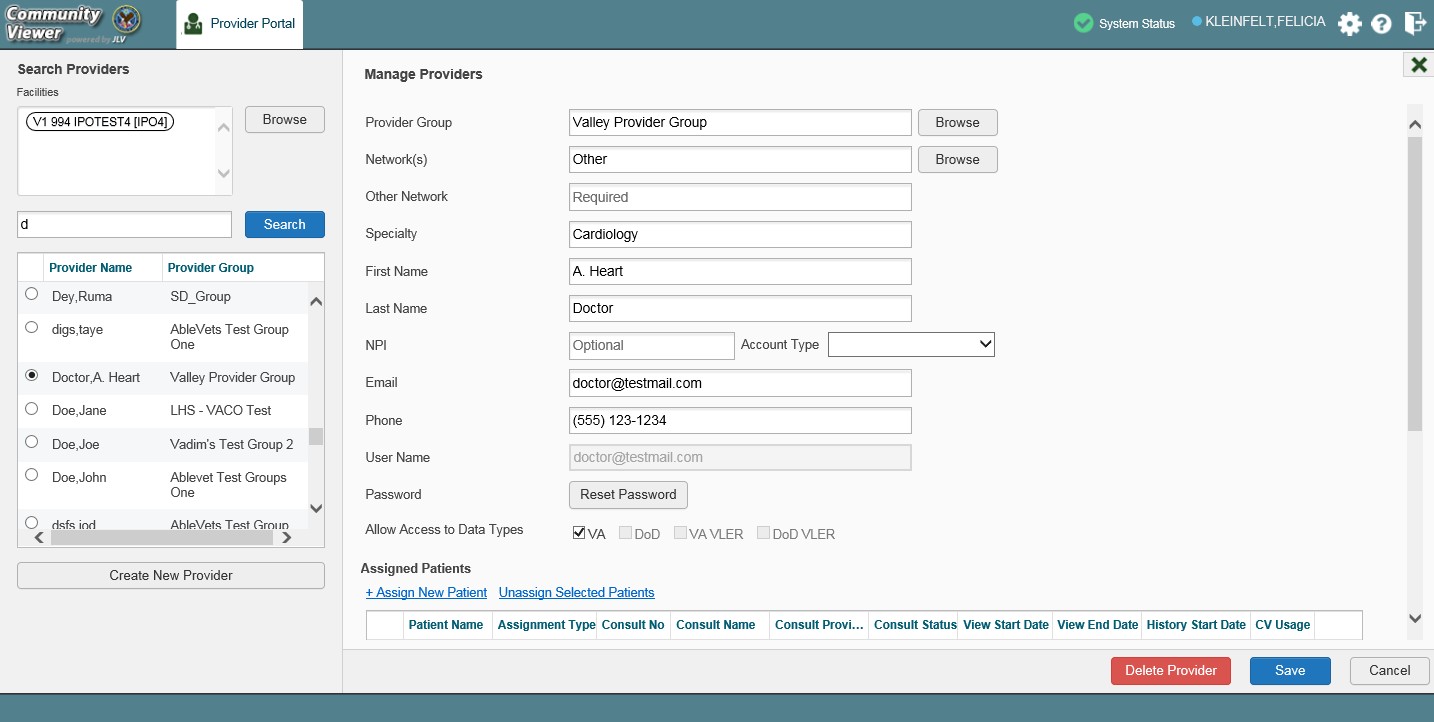
Once the CCP’s account has been created, patients can be assigned to them.

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

To assign patient(s) to a CCP:

1. Click the **Manage Provider (CCP)/Patient Assignment link** in the **CCPM** widget
2. Enter the provider’s name in the field to the left of the **Search** button within the **Search Providers** pane ([Figure 25](#_bookmark51))
3. Click **Search**

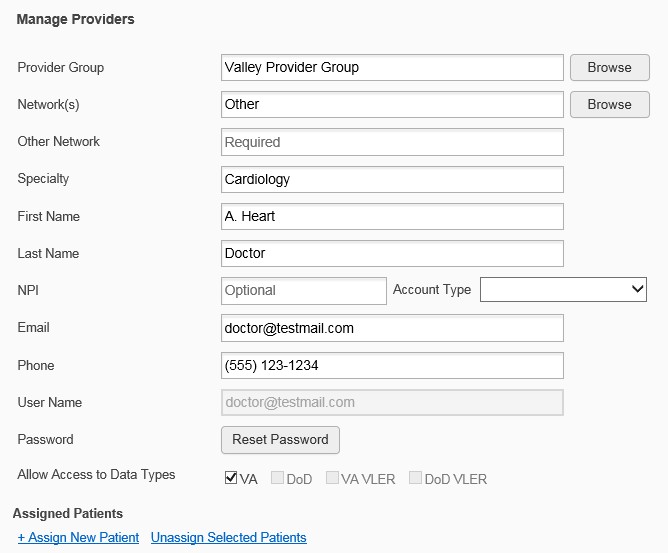
**Figure 25: Search Providers Pane**



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

1. Select the Provider from the list of results
   1. The **Manage Providers** pane opens with the provider’s information
2. Click the **+ Assign New Patient** link (highlighted in [Figure 26](#_bookmark52))
   1. The **Patient Search** dialog opens

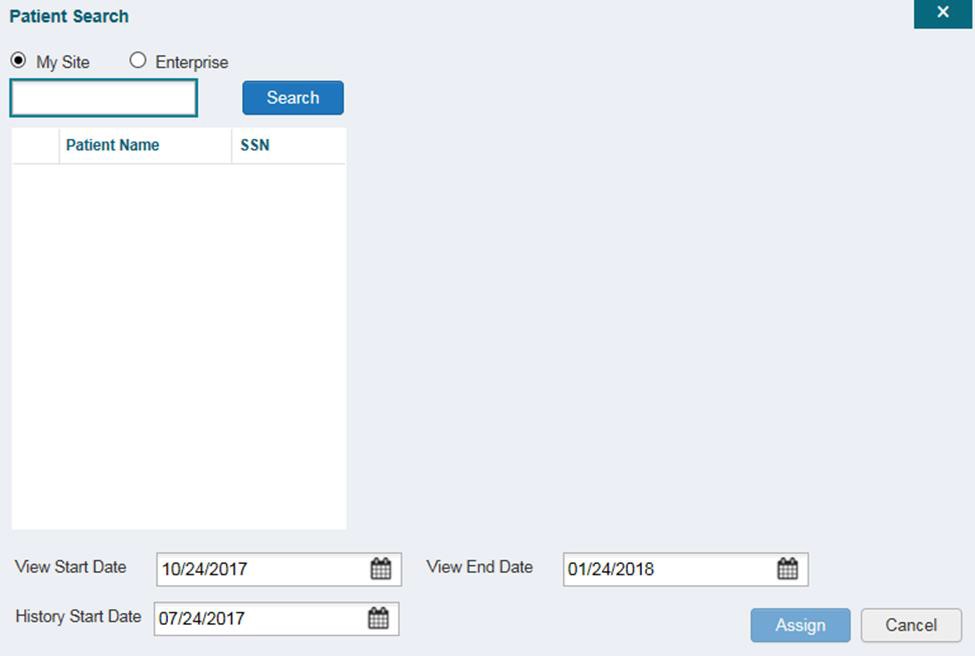
**Figure 26: Manage Providers Fields Detail**



1. Enter the patient name in the blank field at the top of the **Patient Search** dialog ([Figure 27](#_bookmark53))
2. Select the **My Site** search option and enter the search criteria:
   1. The patient's last name, followed by a comma and either the first initial or full spelling of the patient's first name (Smith, J or Smith, John)
   2. You may also enter the patient's full Social Security Number (SSN) (123456789), or first letter of the patient's last name followed by the last 4 digits of the patient’s SSN (S6789)

|  |  |
| --- | --- |
| Image of the information icon. | In this release, only CV Portal Administrators can see the option for, and  perform, an Enterprise patient search. |

**Figure 27: Patient Search Dialog Box**



1. Click **Search**
2. Select a patient from the search results list
3. Select the **Assignment Type** from the dropdown: 30 Day Wait, Consult, Distance-Eligible (40 mile), or Episode of Care
   1. 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
4. If desired, adjust the default **View Start Date**, **View End Date**, and **History Start Date**

fields to restrict the data seen by the CCP (See [Section 3.2.7, Setting Record Display Limits](#_bookmark55).)

1. Click **Assign**

CV uses the following rules to manage patient assignments:

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

**Table 2: Assignment Rules Examples**

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

To unassign patient(s) from a CCP:

1. Repeat steps 1–4 from the **CCPM** widget or select the **Edit** link from the **Manage CCP Groups** pane ([Figure 16](#_bookmark36)) to navigate to the **Manage Providers** pane
2. Click the **Unassign Selected Patients** link (highlighted in [Figure 26](#_bookmark52))
   * 1. **Setting Record Display Limits**

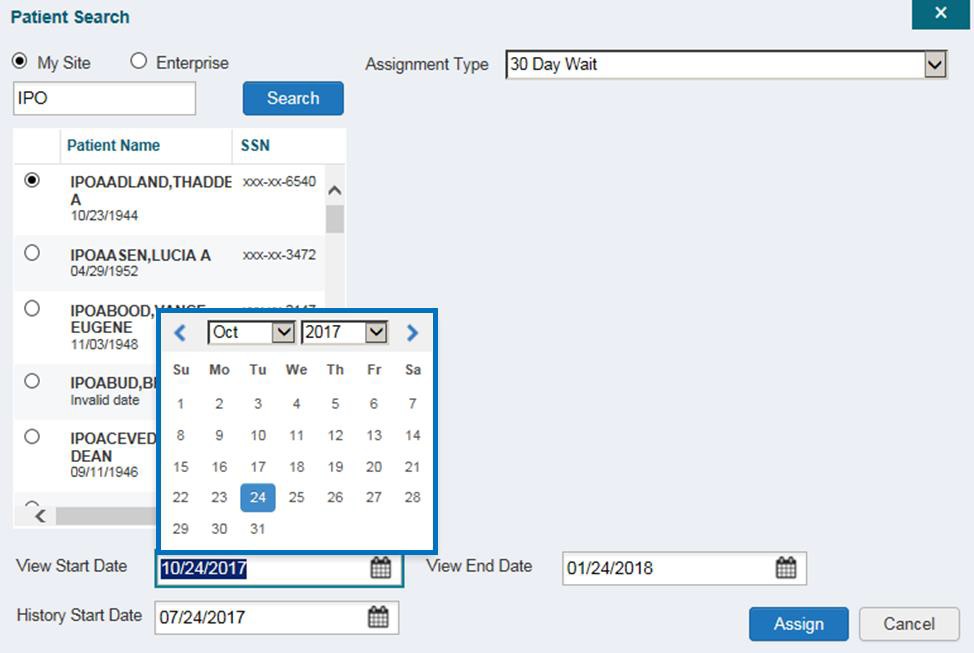
Users can limit the patient records made available to the assigned CCP. There are two settings that control access to patient data:

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

Data access controls are set by the user during the patient assignment process. To set the **Data Access Controls**:

1. Click the **Calendar** icon Image of the calendar icon. next to the **View Start Date** and the **View End Date** fields
2. Select the start and end dates ([Figure 28](#_bookmark56))
3. Alternatively, click the calendar icon next to the **History Start Date**
4. Select a date
5. Click **Assign**

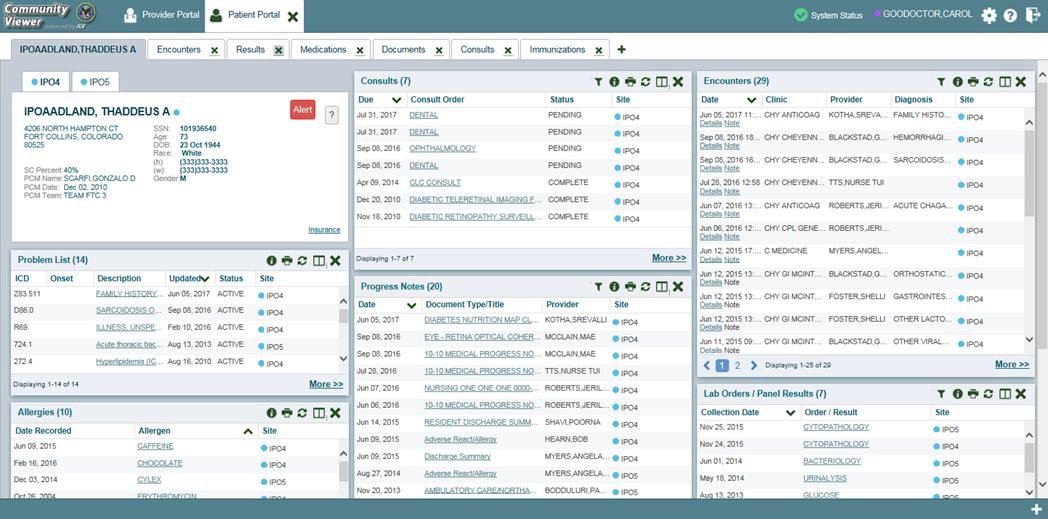
**Figure 28: Data Access Controls**



# Widgets: What Community Providers See

Once the CCP has been granted access to CV, they can see their assigned patient’s VA health information on the **Patient Portal**. Patient data is presented through widgets ([Figure 29](#_bookmark58)), each displaying data specific to an administrative or clinical domain. The **Encounter**, **Results**, **Medications**, **Documents**, **Consults**, and **Immunization** tabs provide unique widget layouts.

**Figure 29: Widget Display on the Patient Portal**



*\*\*Primary Care Management (PCM)*

All widgets available for display on the Patient Portal are housed in a horizontal tray at the bottom of the page, the **Widget Tray**. When customizing their view of CV, CCPs click the + icon in the lower right corner of the page ([Figure 29](#_bookmark58)) to open the **Widget Tray**.

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

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

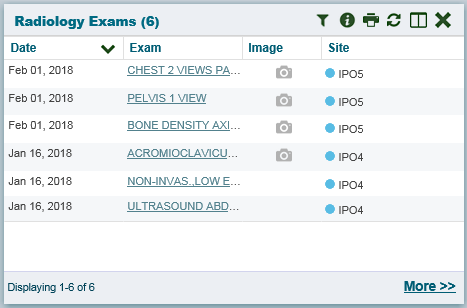
## Nondiagnostic Images

Nondiagnostic images are available in JPEG format from the **Encounters**, **Progress Notes**, and

**Radiology Exams** widgets.

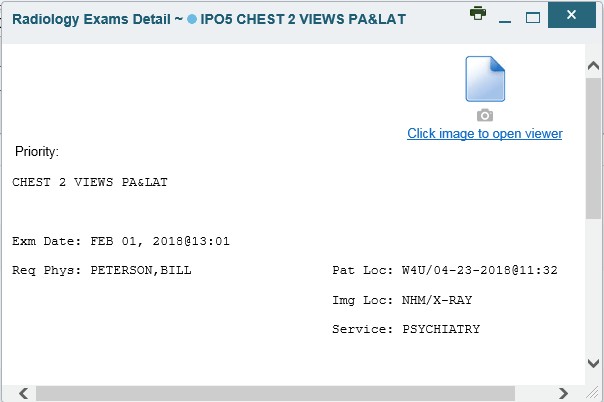
A **Camera** icon Image of the camera icon. in the **Image** column of a widget in minimized view indicates one or more images are associated with that record ([Figure 30](#_bookmark60)). Clicking the **Camera** icon in a supported widget opens the list of images associated with the record. See [Figure 32](#_bookmark62) and [Figure 33](#_bookmark63) below.

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

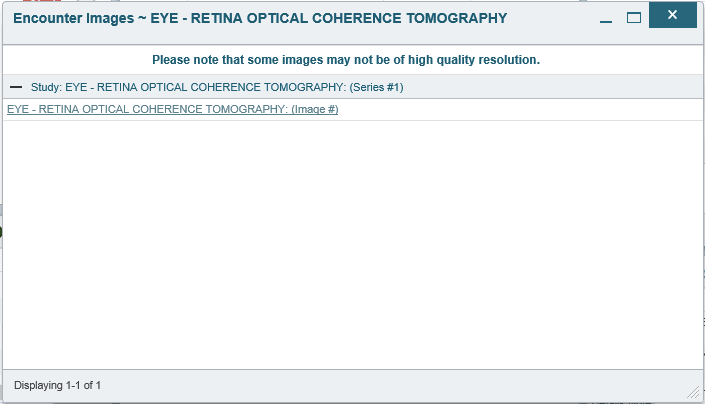


Clicking the **Click Image to open Viewer** link in the **Detail** view ([Figure 31](#_bookmark61)) of a widget opens the list of images associated with that record.

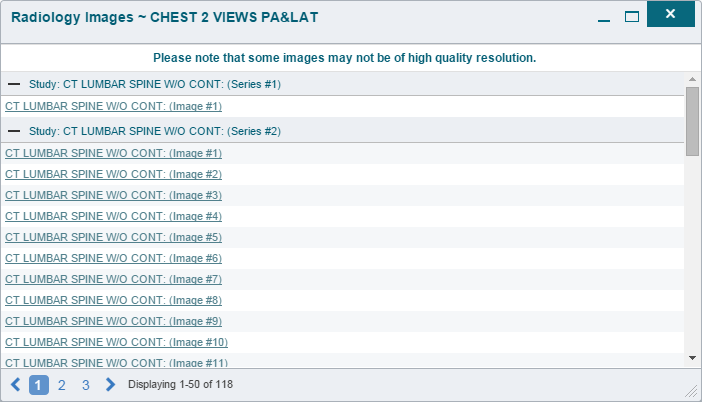
**Figure 31: Radiology Exams Detail–Nondiagnostic Images**



**Figure 32: Single Encounter Nondiagnostic Image**

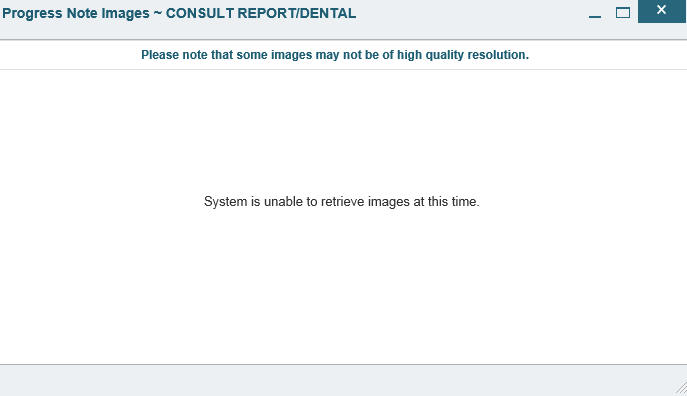


**Figure 33: Multiple Radiology Nondiagnostic Images**



If an image is temporarily unavailable, users will see a *“System is unable to retrieve images at this time”* message ([Figure 34](#_bookmark64)).

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



# Troubleshooting

## Special Instructions for Error Correction

Access to CV is limited to registered, authorized users. CV validates user access against information retrieved from your smart card. If you are experiencing trouble logging in to CV, please review [Table 3](#_bookmark67) before contacting the service desk.

**Table 3: 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. Reinsert PIV card and relaunch 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, this is a PIV card processing problem, or an invalid security certificate chosen.  ***FIX IT:***   1. Close your browser window. 2. Reinsert PIV card and relaunch the CV link. 3. Select a certificate that is not expired and specifies Issued by: Veterans Affairs CA B1.   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?*** Receive Not a valid *ACCESS CODE/VERIFY CODE* pair error on the Login page.  ***WHY?*** 1) CV could not match your Access and Verify codes to the Site selected in the dropdown or VA; or 2) A username and password were entered instead of Access/Verify codes.  ***FIX IT:***   1. Veterans Health Administration (VHA) users must select the **parent VistA host site** for their facility. 2. Reenter correct **Access** and **Verify** codes (Computerized Patient Record System (CPRS) or VistA codes for VHA users). |

|  |  |
| --- | --- |
| **Error Message** | **Resolution Steps** |
| Page cannot be displayed | ***WHAT?*** You receive a *Page cannot be displayed* error when launching CV.  ***WHY?*** The CV URL requires certain IE settings.  ***FIX IT:***   1. With IE open, click the **Tools menu** or press ALT-X. 2. Select Internet Options. 3. When the dialog opens, select the **Advanced tab**. 4. Scroll down in the list until you see the settings below and ensure Secure Socket Layer (SSL) 2.0 is NOT checked and that Transport Layer Security (TLS) 1.0, 1.1, and 1.2 are checked. 5. Click **OK**, then relaunch CV and the page should load. |
| Smart Card required | ***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. Reinsert PIV card and relaunch CV link. 3. If this is unsuccessful, fully reboot your system to refreshes all connections. This resolves greater than 95% of any remaining problems. |
| VERIFY CODE must  be changed before continued use | ***WHAT?*** Receive *VERIFY CODE must be changed before continued use error*  on the Login page.  ***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. |

* + 1. **Patient Search Errors**

The following error messages may appear when you are searching for a patient in the **CCPM** widget. If you are experiencing errors while searching for patients, please review [Table 4](#_bookmark69) before contacting the service desk.

**Table 4: Patient Search Error Messages and Resolution Steps**

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

|  |  |
| --- | --- |
| **Error Message** | **Resolution Steps** |
| 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 four digits of the patient’s SSN. Please try your search again using the first initial of the patient’s last name and the last four digits of the patient’s SSN. |
| 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. |

# Acronyms and Abbreviations

[Table 5](#_bookmark71) lists the acronyms and abbreviations used throughout this document and their descriptions.

**Table 5: Acronyms and Abbreviations**

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