

Community Viewer Version 3.2
Community Care Provider User Guide



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Table of Contents

1. Introduction.....	1
1.1. Purpose of the Guide.....	1
1.1.1. Guide Conventions	1
1.1.2. Terminology.....	2
1.2. Assumptions	2
1.3. System Requirements	2
1.4. Getting Help.....	3
2. Logging in to CV	3
2.1. Changing Your Password	6
2.1.1. Password Requirements	8
2.2. The CV Portal Pages.....	9
2.2.1. System Menu	9
2.2.2. Default View	10
2.2.3. Customizing CV.....	10
2.3. Logging Out of the Current CV Session	14
3. Using CV	14
3.1. Accessing Patient Data via the Assigned Patients Widget	14
3.2. Viewing System Notifications.....	16
3.2.1. Viewing Announcements	16
3.2.2. Viewing System Status.....	18
3.2.3. Viewing Connection Status.....	18
3.3. Using Report Builder	21
3.3.1. About Report Builder	21
3.3.2. Generating a Report.....	21
3.3.2.1. Adding Multiple Records with EZ Select.....	25
3.3.2.2. Adding One Record	26
3.3.2.3. Adding Only Record Details or Notes.....	26
3.3.2.4. Adding Patient Demographics	27
3.3.3. Opening a Report	28
3.3.4. Deleting a Report	30
3.4. Using the Accessible Theme's Functionality.....	30
3.4.1. Keyboard Focus and Portal Navigation in the Accessible Theme.....	30
3.4.2. Using Report Builder in the Accessible Theme.....	31
3.5. Printing.....	32
4. Widgets	33
4.1. Accessing and Opening Widgets.....	33
4.1.1. Sort and Filter Options	34
4.1.1.1. Setting Multiple Filters in Widgets.....	35

4.1.1.2.	Widget Date Range Filters	35
4.1.1.2.1.	Quick Date Range Filter	36
4.1.1.2.2.	Start and End Date Filter.....	38
4.1.1.3.	Tab Date Range Tool	40
4.1.1.4.	Text Filter	41
4.2.	Widget Navigation and Display Options.....	43
4.3.	Minimized vs. Expanded Widget View	43
4.4.	Displaying Widgets on Custom Tabs	44
4.5.	Refreshing Widget Data	44
4.6.	Nondiagnostic Images.....	45
4.7.	Widget Functionality.....	47
4.7.1.	Patient Demographics	47
4.7.1.1.	Viewing Detailed Patient Demographic Information	48
4.7.1.2.	Viewing Third-Party Insurance Information	48
4.7.2.	Pain Management.....	48
4.7.3.	Outpatient Medications	50
4.7.3.1.	Outpatient Medications Widget Data	50
4.7.3.2.	Viewing Outpatient Medication Details	51
4.7.4.	Inpatient Medications	51
4.7.4.1.	Inpatient Medications Widget Data	52
4.7.4.2.	Viewing Inpatient Medication Details.....	52
4.7.5.	Progress Notes.....	52
4.7.5.1.	Progress Notes Widget Data	53
4.7.5.2.	Viewing Progress Notes Details.....	53
4.7.6.	Lab Results	54
4.7.6.1.	Lab Results Widget Data.....	54
4.7.6.2.	Viewing Abnormal Results in the Lab Results Widget	55
4.7.6.3.	Viewing Lab Results Details	55
4.7.6.4.	Graph/Table View from the Lab Results Widget.....	55
4.7.7.	Problem List	57
4.7.7.1.	Problem List Widget Data	58
4.7.7.2.	Viewing Problem List Details.....	59

Table of Figures

Figure 1: Authorized Use Message	1
Figure 2: CCP User Login Page.....	4
Figure 3: CCP VA Privacy and Security Awareness Training Page.....	5
Figure 4: Password Reset Dialog Box	6
Figure 5: Confirmation of Request Sent to Reset Password	6
Figure 6: Password Reset E-mail	7
Figure 7: Password Reset Page	7
Figure 8: Password Reset Confirmation Message.....	8
Figure 9: Password Expiration Notice on the Login Page	9
Figure 10: CV Portal Tools.....	10
Figure 11: Default View	10
Figure 12: The CV Settings Dialog Box.....	11
Figure 13: Blue Theme	12
Figure 14: Green Theme	12
Figure 15: Dark Gray Theme.....	13
Figure 16: Gray Theme.....	13
Figure 17: Accessible (508-Compliant) Theme.....	14
Figure 18: Minimized View of the Assigned Patients Widget.....	15
Figure 19: Expanded View of the My Assigned Patients Widget.....	16
Figure 20: Announcements on the Login Page.....	17
Figure 21: Announcements Banner.....	17
Figure 22: System Status Indicator on the Portal Pages.....	18
Figure 23: Connection Status Icon, Documents Widget.....	19
Figure 24: Connection Status Details, Active Interfaces Shown	20
Figure 25: Connection Status Details View, Active Interfaces Hidden	20
Figure 26: Report Builder Icon on the Patient Portal Toolbar	21
Figure 27: Report Builder Current Report Tab	22
Figure 28: Report Builder Name Report Dialog.....	23
Figure 29: Report Builder Patient Reports Tab.....	24
Figure 30: Report is Ready Indicator on Toolbar	24
Figure 31: Report Builder Select All Icon	25
Figure 32: All Records on a Single Widget Page Added to Report Builder	25
Figure 33: Single Record Added to Report Builder.....	26
Figure 34: Add Detail and Add Record Row Dropdown.....	27
Figure 35: Demographics Widget’s Add to Report Builder Icon	28
Figure 36: Report Contents Dialog	29
Figure 37: Report Builder in Accessible Theme.....	32
Figure 38: Widget Tray on the Patient Portal	34
Figure 39: Filtered Date Range Examples	36
Figure 40: Quick Date Range Filters	37
Figure 41: Quick Date Range Filter (5y) Outside CCP’s Permitted History Dates	38
Figure 42: Lab Results Widget Start and End Date Filters	39
Figure 43: Radiology Reports Widget Start and End Date Calendar.....	40

Figure 44: Tab Date Tool.....	41
Figure 45: Vitals Widget Text Filter.....	42
Figure 46: Expanded View Widget Display	44
Figure 47: Nondiagnostic Images in the Minimized View of the Radiology Reports Widget	45
Figure 48: Multiple Nondiagnostic Radiology Images.....	46
Figure 49: Nondiagnostic Images in the Radiology Reports Detail View.....	46
Figure 50: Radiology Images Unable to Retrieve Images Error.....	47
Figure 51: Patient Demographics Widget.....	48
Figure 52: Pain Management Widget	49
Figure 53: Outpatient Medications	50
Figure 54: Inpatient Medications Widget	51
Figure 55: Progress Notes Widget	53
Figure 56: Lab Results Widget	54
Figure 57: Lab Results Graph/Table View	56
Figure 58: Lab Results Graph Table View, Select a Lab Test.....	57
Figure 59: Problem List Widget	58

Table of Tables

Table 1: System Status Notices.....	18
Table 2: Accessible Keystrokes	30
Table 3: Widget Navigation Tool Descriptions	43

1. Introduction

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

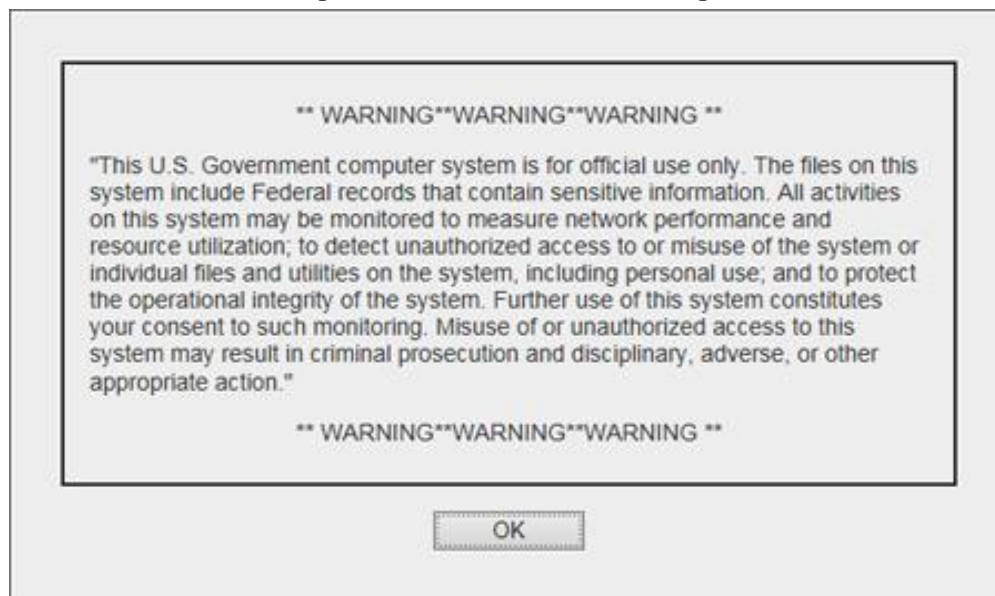
CV pulls information from VA health care systems in real time for viewing within a web browser. Through CV, VA Staff assign patients to providers and provision their use within the CV system, allowing providers access to view consolidated patient data from multiple Veterans Information Systems and Technology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

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

- Access and view patient data
- Request a password reset

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

Figure 1: Authorized Use Message




1.1. Purpose of the Guide

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

1.1.1. Guide Conventions

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

- [Cross-references](#) are indicated by blue, underlined text, and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is conveyed by using **bold**, underlined, and *italicized* text
- The information icon  is used to inform the reader of additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

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


1.2. Assumptions

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

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

1.3. System Requirements

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

 **NOTE:** This release does not support mobile devices.

It is recommended that users access CV from a desktop or laptop PC, using one of the supported browsers:

- Internet Explorer (IE) v11
- Chrome v76
- Microsoft Edge v44
- Safari v12

1.4. Getting Help

If you are an authorized user in need of technical assistance, contact the Community Provider Technical Service Desk. Prior to contacting support, please refer to [Logging in to CV](#) for detailed information about how to access CV.



Community Provider Technical Service Desk

REDACTED

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

Please open the **Online Help** index within CV for more information about the general functionality of CV and a complete list of the widgets available in the application.

2. Logging in to CV

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

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

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



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

- b. If you have forgotten your password, click the **Reset Password** link
- c. If you are not already an authorized user, click on the **New User Request** link for guidance on obtaining access to CV

Figure 2: CCP User Login Page

Community Viewer
powered by JLV

Community Care Provider Login

Username:

Password:

Login

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

System Status
CV data sources available.

[New User Request](#)
[Reset Password](#)
[CV Help](#)

6. Click **Login**

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

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

Figure 3: CCP VA Privacy and Security Awareness Training Page

VA Privacy and Security Awareness Training

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

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

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

- [Information Security Awareness \(pdf\)](#)
- [Electronic Health Records Rules of Behavior \(pdf\)](#)

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

I certify that I have completed and understand the Information Security Awareness training.

I certify that I have renewed and understand the Electronic Health Records Rules of Behavior.

I certify that I have completed and understand the HIPAA privacy training provided by my organization.

Acknowledgement of Accuracy

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

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

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

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

After logging in to CV:

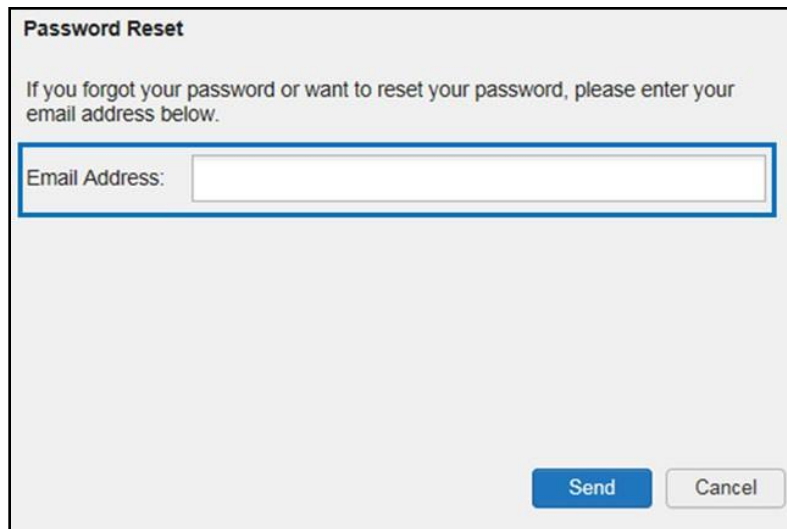
- Your username is displayed in the upper right corner of the page
- The patients assigned to you are shown in the **Assigned Patients** widget, under the **My Assigned Patients** tab
- The patients assigned to your practice group are shown in the **Assigned Patients** widget, under the **Group Assigned Patients** tab
- You can see the patients assigned to your practice group even if you do not have any active or scheduled patient assignments

2.1. Changing Your Password

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

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

Figure 4: Password Reset Dialog Box



Password Reset

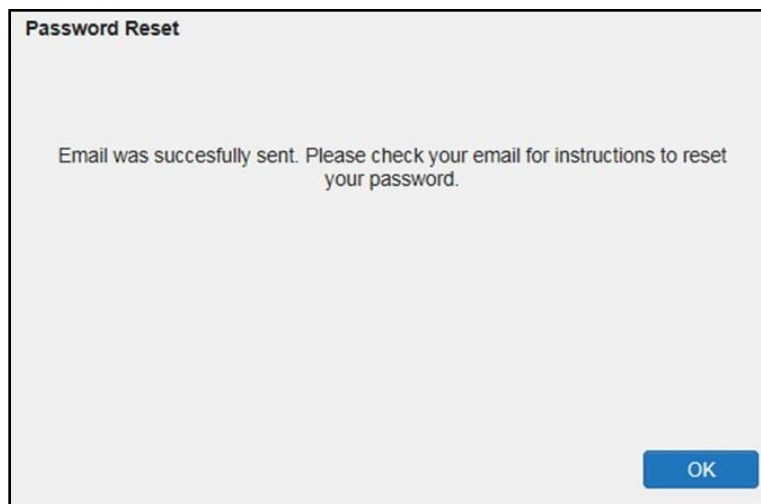
If you forgot your password or want to reset your password, please enter your email address below.

Email Address:

Send Cancel

3. Enter your e-mail address in the field provided in the dialog box
4. Click **Send**
5. A confirmation message displays ([Figure 5](#)) and an e-mail message is generated to Community Provider Technical Service Desk@va.gov

Figure 5: Confirmation of Request Sent to Reset Password



Password Reset

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

OK

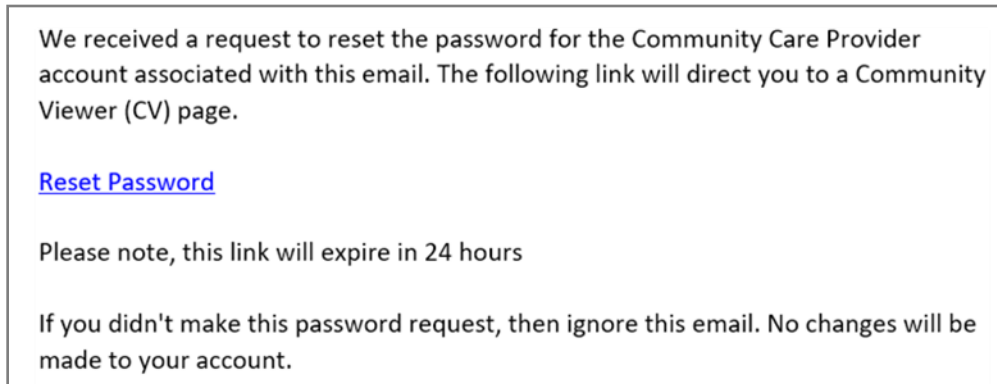
6. A password reset link is sent to the e-mail address you provided

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

Once you receive the password reset e-mail:

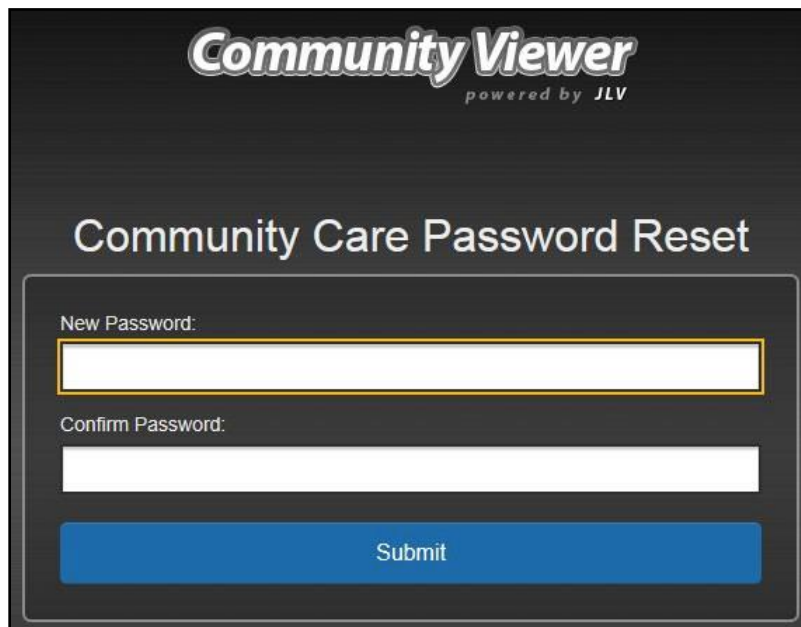
1. Click the link in the password reset e-mail ([Figure 6](#))

Figure 6: Password Reset E-mail



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

Figure 7: Password Reset Page



3. Create a new password following the password guidelines (See [Password Requirements](#)), and enter it in the **New Password** field

4. Repeat the password in the **Confirm Password** field

5. You receive a confirmation message when your password has been successfully reset ([Figure 8](#))

Figure 8: Password Reset Confirmation Message



2.1.1. Password Requirements

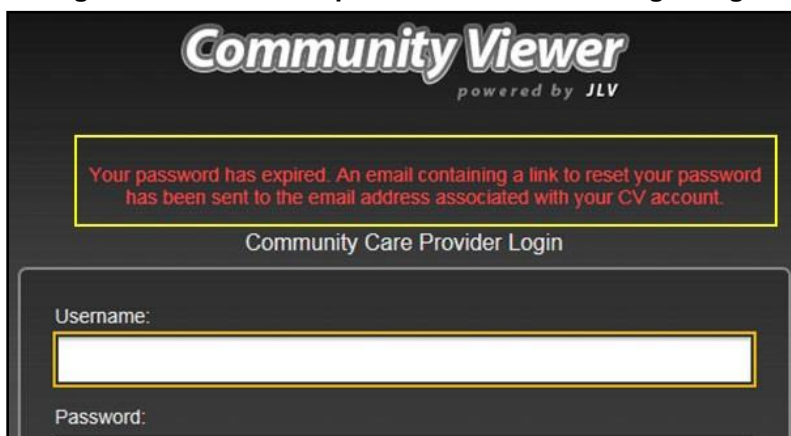
You are prompted to change your password every 90 days. Passwords are case sensitive and must comply with the following structure guidelines:

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

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

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




Figure 9: Password Expiration Notice on the Login Page




2.2. The CV Portal Pages

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

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

 **NOTE:** Switching from the **Patient Portal**  to the **Provider Portal**  closes all associated patient tabs and windows to prevent confusion between patient records.

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

2.2.1. System Menu

The CV portal pages have tools that enable quick access to basic features. These tools appear in the upper right corner of the application window (detailed in [Figure 10](#)).





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

Figure 10: CV Portal Tools

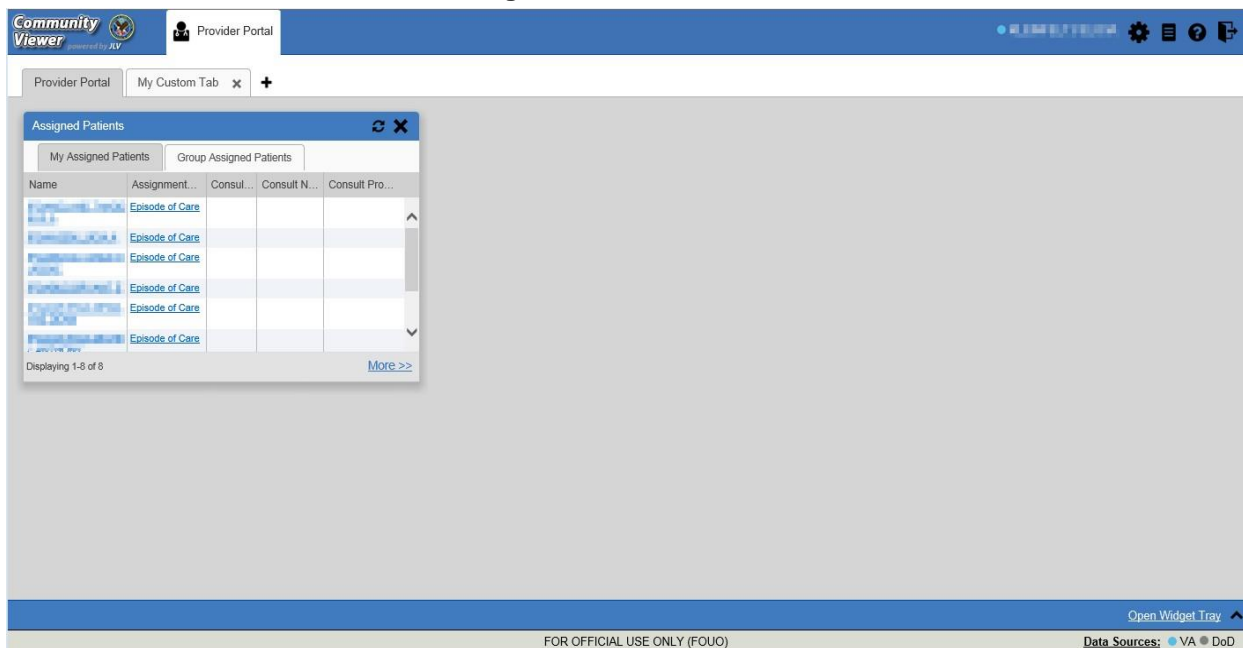


2.2.2. Default View


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

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

Figure 11: Default View



2.2.3. Customizing CV

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

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

Choosing a data source allows you to configure whether you see VA data, Department of Defense (DOD) data, or both. A circular, blue icon in the **Data Sources** pane indicates that VA data is enabled; a square, orange icon indicates that DOD data is enabled; and a circular, gray icon indicates either VA or DOD data is disabled. One primary data source is required.

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

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


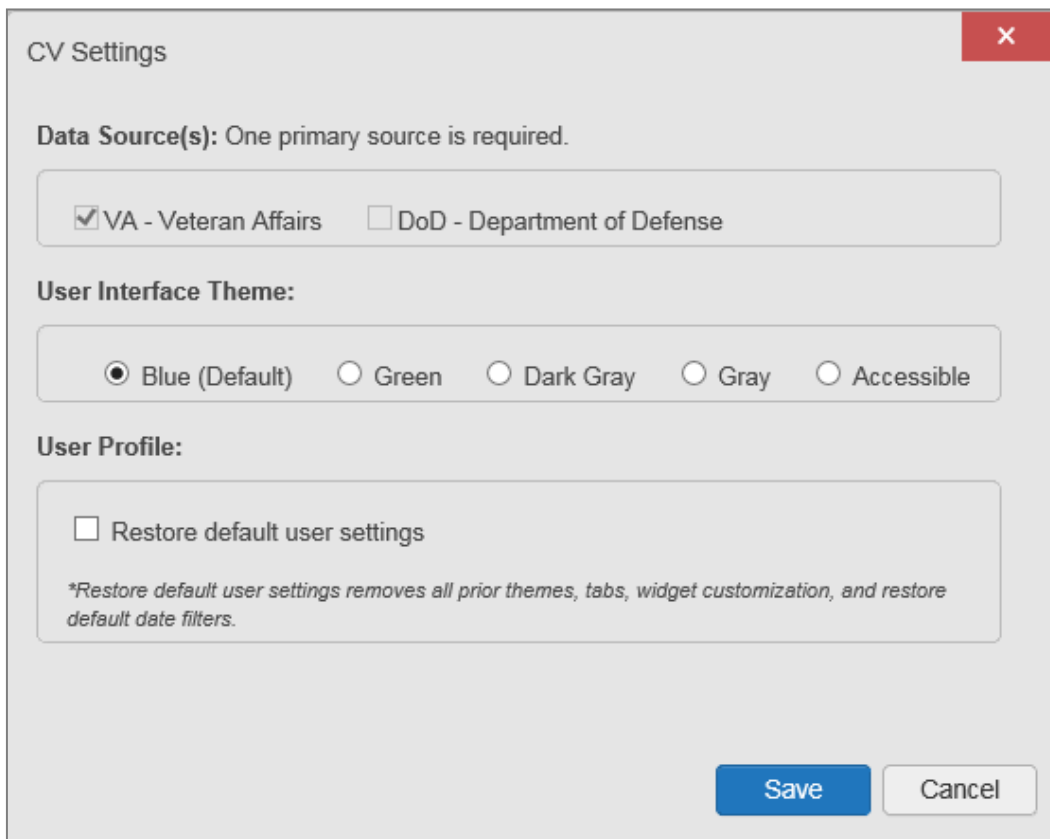
1. Click **Settings**  in the upper right corner of the portal page or the **Data Sources** link in the bottom left of the portal page
2. The **CV Settings** dialog opens ([Figure 12](#))
3. Select the desired data source
4. Click the radio button next to the desired theme
5. Click **Save** to apply the selected theme -OR-
6. Click **Cancel** to exit the **CV Settings** dialog box and restore the previous theme

Figure 12: The CV Settings Dialog Box



CV Settings

Data Source(s): One primary source is required.

VA - Veteran Affairs DoD - Department of Defense

User Interface Theme:

Blue (Default) Green Dark Gray Gray Accessible

User Profile:

Restore default user settings

**Restore default user settings removes all prior themes, tabs, widget customization, and restore default date filters.*

Save Cancel

Examples of the UI themes are displayed in the figures that follow.

Figure 13: Blue Theme

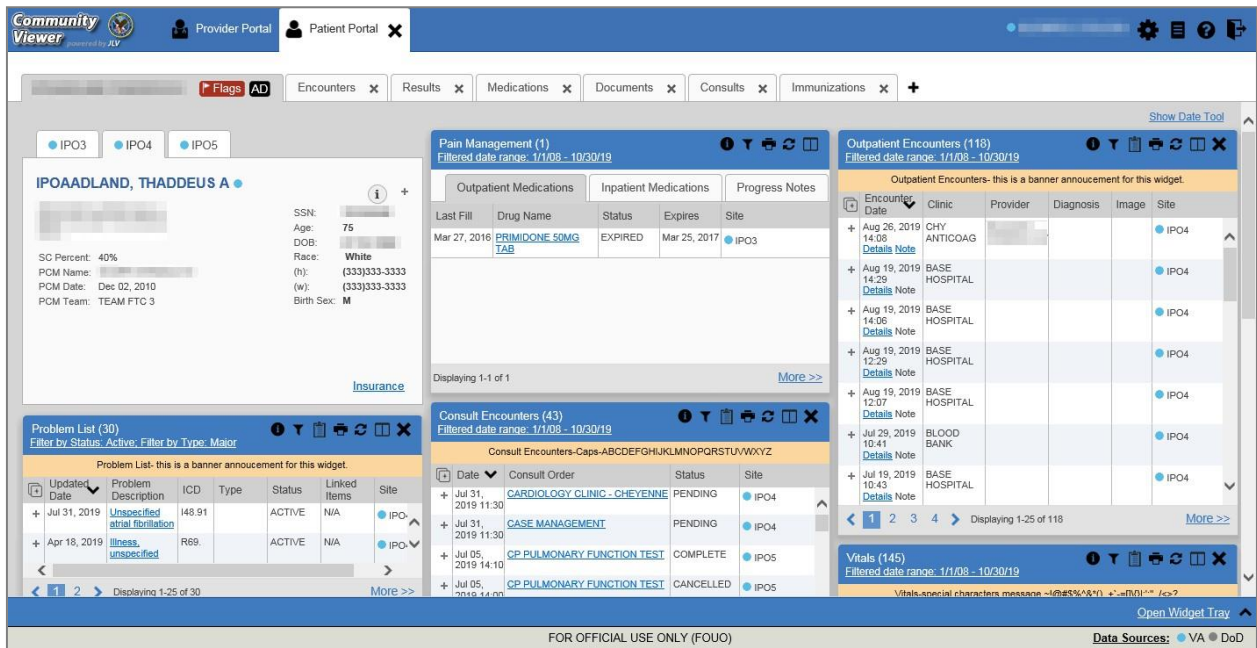


Figure 14: Green Theme

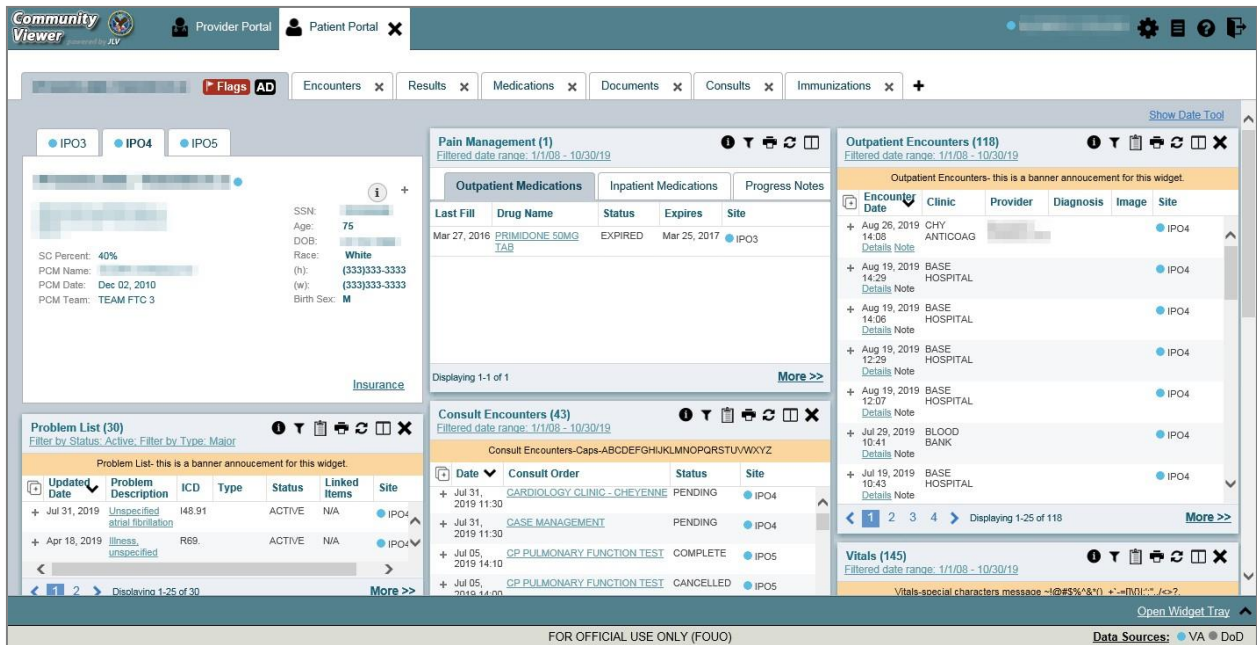


Figure 15: Dark Gray Theme

Community Viewer powered by AV

Provider Portal Patient Portal

Flags AD Encounters Results Medications Documents Consults Immunizations

IPO3 IPO4 IPO5

Pain Management (1)
Filtered date range: 1/1/08 - 10/30/19

Last Fill	Drug Name	Status	Expires	Site
Mar 27, 2016	PRIMIDONE 50MG TAB	EXPIRED	Mar 25, 2017	IPO3

Outpatient Encounters (118)
Filtered date range: 1/1/08 - 10/30/19

Encounter Date	Clinic	Provider	Diagnosis	Image	Site
Aug 26, 2019 14:08	CHY ANTICOAG				IPO4
Aug 19, 2019 14:29	BASE HOSPITAL				IPO4
Aug 19, 2019 14:08	BASE HOSPITAL				IPO4
Aug 19, 2019 12:29	BASE HOSPITAL				IPO4
Aug 19, 2019 12:07	BASE HOSPITAL				IPO4
Jul 29, 2019 10:41	BLOOD BANK				IPO4
Jul 19, 2019 10:43	BASE HOSPITAL				IPO4

Consult Encounters (43)
Filtered date range: 1/1/08 - 10/30/19

Date	Consult Order	Status	Site
Jul 31, 2019 11:30	CARDIOLOGY CLINIC - CHEYENNE	PENDING	IPO4
Jul 31, 2019 11:30	CASE MANAGEMENT	PENDING	IPO4
Jul 05, 2019 14:10	CP PULMONARY FUNCTION TEST	COMPLETE	IPO5
Jul 05, 2019 14:10	CP PULMONARY FUNCTION TEST	CANCELLED	IPO5

Problem List (30)
Filter by Status: Active, Filter by Type: Major

Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
Jul 31, 2019	Unspecified atrial fibrillation	I48.91		ACTIVE	N/A	IPO4
Apr 18, 2019	Illness, unspecified	R69		ACTIVE	N/A	IPO4

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

Figure 16: Gray Theme

Community Viewer powered by AV

Provider Portal Patient Portal

Flags AD Encounters Results Medications Documents Consults Immunizations

IPO3 IPO4 IPO5

Pain Management (1)
Filtered date range: 1/1/08 - 10/30/19

Last Fill	Drug Name	Status	Expires	Site
Mar 27, 2016	PRIMIDONE 50MG TAB	EXPIRED	Mar 25, 2017	IPO3

Outpatient Encounters (118)
Filtered date range: 1/1/08 - 10/30/19

Encounter Date	Clinic	Provider	Diagnosis	Image	Site
Aug 26, 2019 14:08	CHY ANTICOAG				IPO4
Aug 19, 2019 14:29	BASE HOSPITAL				IPO4
Aug 19, 2019 14:08	BASE HOSPITAL				IPO4
Aug 19, 2019 12:29	BASE HOSPITAL				IPO4
Aug 19, 2019 12:07	BASE HOSPITAL				IPO4
Jul 29, 2019 10:41	BLOOD BANK				IPO4
Jul 19, 2019 10:43	BASE HOSPITAL				IPO4

Consult Encounters (43)
Filtered date range: 1/1/08 - 10/30/19

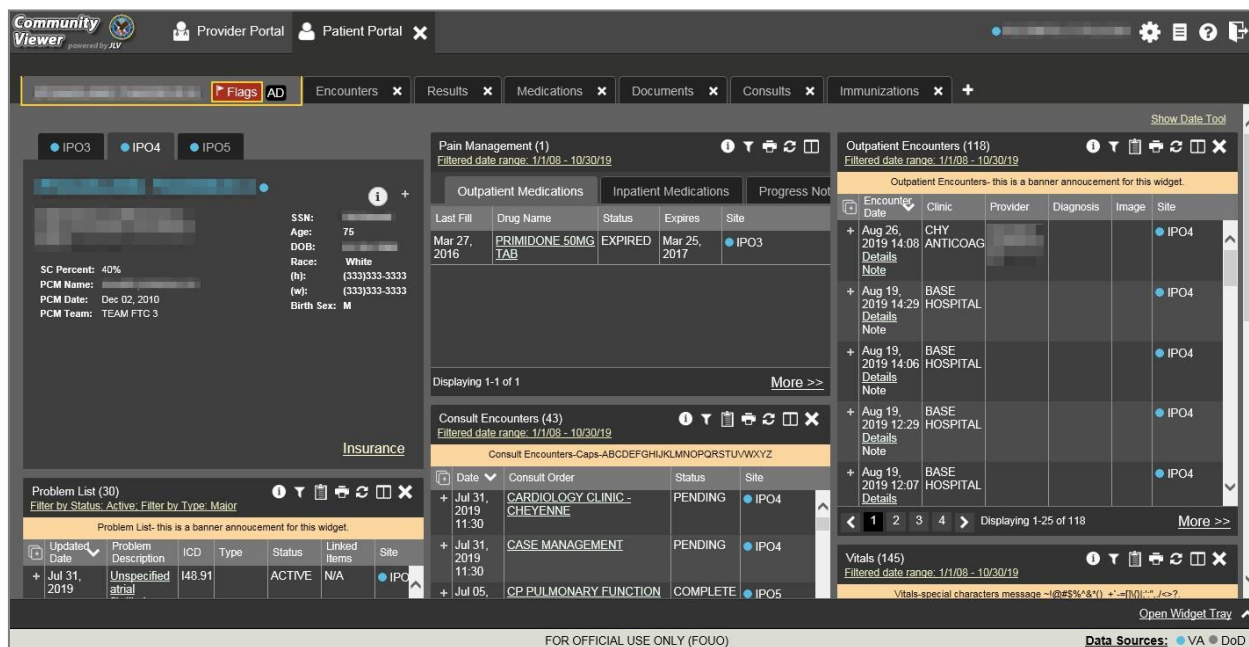
Date	Consult Order	Status	Site
Jul 31, 2019 11:30	CARDIOLOGY CLINIC - CHEYENNE	PENDING	IPO4
Jul 31, 2019 11:30	CASE MANAGEMENT	PENDING	IPO4
Jul 05, 2019 14:10	CP PULMONARY FUNCTION TEST	COMPLETE	IPO5
Jul 05, 2019 14:10	CP PULMONARY FUNCTION TEST	CANCELLED	IPO5

Problem List (30)
Filter by Status: Active, Filter by Type: Major


Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
Jul 31, 2019	Unspecified atrial fibrillation	I48.91		ACTIVE	N/A	IPO4
Apr 18, 2019	Illness, unspecified	R69		ACTIVE	N/A	IPO4

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

Figure 17: Accessible (508-Compliant) Theme



2.3. Logging Out of the Current CV Session

You may intentionally log out to end a CV session by clicking **Logout**  at any time. A CV session ends automatically after 30 minutes of inactivity. You receive an audible and visual warning that the current session is about to terminate after 25 minutes of inactivity. Automatic termination of a session logs you out of the application, closes all CV tabs and windows, and displays the **Logout** page. Close and reopen the browser and return to the CV **Login** page to initiate a new CV session.

3. Using CV

3.1. Accessing Patient Data via the Assigned Patients Widget

Prior to accessing patient data in CV, please read the warning displayed in [Introduction](#).

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


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

Figure 18: Minimized View of the Assigned Patients Widget

Name	Assignment...	Consult...	Consult N...	Consult Prov...
[Redacted]	Consult	486721	CARDIOLO... CLINIC - CHEYENNE	[Redacted]
[Redacted]	Consult	486692	OPHTHALM...	[Redacted]
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			

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

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

The following information is available for each assignment listed in the widget. Click the hyperlinked entries to open the patient's record in the **Patient Portal**.

- **Name:** The patient's name
- **Assignment Type:** The type of assignment that initiated the patient referral; assignment types include Consult and Episode of Care
- Columns of information that only contain data for patients with a *Consult* assignment type ([Figure 19](#))
 - **Consult No.:** A number generated by the VA system for the patient consult
 - **Consult Name:** A label generated by the VA system
 - **Consult Provider:** The VA provider who ordered the consult

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

Figure 19: Expanded View of the My Assigned Patients Widget

Name	Assignment Type	Consult No	Consult Name	Consult Provider
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Episode of Care			
[Redacted]	Consult	486692	OPHTHALMOLOGY	[Redacted]
[Redacted]	Consult	486694	ENT	[Redacted]

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

3.2. Viewing System Notifications

CV uses announcements, system status messages, and connection status messages to notify you of system maintenance events and data source availability.

3.2.1. Viewing Announcements

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

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

Figure 20: Announcements on the Login Page

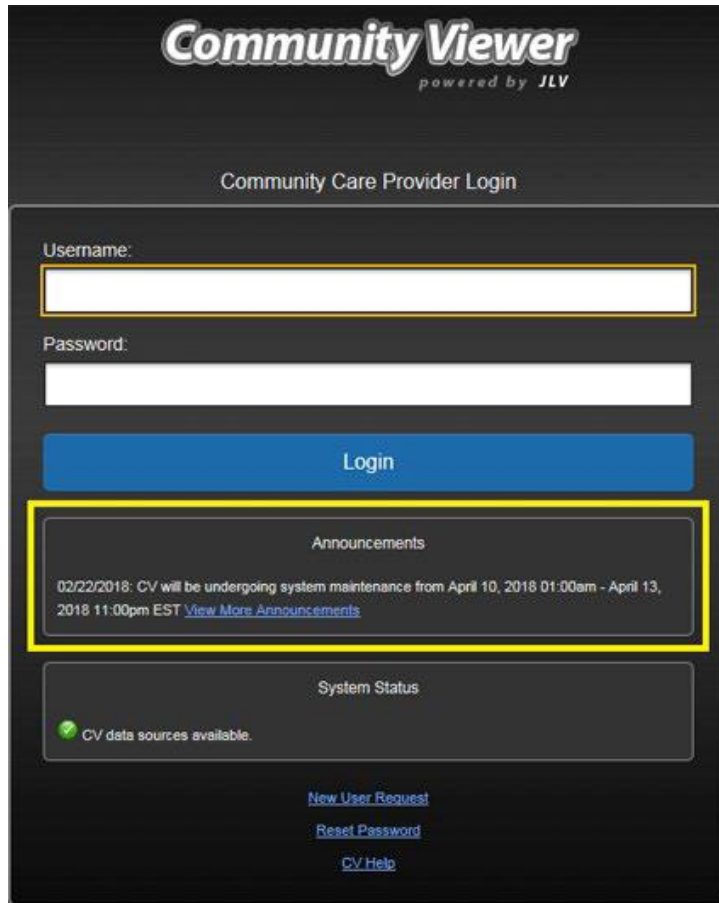
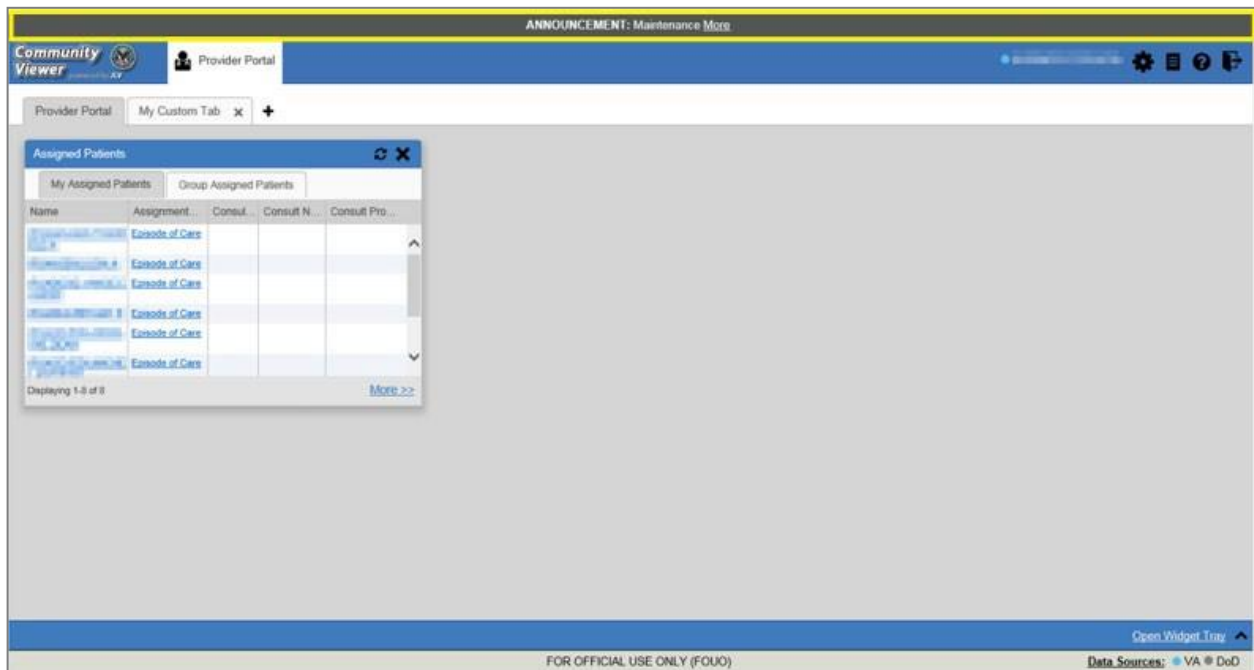


Figure 21: Announcements Banner





3.2.2. Viewing System Status

The system status reports the condition of the CV application. System status updates are received from CV’s Health Monitor, which monitors the services that CV uses to connect to VA data sources.

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

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

When all monitored systems and services are online and connected, a green icon  appears beside **System Status**. The message, “*CV data sources are available*” ([Figure 22](#)) appears on the **Login** page.

When one or more monitored systems or services are offline or unavailable, a yellow warning icon  appears with the message, “*Services are not available to CV.*”


When CV’s Health Monitor is unable to retrieve and report system status information, a red icon  appears with the message, “*System status is unavailable.*” When this status appears, you may not be able to log in to CV or view patient data until the connection is restored. See [Getting Help](#) for information on how to contact support.

Figure 22: System Status Indicator on the Portal Pages



These warnings may be accompanied by one or more of the notices listed in the table, depending on which services are unavailable.

Table 1: System Status Notices

Service	Notice
jMeadows	“ The service that gathers patient data and prepares it for display in CV is unavailable. CV is available for login but may not function otherwise.”
Master Veteran Index (MVI)	“ VA Patient Identity Service is unavailable. VA data may not display.”
VistA Data Service (VDS)	“ The connection to VA sites is unavailable. VA patient records of all types from all sites may not display.”
Provider Profile Management System (PPMS)	“ The PPMS is unavailable. Providers may be unable to log in or provider data may not display.”

3.2.3. Viewing Connection Status

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

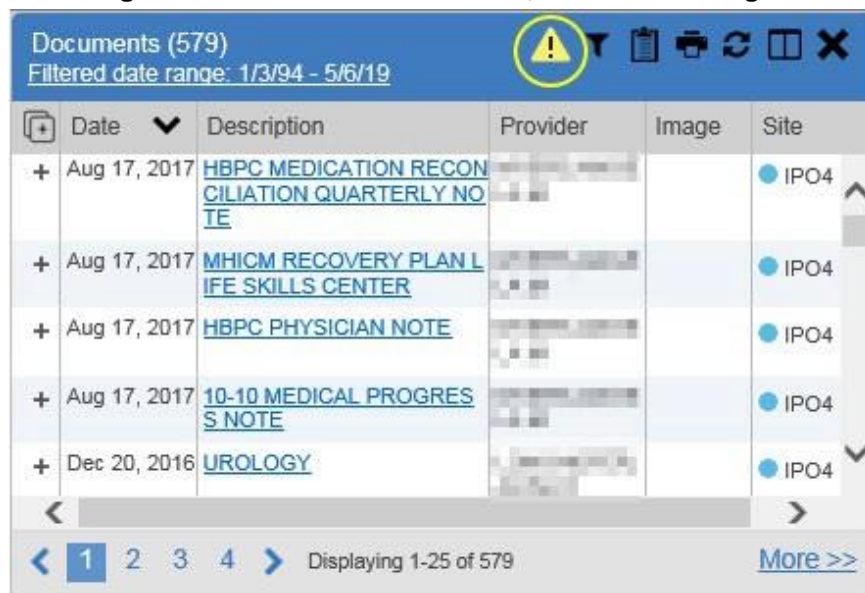
- i **NOTE:** The Connection Status reports the condition of the connection between CV and its external resources, while System Status reports the overall condition of the CV application.

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

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

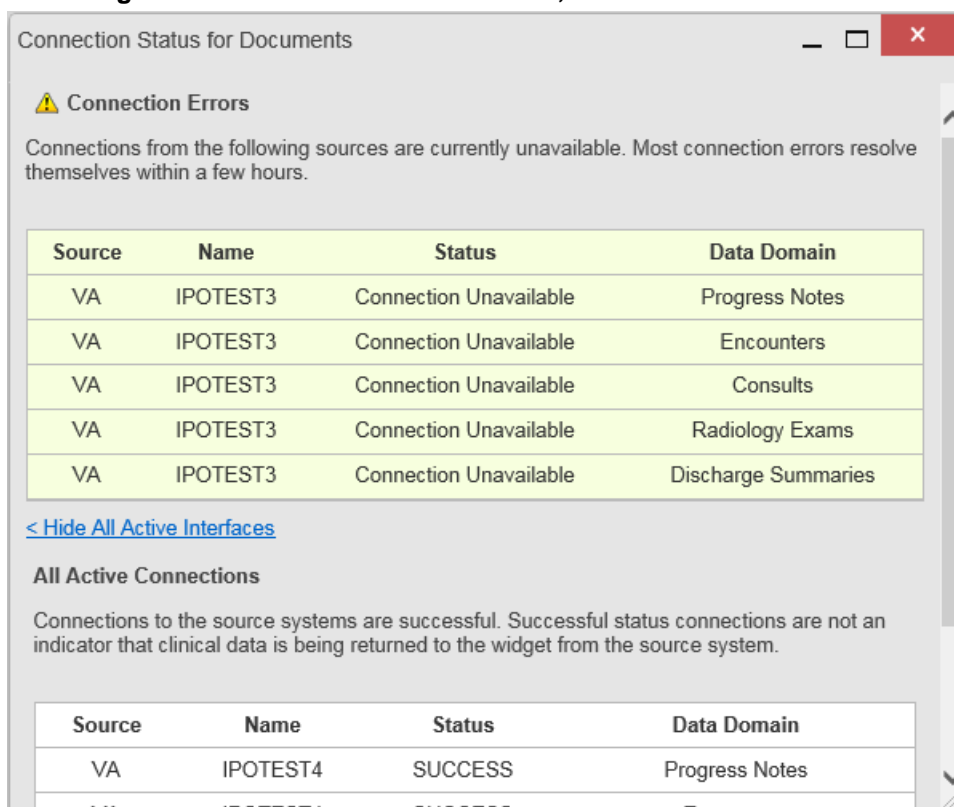
[Figure 23](#) shows a connection status indicator icon displayed on the **Documents** widget toolbar.

Figure 23: Connection Status Icon, Documents Widget



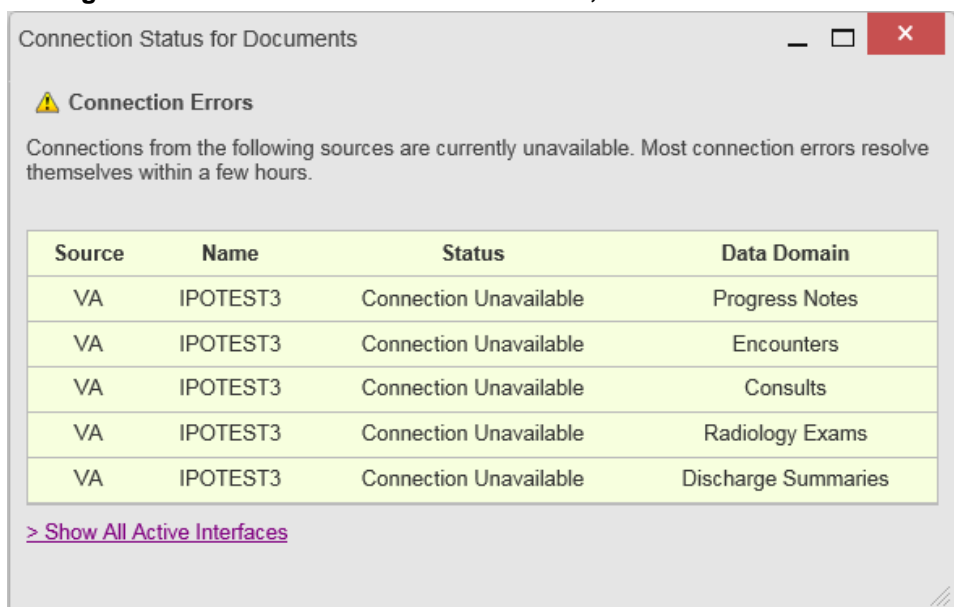
Clicking a **Connection Status** icon opens a standalone window with information about the connection to data sources. Clicking the **<Hide All Active Interfaces** link in the Connection Status window ([Figure 24](#)) hides the detailed **All Active Connections** view and displays only the connection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

Figure 24: Connection Status Details, Active Interfaces Shown



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

Figure 25: Connection Status Details View, Active Interfaces Hidden



3.3. Using Report Builder

The **Report Builder** feature is used to create custom PDF reports using patient data and records displayed in CV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the **Patient Portal** toolbar ([Figure 26](#)).

Figure 26: Report Builder Icon on the Patient Portal Toolbar



3.3.1. About Report Builder

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

The **Current Report** tab ([Figure 27](#)) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

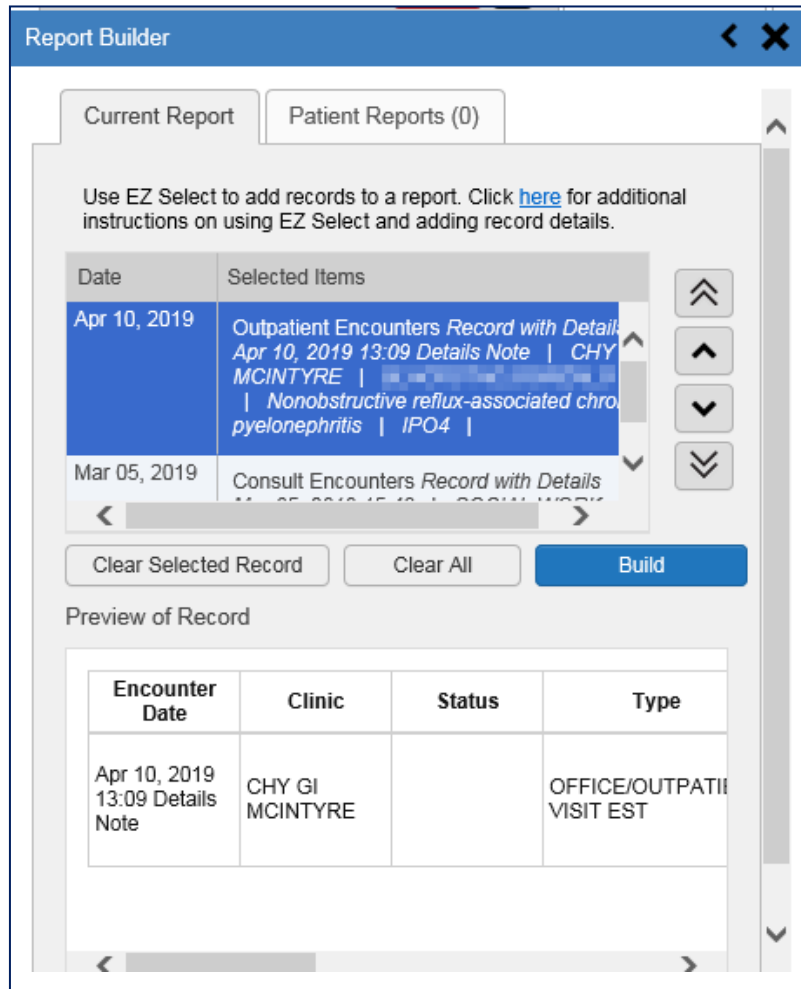
The **Patient Reports** tab ([Figure 29](#)) presents a list of all completed reports, the status of the report generation progress, the date the report expires, and a hyperlink to the contents of the completed report.

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

3.3.2. Generating a Report

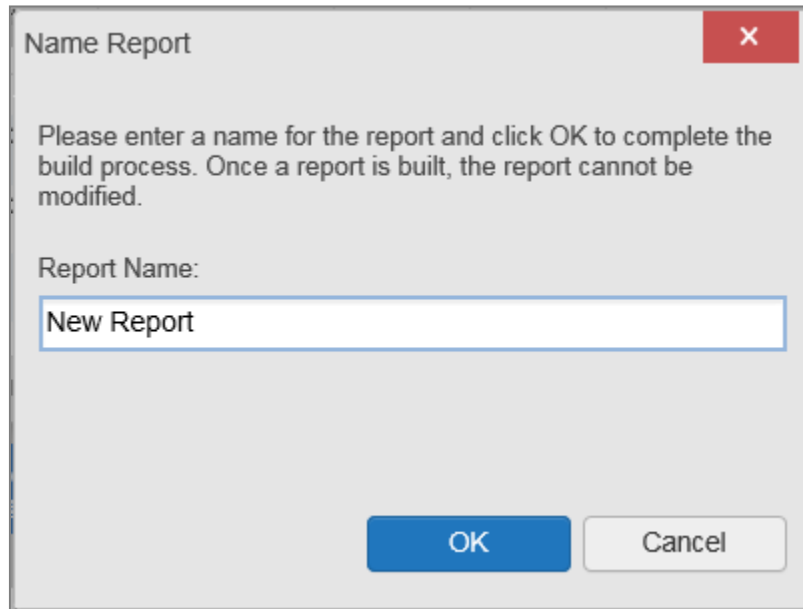
The selected records appear in the **Report Builder** pane ([Figure 27](#)).

Figure 27: Report Builder Current Report Tab



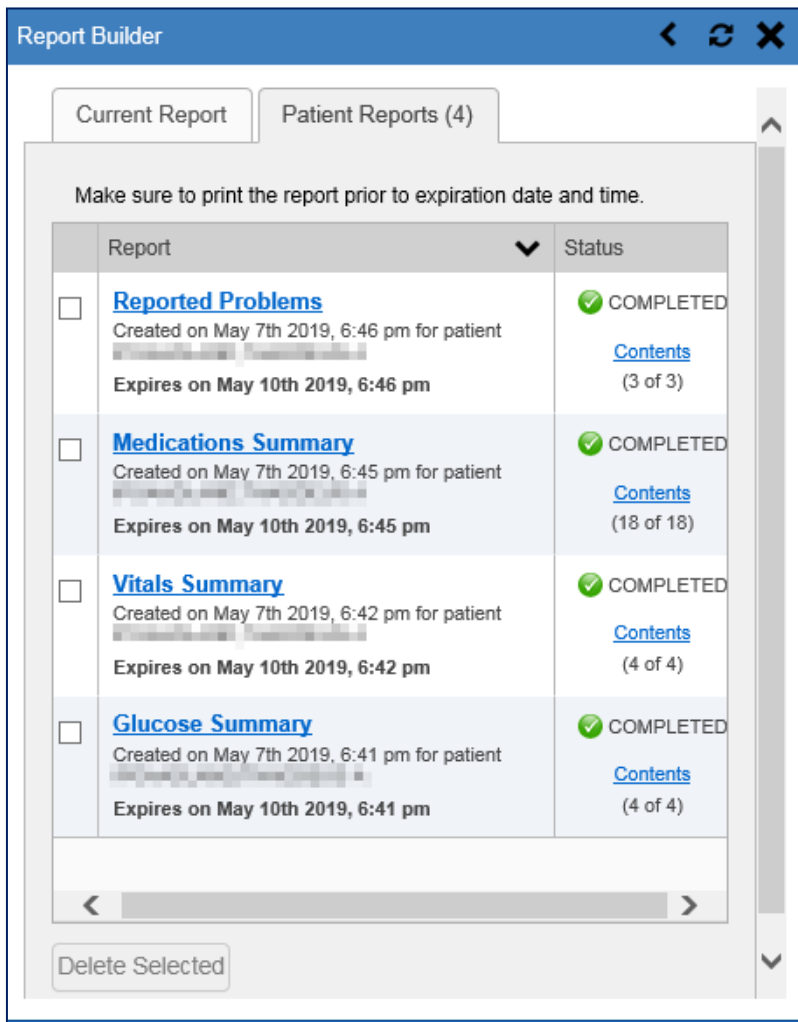
1. Use the navigation arrows to the right of the listed records to arrange the records in the desired order in the generated report
 - a. Records can be removed by clicking **Clear Selected Record** or **Clear All**
2. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane
3. Click **Build** to validate the selected records and prepare the report
 - a. If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column
 - b. If a record cannot be added to the report, an **Error** notation appears next to the record
4. Name the report when prompted and click **OK**

Figure 28: Report Builder Name Report Dialog



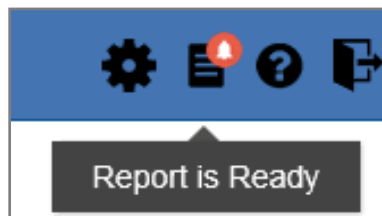
5. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column ([Figure 29](#))
6. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR*
 - a. An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report
 - b. Both the *COMPLETED* and *ERROR* entries include a **Contents** link, which provides a list of the records that appear in the generated report

Figure 29: Report Builder Patient Reports Tab



- c. A report ready message appears for 6 seconds on the portal page when the report has been built and is ready to be printed
- d. A red bell icon appears over the **Report Builder** icon when report builder is closed to indicate that a report is ready to be printed ([Figure 30](#))

Figure 30: Report is Ready Indicator on Toolbar



i **NOTE:** Once a report is created, it is available on the **Patient Reports** tab for 72 hours. After 72 hours, the report expires, is removed from the **Patient Reports** tab, and must be re-created.

3.3.2.1. Adding Multiple Records with EZ Select


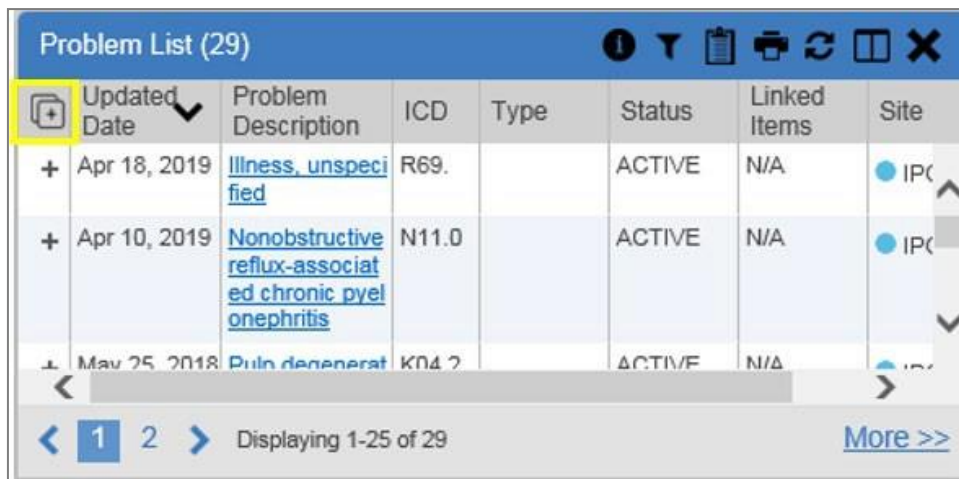

EZ Select allows you to add all records displayed on a single page of a single widget to the Report Builder with one click. Click the **Select All**  icon at the top of the left column ([Figure 31](#)) to add data from all records shown in the widget's page display to the Report Builder, including the details and notes associated with the record. EZ Select is available from the minimized and expanded views as well as the **Patient Flags and Postings** dialog box.

Figure 31: Report Builder Select All Icon



Problem List (29)							
	Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
+	Apr 18, 2019	Illness, unspecified	R69.		ACTIVE	N/A	IPC
+	Apr 10, 2019	Nonobstructive reflux-associated chronic pyelonephritis	N11.0		ACTIVE	N/A	IPC
+	May 25, 2018	Pulmonary degeneration	K04.2		ACTIVE	N/A	IPC

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



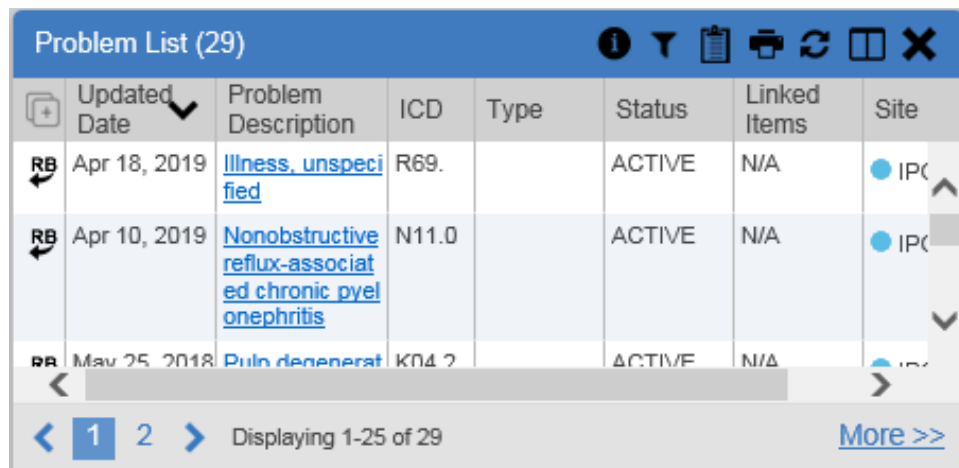




The **Add to Report Builder**  icon in each row changes to the **Added to Report Builder**  icon to confirm the record has been added ([Figure 32](#)).

Figure 32: All Records on a Single Widget Page Added to Report Builder



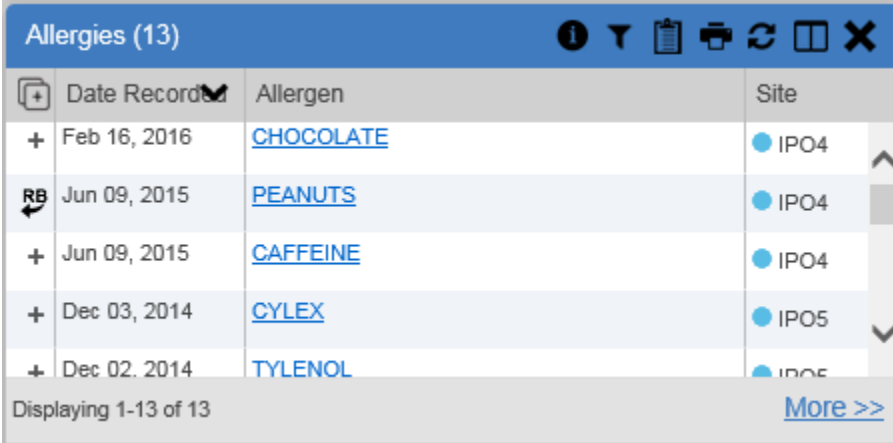
Problem List (29)							
	Updated Date	Problem Description	ICD	Type	Status	Linked Items	Site
	Apr 18, 2019	Illness, unspecified	R69.		ACTIVE	N/A	IPC
	Apr 10, 2019	Nonobstructive reflux-associated chronic pyelonephritis	N11.0		ACTIVE	N/A	IPC
	May 25, 2018	Pulmonary degeneration	K04.2		ACTIVE	N/A	IPC

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

3.3.2.2. Adding One Record

Click the **Add to Report Builder** **+** icon next to a record in a widget to add data from that record to the Report Builder, including the details and notes associated with the record. The **Add to Report Builder** **+** icon in the row changes to the **Added to Report Builder** **RB** icon to confirm the record has been added to the Report Builder (Figure 33). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

Figure 33: Single Record Added to Report Builder



	Date Record	Allergen	Site
+	Feb 16, 2016	CHOCOLATE	● IPO4
RB	Jun 09, 2015	PEANUTS	● IPO4
+	Jun 09, 2015	CAFFEINE	● IPO4
+	Dec 03, 2014	CYLEX	● IPO5
+	Dec 02, 2014	TYLENOL	● IPO5

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

3.3.2.3. Adding Only Record Details or Notes

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

1. Select and hold the **Add to Report Builder** **+** icon to access these options
1. Select **Add Detail** or **Add Detail/Note** to add the details and/or notes associated with the record as well as the record row data to the Report Builder (Figure 34)
2. Select the **Add Record Row** option to add only the data displayed in the widget display for that record and not the information provided in the details and/or notes

Figure 34: Add Detail and Add Record Row Dropdown

Outpatient Encounters (243) Filtered date range: 1/1/94 - 5/8/19						
+	Encounter Date	Clinic	Provider	Diagnosis	Image	Site
+	Mar 03, 2003	ZZHAYNES	[REDACTED]	HEALTH EXAMINATION OF DEFINED SUBPOPULATIONS		• IPO3
<div style="border: 1px solid black; background-color: #f0f0f0; padding: 5px;"> <p>Add Detail</p> <p>Add Record Row</p> </div>						
+	Apr 03, 2003 13:30	CHY UROL MCPEAK	[REDACTED]	NOCTURIA		• IPO3
	Details Note					
+	Apr 03, 2003 14:08	ZZCHY PHA RM COUNSELING	[REDACTED]	OTHER SPECIFIED COUNSELING		• IPO3
	Details Note					
+	Apr 10, 2003 13:30	ZZCHY C&P LESLIE	[REDACTED]	HEALTH EXAMINATION		• IPO3

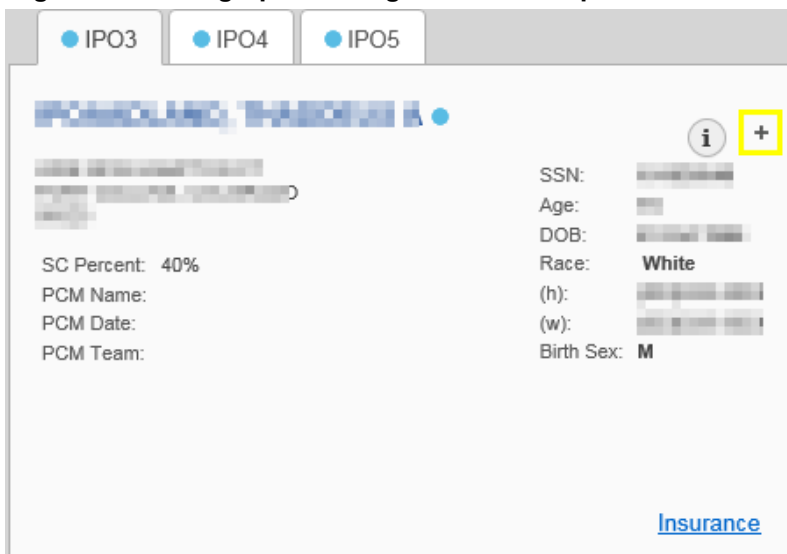
< **1** 2 3 4 > Displaying 1-25 of 243 [More >>](#)

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

3.3.2.4. Adding Patient Demographics

Clicking the **Add to Report Builder +** icon in the upper right corner of the **Demographics** widget adds the patient's demographics details for that site to the Report Builder ([Figure 35](#)). The **Add to Report Builder +** icon changes to the **Added to Report Builder** icon to confirm the demographics data has been added. Click additional site tabs within the **Demographics** widget and repeat as desired to add demographics details from other sites within the patient's health record.

Figure 35: Demographics Widget's Add to Report Builder Icon



3.3.3. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab ([Figure 29](#)) -OR-
2. Click the **Contents** link in the **Status** column of the **Patient Reports** tab to open a list of the records included in the report in the **Report Contents** window ([Figure 29](#)) -OR-
3. Click the blue, hyperlinked report name in the **Report Contents** window ([Figure 36](#))

Figure 36: Report Contents Dialog

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

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

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

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

3.3.4. Deleting a Report

1. Select the checkbox to the left of the report name on the **Patient Reports** tab ([Figure 29](#))
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion

3.4. Using the Accessible Theme's Functionality

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

3.4.1. Keyboard Focus and Portal Navigation in the Accessible Theme

Keyboard focus is the highlighting of portal elements that enables interaction with, and the navigation of, the web application through the keyboard and keystrokes. The portal element in focus is outlined in gold ([Figure 17](#)) as a visual indicator of keyboard focus.

CV uses standard Windows keystrokes (**Tab**, **Shift + Tab**, arrow keys, **Enter**) and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All UI items are accessible via the keyboard when using the Accessible theme.



Pressing **Enter** or the **Spacebar** when an element that provides action is in keyboard focus performs the associated action. Pressing **Enter** or the **Spacebar** when the **Settings** icon is in focus, for example, opens the **CV Settings** dialog box. The **Tab** or arrow keys allow a user to move between keyboard focus items to navigate through portal elements. A complete list of accessible keystrokes is provided in [Table 2](#).


Table 2: Accessible Keystrokes

Keystroke	Description
<i>Application and Portal Navigation</i>	
Alt + 4	Press to transfer keyboard focus to the main or top portal 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 (X) icon.
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 pane containing the UI item with keyboard focus, or to exit a window, widget, or tab.
SPACEBAR	Press to activate any UI item (for example, click an icon).
Arrow Keys	When keyboard focus is on a widget, press the arrow keys to change page viewing in a widget's data table. When keyboard focus is on a dropdown list, press the down arrow to view the list contents.
<i>Portal Tabs</i>	
Arrow Keys	Use the left and right arrow keys to navigate between tabs.

Keystroke	Description
TAB	Press one or more times when focus is on a portal tab to place Add Tab (+) in keyboard focus. Add a Tab: 1) Press Tab 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. 4) Tab to the Add button to confirm the new tab name or tab to the Cancel button to discard the new tab.
ENTER	Press while Add Tab (+) is in focus to add a new portal tab. A dialog box prompts you to enter a name for the tab.
ESC	Focus on a tab and press Esc to remove it.
Windows and Dialog Boxes	
TAB	Press Tab to move keyboard focus through the items within the window.
Adding Widgets to the Portal Pages	
Alt + 1, 2, or 3	Add a widget to a portal page from the Widget Tray: 1) Determine which column (1, 2, or 3) of the portal page you want to place the widget. 2) Focus on the desired widget icon in the Widget Tray. 3) Press Alt + 1, 2, or 3 , depending on the desired column.

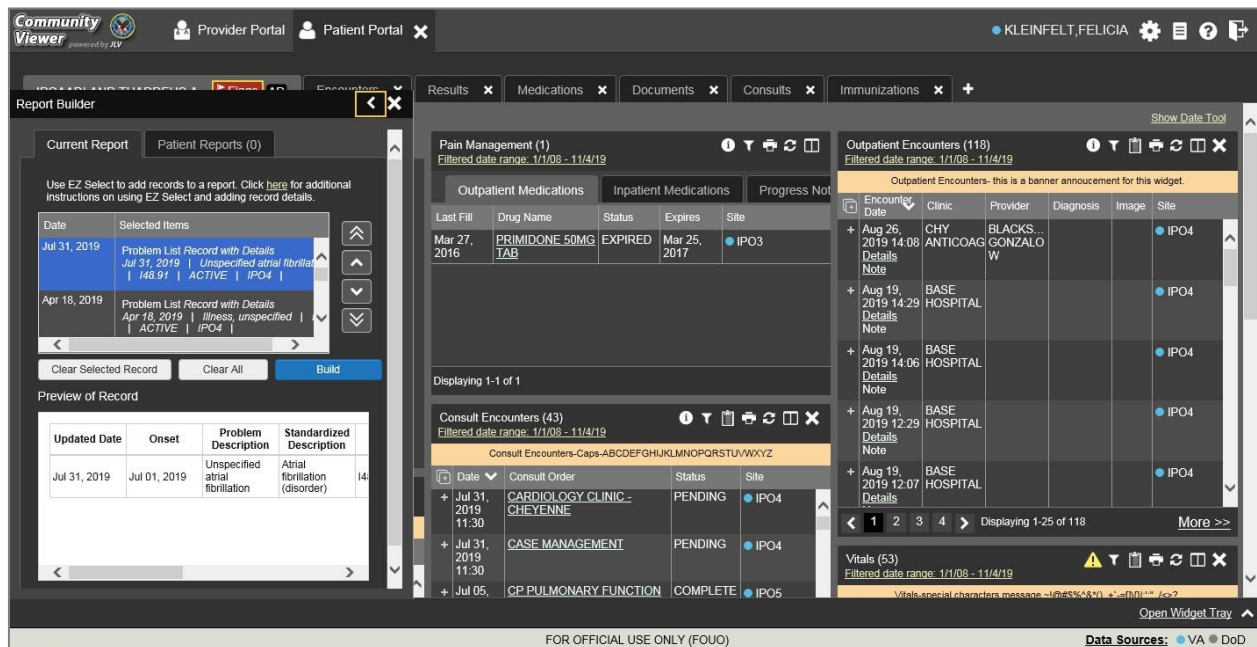
3.4.2. Using Report Builder in the Accessible Theme

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

There are multiple ways to add records and other patient data to a report. Actions can be performed within the widgets to add patient data when the Report Builder is open on the **Patient Portal** ([Figure 37](#)) or when the Report Builder is closed or minimized. The Report Builder can be minimized by pressing **Enter** when the **left arrow** button is in focus, as shown in the example below. This action collapses the Report Builder on the left side of the portal. Closing the window with the **Close**  button removes the Report Builder from the portal.

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

Figure 37: Report Builder in Accessible Theme





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

- Opening reports in a standalone window by pressing **Tab** until focus is on the report name within the **Report** column and press **Enter**
- Viewing report contents by pressing **Tab** until focus is placed on the **Contents** link in the **Status** column and then pressing **Enter**
- Deleting reports by pressing **Tab** until the focus is on the report checkbox, checking the box, then pressing **Tab** until the **Delete Selected** button is in focus, and pressing **Enter**

3.5. Printing

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

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

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

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

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

4. Widgets

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

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

The default layout of the **Patient Portal** for a first-time CV user is shown in [Figure 13](#). The widgets presented are **Patient Demographics, Problem List, Allergies, Outpatient Medications, Pain Management, Consult Encounters, Progress Notes, Outpatient Encounters, and Vitals**.

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

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

4.1. Accessing and Opening Widgets

[Figure 38](#) depicts the **Patient Portal** with an open **Widget Tray**, highlighted at the bottom of the portal. Click the **Open Widget Tray** link in the lower right-hand corner to open the **Widget Tray**. Click, hold, and drag a widget from the tray to the portal. These actions dock the widget on the portal page. Once docked, the widget opens in minimized view.

Use the tray navigation tools (**<< More Widgets** or **More Widgets >>**) placed above the tray or the arrows (< or >) placed below the tray icons in the lower left and right corners of the portal to scroll through all clinical domains available in the **Patient Portal**.


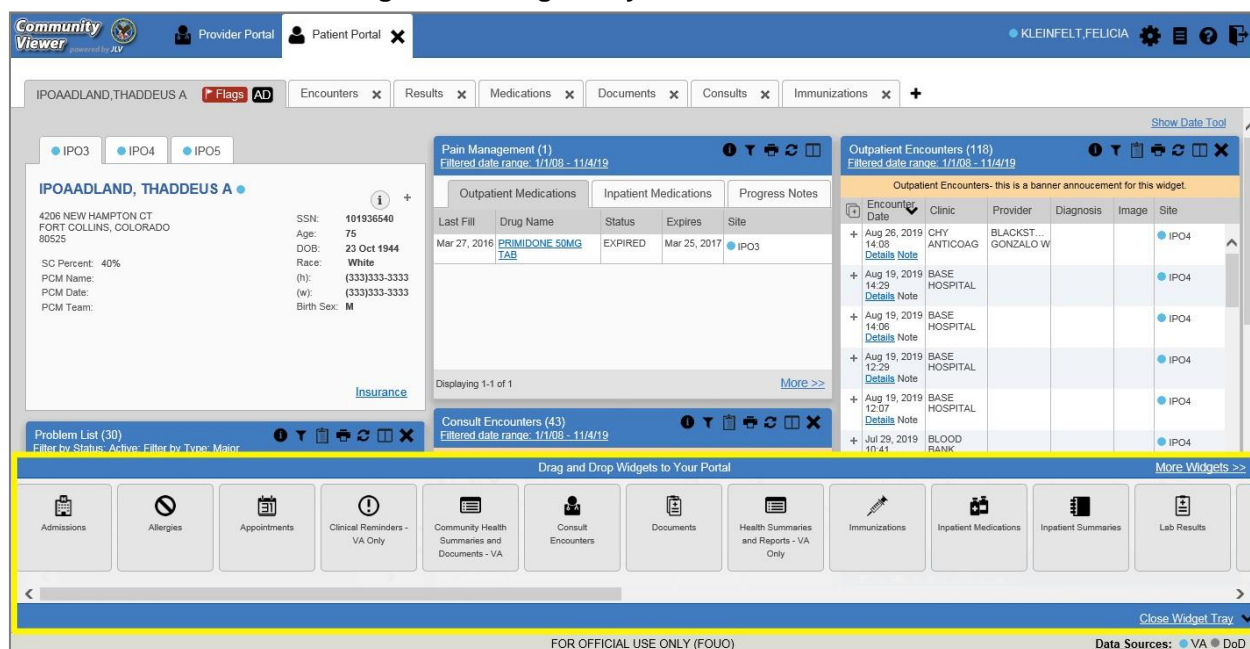
 **NOTE:** Widgets can be removed from a portal page and placed back into the **Widget Tray** by clicking **Close X** in the upper right corner of the docked widget.

Figure 38: Widget Tray on the Patient Portal



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


- Admissions
- Allergies
- Appointments
- Clinical Reminders
- Community Health Summaries and Documents¹
- Consult Encounters
- Documents
- Health Summaries and Reports
- Immunizations
- Inpatient Medications
- Inpatient Summaries
- Lab Results
- MHS GENESIS¹
- Orders
- Outpatient Encounters
- Outpatient Medications
- Pain Management
- Problem List
- Procedures
- Progress Notes
- Questionnaires and Deployment Assessments¹
- Radiology Reports
- Social, Family, and Other Past Histories¹
- Surgery/Procedure Reports
- Vitals

4.1.1. Sort and Filter Options

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

- Click a column title to sort records according to data in that column; an **up** or **down** arrow appearing next to the column title provides a visual indicator that a sort is applied to that column

¹ While available in the widget tray, some widgets display “Data source not enabled” or a connectivity error until data sources are connected in a future release.

- If you sort a column that appears in both minimized and expanded views of the widget, the sort saves in your user profile and persists
- If you sort a column that is only in the expanded view of the widget, your next session restores the default widget sort or the last sort saved to your user profile
- If you sort a **Date** column that has some partial or missing date values, understand:
 - Dates that have month and year but lack a day are treated as though the day were “00” (e.g., July 2018 sorts between June 30, 2018 and July 01, 2018)
 - Dates that have a year only are treated as though the month is January and the day is “00” (e.g., 2018 sorts between December 31, 2017 and January 01, 2018)
- Click **Column Settings**  in the widget toolbar to hide or show the columns within the widget; check/uncheck the column names that appear in the pop-up box, and click **Apply**
- When there are multiple drugs with the same order number, CV maintains the grouping by order number when a column sort is applied in the widget

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


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

4.1.1.1. Setting Multiple Filters in Widgets

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

4.1.1.2. Widget Date Range Filters

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

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


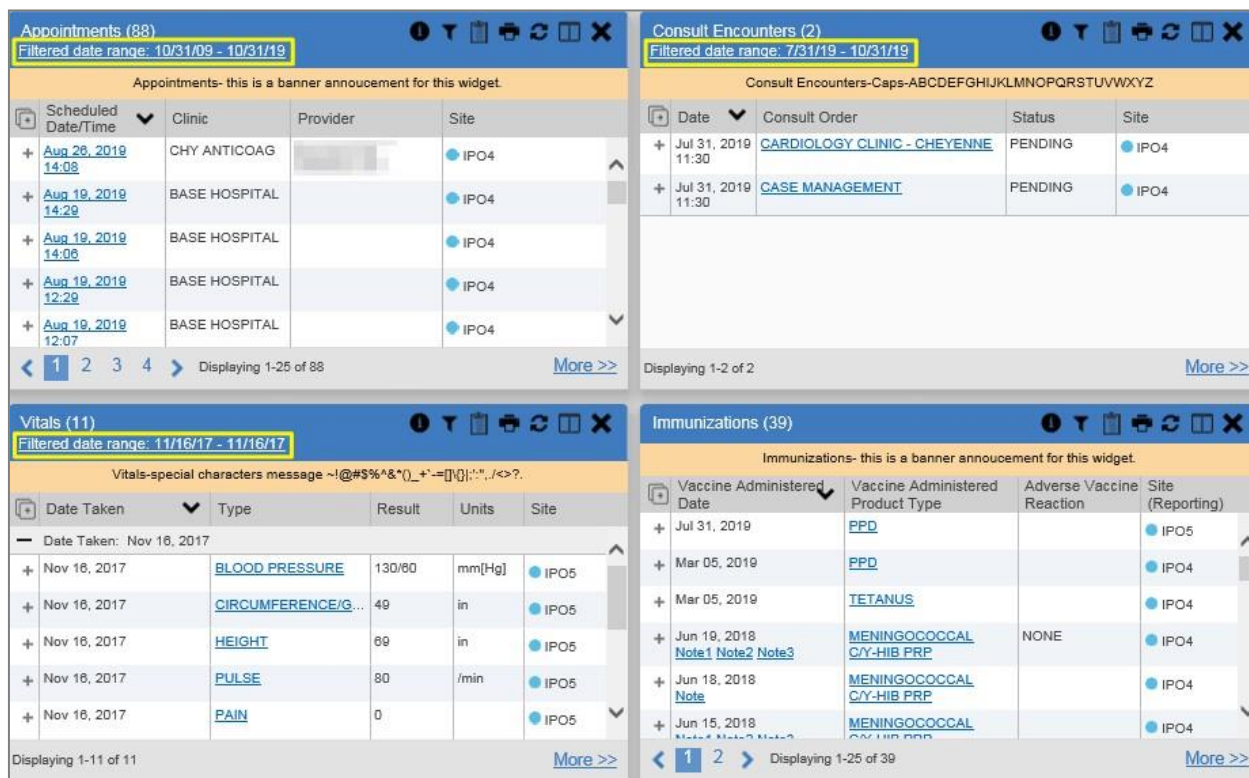
If a date range filter is applied, the selected range is indicated in the widget header, below the title ([Figure 39](#)). Click the **Configure Filter** icon  or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed.

Figure 39: Filtered Date Range Examples




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

i **NOTE:** Changes made to the date range in a widget persist from minimized to expanded view, patient to patient, and session to session, until the widget is either removed or the date range is changed.

i **NOTE:** When looking for Essentris information associated with a specific admission in the **Inpatient Summaries** widget, expand your search date ranges to include additional days before and after the admission where possible. This includes preadmission notes as well as notes signed after the patient was discharged in the filtered widget display.

4.1.1.2.1. Quick Date Range Filter

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

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. Selecting **Cancel**, which is the **Apply** button while the data refresh is running, stops the query. The options represent time counting back from the present day (for example,

selecting 2y displays only records within the last 2 years). Examples of preset date ranges include 1w (last 7 days), 6m (last 6 months), and 3y (last 3 years).

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

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

Figure 40: Quick Date Range Filters

Appointments (145)
 Filtered date range: 1/1/08 - 11/1/19
 If the information you expect does not appear, expand the date range.

Start date: 01/01/2008 End date: 11/01/2019 Apply 1w 2w 1m 3m 6m 1y 2y 3y 5y 10y

Filter by Clinic Filter by Provider Specialty Filter by Site

Enter text to filter Remove All Filters Close Filter

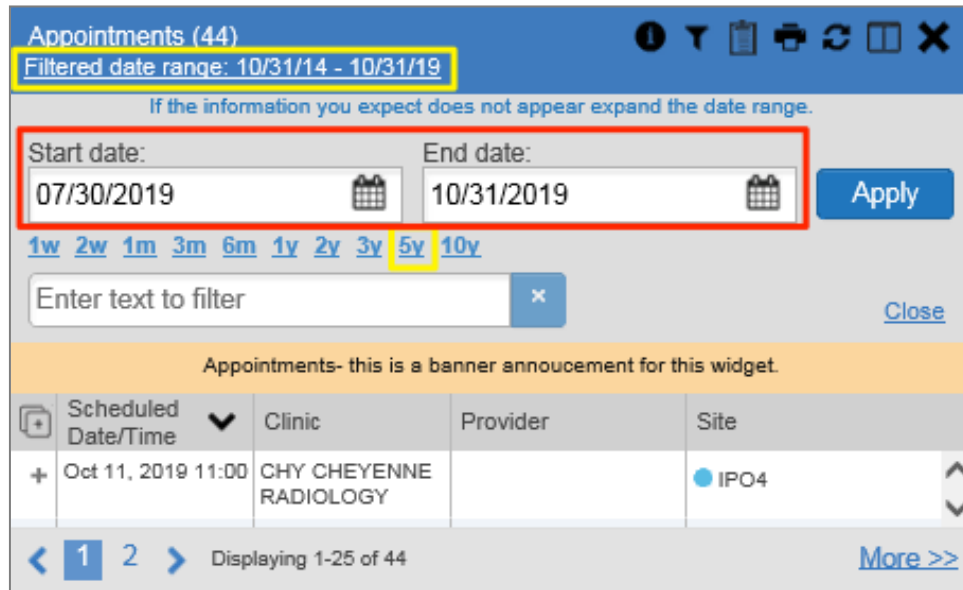
Appointments- this is a banner announcement for this widget.

Scheduled Date/Time	Clinic	Provider	Provider Speci...	Appointment Status	Type	Reason	Site
+ Aug 28, 2019 14:08	CHY ANTICOA G		Allopathic & Osteopathic Physicians	ACTION REQUIRED	CHY ANTICOA G VISIT		IPO4
+ Aug 19, 2019 14:29	BASE HOSPITAL				BASE HOSPITAL VISIT		IPO4
+ Aug 19, 2019 14:06	BASE HOSPITAL				BASE HOSPITAL VISIT		IPO4
+ Aug 19, 2019 12:29	BASE HOSPITAL				BASE HOSPITAL VISIT		IPO4
+ Aug 19, 2019 12:07	BASE HOSPITAL				BASE HOSPITAL VISIT		IPO4
+ Jul 29, 2019 10:41	BLOOD BANK				BLOOD BANK VISIT		IPO4



Displaying 1-25 of 145 Show All

CCPs have limited access to records and can only retrieve records within the date range set by the VA Staff user who created the patient assignment. [Figure 41](#) shows a CCP restricted to records from 07/20/2019 to present, in this case 10/31/2019, which is shown by default in the **Start Date** and **End Date** fields. When the 5y **Quick Date Range** filter is applied, the **Filtered Date Range** shows the entire 5-year period (10/31/14–10/31/19), which includes the date range history the CCP is permitted to view. However, records between the **Filtered Date Range** start date and the day before the CCP’s permitted history start date (10/31/14–07/19/2019) will not display.

Figure 41: Quick Date Range Filter (5y) Outside CCP's Permitted History Dates



4.1.1.2.2. Start and End Date Filter

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


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

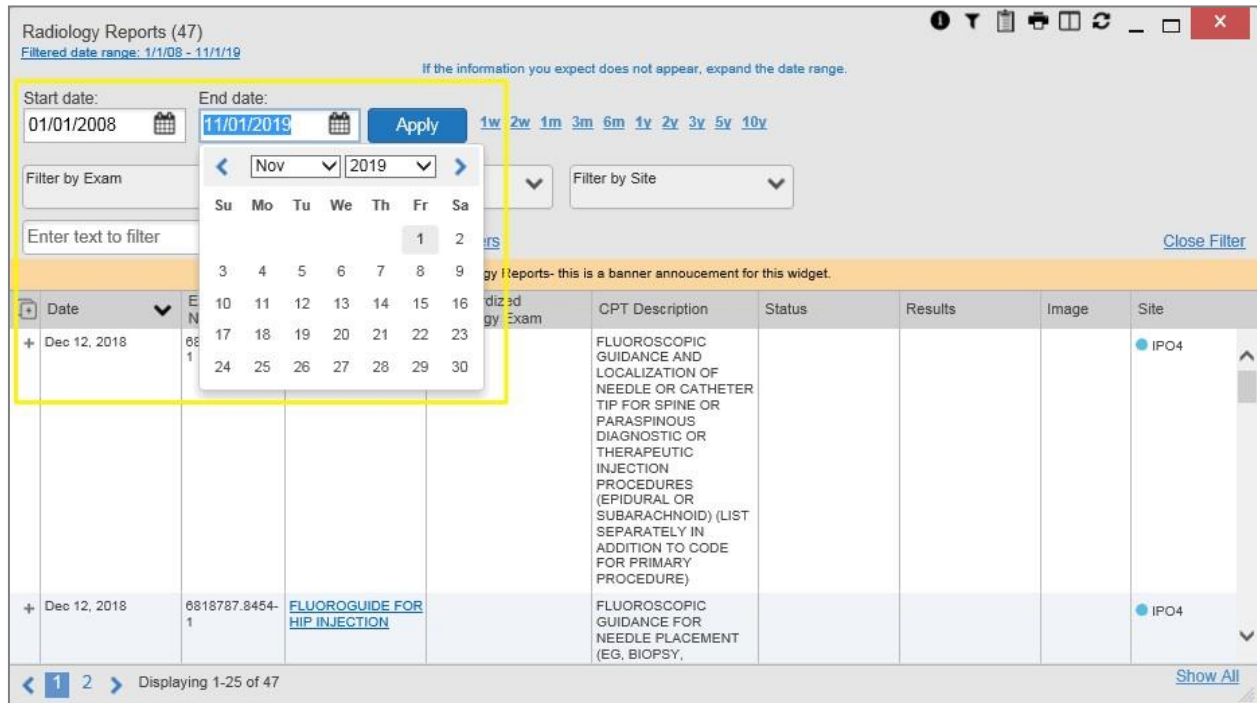
Figure 42: Lab Results Widget Start and End Date Filters


The screenshot shows the 'Lab Results (19)' widget. At the top, it displays 'Filtered date range: 6/2/18 - 6/2/19'. Below this, a message states: 'If the information you expect does not appear expand the date range.' The date filter section includes 'Start date:' with a calendar icon and the value '06/02/2018', and 'End date:' with a calendar icon and the value '06/02/2019'. An 'Apply' button is to the right. Below the date filters are time range options: '1w', '2w', '1m', '3m', '6m', '1y', '2y', '3y', '5y', '10y', and 'All'. A search bar contains the text 'Enter text to filter' and a 'Close' button. A banner below the search bar reads 'Lab Results- this is a banner announcement for this widget.' The main table has columns: 'Collection...', 'Lab Test', 'Result', 'Lab Panel', and 'S...'. Two rows are visible: one for 'SURGICAL PATHOLOGY' with a 'result' and another for 'GLUCOSE' with a value of '119 mg/dl' and 'CHEM PANEL'. The bottom of the widget shows 'Displaying 1-19 of 19' and a 'More >>' link.

Collection...	Lab Test	Result	Lab Panel	S...
+ Dec 12, 2018 09:40	SURGICAL PATHOLOGY	result		● IPO ^
+ Oct 03, 2018 18:08	GLUCOSE	119 mg/dl	CHEM PANEL	● v


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

Figure 43: Radiology Reports Widget Start and End Date Calendar




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

i **NOTE:** Prior day selections persist if you change only the month or year. If you change the month or year and the prior day value does not exist, the calendar will default to the last day of the new month. For example, changing only the month value of an existing August 31, 2018 entry to February would set the date to February 28, 2018 because there are less days in February. Similarly, if you had February 29, 2016 selected, a day which only exists in a leap year, switching the year to 2015 would set the date to February 28, 2015, the last day of the month in a standard year.

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

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

4.1.1.3. Tab Date Range Tool

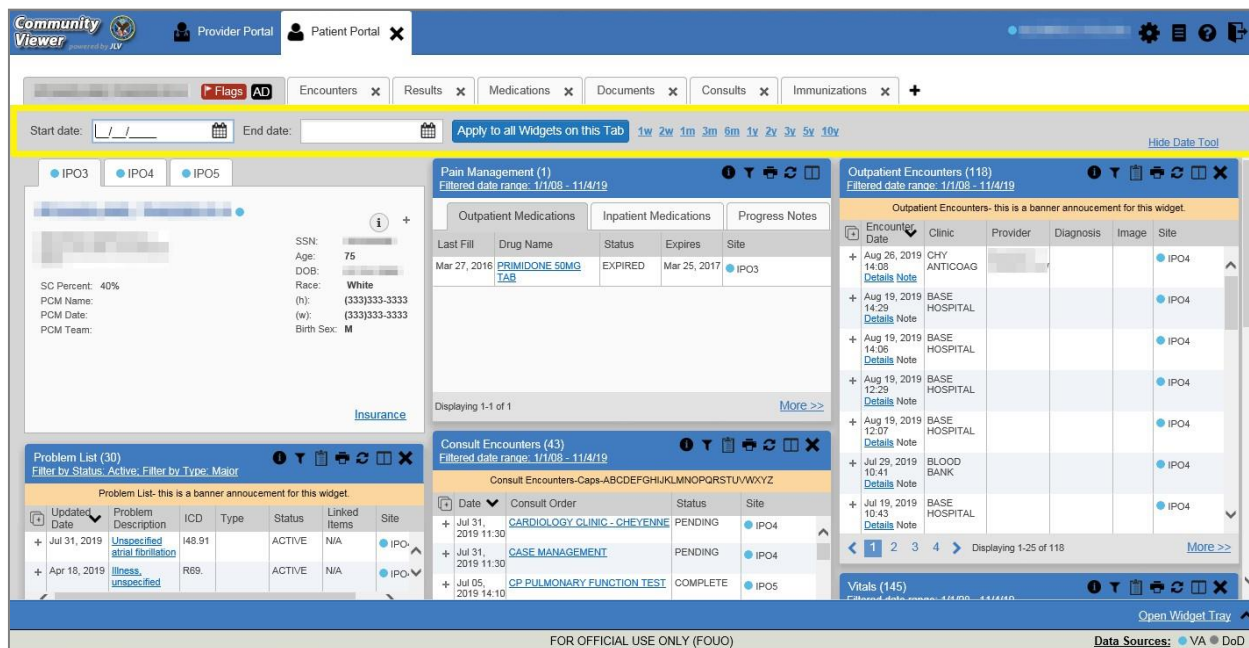
All tabs in the  **Patient Portal** have a **Tab Date** tool that you can use to filter all widgets on a single tab by the same date range. The **Tab Date** tool has the same **Start and End Date** and

Quick Date Range filters available on most individual widgets, but it applies the date filter to all widgets on an individual tab.

1. Select the **Show Date Tool** hyperlink in the upper right corner of a new or existing tab
2. Enter dates in the **Start Date** and **End Date** fields, and select the **Apply to All Widgets on This Tab** button -OR-
3. Select a **Quick Date Range** value in the **Tab Date** tool

The **Tab Date** tool (Figure 44) is hidden by default, and it hides again automatically after you apply a date filter to the tab. Should you decide not to apply a date filter to the tab, select the **Hide Date Tool** hyperlink to hide the tab-level date filters.

Figure 44: Tab Date Tool

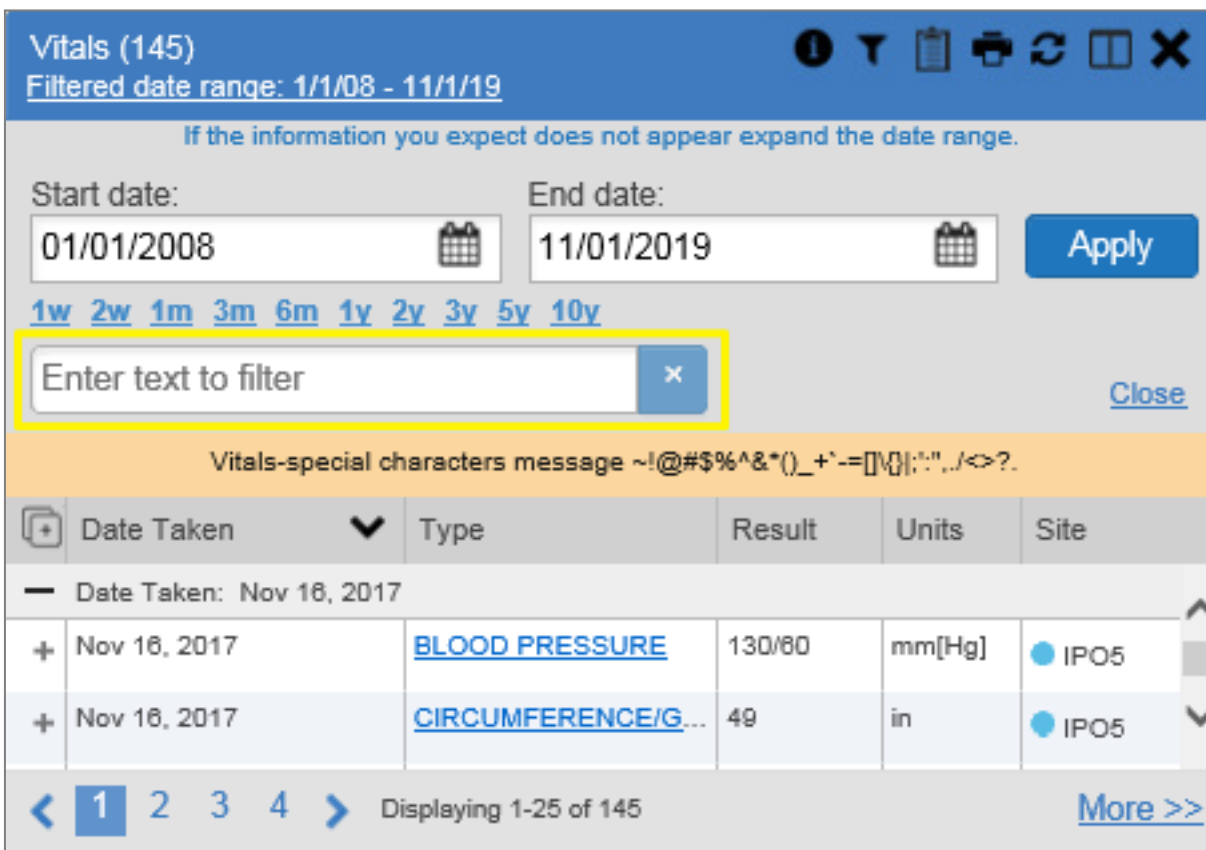




The **Tab Date** tool only filters widgets currently displayed on the active tab that support date range filtering. Widgets that display all data, without a date range, will continue to do so. Filtering only applies to widgets on the tab at the time you apply the **Tab Date** tool and will not affect new widgets added to the tab. You may still apply widget-level date filters to individual widgets after using the **Tab Date** tool.

4.1.1.4. Text Filter

Clinical data widgets on the **Patient** portal and the **Patient Flags and Postings** dialog box provide a text search filter option, allowing you to quickly locate relevant patient data using keywords or characters (Figure 45). Text filters are performed on the information displayed in all columns within a widget, including hidden columns. Filters are not performed on notes, attachments, or details associated with patient records.

Figure 45: Vitals Widget Text Filter



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




- Text filtering applies only to one widget
- Text filters are performed within the subset of filtered data if a date range filter or other dropdown filters are applied within the widget
- Text filters are performed on data within all columns shown in the expanded view of the widget even if the term is entered in the text filter field of the minimized view
- Text filters entered in the minimized view of a widget persist when you open the widget in expanded view
- On widgets with site tabs, text filters entered on one site tab persist when you select other site tabs
- All records across the widget pages are filtered if the widget has multiple page views
- The **Enter text to filter** field is not case sensitive and allows up to 25 characters, including numeric and special characters
- CV begins to filter when you pause while typing the term in the **Enter text to filter** field
- Text filtering is not available in the **Demographics** widget

4.2. Widget Navigation and Display Options

Navigation tools and display options are provided within each widget (listed in [Table 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 46](#).

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

4.3. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized or expanded view. The default rendering of a widget is in minimized view ([Figure 13](#)).

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

Click the **More >>** link at the bottom of the widget in minimized view to launch the expanded view ([Figure 46](#)), which provides additional display and filtering options.


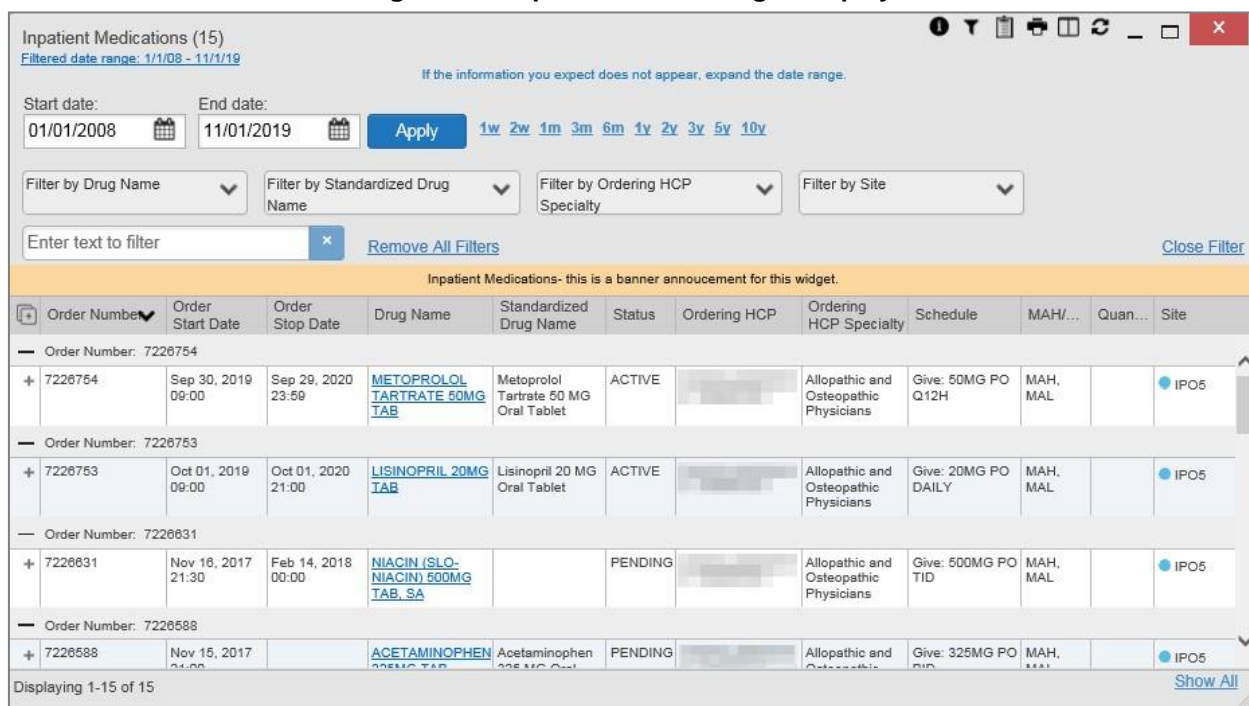
Click **Configure Filter**  from the widget toolbar if the additional display configuration options are not displayed in expanded view.

Figure 46: Expanded View Widget Display



4.4. Displaying Widgets on Custom Tabs


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




1. Click the plus sign + to the right of the tabs along the top of the **Patient Portal** ([Figure 13](#))
 - a. The **Add Tab** dialog box opens
2. Type a name for the new tab in the **Add Tab** dialog box, and click **Add**
3. Open the **Widget Tray** within the new tab space, then click, hold, and drag each of the desired widgets to the portal page

i **NOTE:** Tab configurations remain set until you manually change them or restore your profile to default in the **CV Settings** dialog, which will remove all custom tabs.

4. Click between preset and custom tabs at any time without losing any of the configurations created on the custom tabs
 - a. Tabs persist, even when a patient change is made
 - b. Custom tabs can be renamed by double-clicking the tab name

4.5. Refreshing Widget Data

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

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

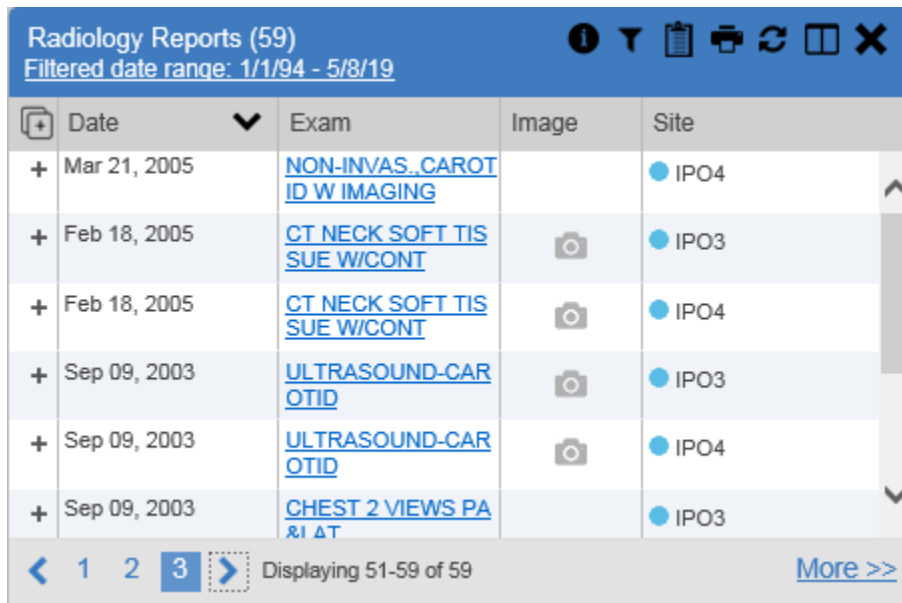
4.6. Nondiagnostic Images





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

When a **Camera** icon  appears in the **Image** column ([Figure 47](#)), one or more images are associated with that record.

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

Figure 47: Nondiagnostic Images in the Minimized View of the Radiology Reports Widget



Date	Exam	Image	Site
Mar 21, 2005	NON-INVAS. CAROT ID W IMAGING		IPO4
Feb 18, 2005	CT NECK SOFT TIS SUE W/CONT		IPO3
Feb 18, 2005	CT NECK SOFT TIS SUE W/CONT		IPO4
Sep 09, 2003	ULTRASOUND-CAR OTID		IPO3
Sep 09, 2003	ULTRASOUND-CAR OTID		IPO4
Sep 09, 2003	CHEST 2 VIEWS PA & I AT		IPO3


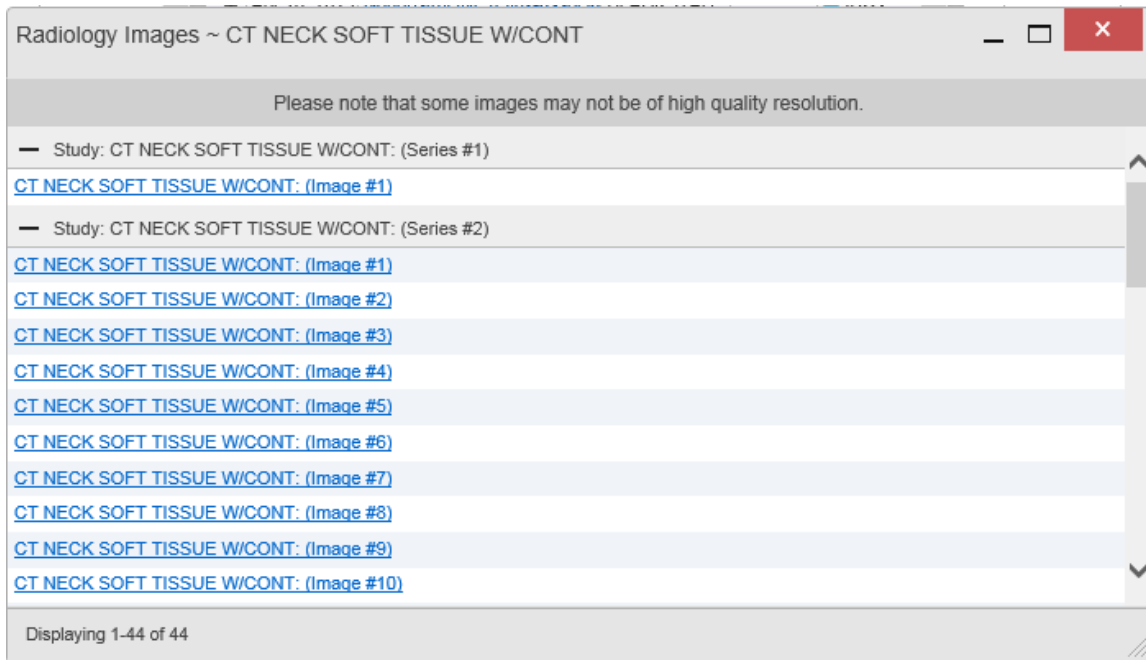
Click the **Camera** icon  to display a list of link(s) to the image(s) ([Figure 48](#)). Click the hyperlinked name of the image to open it.

Figure 48: Multiple Nondiagnostic Radiology Images



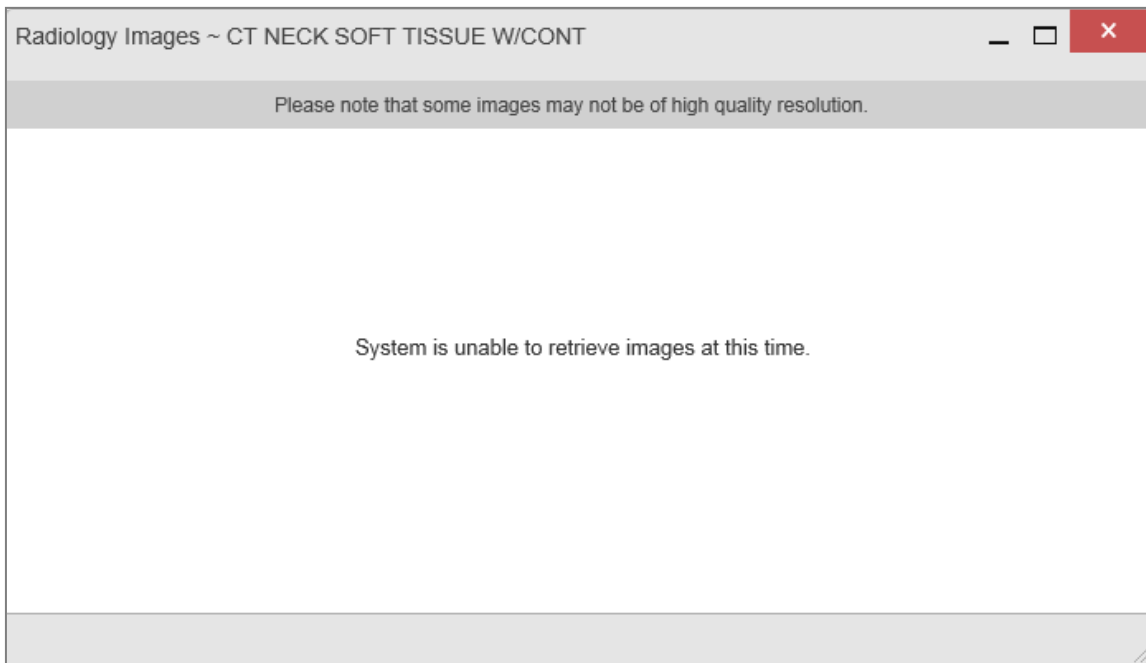
When in **Detail** view, click the **Click image to open viewer** link (Figure 49) to open the associated image.

Figure 49: Nondiagnostic Images in the Radiology Reports Detail View




If an image is temporarily unavailable, users may see the message: “*System is unable to retrieve images at this time*” (Figure 50). Try to retrieve the image later, or contact the Community Provider Technical Service Desk if the problem persists ([Getting Help](#)).

Figure 50: Radiology Images Unable to Retrieve Images Error



4.7. Widget Functionality

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

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

4.7.1. Patient Demographics

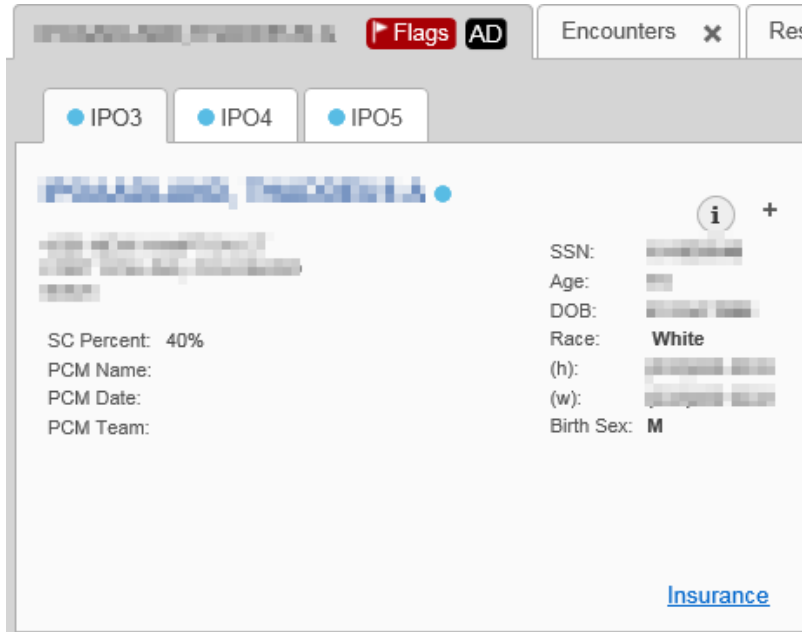
A summary of the patient's demographics (personal data) appears in the upper left section of the **Patient Portal** (Figure 51). This static widget cannot be removed from the **Patient Portal** or moved to a different position. The tabs above the patient's name provide the patient's demographics summary at each VA site that the patient has visited.

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

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

The **Advance Directives** icon launches the **Advance Directives** dialog. The icon displays gray and does not launch the **Advance Directives** dialog if there are no advance directives on the patient's record.

Figure 51: Patient Demographics Widget



4.7.1.1. Viewing Detailed Patient Demographic Information

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

4.7.1.2. Viewing Third-Party Insurance Information

Third-party payers and additional insurance information are available from a link within the **Demographics** widget on the **Patient Portal** (Figure 51). Click the **Insurance** link in the **Demographics** widget to open a separate window that displays detailed insurance information for the patient.

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

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

4.7.2. Pain Management

The **Pain Management** widget (Figure 52) displays a patient's pain management treatment history, an up-to-date list of current and prior pain medications, and drugs that may interact with those pain medications.

The **Pain Management** widget is a static widget permanently positioned to the right of the **Demographics** widget on the **Patient Portal** (Figure 13). The default instance of the **Pain Management** widget cannot be moved or removed.

i **NOTE:** Multiple instances of the **Pain Management** widget can be added to any portal tab. This allows for multiple views of the same pain management data (Figure 52). These additional instances of the widget can be moved or removed.

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

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

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

Figure 52: Pain Management Widget

The screenshot displays four instances of the Pain Management widget. Each instance has a blue header with the title 'Pain Management (X)' and a filtered date range of '1/1/08 - 11/1/19'. Below the header are three tabs: 'Outpatient Medications', 'Inpatient Medications', and 'Progress Notes'.

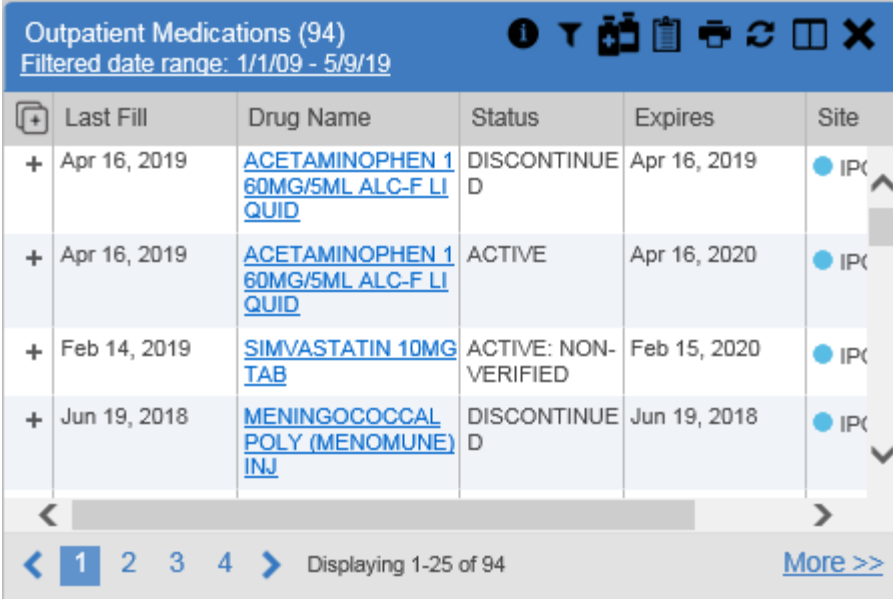
- Top Left Instance:** Minimized view showing one record in the 'Outpatient Medications' tab. The record has a 'Last Fill' of 'Mar 27, 2018', 'Drug Name' of 'PRIMIDONE 50MG TAB', 'Status' of 'EXPIRED', 'Expires' of 'Mar 25, 2017', and 'Site' of 'IPO3'. It shows 'Displaying 1-1 of 1'.
- Top Right Instance:** Minimized view showing 'No Data' in the 'Outpatient Medications' tab. It shows 'Displaying 1-1 of 1'.
- Bottom Left Instance:** Expanded view showing a list of records in the 'Outpatient Medications' tab. The records include dates from Jul 03, 2018 to Jun 18, 2018, with document titles like 'CONSENT FOR LONG-TERM OPIOIDS FOR PAIN' and 'CONSENT FOR PAIN MANAGEMENT - IMED'. It shows 'Displaying 1-8 of 8' and a 'More >>' link.
- Bottom Right Instance:** Expanded view showing a date filter interface. It includes 'Start date' (01/01/2008) and 'End date' (11/01/2019) fields, an 'Apply' button, and a search box for filtering records. It shows 'Displaying 1-8 of 8' and a 'More >>' link.

4.7.3. Outpatient Medications

The **Outpatient Medications** widget (Figure 53) displays outpatient medication information, including active medications and medications that have expired or been discontinued within the past 120 days. The information is displayed in reverse chronological order by the last fill order date.

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

Figure 53: Outpatient Medications



The screenshot shows the 'Outpatient Medications (94)' widget with a filtered date range of 1/1/09 - 5/9/19. The table displays the following data:

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

4.7.3.1. Outpatient Medications Widget Data

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

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

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

- Last Fill
- Drug Name
- Standardized Drug Name
- Prescription Number
- Sig

- Quantity
- Days' Supply
- Refills Left
- Status
- Ordering Health Care Provider (HCP)
- Ordering HCP Specialty
- Expires
- Site

4.7.3.2. Viewing Outpatient Medication Details

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

4.7.4. Inpatient Medications


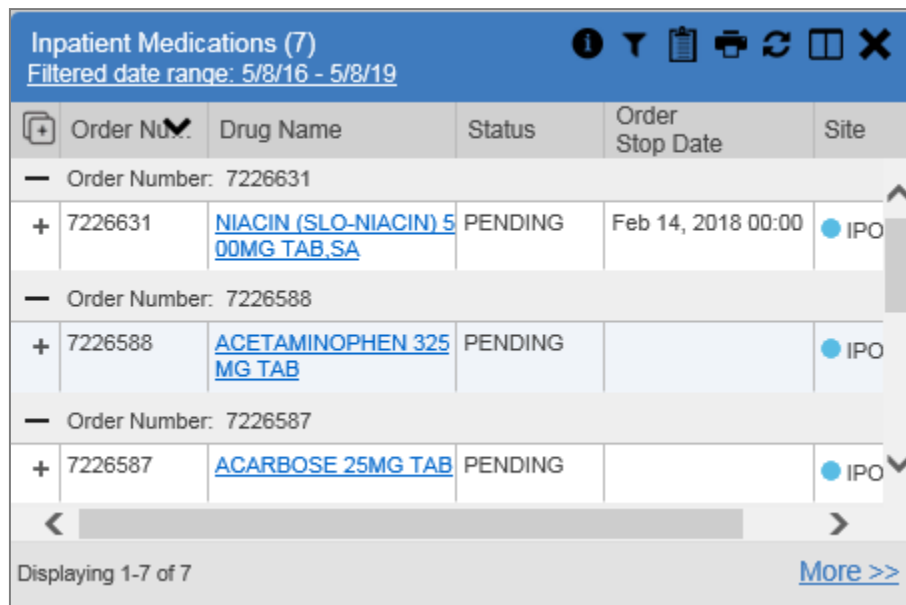
The  **Inpatient Medications** widget ([Figure 54](#)) displays inpatient medication information. The medications are grouped by the order number, where available.

Figure 54: Inpatient Medications Widget



Inpatient Medications (7) Filtered date range: 5/8/16 - 5/8/19					
Order Num	Drug Name	Status	Order Stop Date	Site	
- Order Number: 7226631					
+ 7226631	NIACIN (SLO-NIACIN) 500MG TAB,SA	PENDING	Feb 14, 2018 00:00	IPO	
- Order Number: 7226588					
+ 7226588	ACETAMINOPHEN 325 MG TAB	PENDING		IPO	
- Order Number: 7226587					
+ 7226587	ACARBOSE 25MG TAB	PENDING		IPO	

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

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

4.7.4.1. Inpatient Medications Widget Data

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

- Order Number²
- Drug Name
- Status
- Order Stop Date
- Site

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


- Order Number²
- Order Start Date
- Order Stop Date
- Drug Name
- Standardized Drug Name
- Status
- Ordering HCP
- Ordering HCP Specialty
- Schedule
- MAH/MAL³
- Quantity
- Site


4.7.4.2. Viewing Inpatient Medication Details

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

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

4.7.5. Progress Notes

The  **Progress Notes** widget ([Figure 55](#)) displays the patient's progress notes information, displayed in reverse chronological order by the note date.

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

² 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.

³ The Medication Administration History (MAH) / Medication Administration Log (MAL) column is a placeholder that will hold links to MAH/MAL reports in a future release.

Figure 55: Progress Notes Widget

Progress Notes (91)					
Filtered date range: 1/1/09 - 5/9/19					
	Date	Document Type/Title	Provider	Image	Site
+	Apr 10, 2019	GI (GASTROINTESTINAL) PROCEDURE NOTE			IPO4
+	Apr 08, 2019	OPTOMETRY EYE CONSULT REPORT			IPO4
+	Mar 05, 2019	ADVANCE DIRECTIVE CONSULT REPORT			IPO4
+	Mar 05, 2019	RESCINDED ADVANCE DIRECTIVE			IPO4
+	Dec 18, 2018	INFORMED CONSENT - CARDIAC SURGERY			IPO5
+	Dec 12, 2018	SURGERY CONSULT REPORT			IPO4

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

4.7.5.1. Progress Notes Widget Data

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

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

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

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

4.7.5.2. Viewing Progress Notes Details

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

4.7.6. Lab Results


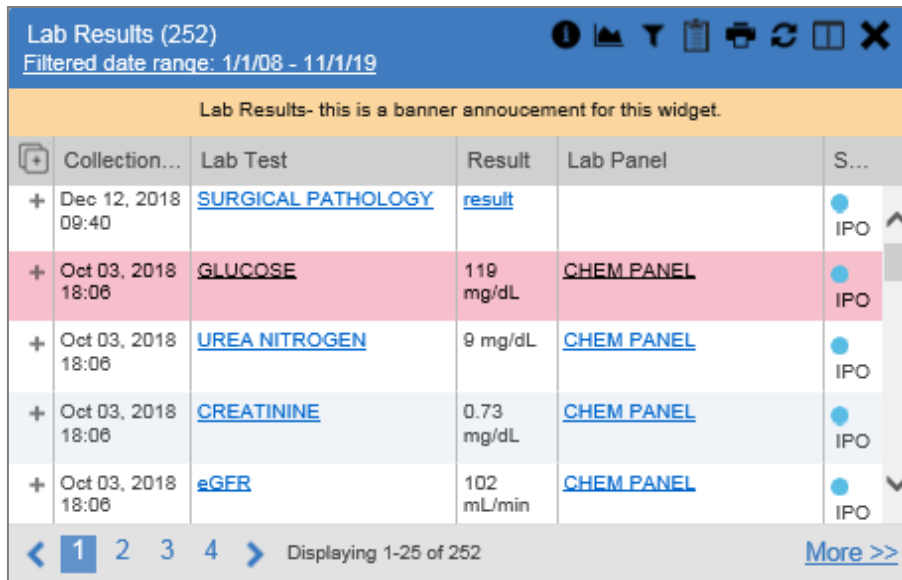
The  **Lab Results** widget ([Figure 56](#)) displays the patient’s lab result information for chemistry, anatomic pathology, microbiology labs, as well as skin test data and blood transfusion history, where available in the patient’s record. The information is displayed in reverse chronological order by the collection date.

Figure 56: Lab Results Widget



Collection...	Lab Test	Result	Lab Panel	S...
Dec 12, 2018 09:40	SURGICAL PATHOLOGY	result		IPO
Oct 03, 2018 18:06	GLUCOSE	119 mg/dL	CHEM PANEL	IPO
Oct 03, 2018 18:06	UREA NITROGEN	9 mg/dL	CHEM PANEL	IPO
Oct 03, 2018 18:06	CREATININE	0.73 mg/dL	CHEM PANEL	IPO
Oct 03, 2018 18:06	eGFR	102 mL/min	CHEM PANEL	IPO

4.7.6.1. Lab Results Widget Data

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



- Collection Date
- Lab Test
- Result
- Lab Panel
- Site

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

The columns of information in the expanded view are:

- Collection Date
- Specimen Source
- Lab Test
- Result
- Interpretation
- Units
- Ref Range

- Lab Panel
- Type
- Order Number
- Ordering HCP
- Status
- Site

 **NOTE:** While the **Standardized Lab Test** and **Ordering HCP Specialty** columns are not listed by default, you may add them to the expanded view by selecting their corresponding checkboxes in the  **Column Settings**.

4.7.6.2. Viewing Abnormal Results in the Lab Results Widget

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


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

4.7.6.3. Viewing Lab Results Details

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

4.7.6.4. Graph/Table View from the Lab Results Widget

The **Lab Results** widget provides the option to display multiple results for the same lab test in a graph and table.

1. Select the  **Graph** icon from the widget toolbar in either minimized or expanded view **-OR-**
2. Click **More >>** from the minimized view of the **Lab Results** widget to open an expanded view of the widget, then select the **Show Graph/Table** link
3. Select a value from the **Select a Lab Test** dropdown in the **Lab Results Graph/Table** dialog
 - a. The graph displays with corresponding table values beneath
4. Select the **Show Labels** checkbox to toggle data labels on or off in the graph
5. Select the **Close** button to exit **Graph/Table** view and return to the minimized or expanded view of the **Lab Results** widget

[Figure 57](#) displays an example **Graph/Table** view of the lab test results.

Figure 57: Lab Results Graph/Table View




In the expanded view of the Lab Results Widget, selecting one or more values in the **Filter by Lab Test** dropdown will disable all other filter dropdowns until the filtered selections are removed. The lab test values in the **Filter by Lab Test** dropdown dynamically increase or decrease depending on the date filter criteria you apply. Tests with the same LOINC code (shown in parentheses following the lab test name) as the ones selected will be automatically included in the filtered results displayed in the widget.

You may only use the graph/table feature for a single lab test LOINC value. All lab tests with the same LOINC will be graphed even if the lab test names differ. While you can select multiple lab test values in the **Filter by Lab Test** dropdown, you will be forced to select a single lab test value from the **Select a Lab Test** dropdown in the **Lab Results Graph/Table** dialog ([Figure 58](#)) once you select either the **Graph** icon or the **Show Graph/Table** link. The lab test values in the **Select a Lab Test** dropdown also dynamically increase or decrease depending on the filter criteria applied in the **Lab Results Widget**.

Figure 58: Lab Results Graph Table View, Select a Lab Test

The screenshot shows a software interface for viewing lab results. At the top, it displays 'Lab Results (5)' and a filtered date range of '1/1/80 - 6/19/19'. Below this, there are date pickers for 'Start date' (01/01/1980) and 'End date' (06/19/2019). A 'Filter by Lab Test (3 selected)' dropdown is visible, along with a search box for filtering. A table of lab results is shown with columns for 'Collection Date', 'Specimen Source', 'Lab Test', and numerical values. A dropdown menu titled 'Select a Lab Test' is open, listing three options: 'UA GLUCOSE (2350-7)', 'URINE GLUCOSE (2350-7)', and 'URINE GLUCOSE (5792-7)'. The bottom of the interface shows 'Displaying 1-5 of 5' and a 'Show All' link.

Collection Date	Specimen Source	Lab Test	Value	Unit	Panel	Code
May 18, 2014 23:30	URINE	UA GLUCOSE				
Mar 03, 2010 09:25	URINE	URINE GLUCOSE				
Mar 03, 2010 09:25	URINE	URINE GLUCOSE				
Mar 03, 2003 09:12	URINE	URINE GLUCOSE	250	MG/DL		CHEM ^7df69960-a08e-472a-899e-4a2d2158d180
Mar 03, 2003 09:12	URINE	URINE GLUCOSE	250	MG/DL		CHEM

You may also generate a graph for all lab tests with the same LOINC code by selecting the  **Graph** icon from the **Lab Results Details** view.

4.7.7. Problem List


The  Problem List widget ([Figure 59](#)) displays a list of the patient's health issues. The information is first sorted by ACTIVE status and then displayed in reverse chronological order.

Figure 59: Problem List Widget

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

4.7.7.1. Problem List Widget Data

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

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

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

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

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

- Status
- Linked Items
- Site

4.7.7.2. Viewing Problem List Details

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