Revision History

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Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User’s Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.
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1. Introduction

Born from a joint Department of Defense (DoD)-Department of Veterans Affairs (VA) venture called JANUS, Joint Legacy Viewer (JLV) was directed by the Secretary of the VA and the Secretary of Defense in early 2013 to further support interoperability between the two departments. JLV is a centrally hosted, Java-based web application managed as a single code baseline, and deployed in separate DoD and VA environments. Its browser-based, graphical user interface (GUI) provides an integrated, read-only view of Electronic Health Record (EHR) data from the VA, DoD, and Veterans Health Information Exchange (VHIE) community partners, within a single application.

JLV eliminates the need for VA and DoD clinicians to access disparate viewers. The GUI retrieves clinical data from a number of native data sources and systems, then presents it to the user via widgets, each corresponding to a clinical data domain.

Users can create and personalize tabs, drag and drop widgets onto tabs, sort data within a widget’s columns, set date filters, and expand a widget for a detailed view of patient information. Within each widget, a circular, blue icon indicates the data retrieved is from a VA source; a square, orange icon indicates that the data retrieved is from a DoD source; and a hexagonal, purple icon indicates data that the data retrieved is from VA VHIE partners.

This document is intended for VA JLV users supporting the:

- Veterans Health Administration (VHA)
- Veterans Benefits Administration (VBA)

Table 1 describes authorized JLV users and their responsibilities.

<table>
<thead>
<tr>
<th>User</th>
<th>Description and Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>DoD Clinician</td>
<td>DoD clinicians who access patient EHRs</td>
</tr>
<tr>
<td>VHA</td>
<td>VA clinicians and administrative staff who access patient EHRs to assist in providing health care services</td>
</tr>
<tr>
<td>VBA</td>
<td>VA administrative staff who access patient EHRs to assist in Veterans benefits administration processes</td>
</tr>
</tbody>
</table>

1.1. Purpose of the Guide

The purpose of the User Guide is to familiarize VA users with the important features and navigational elements of JLV.

The major features of the JLV GUI include:

- Access to patient data (through widgets)
- Patient context management
- User-restricted access (Break the Glass)
- Use of the Report Builder
- Option to use the accessible (508 compliant) interface
1.1.1. Guide Conventions

This document is designed for both online and hardcopy consumption.

- **Cross References** are indicated by blue, underlined text and provide a hyperlink to figures, tables, and other sections within this guide
- Emphasis is expressed by **bold** and *italicized* text
- The information symbol ☐ calls the reader’s attention to additional information

1.1.2. Terminology

The following standard terms are used throughout this guide:

- **Patient Portal**: The page that displays patient data through widgets
- **Provider Portal**: The landing page, or default view, of JLV that appears after logging in to the application that displays widgets and the tools that enable quick access to basic features
- **Tabs**: Tabs display the Patient and Provider portals, and present user-customized views of widgets
- **Widget**: A component of the JLV interface that enables a user to view information or perform a function
- **Widget Tray**: An expandable and collapsible tray at the bottom of the portal pages that provides access to all widgets available for placement on the portal pages

1.2. Assumptions

The User Guide is written from the perspective of VA JLV users, assuming the following:

- You can open, navigate, and use a web browser
- You can use web-based applications, their menu options, and navigation tools
- You have the Uniform Resource Locator (URL) for the JLV Login page, a system username, and the Access/Verify codes required to launch JLV
- You are using the functionality of JLV to support VHA and/or VBA workflows

1.3. System Requirements

JLV is optimized for use with the VA standard browser, Internet Explorer (IE) version 11. To ensure proper viewing of patient data and other application elements, it is recommended that JLV is viewed using:

- A monitor set to a minimum screen resolution of 1024 x 768
- The approved browser, with the browser’s zoom percentage set to 100

JLV must be accessed through IE versions 9 and above. Other web browsers may function, but are not certified for support. It is also recommended that Adobe Reader be installed on the user’s system.
1.4. Getting Help

For how to information within JLV, please see online help. For access to JLV training videos and additional JLV training materials, please visit JLV Resources.

Prior to contacting the Enterprise Service Desk (ESD) for support (Table 2), please refer to Section 2, Logging in to JLV, for detailed information about how to access JLV, and to Section 6, Troubleshooting, for suggested resolution steps and troubleshooting information.

If you are an authorized user, are having trouble logging in to JLV, or are experiencing other application issues, please contact the ESD via telephone or by using the YourIT self-service portal for assistance.

NOTE: Unregistered users should contact support to request access to JLV.

Table 2: ESD Contact Information

<table>
<thead>
<tr>
<th>IT Enterprise Service Desk</th>
<th>Phone: 855-673-4357</th>
</tr>
</thead>
<tbody>
<tr>
<td>YourIT Self-Service Portal:</td>
<td><a href="https://yourIT.va.gov">https://yourIT.va.gov</a></td>
</tr>
</tbody>
</table>
2. Logging in to JLV

Authorized, registered users within the VA and DoD are provided access information to log in to JLV. VHA users who have access to the Computerized Patient Record System (CPRS) are automatically authorized to use JLV. VBA users must contact the ESD for access.

Refer to Section 6, Troubleshooting, for more tips on logging in to JLV.

Users who are not authorized to access JLV will see an *Access denied* message. If you believe you received the message in error, please contact the ESD.

The JLV Login page displays the last successful and unsuccessful log in attempts in the lower left corner, along with the date, local time, and the Internet Protocol (IP) address from which access was made, or attempted access failed.

**PLEASE NOTE:** There is no functionality available for changing a user identification (ID) and password in JLV. For information about login errors, Access code errors, or Verify code errors, see Section 6, Troubleshooting.

2.1. VHA User Log In

The log in steps detailed below apply to VHA users accessing JLV through a URL.

To log in to JLV:

1. Enter VHA’s URL for JLV into the address bar of your Internet browser ([https://jlv.med.va.gov/JLV](https://jlv.med.va.gov/JLV))

2. Once SSOi is enabled, all VA users will be redirected to the **VA Single Sign-On** page (Figure 1)

   a. VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV

   Once SSOi is enabled, users with a Personal Identity Verification (PIV) exemption may select any of the alternate authentication options available through the VA Single Sign-On Login page for access to JLV. PIV exemptions, if required, can be obtained from the ESD.
3. Once authenticated by the Single Sign-On system, you are redirected to JLV

4. Read the important user consent information regarding access to a Government information system, and click I Accept

   Optional Step:

   Users of Assistive Technology can check the Accessibility Mode option in the top-right corner, above the JLV Login page fields

   If selected, JLV opens and displays the application in the 508-compliant Accessible User Interface (UI) theme (See Section 3.2.2, Using the Accessible Theme's Functionality, for detailed information)

5. Enter your VA login credentials:
   a. Enter your CPRS Veterans Health Information Systems and Technology Architecture (VistA) Access Code
   b. Enter your CPRS (VistA) Verify Code
   c. Select VA from the Agency field
   d. Select your VA Medical Center or regional Health Care System from the Site field

6. Click Login
2.2. VBA User Log In

The following instructions apply to VBA users accessing JLV.

To log in to JLV:

1. Enter the VBA’s URL for JLV into the address bar of your Internet browser
   (https://jlv.med.va.gov/JLV_Claims)

2. All VA users will be redirected to the VA Single Sign-On page (Figure 1)
   a. VA users must sign in to, and be authenticated by, the Single Sign-On system in order to access JLV

   Users may select any of the authentication options available through the VA Single
   Sign-On Login page for access to JLV.

3. Once authenticated by the Single Sign-On system, you are redirected to JLV

4. Read the important user consent information regarding access to a Government
   information system, and click I Accept

5. If desired, check the Accessibility Mode option in the top-right corner, above the JLV
   Login page fields
   a. If selected, JLV opens and displays the application in the 508-compliant Accessible
      UI theme (See Section 3.2.2, Using the Accessible Theme’s Functionality, for detailed
      information)

6. Enter your login credentials:
   a. Enter your Compensation and Pension Record Interchange (CAPRI) Access Code
   b. Enter your CAPRI Verify Code
   c. Select VA from the Agency field
   d. Select Veterans Benefits Admin from the Site dropdown list

7. Click Login

   Users with any CAPRI patient selection restrictions will not be able to log in JLV.

2.3. Editing Your User Profile at Log In

One method of setting application configuration options (customizing) is by using the Edit
Profile link (highlighted in Figure 2) to access the user profile fields through the JLV Login
page.

The subsections below discuss the options to set the UI theme, and to enable/disable the Include
Community Data function via the Edit Profile link.

User profile options can also be set within JLV. See Section 3.2, Customizing JLV.
The selected options are saved to the user profile by clicking **Save and Login** and remain set for all subsequent JLV sessions until changed by the user.

**Figure 2: Edit Profile Link on the JLV Login Page**

![Joint Legacy Viewer Login Page](image)

2.3.1. **Selecting a UI Theme**

Selecting a UI theme sets the font color and foreground/background colors of the JLV GUI for the widgets, toolbars, and dialog boxes. Theme color options are Blue (Default), Green, Dark Gray, Gray, and Accessible (508 compliant). The UI theme choices appear below the **Agency** and **Site** fields, as seen in **Figure 3**.

The **Accessible** theme provides larger fonts, enhanced tab and keystroke functionality, and screen reader compatibility, compliant with Federal accessibility requirements and Section 508 standards. Refer to **Section 3.2.2, Using the Accessible Theme’s Functionality**, for more information.

2.3.2. **Community Data Display**

Checking (enabling) the **Include Community Data** option will tell JLV to query for, receive, and integrate patient data from external VA VHIE community partner data sources. The community data setting is in the bottom half of the **Edit Profile** dialog, seen in **Figure 3**.
Regardless of this setting, VHIE community data is available in the Community Health Summaries and Documents - VA widget. See Section 5.3, Community Health Summaries and Documents - VA, for detailed information.

VBA users do not have access to community data and will not see the Include Community Data option.

**Figure 3: Community Data Display Option**

![Community Data Display Option](image)
2.4. Logging Out of the Current JLV Session

To end the current session and exit JLV, click the Log Out icon (highlighted in Figure 4) at any time.

Figure 4: JLV Log Out Icon

A JLV session will end automatically after 30 minutes of inactivity. You will receive a warning that the session will be ended after 25 minutes of inactivity. Automatic termination of a session logs you out of the application and displays the Logout page. To initiate a new JLV session, close and reopen the browser and return to the JLV Login page.

Actions in JLV that are considered activity are changing patients, refreshing widgets, opening or closing widgets, adding or removing widgets from the portal pages, and adjusting date ranges.
3. The Elements and Functionality of JLV

3.1. The JLV Portal Pages

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

- The Patient Portal
- The Provider Portal

3.1.1. Default View

Upon log in, users will see the Provider Portal. The portal displays the Patient Search dialog box and the References widget by default.

CPRS users who select a patient within CPRS, then launch JLV are taken directly to the JLV Patient Portal, where the records for the patient selected in CPRS are displayed.

The References widget (Figure 5) is shown by default on the Provider Portal. The References widget displays hyperlinked references to online resources. Click a reference link to access the associated website. Click the Add icon + to add a new reference link.

Only the reference links you add can be deleted. To delete a reference link, right-click the link and select Delete URL. Users will not be able to delete reference links included in the default widget configuration.

![Figure 5: References Widget](image)

The Patient Portal displays a selected patient's clinical records and other patient-centric information.

New JLV users will see a preconfigured, default widget layout on the Patient Portal when a patient is selected. The default layout includes the Allergies, Problem List, Documents, Outpatient Medications, and Lab Results widgets.
Users can configure the layout of widgets on the Patient Portal and create multiple widget tabs, as described in Section 3.2, Customizing JLV after Log In, and in Section 4.1, Accessing and Opening Widgets. Customizations are saved to the user profile and remain until manually changed.

3.1.2. System Menu

Each portal page has a toolbar (highlighted in Figure 6) that enables quick access to the following features:

- **Configuration Options:** Click the Settings icon in the top-right corner of either portal page to set user preferences, including the UI theme (Refer to Section 3.2, Customizing JLV)
- **Report Builder:** Click the Report Builder icon in the top-right corner of either portal page to create custom reports (Refer to Section 4.8, Using Report Builder)
- **Access Online Help:** Click the Help icon in the top-right corner of either portal page to open online help
- **Log Out of JLV:** Click the Log Out icon to log out and close the current JLV session (Refer to Section 2.4, Logging Out of the Current JLV Session)

Figure 6: JLV Tools on the Portal Pages

The following functions can be completed from the portal pages (highlighted in Figure 7):

- Perform a Patient Search
- Switch between the Patient Portal and the Provider Portal
- View the system status
- View Context Management status
- Open the widget tray (bottom-right corner of the portal pages)
3.1.3. Viewing System Status

The system status reports the condition of the JLV application as a whole. If there is a system status alert, the warning icon ⚠ is displayed to the left of your username. Hovering over System Status provides additional information.

NOTE: The System Status reports the overall condition of the JLV application, while the Connection Status reports the condition of the connection between JLV and its external resources. See Section 4.5, Viewing Connection Status, for more information.

JLV displays the system status on the Login page, below the user credential fields (highlighted in Figure 8), and at the top of the Portal Pages (Figure 7).

- When all monitored systems and services are online and connected, a green icon ✔ appears next to the status message JLV data sources are available on the JLV Login page.
- When one or more of the monitored systems or services is offline or unavailable, a yellow warning icon ⚠ appears next to the status message JLV is having problems.
- Notification of unavailable systems persisting longer than 10 minutes should be reported to the VA Enterprise Service Desk (Section 1.4, Getting Help).
- When the jMeadows Data Service is unavailable, a red icon ✗ appears next to the message, JLV is having problems, jMeadows Data Service is unavailable, JLV may not function properly.
- Users may not be able to log in to JLV, or view patient data, until the jMeadows connection is restored.
3.1.4. Patient Context Management

Clinical Context Management (CCOW) is a way for applications to synchronize the display of clinical context, based on the Health Level 7 (HL7) CCOW standard. If CCOW-compliant applications are sharing context and one of the applications changes the data display to a different patient, the other applications will switch to display that same patient.

JLV is context management-enabled. When context is enabled, a patient change made in one context-enabled application (i.e., CPRS) will trigger the same change in JLV. The same effect is shown vice versa; that is, when a patient is selected in JLV, it triggers a patient change in other context-enabled applications.

Context management is enabled by default, and JLV will attempt to connect to the context vault upon a valid login. The context status appears in the top-right corner of the portal pages. When context is established, the **Context On** icon  is shown. When context is suspended, the **Context Suspended** icon  is shown.

*Figure 9* shows the context indicator location on a JLV portal pages. In this example, context is suspended.
3.1.4.1. Suspending Context

Context can be manually suspended.

To manually suspend context:

1. Click the **Context On** icon 🔄
2. The CCOW warning message, *Are you sure you want to break patient link?* appears (Figure 10)
3. Click **Yes** to continue

Once context is suspended, the **Context Suspended** icon 🔄 is displayed on the portal pages. When context is suspended, patient changes will not be reflected in either JLV or other CCOW-enabled applications.

![Figure 10: Suspending Context](image)

3.1.4.2. Establishing Context

When context is suspended, it can be reestablished manually.

To establish or reestablish context:

1. Click the **Context Suspended** icon 🔄
2. The CCOW warning message, *Are you sure you want to rejoin patient link?* appears (Figure 11)
3. Click **Yes**

Once context is established, the **Context On** icon 🔄 is displayed on the portal pages.
3.1.4.3. Unable to Communicate with Vault

If JLV is unable to initiate context management upon log in, the user will see the CCOW Error message (Figure 12). Click OK to continue. The **Context Suspended** icon is displayed on the portal pages. If the CCOW error persists, contact your local service desk for assistance.

3.1.4.4. Context Synchronization Failure

In the event that JLV is unable to reestablish context, a CCOW Error message is presented (Figure 13). This indicates context is suspended. Click OK to continue. The **Context Suspended** icon is displayed on the portal pages.

VBA users will encounter the error message (Figure 13) at each log in, as there are no CCOW system components installed on their computers.
3.2. Customizing JLV

Configuration options can be set within JLV by clicking the Settings icon.

3.2.1. Setting the UI Theme

The UI theme setting is a part of the user profile. Choosing a UI theme sets the font, foreground, and background colors of the widgets, toolbars, and dialog boxes. Once selected, the UI theme is stored in the user profile, and remains set until changed. The available UI themes are Blue (Default), Green, Dark Gray, Gray, and Accessible (508 compliant).

To set the UI theme within JLV:

1. Click the Settings icon in the upper right corner of the portal pages (Figure 6)
2. The User Configuration dialog box opens
3. Select the desired theme and click Save
4. Alternatively, click Cancel to exit the dialog box and restore the previous theme
Figure 16: Dark Gray UI Theme

Figure 17: Gray UI Theme
3.2.2. Using the Accessible Theme’s Functionality

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

The Accessible theme is available for users who have adaptive technologies installed on their computers.

3.2.2.1. Keyboard Focus and Screen Navigation

Keyboard focus is the highlighting of a screen element, field, or control that enables interaction with, and navigation of, JLV through the use of the keyboard and keystrokes. The item in focus is outlined in gold as a visual indicator of the element, field, or control with keyboard focus that will receive information typed on the keyboard.

JLV uses common Windows keystrokes (Tab, Shift + Tab, arrow keys, Enter), and keyboard shortcuts to move the focus to all menus, and activate all functions on the menus. All user interface items are accessible via the keyboard under the Accessible theme.

Pressing Enter or the Spacebar when an element that provides action is in keyboard focus performs the associated action. For example, pressing Enter or the Spacebar when the Settings icon is in focus opens the User Configuration dialog box. Using the arrow keys or the Tab key moves between keyboard focus items to navigate through screen elements. A complete list of accessible keystrokes is provided in Table 3.
### Table 3: Accessible Theme Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application &amp; Portal Navigation</strong></td>
<td></td>
</tr>
</tbody>
</table>
| ALT + 4 | Press to transfer keyboard focus to the main or top screen element  
1) On a portal page, focus is transferred Patient Search or the patient tab in the **Demographics** widget  
2) In a widget, focus is transferred to the More>> link  
3) In a dialog box, focus is transferred to the dialog box's **Close** button |
| ENTER | Press to initiate the action associated with the item in focus |
| TAB | Press to transfer keyboard focus to other user interface items |
| ESC | Press to return keyboard focus to the panel containing the user interface item with keyboard focus, or to exit a window, widget, or tab |
| SPACEBAR | Press to activate any user interface item (for example, click a button) |
| Arrow Keys | When focused on a widget, press the arrow keys to change page viewing in a widget's data table  
When focused on a dropdown list, press the down arrow key to view list contents |
| Ctrl + r | When working with Report Builder, place keyboard focus on a record in a widget and press Ctrl + r to add the record to the Report Builder pane |
| **Tab Panels** | |
| Arrow Keys | Use the left and right arrow keys to change tab panels  
To add a tab panel, press the right arrow key until the last tab (labeled with a plus sign) is selected. A dialog box prompts for the new tab name  
To close a tab, focus on the tab panel and press Esc |
| **Windows or Dialog Boxes** | |
| TAB | Press to transfer keyboard focus to other user interface items within the window or dialog box |
| **Adding Widgets to a Portal Page** | |
| Number position | To add a widget from the widget tray using keystrokes:  
1) Determine which column (1, 2, or 3) in which to place the widget  
2) Focus on the desired widget icon in the widget tray and press the 1, 2, or 3 key, depending on the column chosen |

#### 3.2.2.2. Accessible Theme Screen Navigation

An element with keyboard focus is the starting point for screen navigation. Pressing the **Enter** key when a screen element or icon has keyboard focus mimics a mouse click.

**Figure 19** depicts the **Documents** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. In this example, pressing the **Tab** key shifts the keyboard focus from the **Documents** widget to the widget immediately below the **Documents** widget. Pressing the **Tab** key again shifts the keyboard focus to the widget at the top of the next column.
To view hover text where available, focus on the element within the widget that has hover text. After a small delay, the text will appear as if the user hovered over the element with a mouse cursor.

**Figure 19: Navigation Using Elements with Keyboard Focus**

In **Figure 20**, the **Document** details window has keyboard focus. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to **Close (X)** and press **Enter** to close the details window. After closing the window, keyboard focus returns to the last element that had keyboard focus prior to opening the window.
3.3. User-Restricted Access to Patient Data

3.3.1. VHA Users Viewing DoD-only Patients

VHA users are permitted to view the records of patients considered DoD-only, meaning they either have no VA identifiers or are not registered in the Master Veteran Index (MVI). The VA requires that these actions be audited. If an attempt is made to access DoD-only patient records, the VHA user is asked to specify the purpose for access. The purpose options presented to the user are: Emergent Care, Clinical Care, or Authorized Administrative Use (Figure 21).

Once the purpose for access is selected, clicking Agree to be Audited & Access this Patient Record (Figure 21), displays the requested data, and audits the action. The access purpose, organization of the VA provider, date, username, IP address, user’s Internal Entry Number (IEN), host system’s ID, and patient’s Electronic Data Interchange Personal Identifier (EDIPi) are captured in the audit record.
3.3.2. **VBA Users Viewing Patients with DoD Data**

VBA users may see one of two different dialog boxes, depending on whether or not the patient is registered for care in the VA. If the patient is registered for care in the VA, they are in MVI.

- **Patient registered in MVI:** VBA users are permitted to view the records of a patient who is registered in MVI, but the VA requires that these actions be audited.
  - After performing a patient search and selecting a patient from the search results, a VBA user will see the audit notification (Figure 22) if the patient they selected is registered in MVI.
  - After agreeing to the audit, the VBA user can access the patient’s record.

---

**Figure 21:** VA User Restricted Access Dialog

![VA User Restricted Access Dialog](image)

**Figure 22:** VBA User Audit Notification

![VBA User Audit Notification](image)
• **Patient not registered in MVI:** VBA users are not permitted to access the records of a patient who is not registered in MVI
• After performing a patient search and selecting a patient from the search results, a VBA user will see the restricted access notification (Figure 23) if the selected patient is not registered in MVI
• Clicking **Cancel** returns the user to the previous screen

![Figure 23: Restricted Access Notification](image)

### 3.3.3. Access to DoD Sensitive Records

All JLV users are audited each time a sensitive DoD record is accessed. Auditing applies to sensitive documents, lab panel results, outpatient encounters, or progress notes records. For each attempt to access sensitive data, JLV records the user’s name, organization, Social Security Number (SSN)/EDIPI (for DoD users), PIV (for VA users), location, patient identifiers (patient last name, first name, middle initial [MI], SSN/EDSPI [DoD only], MVI [VA only], and date of birth [DOB]), data accessed, date and time, and reason for access.

The audit prompt is seen each time access to a sensitive record is attempted, even if the user has been previously audited for the same record.

JLV notifies users before they are audited. The message is triggered when the user clicks a masked record that is marked **Sensitive**. An example of a masked record displayed in a widget and the audit notification are depicted in **Figure 24**.

After the user selects the purpose for viewing the record and agrees to be audited, the sensitive data is displayed in the **Details** view of the widget.
3.4. Patient Searches

The core function of JLV is to display patient information on the Patient Portal. Use the Patient Search feature to perform a patient search, perform a family search, or use the advanced search options.

JLV determines which enterprise service to use for a patient search, based upon the search criteria:

- If the EDIPI or Sponsor SSN is entered, JLV utilizes Patient Discovery Web Service (PDWS) for the search (See Section 3.4.1, PDWS Search Rules and Supported Searches, for details)
- If the EDIPI or Sponsor SSN fields are empty, JLV utilizes MVI for the search (See Section 3.4.2, MVI Search Guidelines, for details)
3.4.1. PDWS Search Rules and Supported Searches

When JLV utilizes PDWS for patient search, the applicable rules and rule sets required for the PDWS interface must be used:

- **Rule Set 1:** When searching by SSN, the full nine-digit SSN must be entered, and the Last Name or DOB must also be supplied
  - This is true for search by patient SSN, as well as Sponsor SSN
- **Rule Set 2:** If you do not have the patient’s SSN, you must supply ALL of the following identifiers: last name, first name, DOB, and gender
  - Blanks in any of these four required fields will generate an error
  - A 10-digit string is required for telephone number

The following search combinations are supported when PDWS is utilized:

- DoD ID, also referred to as the EDIPI
- Patient SSN and Last Name
- Patient SSN and DOB
- Sponsor SSN and Last Name
- Sponsor SSN and DOB
- Last Name, First Name, DOB, and Gender (ALL identifiers must be entered)

3.4.2. MVI Search Guidelines

JLV utilizes MVI for a patient search when the search parameters include the patient’s name and SSN. MVI requires the full last name is entered when the patient’s SSN is entered. MVI may also require entering the patient’s first name and DOB to increase the efficiency of the search, and the likelihood of locating the patient. An example would be searching for a patient with a common last name, such as Smith or Jones.

3.4.3. Patient Search Using DoD ID

To perform a patient search using the DoD ID (Figure 25):

1. Click the Patient Search icon at the top of the portal pages
   a. The Patient Search dialog opens
2. Enter the 10-digit patient DoD ID (EDIPI) in the DoD ID field
3. Click Search
   a. The search results are displayed in the lower third of the dialog box, under the Search Results tab
4. Click a patient’s name in the search results list to open the associated record
   a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
5. After selecting a patient, the Patient Portal opens and displays the selected patient’s data

3.4.4. Patient Search Using SSN
To perform a patient search using the patient’s SSN:
1. Click the Patient Search icon at the top of the portal pages
   a. The Patient Search dialog box opens
2. Enter the patient’s full, nine-digit SSN in the SSN field (Figure 26)
   a. When searching by SSN, either the last name or the DOB must be entered to perform the search
3. Click **Search**
   a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
   b. If a match of patient names cannot be made, enter additional identifiers (first name, DOB) to refine the search (Figure 30)
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab

5. Click a patient’s name in the search results list to open the associated record
   a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification

6. After selecting a patient, the **Patient Portal** opens and displays the selected patient’s data

### 3.4.5. Advanced Patient Search Options

Advanced patient search options in the **Patient Search** dialog box allow for the use of additional patient identifiers when performing a patient search.

To search using advanced patient search options:

1. Click the **Patient Search** icon at the top of the portal pages
   a. The **Patient Search** dialog box opens

2. Click the **Show Advanced Search Options** link under the **Last Name** field (seen in Figure 26)

3. Enter the patient identifiers in the appropriate search fields, as desired
   a. Advanced search option fields include **DOB**, MI, Gender, Address, State, City, Zip, and Telephone

---

**Figure 28: Advanced Search Options**

![Advanced Search Options](image_url)
4. Click **Search**
   a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search
5. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab
6. Click a patient’s name in the search results list to open the associated record
   a. The Name, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
7. After selecting a patient, the **Patient Portal** opens and displays the selected patient’s data

3.4.6. **Family Member Search**

A family member search can be performed using the **Sponsor SSN** field in the **Patient Search** dialog box.

To perform a family member search:

1. Click the **Patient Search** icon at the top of the portal pages
   a. The **Patient Search** dialog box opens
2. Enter the SSN in the **Sponsor SSN** field
   a. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields (Figure 29)
3. Click **Search**
   a. If the required patient identifiers are not provided, hover text appears indicating the information necessary to complete the patient search
4. The search results are displayed in the lower third of the dialog box, under the **Search Results** tab (Figure 29)
5. Click a name in the **Search Results** list
   a. The **Family Members** dialog opens ([Figure 30](#))
   b. The sponsor’s identifiers and a list of dependents are displayed in the dialog
6. Click a name in the list of family members to open the associated record
7. After selecting a patient, the **Patient Portal** ( kişi ) opens and displays the selected patient’s data
3.4.7. Recently Viewed Patients List

Users who have previously logged into JLV, searched for a patient, and viewed that patient’s records, can see and access a list of recently viewed patients. A recent patient is defined as a patient whose record has been viewed (opened) by the user.

**NOTE:** The Recently Viewed Patients list does not include search history or recent search results, only a list of patients whose data was accessed and viewed. The list is limited to 10 patients.

To open the list of recently viewed patients:

1. Click the Patient Search icon at the top of the portal pages
   a. The Patient Search dialog box opens
2. Click the Recently Viewed Patients tab in the lower third of the Patient Search dialog box
3. A list of recently viewed patients is displayed (Figure 31)
   a. The Name, DoD ID, SSN, DOB, and Gender columns in the results list provide information to assist with patient identification
4. Click a patient’s name in the Recently Viewed Patients list to open the associated record
5. After selecting a patient, the Patient Portal opens and displays the selected patient’s data
Figure 31: Recently Viewed Patients List
4. Widgets

Widgets are elements on the JLV portal pages that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal pages (Figure 32), but can be expanded to view additional details. The list of available widgets is provided in a horizontal tray at the bottom of the page.

Widgets may take anywhere between 10 seconds to 90 seconds to load, depending on the date range settings.

4.1. Accessing and Opening Widgets

Widgets can be opened, rearranged, and closed. All available widgets are displayed in the widget tray, at the bottom of the portal pages (Figure 33).

To place a widget on the Patient Portal:
1. Open the widget tray by clicking the **Open Widget Tray** link in the bottom-right corner of the portal page
2. Use the scroll bar arrows < > at either end of the tray to see all widget choices

-OR-
3. Click the **More Widgets >>** link to scroll through the list of widgets
4. Click and hold a widget in the tray, then drag it to the portal page and drop it in the desired location
5. The widget is docked on the portal page, and opens in minimized view
6. Close the widget tray by clicking the **Close Widget Tray** link

Widgets can be closed (removed from the portal page) by clicking the **Close** icon in the top-right corner of the widget. Rearrange the widgets displayed on the portal page by dragging and dropping them.

### 4.2. Widget Navigation and Display Options

Each widget has tools and display options available to navigate through, and change, the display of data. The vertical scroll bar allows the user to move through, and view, the widget’s data. The options at the bottom of a widget provide various ways to see all the records loaded for the widget’s clinical domain.

Navigation icons and actions are detailed in [Table 4](#).

<table>
<thead>
<tr>
<th>Navigation Icon/Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>‹</td>
<td>Go to Previous Page</td>
</tr>
<tr>
<td>1</td>
<td>Jump to Page</td>
</tr>
<tr>
<td>›</td>
<td>Go to Next Page</td>
</tr>
<tr>
<td>More &gt;&gt;</td>
<td>Go to Expanded View</td>
</tr>
<tr>
<td>1-25 of 55</td>
<td>Record Display Indicator</td>
</tr>
<tr>
<td><strong>Show All</strong>/ <strong>Show Paged</strong></td>
<td>Display Setting</td>
</tr>
</tbody>
</table>

When there are more than 25 records available in a widget, they are grouped in **Show Paged** view. Records 1 through 25 can be viewed by using the widget’s vertical scroll bar. Records 26+ can be viewed by using the page navigation options, in the lower left corner of the widget, to jump to subsequent pages. The expanded view of a widget contains a **Show All** link, which
opens all records for that widget, in a scrollable window. Click **Show Paged** to return to the display of records grouped by pages.

### 4.3. Widget Toolbars

There is a toolbar in the upper right corner of both the minimized and expanded views of each widget, and most dialog boxes. Toolbar icons vary by widget, open dialog box, and window. **Table 5** describes the functionality of each toolbar icon.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Plus Icon]</td>
<td>Add to Report Builder</td>
<td>Adds the information displayed in the window to the Report Builder. This icon is available for supported domains when a record has a Details or Notes view that displays in a standalone window.</td>
</tr>
<tr>
<td>![Close Icon]</td>
<td>Close</td>
<td>Removes the widget from the portal screen or closes a dialog box.</td>
</tr>
<tr>
<td>![Columns Icon]</td>
<td>Column Settings</td>
<td>Used to configure the columns within the widget. Turn on or off the columns displayed by checking the column names that appear in the pop-up box and checking <strong>Apply</strong>.</td>
</tr>
</tbody>
</table>
| ![Filter Icon] | Configure Filter | Used to filter on specific record types or other elements within the widget, including a date filter. If a date range filter is applied in an open widget, the date range is displayed in the widget header.  
**Note:** After setting a filter, the **Close Filter** option is enabled in the widget. Clicking **Close Filter** will restore the full display of records within the widget. |
| ![Clipboard Icon] | Copy to Clipboard | Copies the content of the open window to the clipboard for pasting into another application. Copy to Clipboard is disabled in the widget toolbar after clicking **Show All** within a widget. |
| ![Status Icon] | Connection Status | Both icons provide a status indicator for DoD, VA, and community partner data sources. The circle with the lowercase “i” indicates all sources are available. The yellow triangle warning ![Warning Icon] indicates one or more data sources are unavailable. Clicking either status icon will open the connection status details in a separate window.  
**Note:** Connection status updates are not available from the Clinical Reminders widget. |
| ![Print Icon] | Print | Prints the contents of the open window. Printing is disabled in the widget toolbar after clicking **Show All** within a widget.  
**Note:** It is recommended that JLV users have the latest Adobe Reader installed for the Report Builder and other printing features. |
<p>| ![Refresh Icon] | Refresh | Refreshes the widget or window display. Only the data within that widget’s dataset is updated. |
| ![Rx Icon] | Rx | Converts the medication data within the widget to text, and opens the text in a pop-up window. Available from the Outpatient Medications widget. |</p>
<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Site List</td>
<td>Opens a list of community sites where the patient has been seen (only available from the Community Health Summaries and Documents–VA widget).</td>
</tr>
<tr>
<td></td>
<td>VHIE Refresh</td>
<td>Refreshes VHIE-enabled widgets with the community partner data stored in the VHIE cache, in addition to refreshing DoD and VA data.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>NOTE:</strong> The VHIE Refresh icon is shown in VHIE-enabled widgets only when Include Community Data is enabled. (The Community Data option will be available in a future release.)</td>
</tr>
</tbody>
</table>

## 4.4. Minimized vs. Expanded Widget View

Each widget can be displayed in either a minimized (default) or an expanded view. Minimized view displays a simple list of the available patient data for a clinical domain, arranged in reverse chronological order by default. Expanded view provides a detailed list of similarly arranged patient data. When the expanded view of a widget is launched, it opens in a new, separate window that displays more attributes of the records in the widget, including additional, sortable columns of data.

![Important note]

The Community Health Summaries and Documents - VA widget does not have an expanded view. Instead, a document opened from the minimized view of the widget is displayed in a new, separate window.

Click the More >> link at the bottom of a widget to launch the expanded view, and see the additional display and functionality options.

### 4.4.1. Date Range Filters

Patient data displayed within a widget can be filtered by date range. If a date range filter is applied, the selected range is indicated in the widget header, below the title. 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 34).
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.

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.

### 4.4.1.1. Quick Date Range Filter

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

Clicking a **Quick Date Range** filter refreshes the data displayed to show only the records for the selected range. The options represent time counting back from the present day (for example, selecting 2y will display 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).

The **Quick Date Range** filter is contextual. If today is February 2, 2017, the preset filters will count backwards using that date. If today is April 16, 2017, the preset filter will count backwards using that date.

**Figure 35** highlights the **Quick Date Range** filter options in the expanded view of the Documents widget.
4.4.1.2. Start and End Date Filter

Use the Start Date and End Date filter to display data for a specific time range. The start and end date fields are available at the top of multiple widgets by clicking the Filtered Date Range link, or by clicking the Configure Filter icon.

The Start and End Date filter is static. If the start date is set to June 2, 2016 and the end date is set to June 2, 2017, the data in that date range will display, no matter what today’s date is.

Figure 36 provides an example of the start and end date filter fields in the expanded view of the Radiology Reports widget.
To set a custom date range:

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

**NOTE:** The custom date range option requires that a specific day is selected within the calendar. If no day is selected, the custom date range will not be applied.

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

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

### 4.5. Viewing Connection Status

JLV widgets display the status of their connection to VA, DoD, and Community Partner data sources. Connection status information is available for each widget, except Clinical Reminders.
NOTE: The Connection Status reports the condition of the connection between JLV and its external resources, while System Status reports the overall condition of the JLV application. See Section 3.1.3, Viewing System Status, for more information.

The Connection Status icon on a widget toolbar indicates the state of the connection to VA, DoD, and community partner data sources. There are two status conditions:

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

Figure 37 shows a connection status indicator icon displayed on the Documents widget toolbar.

Figure 37: Connection Status Indicator

Clicking a Connection Status icon opens a standalone window with information about the connection to data sources (Figure 38).
Clicking the **Show All Active Interfaces** link in the **Connection Status Window** (Figure 38) opens a Connection Status Details View (Figure 39).

Figure 38: Connection Status Window

![Connection Status Window](image)

Figure 39: Connection Status Details

![Connection Status Details](image)
4.6. 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 portal page layouts (widget layouts and custom tabs) are saved to the user profile, and are displayed in future sessions.

To create a custom tab:

1. Click the plus sign + beside the existing tabs on the portal page (Figure 40)

   **Figure 40: Add Custom Tab Icon**

2. The Add Tab dialog box opens (Figure 41)

   **Figure 41: Add Tab Dialog Box**

3. Type the name of the new tab in the Add Tab dialog box and click Add

4. Click the Open Widget Tray link within the new tab space to display all available widgets

5. Click, hold, and drag each of the desired widgets to the screen

   Tab configurations remain as set, until manually changed.

6. Click between tabs at any time, without losing each tab’s configuration

   a. Tab layouts persist, even when a patient change is made
b. Custom tabs can be renamed by double-clicking the tab name

4.7. Refreshing Data in a Widget

The data displayed in a widget can be refreshed by clicking the Refresh icon. This action retrieves data from VA and DoD sources and refreshes the individual widget’s display.

A widget will display the VHIE Refresh icon if the widget supports community partner data, and the Include Community Data option is enabled. When you click the VHIE Refresh icon, JLV sends a new query to VHIE sources for Community Partner data.

Clicking the VHIE Refresh icon in one widget refreshes all other open, VHIE-enabled widgets.

If the option to Include Community Data is disabled, the VHIE Refresh icon will not be displayed in any of the widgets that support the display of community data.

4.8. VistA Imaging Viewer

JLV integrates access to the VistA Imaging Viewer (an external application), allowing VA users access to VA imaging artifacts for supported clinical domains (widgets). Users can open an instance of the VistA Imaging Viewer through JLV. For more information regarding the VistA Imaging Viewer, please see the VistA Imaging SharePoint site.

A camera icon displayed in the Image column (Figure 42) of the Documents, Outpatient Encounters, Procedures, Progress Notes, and Radiology Reports widgets indicates that one or more images are associated with that record. Clicking the camera icon within the widget opens the VistA Imaging Viewer in a standalone window and displays the associated image.

Figure 42: Camera Icon in the Image Column
If a record has one or more images associated with it, the Details view of the record includes a display of a thumbnail in the top-right corner of the window (Figure 43). Below the thumbnail, a link that reads, **Click image to open viewer**, is also displayed. Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

**Figure 43: Thumbnail and Link in Details View**

![Image](image-url)

4.9. Using Report Builder

The **Report Builder** feature is used to create custom reports using patient data and records displayed in JLV widgets. Content for reports can be selected from either the minimized or expanded view of a supported widget. **Report Builder** is accessed from the toolbar in the upper right corner of the **Patient Portal** (highlighted in Figure 44).

**Figure 44: Report Builder Icon**

![Image](image-url)

The Report Builder pane is comprised of the **Current Report** tab (Figure 45) and the **Patient Reports** tab (Figure 46).

The **Current Report** tab (Figure 45) 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 46) presents a list of all completed reports, the status of the report generation progress, the date the report will expire, and a hyperlink to the contents of the completed report.
Create a custom report:

1. Click the **Report Builder** icon (highlighted in Figure 44)
   a. The **Report Builder** pane opens (Figure 47)

2. Select records to add to the report:
   a. Any record or demographics data within a widget can be added by right-clicking the entry in an open widget and selecting **Add Record to Report** (Figure 47)
      • The record will be added exactly as it appears in the widget
   b. Click the **Add to Report Builder** icon within any detailed **Demographics** tab to add demographics data, which will appear at the top of the report by default
   c. If the desired record has a **Details** or **Notes** view, click the **Add to Report Builder** icon on the toolbar of the open **Details** or **Notes** window to add the additional record information
      • Some DoD documents do not have associated **Details** or **Notes**. Clicking on their name in the list of documents will present the dialog box shown in Figure 47
• Some DoD documents can only be added to Report Builder by opening the Details or Notes view of the document (Figure 48)

**Figure 47: Report Builder Pane and Add Record to Report Option**

![Report Builder Pane and Add Record to Report Option](image)

**Figure 48: Report Builder - Document Ready Dialog Box**

![Report Builder - Document Ready Dialog Box](image)

3. The selected records appear in the **Report Builder** window

4. Use the navigation arrows to the right of the listed records (highlighted in Figure 49) 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** (highlighted in Figure 49)
5. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane (Figure 49)

6. Click **Build** (highlighted in Figure 49) to validate the selected records and prepare the report
   
   a. If a record is added to the report without an error, there will be a **Ready** notation next to it in the **Status** column

   b. If a record cannot be added to the report, an **Error** notation will appear next to the record

7. Name the report when prompted and click **OK** (Figure 50)
8. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column.

9. When processing is complete, the **Status** column displays either **COMPLETED** or **ERROR** (Figure 51):
   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 **COMPLETED** or **ERROR** entries will include a **Contents** link (Figure 51), which provides a list of the records that will appear in the generated report.
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 (Figure 52)

d. A red icon (Figure 52) appears over the Report Builder icon when report builder is closed to indicate that a report is ready to be printed
Once a report is created, it is available on the Patient Reports tab for 72 hours. After 72 hours, the report expires, is removed from the Patient Reports tab, and can no longer be accessed.

Open a report:

1. Click the report name in the **Report** column of the **Patient Reports** tab (Figure 51) - 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 51) - OR -
3. Click the blue, hyperlinked report name in the **Report Contents** window (Figure 53)

![Figure 53: Report Contents Window](image)

Delete a report:

1. Select the checkbox to the left of the report name on the **Patient Reports** tab (Figure 51)
2. Click the **Delete Selected** button
3. Click **OK** to confirm deletion (Figure 54)

![Figure 54: Delete Reports Dialog Box](image)
4.10. 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.

To print the data list of a widget in either minimized or expanded view click the Print icon on the desired widget’s toolbar.

To print the details window of a widget, click the Print icon on the details window’s toolbar.

To print a report created in Report Builder, click the Print icon within the report window.

Each report generated using Report Builder includes this disclaimer:

ℹ️ The information contained in this transmission may contain privileged and confidential information, including patient information protected by federal and state privacy laws.
5. Widget Functionality

The following subsections detail the functionality in a sampling of the widgets available in JLV.

5.1. Patient Demographics Widget

The Patient Demographics widget displays a summary of the patient’s non-clinical, personal data. The widget appears in the upper left section of the Patient Portal (Figure 55). The tabs above the patient’s name provide a demographics summary for each site (VA, DoD, or VHIE) the patient has visited.

The Patient Demographics widget provides additional functionality and displays:

- Clicking the patient's name opens details in a standalone window
- Clicking a Connection Status icon opens the connection status details in a separate window
- Clicking the Flags icon above the tabs in the widget opens clinical flag details in a new window

A warning icon displayed on one or more tabs within the Demographics widget is an indication that the patient is not registered at that VA site or DoD facility.

5.1.1. Patient Flags and Alerts

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DoD sites, the Flags icon is displayed next to the Patient Name tab, above the Demographics widget, on the Patient Portal (Figure 56).

The Patient Flags and Alerts details window opens and displays by default when the Patient Portal opens, if there are warnings associated with the selected patient.
Click the **Flags** icon to open the **Patient Flags and Postings** details window (**Figure 57**). The window displays a list of alerts and flags within the patient’s record. If the patient’s record does not contain any clinical warnings, the **Flags** icon is not displayed.

**5.1.2. Race Data Terminology Normalization**

Race data from VA and DoD sources in the **Patient Demographics** widget is normalized. Hovering over the **Race** information displays the standardized name and code for the race classification, normalized to the Centers for Disease Control (CDC) standard (**Figure 58**).
5.1.3. Demographics from Community Partners

When users enable the Include Community Data setting and VHIE patient data is displayed, the Patient Demographics widget displays color-coded information.

- The blue circle represents data retrieved from a VA system
- The orange square represents data retrieved from a DoD system
- The purple hexagon represents data retrieved from VHIE sources

Please Note: VHA users can see the Include Community Data option, but it is not yet active. It will be enabled in a future release.

5.1.4. Viewing Third-Party Insurance Information

Third-party payers and insurance information is available from the Patient Demographics widget. Click the Insurance link in the Demographics widget. A new window (Figure 59) opens with the following insurance information:

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- Subscriber Date of Birth
- Subscriber’s Relationship to Insurer
- Health Plan Mailing Address
- Health Plan Contact Information
Use the scroll bar in the window to view the columns not seen within the default window size.

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

### 5.2. Documents Widget

The **Documents** widget (Figure 60) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consult encounters, discharge summaries (inpatient notes), questionnaires, and Health Artifact and Image Management Solution (HAIMS) records. HAIMS records retrieved by JLV include scanned paper records, imported paper records, scanned non-radiology images, and imported non-radiology images, displayed in chronological order by the document date.
5.2.1. **Documents Widget Data**

The minimized view of the **Documents** widget displays the following information:

- Date
- Description
- Provider
- Image
- Site

Outpatient encounter records displayed in the **Documents** widget may have a details link enabled in the **Date** column. Where available, click the link to open a **Details** window for records of this type.

The **Description** column displays the document title, where available. Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the widget to open the document.

A **camera** icon in the **Image** column of the **Documents** widget indicates that one or more images are associated with that record. Clicking the **camera** icon opens the VistA Imaging Viewer in a standalone window and displays the associated image(s).

Click **More >>** in the minimized view of the **Documents** widget to open the expanded view (**Figure 61**). Information in expanded view includes:

- Date
- Description
- Standardized Description
- Provider
- Provider Specialty
- Location
- Status
- Image
- Source System
- Site
5.2.2. Viewing Documents

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents** widget to access additional information for a listed record. Depending on the record type, the additional information may open in either a details window or a separate browser window. **Figure 62** displays outpatient encounters details, accessed through the **Documents** widget.
5.2.3. Viewing DoD Sensitive Data

JLV masks the display of sensitive records in the Documents widget. The record is masked with the tag **Sensitive**. A user may view the data, but the action is audited each time the sensitive DoD record is viewed.

After clicking the hyperlink in the Description column for a sensitive record, JLV notifies the user that they will be audited. This message is triggered each time a user clicks a sensitive record. After the user selects the purpose of viewing the record and agrees to be audited, the sensitive data appears in Details view, but the record remains masked in the minimized and expanded views of the widget.

5.2.4. Display and Filter Options

Display and filter options within the Documents widget include:

- Click a column title to sort records by that column
  - If a user sorts a column that appears in both minimized and expanded views of the widget, the sort is saved to the user profile, and appears in subsequent JLV sessions
  - If a user sorts a column that is only available in the expanded view of the widget, subsequent JLV sessions display the default widget sort, or the last sort saved to the user profile.
- Use the Quick Date Range Selector, or the Start Date and End Date calendars, to specify the date range of records to be displayed within the widget
  - If the information you expect does not appear in the widget display, use the Start Date and End Date filter options to expand the date range
• When a date range filter is applied in an open widget, the date range is displayed in the widget header
• Open or close the filter options by clicking the date range in the header
• Click the **Column Settings** icon on the widget toolbar to show or hide columns within the widget
  - Check/uncheck the column names that appear in the pop-up dialog box, then click **Apply**
• Use the **Filter by Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
• Use the **Filter by Standardized Description** dropdown to redraw the widget and show only the records for the selected description(s) (Only available in expanded view)
• Use the **Filter by Provider Specialty** dropdown to redraw the widget and show only the records for the selected provider type(s) (Only available in expanded view)
• Use the **Filter by Location** dropdown to redraw the widget and show only the records for the selected location(s) (Only available in expanded view)
• Use the **Filter by Site** dropdown to redraw the widget to show only the records for the selected site(s)

### 5.2.5. Terminology Normalization

Terminology normalization in the **Documents** widget is provided through the following columns:

- The **Description** column displays the name of a note or document in the patient record
  - Hovering over an entry in this column displays the standard used for terminology normalization for the clinical domain (Logical Observation Identifiers Names and Codes [LOINC]) and the standardized LOINC name and code for that document
- The **Standardized Description** column displays the standardized name for the corresponding entry in the **Description** column, mapped to the LOINC standard
  - In addition to the standardized name, hovering over an entry in this column displays the standard used for terminology normalization for the clinical domain (LOINC) and the standardized code for that document.
- The data in the **Provider and Provider Specialty** columns, in both the minimized and expanded views of the widget, is normalized to the National Uniform Claim Committee Taxonomy (NUCC) standard
  - Hovering over entries in these columns displays the standardized name and code for the provider

**Figure 63** highlights a document mapped to the LOINC standard. The standardized name and code are displayed in the hover text over the record in the **Description** column.
5.3. Community Health Summaries and Documents - VA

The Community Health Summaries and Documents - VA widget displays the patient’s VA VHIE community partner information, including Continuity of Care Documents (CCDs) in C32 and C62 formats, and HL7 Consolidated-Clinical Document (C-CDA) structured documents available for the patient. The information in this widget is sorted by the title of the entry listed in the Document column.

5.3.1. Community Health Summaries and Documents - VA Widget Data

Data displayed within the Community Health Summaries and Documents - VA widget includes:

- Date
- Document
- Source

The purple hexagon beside entries in the Source column denotes the source of the data is outside the VA.
The **Site List** icon on the toolbar in the **Community Health Summaries and Documents - VA** widget (Figure 64) generates a list of community sites where the patient has been seen.

Click the **Site List** icon to open the full list of community sites where the patient has been seen. The site list content is gathered from the widget's **Source** column and the sites where the patient was seen, but no document was generated. Click **Close Site List** to remove the full site list from the widget display.

### 5.3.2. Viewing VA Community Health Summary Documents

The **Community and Health Summaries and Documents - VA** widget is rendered only in minimized view. Instead of an expanded view, the selected document opens in a new browser window (Figure 65).

**Figure 64** shows health summary records available from the **Document** column in the **Community Health Summaries and Documents - VA** widget. Clicking a hyperlinked entry in the **Document** column opens the document in a separate browser tab (Figure 65).

Multiple documents can be opened in separate browser tabs for simultaneous viewing and printing.
5.4. Military Health System (MHS) GENESIS Widget

The MHS GENESIS widget displays the documents in patient records from the MHS GENESIS system. The information is displayed in reverse chronological order by date.

5.4.1. MHS GENESIS Widget Data

The minimized view of the MHS GENESIS widget includes the following orders information:

- Date
- Document Title
- Document Type
- Site

Figure 66 highlights the MHS GENESIS widget in minimized view. There is no expanded view for the widget; instead, the CCDA document selected opens in a new browser window (Figure 67).
Medical CCDs, Dental CCDs, and aggregate CCDs with blank entries in the **Date** column for the record appear first in the widget by default.

![Figure 66: MHS GENESIS Widget](image)

### 5.4.2. Viewing MHS GENESIS Documents

Click a hyperlink in the **Document** column in either view of the MHS GENESIS widget to display a Consolidated Clinical Document Architecture (CCDA) document (*Figure 67*) in a new browser window.
Figure 67: CCDA Document

![CCDA Document Image]

### Table of Contents

- Patient Information
- Encounters
- Vital Signs
- Problem
- Allergies
- Medications
- Results
- Immunizations
- Procedures
- Social History
- Functional Status
- Assessment Plan
- Hospital Discharge Instructions
- Healthcare Providers
- Contact Information

#### Patient Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Primary Home, 1234 Howard St, La Jolla, CA 92038, US Tel: (760)222-5555</td>
</tr>
<tr>
<td>Mental Status</td>
<td></td>
</tr>
<tr>
<td>Religious Affiliation</td>
<td></td>
</tr>
<tr>
<td>Race</td>
<td>Black or African American</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Not Hispanic or Latino</td>
</tr>
<tr>
<td>Language(s)</td>
<td></td>
</tr>
<tr>
<td>Preferred Language</td>
<td></td>
</tr>
</tbody>
</table>

#### Encounters

- 2/17/17
- FC Farnsht Clinics 9 (S) -
- 2/17/17
6. Troubleshooting

The following subsections provide information about troubleshooting common errors in JLV. For how to information within JLV, please see online help. To see JLV training videos and access additional JLV training materials, please visit JLV Resources.

6.1. Special Instructions for Error Correction

JLV utilizes access control and authentication services to limit access to registered, authorized users. When enabled, JLV validates a user against information retrieved from their Smart Card. If you are having trouble logging in to JLV, and have used the correct URL for your agency, please review the following before contacting the ESD:

Users with any CAPRI patient selection restrictions will not be able to log in JLV. Instead, they will see this message on the JLV Login page:

![Figure 68: Login Error - CAPRI Patient Selection Restrictions](image)

VHA users:
- Have accessed JLV using the VHA URL ([https://jlv.med.va.gov/JLV](https://jlv.med.va.gov/JLV))
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV Login page
• Have selected a site from the Site dropdown list on the JLV Login page (Most users must specify the individual facility name or their parent healthcare system name)

VBA users:
• Have accessed JLV using the VBA URL ([https://jlv.med.va.gov/JLV_Claims](https://jlv.med.va.gov/JLV_Claims))
• Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV Login page

### 6.1.1. Login Page Error Messages

Troubleshooting steps for error messages received at the login page are provided in Table 6.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Resolution Steps</th>
</tr>
</thead>
</table>
| **Access denied. You are not an authorized user**  | **WHAT?** You see the error message *Access Denied. You are not an authorized User.*
**WHY?** There is a PIV card processing problem; the wrong security or an invalid security certificate was selected; or you are not an authorized user.
**FIX IT:**
1) Close your browser window
2) Reinsert your PIV card and relaunch JLV
3) Select a certificate that is not expired, and specifies *Issued by: Veterans Affairs CA B1*
4) If unsuccessful, contact the ESD |
| **Could not save User Profile**                    | **WHAT?** You receive the error message *Could not save User Profile.*
**WHY?** The error occurred during PIV authentication. It is typically a PIV card processing problem, or the wrong security certificate is chosen.
**FIX IT:**
1) Close your browser window
2) Reinsert your PIV card and relaunch JLV
3) Select a certificate that is not expired, and specifies *Issued by: Veterans Affairs CA B1*
4) If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again |
| **Not a valid ACCESS/VERIFY CODE pair**            | **WHAT?** You see the error message *Not a valid ACCESS CODE/VERIFY CODE pair* error at the login screen.
**WHY?** 1) JLV could not match your Access and Verify codes to the site selected in the dropdown, or 2) A username and password were entered instead of Access/Verify codes.
**FIX IT:**
1) VHA users must select the parent VistA host site for their facility
2) Reenter your Access and Verify codes (CAPRI codes for VBA users, CPRS codes for VHA users) |
| **Page cannot be displayed**                       | **WHAT?** You receive a *Page cannot be displayed* error when launching JLV.
**WHY?** The JLV URL requires certain IE settings.
**FIX IT:**
1) Click the Tools menu (press ALT+X) in IE |
## Error Message

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Resolution Steps</th>
</tr>
</thead>
</table>
| 2) Select Internet Options  
3) When the dialog box opens, click the **Advanced** tab  
4) Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked  
5) Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked  
5) Click **OK** to close the dialog box, then relaunch JLV (The page should load) |

### Smart Card required

**WHAT?** You see the error message *Smart Card Required.*  
**WHY?** Your Smart Card was not read by Windows Security and JLV before opening the JLV URL.  
**FIX IT:**  
1) Close all browser sessions and browser-based applications  
2) Reinsert your PIV card, and relaunch the JLV URL  
3) If unsuccessful, close all open IE windows-tabs, then Open IE and try JLV again

### VERIFY CODE must be changed before continued use

**WHAT?** You receive the message *VERIFY CODE must be changed before continued use* at the login screen.  
**WHY?** Your CPRS or CAPRI VERIFY CODE has expired.  
**FIX IT:**  
1) Open CPRS, VistA, or CAPRI (VBA users)  
2) Select the **Change Verify Code** checkbox on the sign-on dialog before clicking **OK**  
3) You will be prompted to create a new Verify code  
4) Once your Verify code has been changed for CPRS or CAPRI, relaunch JLV and the new code will be recognized immediately

### The JLV button in CPRS does nothing

**WHAT?** Clicking the JLV button in CPRS does not open JLV.  
**WHY?** You are likely using Google Chrome as your default browser.  
**FIX IT:**  
1) Click **Start** menu, then select **Default Programs** in the right pane  
2) Click **Set your default programs**  
3) Click **Internet Explorer** in the list, then click **Set this program as default.**

## 6.1.2. System Error Messages

**Table 7** summarizes system messages that may be presented to JLV users.

### Table 7: System Error Messages

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Message displays, but behavior occurs: The browser window does not allow the user to scroll to widgets, or access the JLV icons on the portal pages.</td>
<td>Access JLV using IE 11. Use a monitor with a minimum screen resolution of 1024 x 768. Set the browser zoom feature to 100%. If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log in to JLV again.</td>
</tr>
<tr>
<td>Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.</td>
<td>Either VistA Data Service or VistA Imaging Exchange is offline, and JLV is unable to retrieve the necessary data</td>
</tr>
<tr>
<td>Message</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MVI Message: There are no patients found using the current parameters.</td>
<td>No patient records were found using the information entered in the Patient Search dialog box. Reenter patient identifiers in the Patient Search dialog box fields after verifying the accuracy of the information.</td>
</tr>
<tr>
<td>MVI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.</td>
<td>No unique patient is found with the identifiers used in the search. Click OK to return to the Patient Search window and provide additional patient identifiers, like the full first name or DOB.</td>
</tr>
<tr>
<td>MVI Error: Your query yields too many results. Please modify your search parameters to narrow the search.</td>
<td>JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients. Modify the information in the Patient Search dialog box using additional patient identifiers to reduce the number of results.</td>
</tr>
<tr>
<td>MVI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.</td>
<td>There may be one or more errors in the Patient Search dialog fields. Validate the patient identifiers and try the search again. If problems persist, there may be an error between MVI and the Defense Enrollment Eligibility Reporting System (DEERS).</td>
</tr>
<tr>
<td>You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.</td>
<td>VA security regulations prevent a user from accessing their own medical records.</td>
</tr>
<tr>
<td>You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ACP Coordinator.</td>
<td>Per VA policy, JLV does not allow access to patient records if the JLV user’s SSN is not in their VistA profile.</td>
</tr>
<tr>
<td>An error occurred while attempting to retrieve the document.</td>
<td>Occurs when something goes wrong when JLV tries to retrieve a selected document.</td>
</tr>
<tr>
<td>An error occurred while attempting to display the document.</td>
<td>Occurs when JLV tries to receive a document, but has trouble converting the document to a viewable format.</td>
</tr>
<tr>
<td>Your patient selection is limited. To access electronic health record data, please log into CAPRI.</td>
<td>Some VBA users have patient or site restrictions attached to their profile. Log into CAPRI to view patient records.</td>
</tr>
<tr>
<td>Connection Status alert or error displayed in the Community Health Summaries and Documents - VA widget: One or more data sources could not be connected; some entries will not appear. or Error: DAS Query failure. HTTP error.</td>
<td>These messages appear when the VA VHIE service is not available. If either message persists for more than 5 minutes, contact support to report the connection error.</td>
</tr>
<tr>
<td>Error displayed in Community Health Summaries and Documents – VA widget: Connection Error – No Data</td>
<td>JLV was unable to retrieve data from eHX.</td>
</tr>
<tr>
<td>Message</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Errors displayed in the <strong>Community Health Summaries and Documents - VA</strong> widget: An error occurred while attempting to retrieve the document. or An error occurred while attempting to display the document.</td>
<td>These error messages may appear when a user attempts to view a document, but JLV is either unable to retrieve it, or is unable to convert the document to HTML.</td>
</tr>
</tbody>
</table>
6.1.3. VA VHIE Server Error Message

Table 8 details an error that may be presented to JLV users, related to the display of VA VHIE data.

Table 8: Community Health Summaries and Documents - VA Widget Error Message

<table>
<thead>
<tr>
<th>Message</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>An error occurred while attempting to retrieve the document. or</td>
<td>These messages may occur when you try to view a VA widget, but JLV is either unable to retrieve the document, or JLV is unable to convert the document to HTML.</td>
</tr>
<tr>
<td>An error occurred while attempting to display the document.</td>
<td></td>
</tr>
</tbody>
</table>
7. Acronyms and Abbreviations

Table 9 lists the acronyms and abbreviations used throughout this document, and their descriptions.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPRI</td>
<td>Compensation and Pension Record Interchange</td>
</tr>
<tr>
<td>CCDA</td>
<td>Consolidated Clinical Document Architecture</td>
</tr>
<tr>
<td>CCOW</td>
<td>Clinical Context Object Workgroup</td>
</tr>
<tr>
<td>CDC</td>
<td>Centers for Disease Control</td>
</tr>
<tr>
<td>CPRS</td>
<td>Computerized Patient Record System</td>
</tr>
<tr>
<td>DEERS</td>
<td>Defense Enrollment Eligibility Reporting System</td>
</tr>
<tr>
<td>DOB</td>
<td>Date of Birth</td>
</tr>
<tr>
<td>DoD</td>
<td>Department of Defense</td>
</tr>
<tr>
<td>EDIPI</td>
<td>Electronic Data Interchange Personal Identifier</td>
</tr>
<tr>
<td>EHR</td>
<td>Electronic Health Records</td>
</tr>
<tr>
<td>eHX</td>
<td>eHealth Exchange</td>
</tr>
<tr>
<td>ESD</td>
<td>Enterprise Service Desk</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>HAIMS</td>
<td>Healthcare Artifact and Image Management Solution</td>
</tr>
<tr>
<td>HL7</td>
<td>Health Level 7</td>
</tr>
<tr>
<td>ID</td>
<td>Identification</td>
</tr>
<tr>
<td>IE</td>
<td>Internet Explorer</td>
</tr>
<tr>
<td>IEN</td>
<td>Internal Entry Number</td>
</tr>
<tr>
<td>IP</td>
<td>Internet Protocol</td>
</tr>
<tr>
<td>JLV</td>
<td>Joint Legacy Viewer</td>
</tr>
<tr>
<td>LOINC</td>
<td>Logical Observation Identifiers Names and Codes</td>
</tr>
<tr>
<td>MHS</td>
<td>Military Health System</td>
</tr>
<tr>
<td>MI</td>
<td>Middle Initial</td>
</tr>
<tr>
<td>MVI</td>
<td>Master Veteran Index</td>
</tr>
<tr>
<td>NUCC</td>
<td>National Uniform Claim Committee</td>
</tr>
<tr>
<td>OIT</td>
<td>Office of Information and Technology</td>
</tr>
<tr>
<td>PDWS</td>
<td>Patient Discovery Web Service</td>
</tr>
<tr>
<td>PIV</td>
<td>Personal Identity Verification</td>
</tr>
<tr>
<td>SSL</td>
<td>Secure Sockets Layer</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TLS</td>
<td>Transport Layer Security</td>
</tr>
<tr>
<td>UI</td>
<td>User Interface</td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator</td>
</tr>
<tr>
<td>VA</td>
<td>Department of Veterans Affairs</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>VBA</td>
<td>Veterans Benefits Administration</td>
</tr>
<tr>
<td>VHA</td>
<td>Veterans Health Administration</td>
</tr>
<tr>
<td>VistA</td>
<td>Veterans Health Information Systems and Technology Architecture</td>
</tr>
<tr>
<td>VHIE</td>
<td>Virtual Lifetime Electronic Record</td>
</tr>
</tbody>
</table>