# Joint Longitudinal Viewer (JLV) 3.1.0.0.0

# User Guide

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**Department of Veterans Affairs**

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# Revision History

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# Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the user guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it is updated as needed. A user guide is a technical communication document intended to give assistance to people using a system, such as Veterans Health Information Systems and Technology Architecture (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. 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 Longitudinal 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 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 several 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.

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 1: JLV User Profiles**

| User | Description and Responsibilities |
|---|---|
| **Compensation and Pension Record Interchange (CAPRI)-Claims** | VA administrative staff who access patient EHRs to assist in VBA processes |
| **VHA** | VA clinicians and administrative staff who access patient EHRs to assist in providing health care services |
| **DOD Clinician** | DOD clinicians who access patient EHRs |

## 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 (Section 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.
- **Tab:** A component of the JLV interface that displays the **Patient** portal and presents 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 on the portal page that provides access to all widgets available for placement on the portal page.

## 1.2. Assumptions

The user guide is written from the perspective of VA 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 required Access and Verify codes.
- 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 browsers, Microsoft Edge, Chrome, Internet Explorer (IE) version 11 and Safari. Other web browsers may function but are not certified for support. It is recommended that you view JLV using:

- A monitor set to a minimum screen resolution of 1024 x 768.
- An approved browser, with the browser's zoom percentage set to 100%.

It is also recommended that Adobe Reader be installed on your system.

## 1.4. Getting Help

Please see online help for how-to information within JLV. Please visit REDACTED for access to JLV training videos and additional JLV training materials.

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

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

**IT Enterprise Service Desk**
Phone: REDACTED
YourIT Self-Service Portal: REDACTED

If you are unable to retrieve community partner documents for a patient, please contact your local Veterans Health Information Exchange (VHIE) Coordinator. If you need assistance locating your local contact, please e-mail REDACTED.

# 2. Logging Into JLV

Users who have access to the Computerized Patient Record System (CPRS), CAPRI, and Cerner PowerChart are automatically authorized to use JLV.

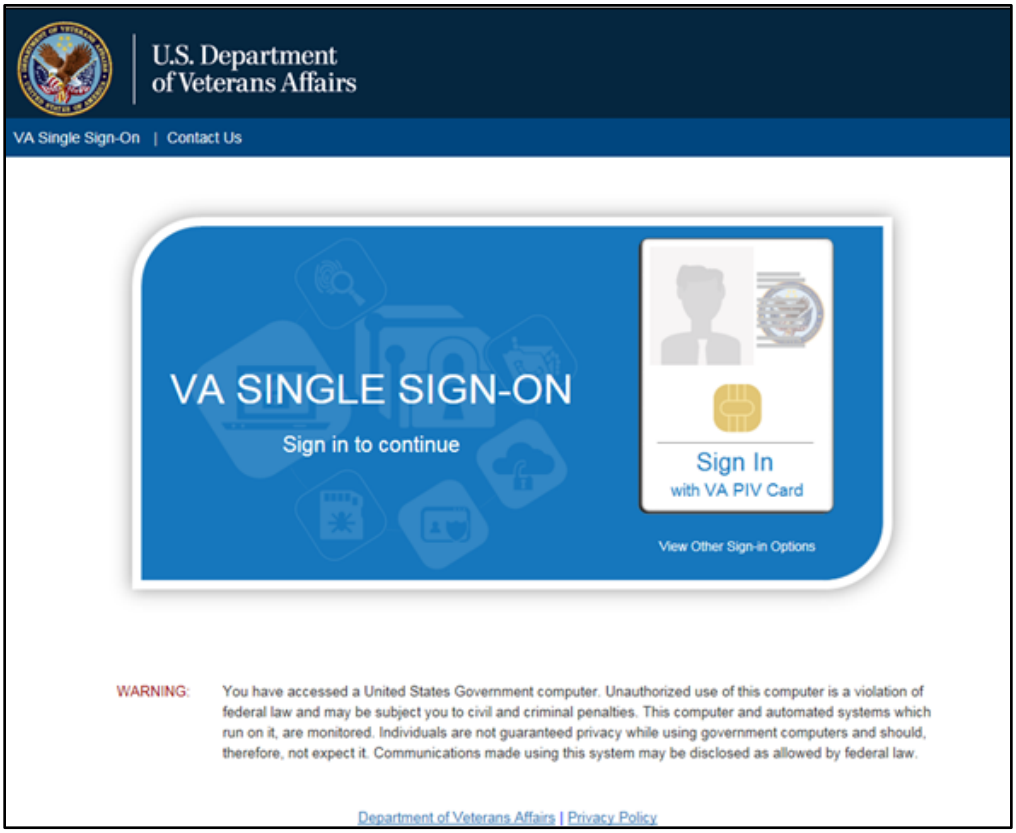
**NOTE:** There is no functionality available to change a user identification (ID) and password in JLV. See Troubleshooting for information about login errors, Access code errors, or Verify code errors.

## 2.1. VHA User Login

To log into JLV through SSOi, you must first link your Personal Identity Verification (PIV) card to your VistA account (see Link Your PIV Card and VistA Account). If you can log into CPRS or JLV without entering your Access and Verify code, you are already linked.

1. Enter the JLV URL (REDACTED) into the address bar of your Internet browser, select the **JLV** button CPRS if available, or select the **JLV** button in PowerChart.
   a. You are redirected to the **VA Single Sign-On Internal (SSOi)** page (Figure 1).

**Figure 1: SSOi Page for VA Users**




2. Click the **Sign in with VA PIV Card** button.
3. Select the current authentication certificate *Veterans Affairs User CA B1*, and click **OK.**
4. Enter your Personal Identification Number (PIN), and click **OK.**
   a. If the **Home VistA Site** dialog appears (Figure 2), select your site, and click **Save.**

**Figure 2: Home VistA Site Dialog for VHA Users**

b. If your PIV card is properly linked to the home VistA site you selected, the **Government Information System Acknowledgement** displays.

c. If your PIV is not properly linked to the home VistA site you selected, the **Link My Account** page displays (Figure 3, Link Your PIV Card and VistA Account).

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

   a. You are redirected to JLV (Figure 9).

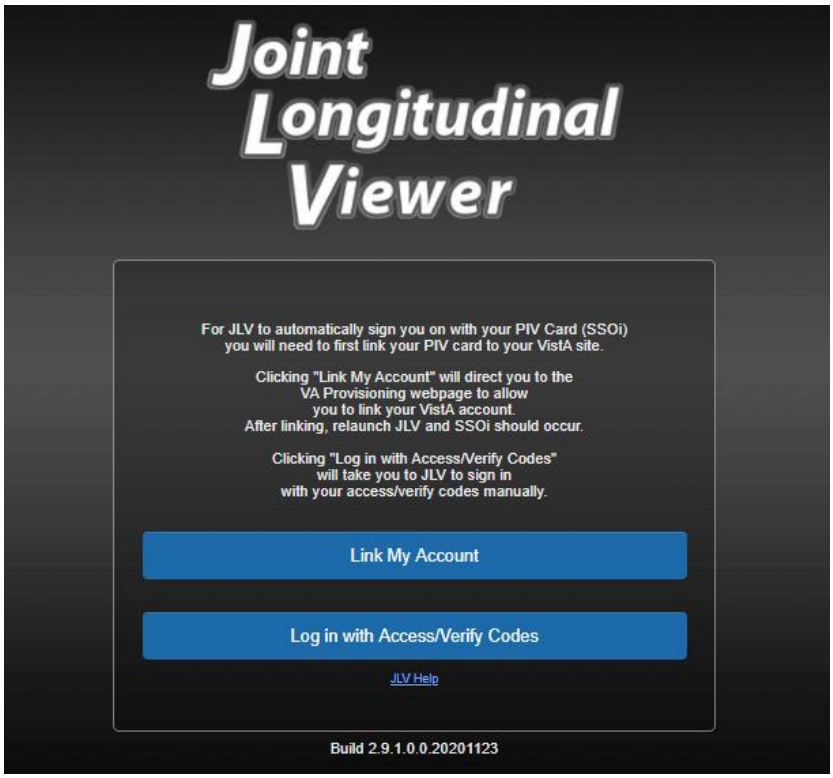
### 2.1.1. Link Your PIV Card and VistA Account

You need your Access and Verify codes for your VistA account and a PIV card PIN to link your PIV credentials to your VistA account. If you do not remember your PIN or experience any other issue related to your PIV card, visit your local PIV office.

1) Complete steps 1–4 listed in VHA User Login.

   b. **Link My Account** page displays (Figure 3).

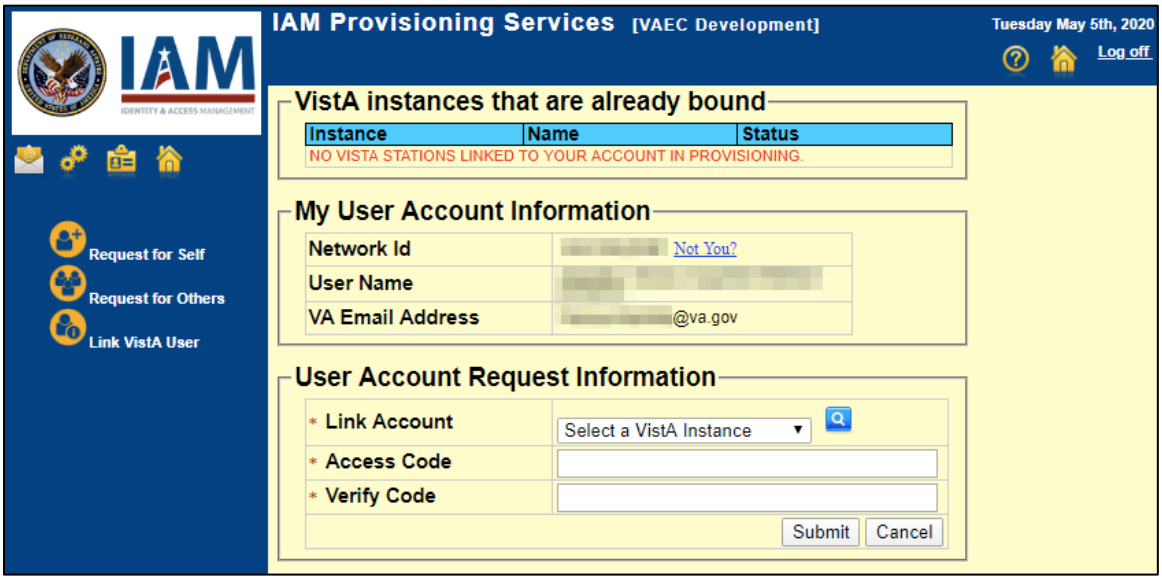
**Figure 3: JLV Link My Account Page**




6. Select the **Link My Account** button.

   a. JLV redirects the user to the Identity Access Management (**IAM) Provisioning Services** page (Figure 4).

**Figure 4: IAM Provisioning Services Link VistA User Page**




**NOTE:** Close all other open applications and browser windows. You may experience a failure to link your account(s) if you are logged into CPRS and your VistA application. If this occurs, you should log out and not log back into CPRS until you receive an email stating your account is linked.

7. Click the **Link Vista** User link (Figure 4)

**NOTE:** Ignore the "No VistA stations linked to your account in provisioning" message that displays.

8. Select the appropriate instance of VistA from the **Link Account** dropdown.

**NOTE:** The VistA instance list is sorted by station number. If your station is a divisional site of the main PARENT VA site, select the parent site from the list. Example: if your divisional site is Albany, select the parent site 528 Upstate New York HCS from the list.

9. Enter your Access and Verify codes for the selected VistA instance.
10. Click **Submit**.

## 2.2. CAPRI-Claims User Login

The following instructions apply to CAPRI-Claims users accessing JLV.

**NOTE:** Users with any CAPRI patient selection restrictions must use the **Joint Longitudinal Viewer** tab in CAPRI to access JLV.

1) Enter the URL into the address bar of your Internet browser (REDACTED), or select the **Joint Longitudinal Viewer** tab in CAPRI.

a. You are redirected to the **VA SSOi** page (Figure 1).

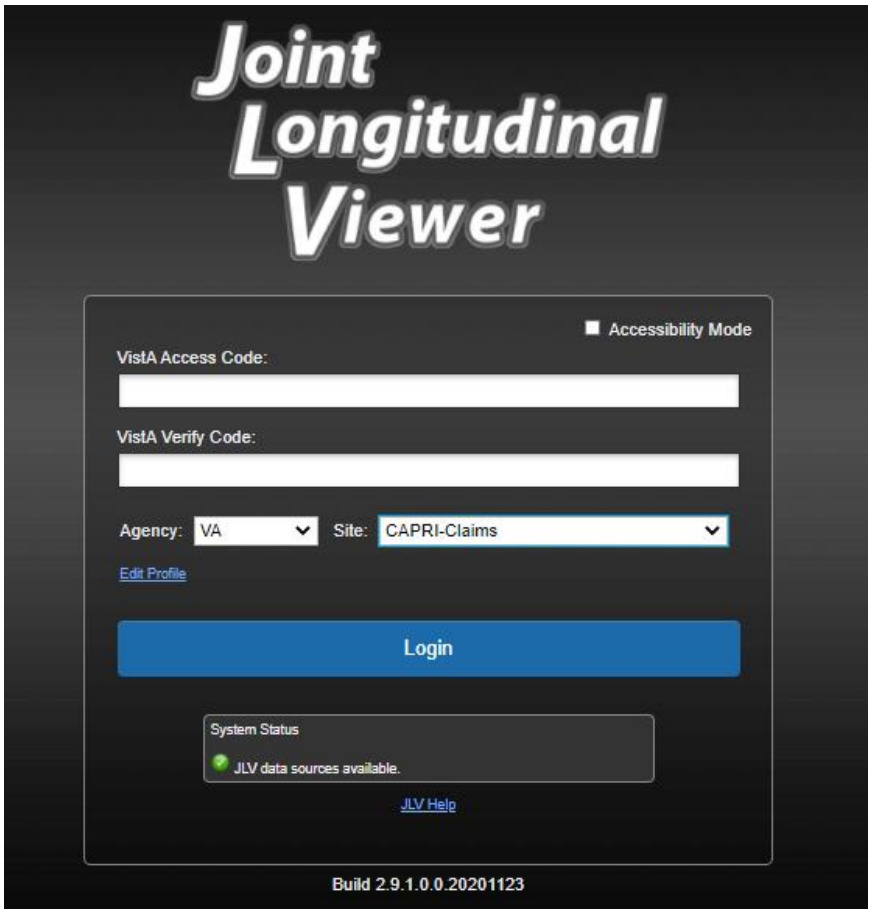
11. Click the **Sign in with VA PIV Card** button.
12. Select the authentication certificate *Veterans Affairs User CA B1*, and click **OK**.
13. Enter your PIN, and click **OK**.
    a. If the **Home VistA Site** dialog appears (Figure 5), select *CAPRI-Claims***,** and click **Save**.

**Figure 5: Home VistA Site Dialog for CAPRI-Claims**

**NOTE:** When CAPRI/Claims is stored as a user's JLV Login site and the user's PIV card is linked to the Claims system in IAM, the user is only prompted for PIV Cert and PIN to authenticate to JLV.

b. You are redirected to the JLV **Login** page (Figure 6).

**Figure 6: The JLV Login Page**




14. Read the important user consent information regarding access to a Government information system, and click **I Accept**.
15. If desired, check the **Accessibility Mode** option.
    a. If selected, JLV opens and displays the application in the Section 508-compliant Accessible UI theme (See Using the Accessible Theme's Functionality for detailed information).
16. Enter your login credentials:
    a. Enter your CAPRI Access code.
    b. Enter your CAPRI Verify code.
    c. Select VA from the **Agency** field.
    d. Select CAPRI-Claims from the **Site** dropdown list.
17. Click **Login**.
    a. You are redirected to JLV (Figure 9).

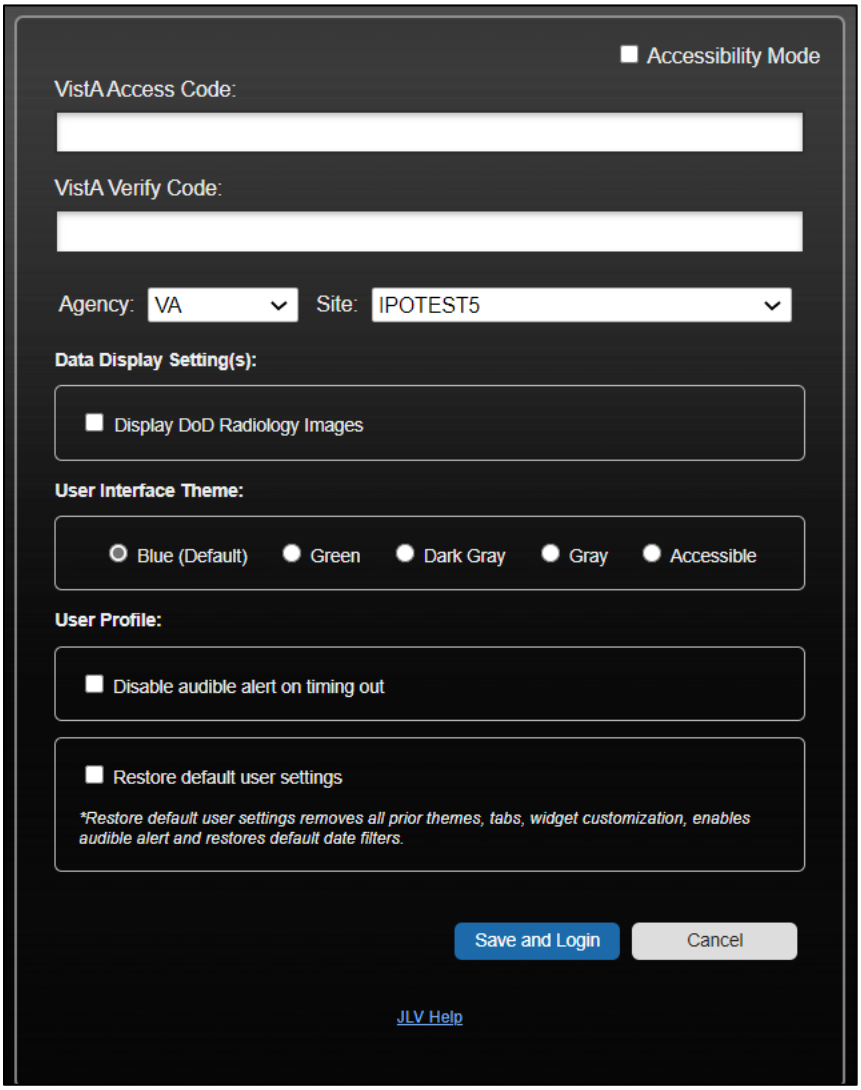
### 2.2.1. Editing Your User Profile at Login

One method of setting application configuration options (i.e., customizing) is by using the **Edit Profile** link (Figure 6) to access the user profile fields through the JLV **Login** page (Figure 7). User profile options can also be set within JLV. See Customizing JLV.

**NOTE:** Only CAPRI-Claims users and those who haven't yet linked their VistA accounts to their PIV can load the **Login** page and access the **Edit Profile** link.

**NOTE:** The selected options are saved to your user profile by clicking **Save and Login** and remain set for all subsequent JLV sessions until you change them.

**Figure 7: User Profile Data Source and User Interface Option Fields**



## 2.3. Logging Out of the Current JLV Session

Click (highlighted in Figure 8) at any time to end the current session and exit JLV.

**Figure 8: JLV Logout Icon**

A JLV session ends automatically after 60 minutes of inactivity. Actions in JLV that are considered activity are changing patients, refreshing widgets, opening, or closing widgets, adding, or removing widgets from the portal page, and adjusting date ranges. You receive an audible and visual warning that the current session is about to terminate after 55 minutes of inactivity. Automatic termination of a session logs you out of the application, closes all JLV tabs and windows, and displays the **Logout** page. Close and reopen the browser and return to the JLV **Login** page to initiate a new JLV session. If SSOi is enabled, you are redirected to the **VA Single Single-On Logout** page.

**NOTE:** The audible alert can be disabled by selecting **Disable audible alert on time out** in the **Settings** panel.

# 3. The Elements and Functionality of JLV

## 3.1. The JLV Patient Portal Page

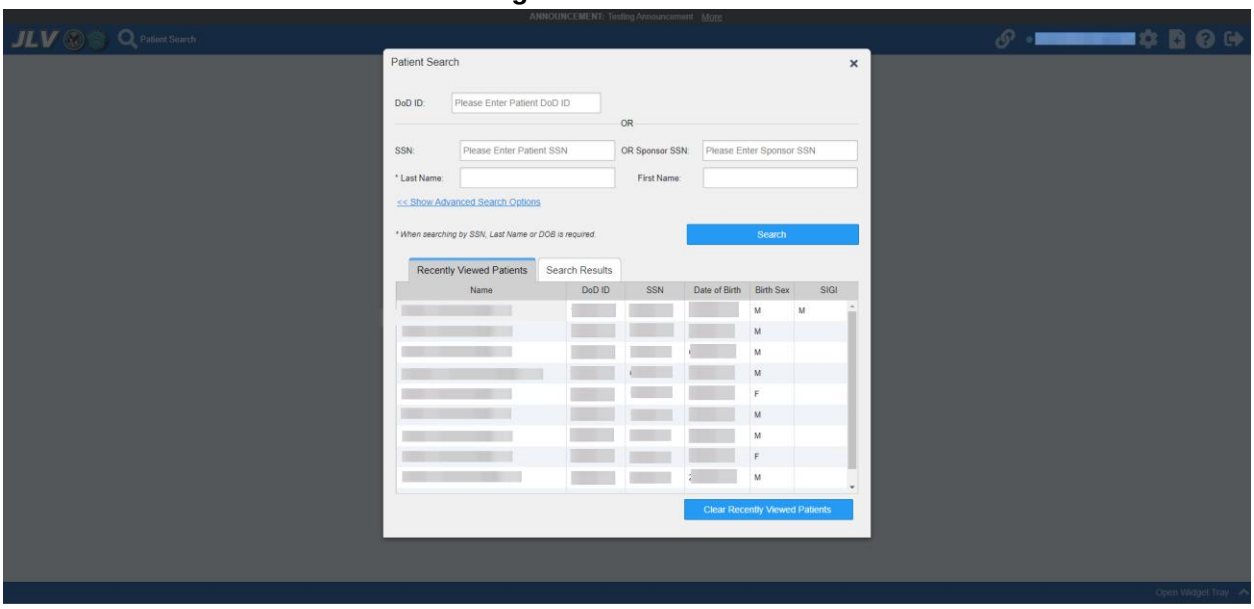
After a successful log in, your username displays on the portal toolbar, and the JLV portal page is displayed.

### 3.1.1. Default View

Upon log in, you see the **Patient Search** dialog box by default.

**NOTE:** 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.

**Figure 9: Default View**




Clicking a patient name in the **Patient Search** window displays the selected patient's clinical records and other patient-centric information.

> **Note:** The Patient Flags and Postings window opens and displays by default when the Patient portal opens if there are warnings associated with the selected patient. For more information, see Patient Flags and Alerts.

New JLV users see a preconfigured, default widget layout on the Patient portal when a patient is selected. The default layout includes the **Allergies**, **Problem List**, **Documents & Images**, **Medications - Outpatient**, and **Lab Results** widgets, as well as the **Patient Flags and Postings** widget if applicable.

> **NOTE:** You can configure the layout of widgets on the Patient portal and create multiple widget tabs, as described in Customizing JLV and in Accessing and Opening Widgets. Customizations are saved to your user profile and remain until manually changed.

### 3.1.2. System Menu

Each portal page has a toolbar (highlighted in Figure 10) that enables quick access to the following features:

- View Context Management status .
- **Settings:** Click to set user preferences, including the UI theme (Refer to Customizing JLV).
- **Report Builder:** Click to create custom reports (Refer to Using Report Builder).

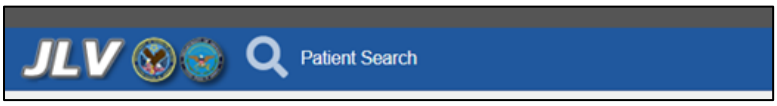
- **Online Help:** Click to open online help.
- **Logout:** Click to log out and close the current JLV session (Refer to Logging Out of the Current JLV Session).

**Figure 10: JLV Tools on the Portal Page**

The following functions can be completed from the portal pages (highlighted in Figure 11):

- Perform a **Patient Search**.
- View the system status .
- Open the widget tray using the **Open Widget Tray ^** link on the portal page (as shown in Accessing and Opening Widgets, Figure 46).

**Figure 11: More JLV Functionality**




### 3.1.3. Viewing System Status

The system status reports the condition of the JLV application. 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 Viewing Connection Status for more information.

JLV displays the system status on the **Login** page and on the portal toolbar.

- When all monitored systems and services are online and connected, appears with the status message, "*JLV data sources are available*".
- When one or more of the monitored systems or services is offline or unavailable, appears with the status message, "*Services are not available to JLV*".
- When JLV is unavailable, appears with the message, "*System status is unavailable*".
  - You may not be able to log into JLV or view patient data until the connection is restored.

These warnings may be accompanied by one or more of the notices listed in Table 2, depending on which services are unavailable. Figure 12 shows a system status message on the **Login** page, and Figure 13 shows the **System Status** hover text on the portal toolbar.

**Table 2: System Status Notices by Service**

| Service | Notice |
|---|---|
| **jMeadows** | *"**The service that gathers patient data and prepares it for display in JLV is unavailable.** JLV is available for login but may not function otherwise."* |
| **Master Person Index (MPI)** | *"**VA Patient Identity Service is unavailable.** Patient search may not be available, and VA and community partner data may not display."* |
| **Patient Discovery Web Service (PDWS)** | *"**DOD Patient Identity Service is unavailable.** Patient search may not be available and DOD data may not display."* |
| **Relay Service** | *"**All DOD, Federal EHR, and Community Partner data in widgets is currently unavailable.** The source connection is down and DOD, Federal EHR, and Community Partner data of all types from all sites 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."* |
| **Data Exchange Service (DES)** | *"**Some Federal EHR, DOD, and Community Partner data are currently unavailable.** The source connection is down and some DOD and Community Partner, and some FEHR data of all types from all sites may not display in widgets.* |
| **Electronic Health Record Modernization (EHRM)** | ***"Federal EHR (Cerner) is currently unavailable.** The source connection is down and some Federal EHR data may not display."* |

**Figure 12: System Status on the JLV Login Page**

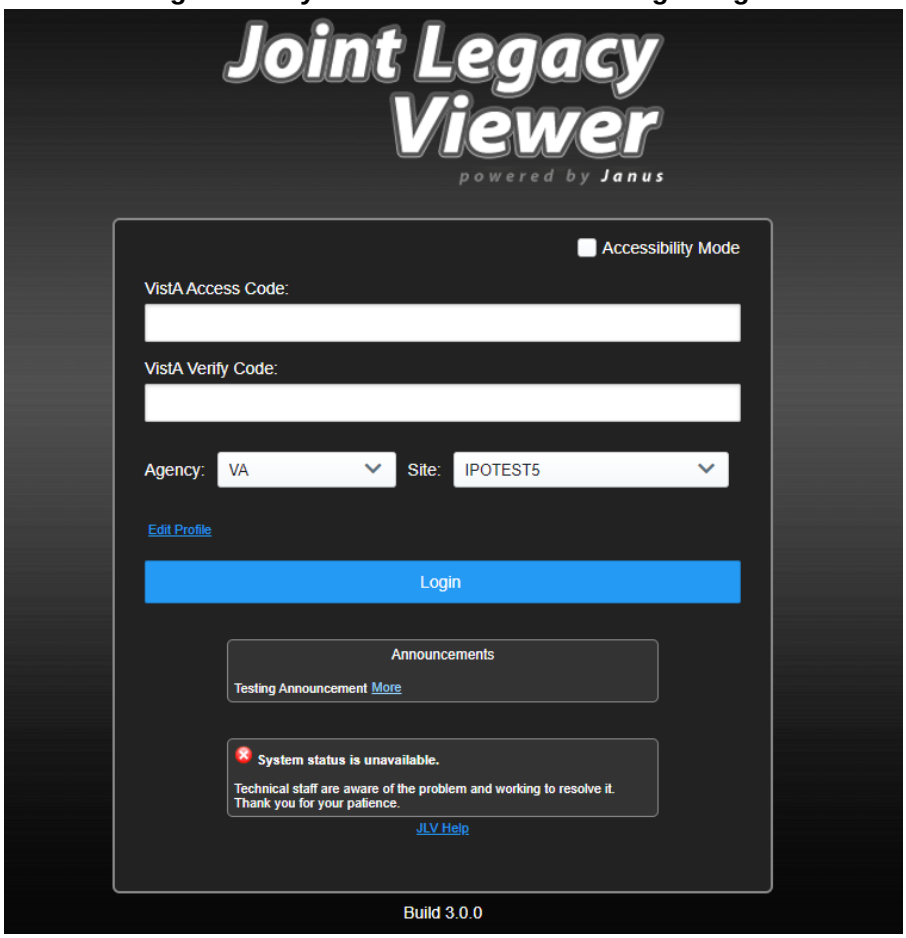



**Figure 13: System Status on the JLV Toolbar**

A System Status icon appears in the JLV Navigation Bar to indicate the status.

### 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 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) triggers 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 attempts to connect to the context vault upon a valid login. The context status appears on the portal toolbar. When context is established, is shown. When context is suspended, is shown.

Figure 14 shows the context indicator location on a JLV portal page. Context is established in this example.

**Figure 14: Context Indicator**

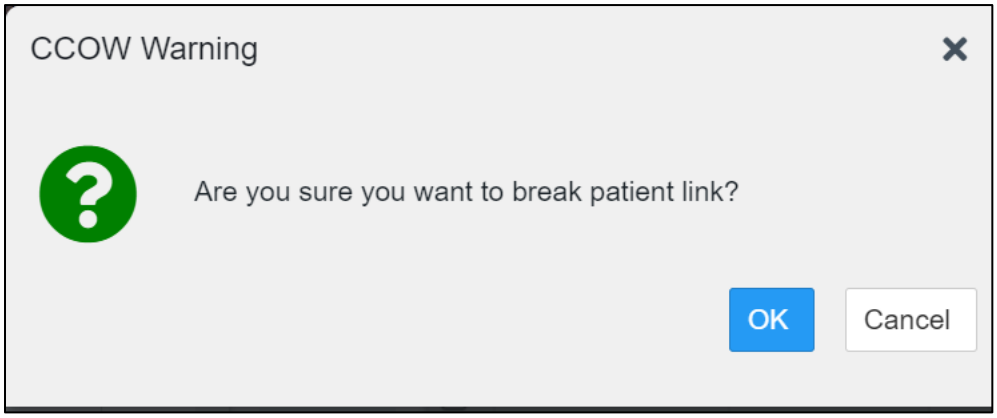
### 3.1.4.1. Suspending Context

Context can be manually suspended.

1. Click .
2. The CCOW warning message, "*Are you sure you want to break patient link?*" appears (Figure 15).
3. Click **Yes** to continue.

Once context is suspended, displays on the portal page. When context is suspended, patient changes are not reflected in either JLV or other CCOW-enabled applications.

**Figure 15: Suspending Context**



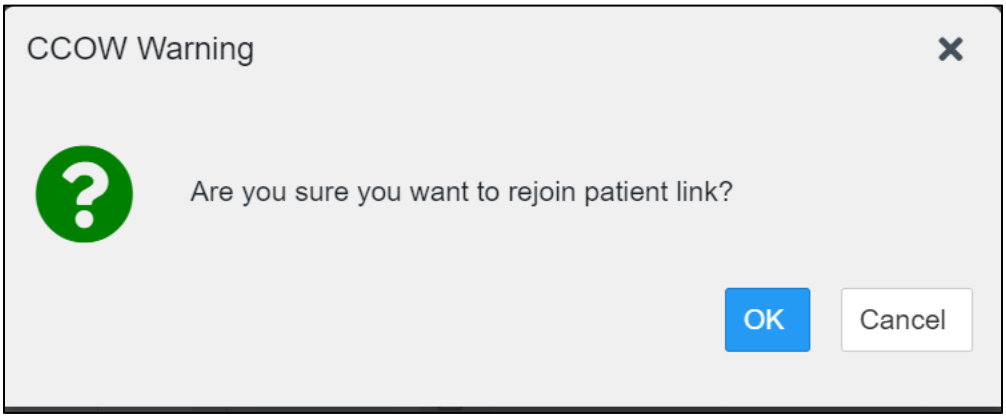

### 3.1.4.2. Establishing Context

When context is suspended, it can be reestablished manually.

1. Click .
2. The CCOW warning message, "*Are you sure you want to rejoin patient link?*" appears (Figure 16).
3. Click **Yes**.

Once context is established, displays on the portal page.

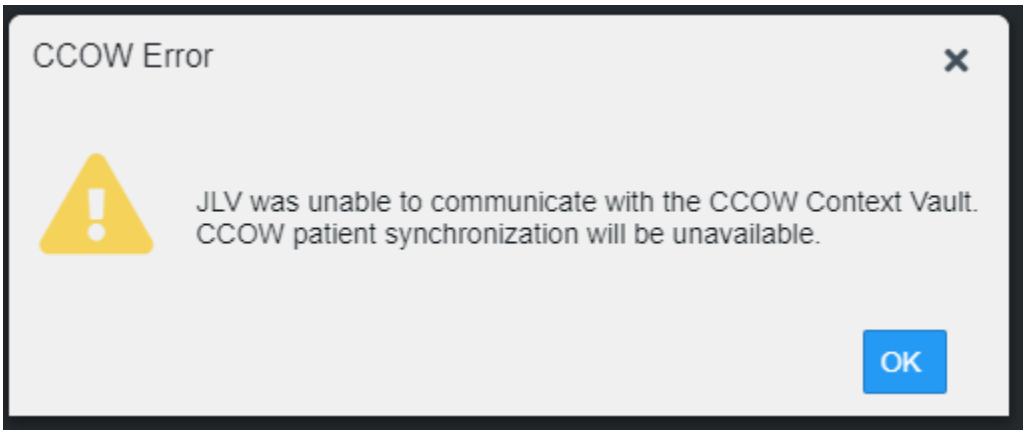
**Figure 16: CCOW Warning Message**




### 3.1.4.3. Unable to Communicate with Vault

If JLV is unable to initiate context management upon log in, you see the CCOW Error message (Figure 17). Click **OK** to continue. displays on the portal page. If the CCOW error persists, contact your local service desk for assistance.

**Figure 17: CCOW Error Message**

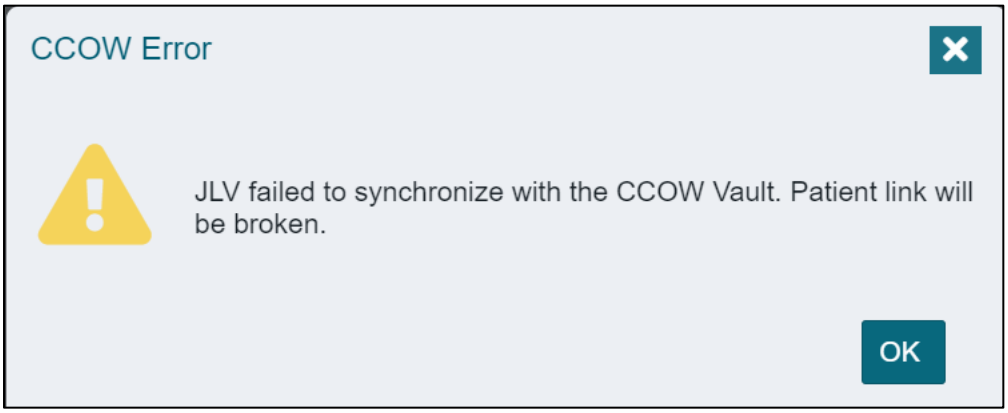



**NOTE:** This error message automatically displays if you have more than one active JLV session open.

### 3.1.4.4. Context Synchronization Failure

A CCOW error message is presented if JLV is unable to reestablish context (Figure 18). This indicates context is suspended. Click **OK** to continue. displays on the portal page. CAPRI-Claims users may encounter this error message at each log in, as there are usually no CCOW system components installed on their computers.

**Figure 18: Context Synchronization Failure**



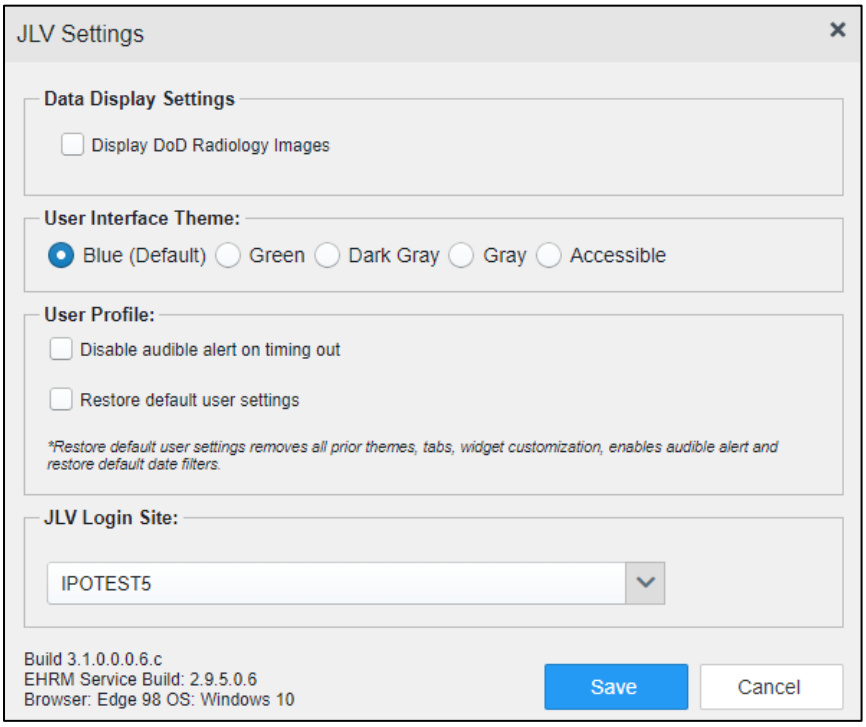

## 3.2. Customizing JLV

Configuration options can be set in the **JLV Settings** dialog (Figure 19). These settings are saved to your user profile and persist.

1) Click the ⚙ link on the **portal** page (Figure 10).
   a. The **JLV Settings** dialog box opens (all selections are optional).
4. Select the data display setting checkbox for DOD Radiology Images to display within the Radiology Reports Widget.
5. Select the radio button to change the color theme.
6. To disable audible alert on timing out, select the check box.
7. To restore your user profile default settings, click the checkbox.
8. To change your JLV Login Site, select from the dropdown list (VA sites only).
9. Click **Save** to apply the selected data display setting and/or theme **OR**
10. Click **Cancel** to exit the dialog box and restore the previous data display and/or theme configuration.

Additional information on each of these selections is contained in the following sections.

**Figure 19: JLV Settings Dialog Box**




**NOTE:** Users logging into JLV with a PIV card will have the option of changing their site location. Users should only select sites linked to their PIV card. The new selection will not take effect until the next login and will remain the user's default site until updated or reset.

You may reset your user profile to JLV defaults by selecting the **Restore Default User Settings** checkbox and then the **Save** button in the **JLV Settings** dialog. This feature resets the theme and data display to default; enables the audible alert; removes any custom tabs; and resets all widgets to their default configurations, which removes any custom sort or filter settings.

### 3.2.1. About Data Display Settings

The data display setting is part of your user profile. The data display setting enables you to specify whether to include DOD radiology images. This option is disabled by default.

JLV displays data source indicators in the **Site** columns of individual widgets (Figure 20). A blue circle indicates VA data; an orange square indicates DOD data; a purple hexagon indicates community partner data (if enabled); and a green triangle indicates Cerner Millennium Federal Electronic Health Record (FEHR) data (Table 3). Hovering over individual data source indicators provides more specific information about the data source.

**Table 3: Data Sources**

| Icon | Sources | Hover information | Data Supplied |
|---|---|---|---|
| **XXX**<br>**XXX = the three-letter VistA site abbreviation** | CPRS/VistA system data | VA: location<br>Examples:<br>• VA: Walla Walla, WA<br>• VA: Central Texas HCS[1] | Supplies all records from CPRS/VistA for all sites. These records will remain available even after a site transitions to VA EHRM (Cerner). |
| DoD | CHCS[2] (CDR[3]), AHLTA[4], Essentris, TMDS[5], various clinical applications | DOD source system : Full name of DOD Medical Treatment Facility<br>Examples:<br>• CDR: Fairchild AFB[6]<br>• AHLTA: JB[7] San Antonio | Supplies all records from all sites from all DOD facilities for all legacy applications. These records will remain available even after a site transitions to MHS GENESIS (Cerner). |
| FEHR | DOD MHS GENESIS (Cerner) and VA EHRM (Cerner) records stored in Cerner Millennium | FEHR: VA or DOD facility name/location<br>Examples:<br>• FEHR: Spokane, WA<br>• FEHR: Madigan AMC[8] | Supplies records from VA and DOD facilities that have migrated to the new Federal EHR, called MHS GENESIS in DOD and VA EHRM (Cerner) in VA. |
| **Name**<br>**Name = Community Partner name** | All DOD and VA Community Partners (VHIE/VLER[9]), Sequoia Project and DOD Health Information Exchange) | Federal HIE[10]: Community Partner Organization Name<br>Examples:<br>• Federal HIE: UC[11] San Diego<br>• Federal HIE: Mayo Clinic | Supplies continuity of care documents, care summaries, and notes when provided by partners. Partner capabilities and responses vary. |

### 3.2.2. About UI Themes

The UI theme setting is also part of your 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 your user profile and remains set until you change it. The available UI themes are Blue (Default), Green, Dark Gray, Gray, and Accessible (Section 508-compliant).

[1] Health Care System
[2] Composite Health Care System
[3] Clinical Data Repository
[4] Armed Forces Health Longitudinal Technology Application
[5] Theater Medical Data Store
[6] Air Force Base
[7] Joint Base
[8] Army Medical Center
[9] Virtual Lifetime Electronic Record
[10] Health Information Exchange
[11] University of California

**Figure 20: Blue (Default) UI Theme[12]**

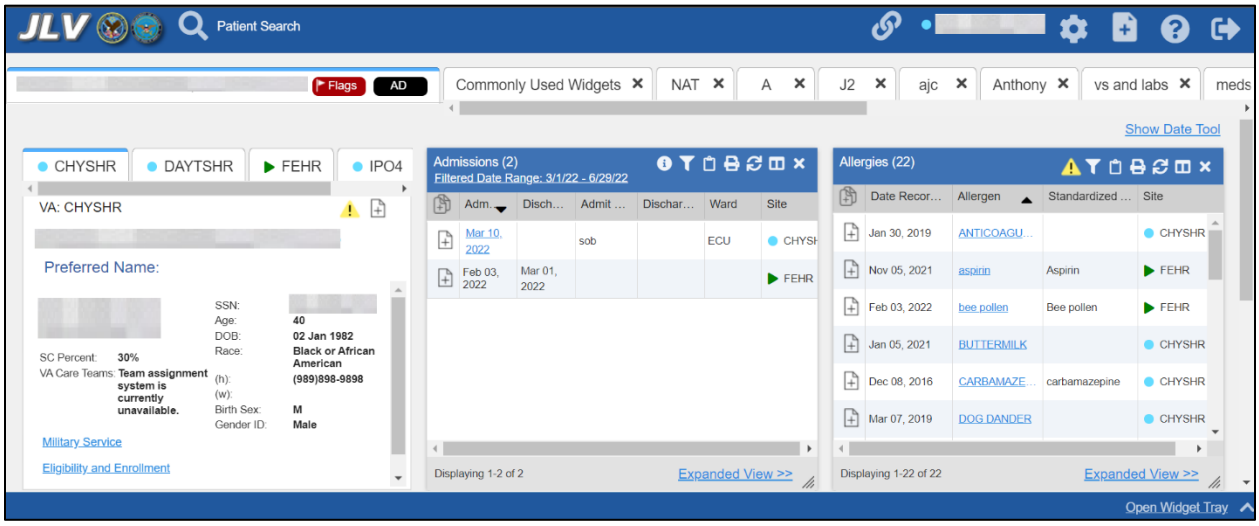
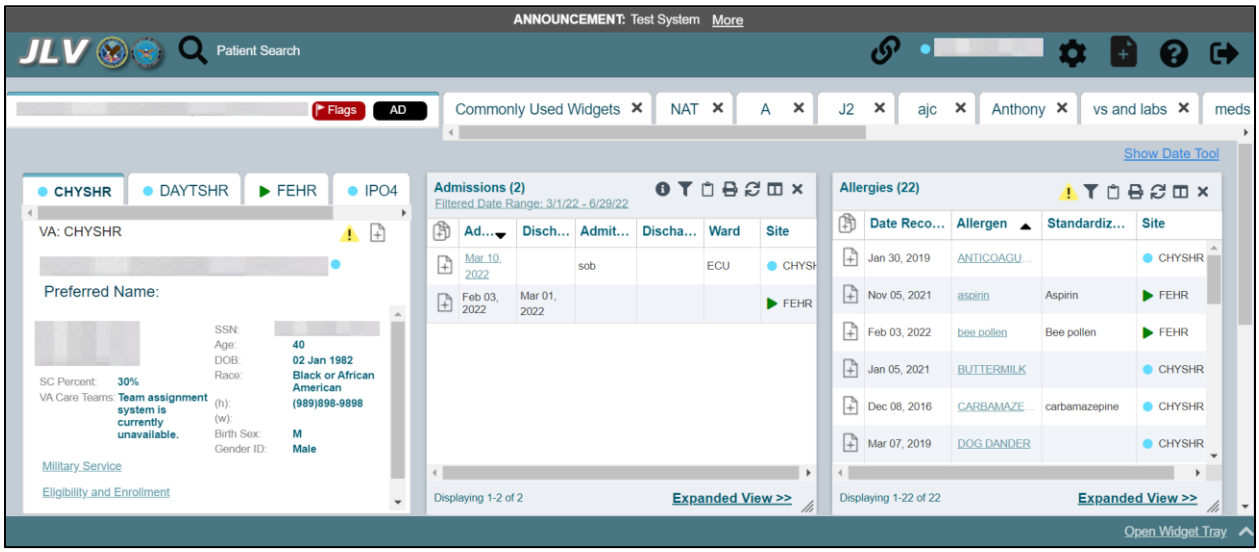



**Figure 21: Green UI Theme**




[12] Primary Care Provider (PCP), Patient-Aligned Care Team (PACT), Social Security Number (SSN), Date of Birth (DOB)

**Figure 22: Dark Gray UI Theme**

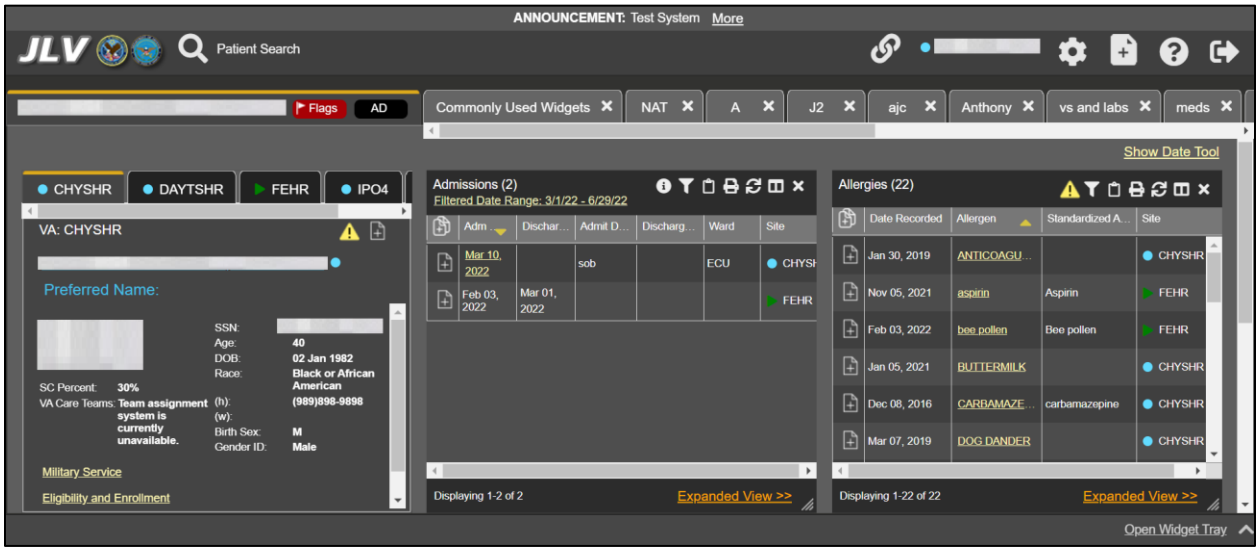



**Figure 23: Gray UI Theme**

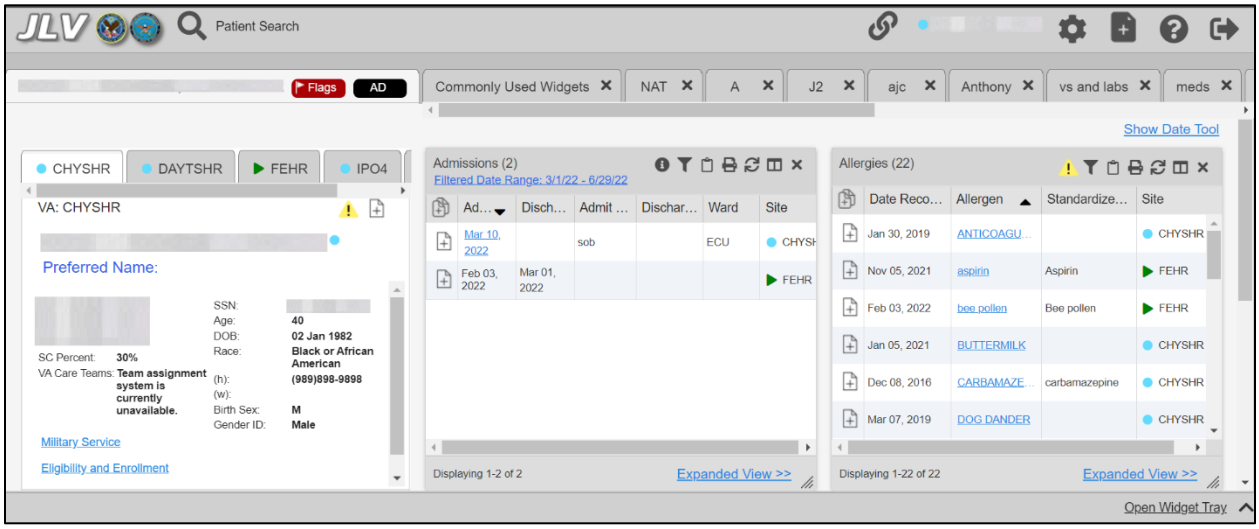
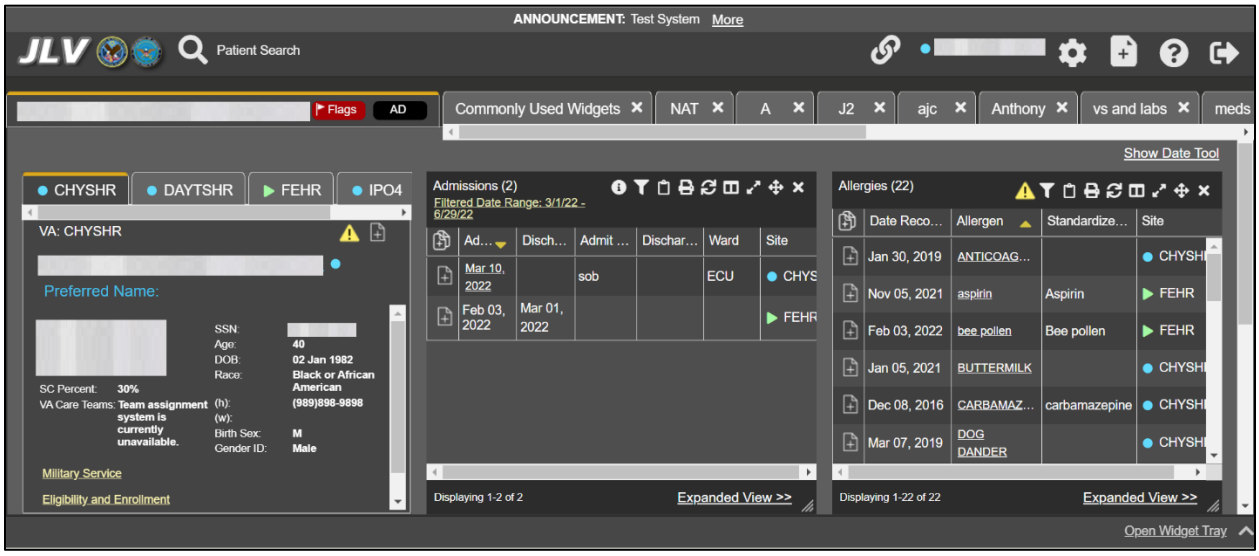


**Figure 24: Accessible (Section 508-Compliant) UI Theme**




### 3.2.3. Using the Accessible Theme's Functionality

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

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

#### 3.2.3.1. Keyboard Focus and Portal Navigation

Keyboard focus is the highlighting of a portal element, field, or control that enables interaction with, and navigation of, JLV using the keyboard and keystrokes. When navigating interactable elements with the Tab key, the item in focus is outlined in gold as a visual indicator.

JLV uses standard accessibility software key commands for navigation and interaction.

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 ⚙ is in focus opens the **JLV Settings** dialog box. Using the arrow keys or the **Tab** key moves between keyboard focus items to navigate through screen elements.

The following tables provide a complete list of accessible keystrokes.

**Table 4: Accessible Theme Keyboard Shortcuts – Portal & Widget Navigation**

| Keystroke | Description |
|---|---|
| **ALT + W** | Press to enter widget body. |
| **ENTER** | Press to initiate the action associated with the item in focus. |
| **TAB** | Press to transfer keyboard focus to other user interface items. |

| Keystroke | Description |
|---|---|
| **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, and close dropdowns. |
| **SPACEBAR** | Press to activate any user interface item (for example, click a button). |
| **Arrow Keys** | When focused on a dropdown list, press the down arrow key to view list contents. |

**Table 5: Accessible Theme Keyboard Shortcuts - Portal Tabs**

| Keystroke | Description |
|---|---|
| **Arrow Keys** | Use the left and right arrow keys to change tab panels. |
| **TAB** | 1) Press **Tab** until **+** is in focus<br>2) Press **Enter**<br>3) The new tab dialog box opens and prompts you to enter a name for the new tab<br>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 to initiate data load of tab. |
| **1** | On custom portal tabs, press 1 to rename the tab. |
| **DELETE** | On custom portal tabs, press DELETE to remove the tab. |

**Table 6: Accessible Theme Keyboard Shortcuts – Windows or Dialog Boxes**

| Keystroke | Description |
|---|---|
| **TAB** | Press to transfer keyboard focus to other user interface items within the window or dialog box. |

**Table 7: Accessible Theme Keyboard Shortcuts – Adding Widgets to the Portal Page**

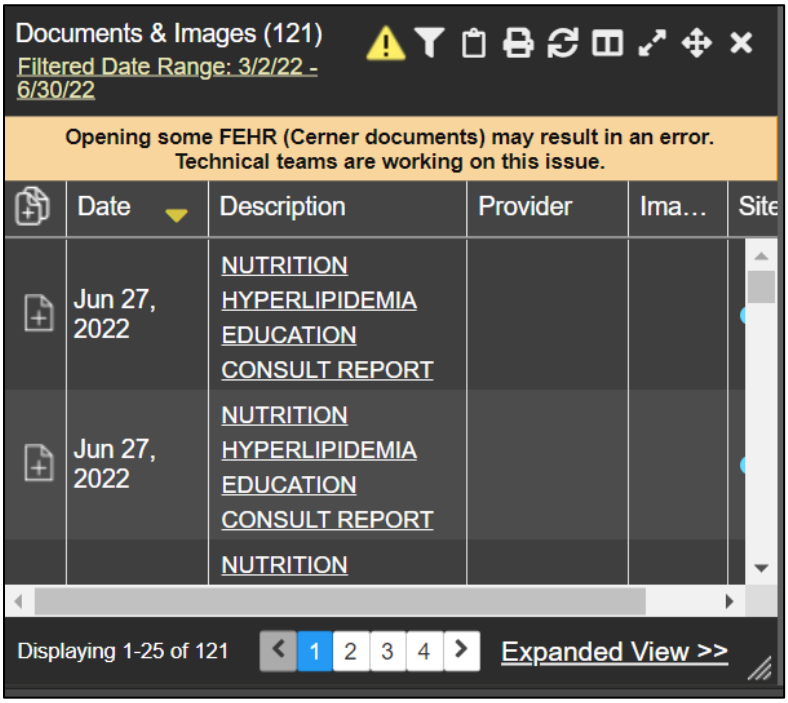
| Keystroke | Description |
|---|---|
| **=** | Press to load a dialogue box with options to place a widget. |

### 3.2.3.2. Accessible Theme Portal Navigation

An element with keyboard focus is the starting point for portal navigation. Pressing the **ALT+W** keys when a widget is in focus, will take you to the first interactable element in the widget.

Figure 25 depicts the **Documents & Images** widget with keyboard focus. Focus can be changed by pressing the **Tab** key. Pressing the **Tab** or Shift Tab key, in this example, shifts the keyboard focus from one interactable element to the next. Press the escape key to return focus to the widget body.

**Figure 25: Navigation Using Elements with Keyboard Focus**




The **Document** details window has keyboard focus in Figure 26. Move through the toolbar buttons by using the arrow keys, or by pressing **Tab**. Move to ✕ 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.

**Figure 26: Document Details with Keyboard Focus**

### 3.2.3.3. Table Functionality

Table Column Headers (Figure 27) can be sorted by selecting the column header and pressing the space bar or enter key to sort the column. Upon a sort,(Figure 28) a user will have to leave the table and reenter for JAWS to receive the updated Table Data.

**Figure 27:Table Column Header**

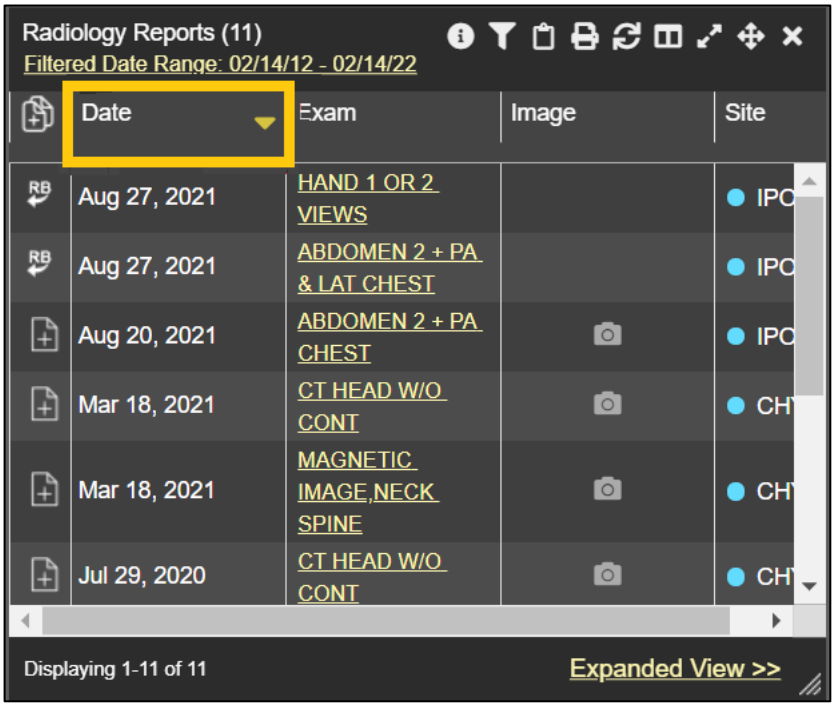
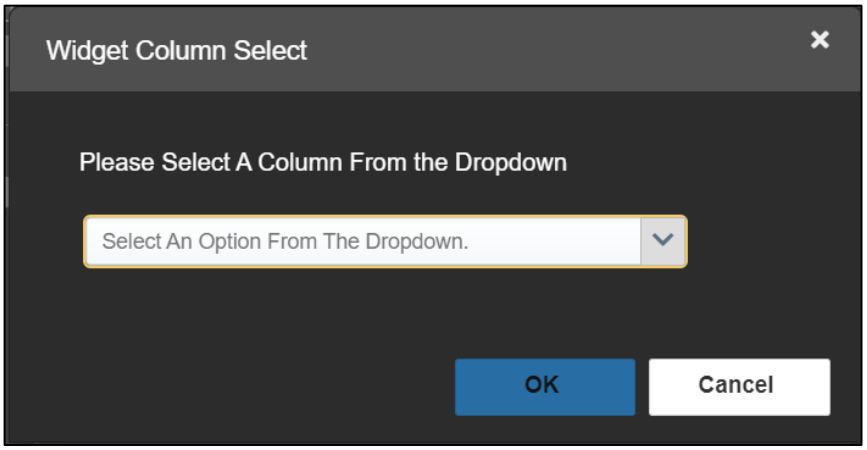


**Figure 28: Widget Column Select Dropdown**




**NOTE:** Not all table columns are sortable. EZ Select All Column Header and Report Builder Selected Items Column Header are not sortable.

### 3.2.3.4. Widget Move

In the widget tools menu, pressing the four-arrow icon or move widget button (Figure 29) will open a dialogue with options to move the widget on the screen or inside the portal (Figure 30). This function is available in both the minimized and expanded view.

**Figure 29: Widget Move Icon**

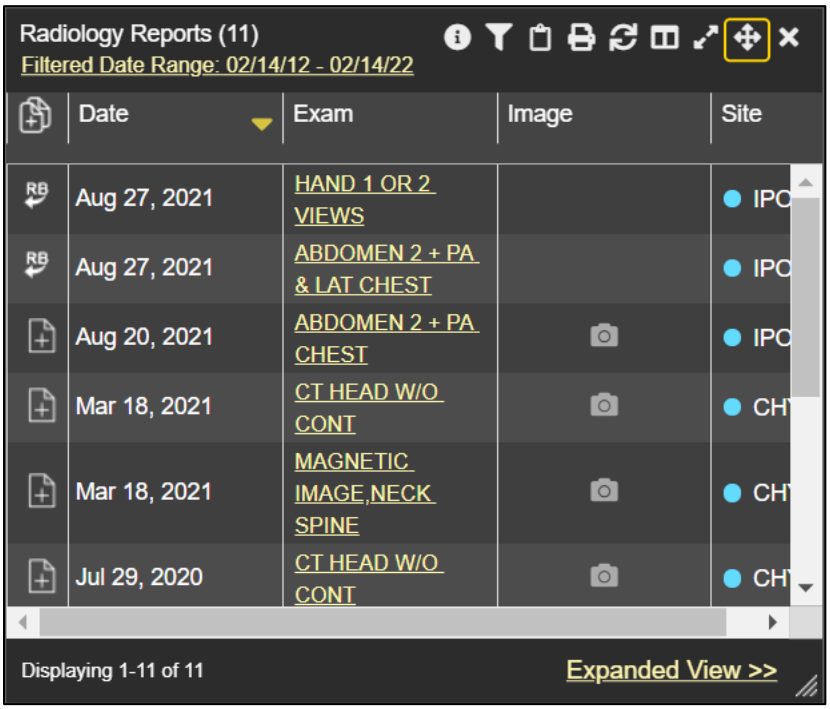
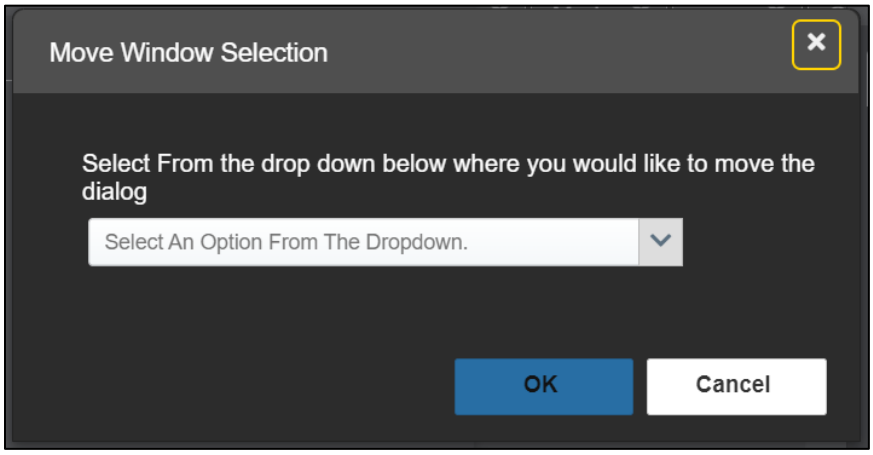


**Figure 30: Widget Move Dropdown**




### 3.2.3.5. Widget Resize

In the widget tools menu, pressing the two-arrow icon or resize widget button (Figure 31) will open a dialogue with options to resize the widget on the screen or inside the portal (Figure 32). This function is available in both the minimized and expanded view.

**Figure 31: Widget Resize Icon**

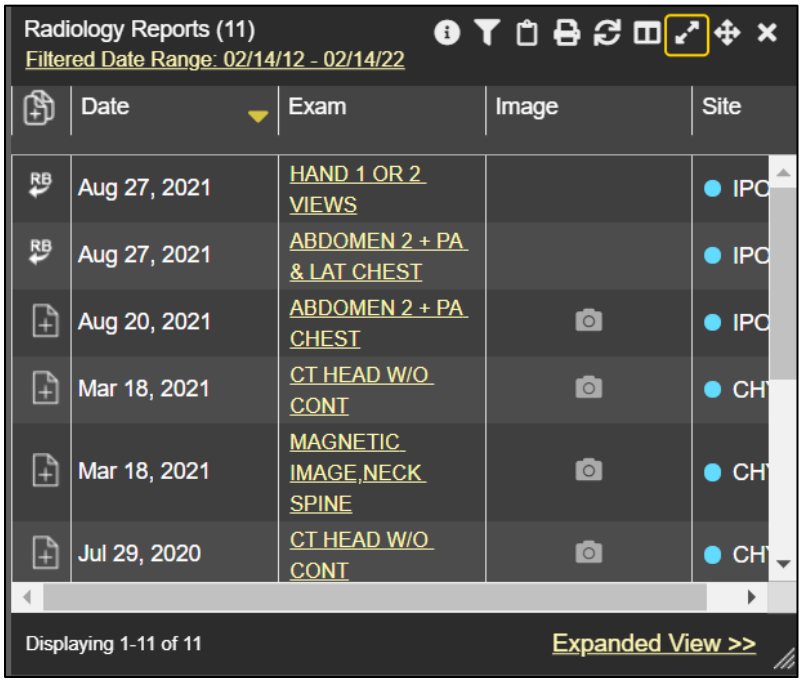
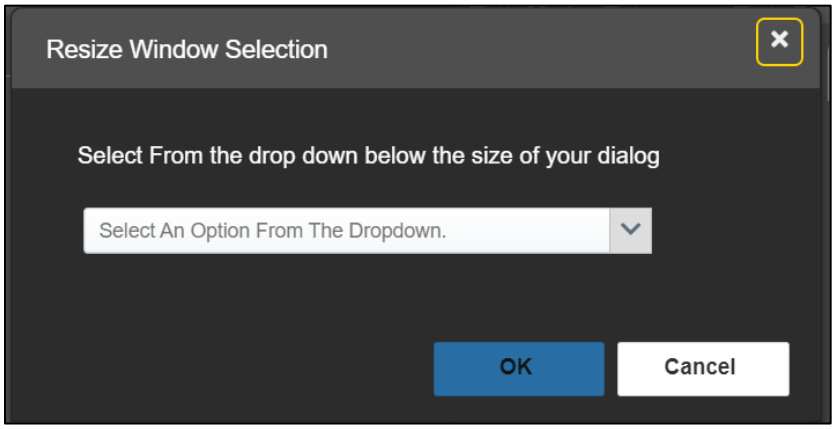


**Figure 32: Widget Resize Dropdown**



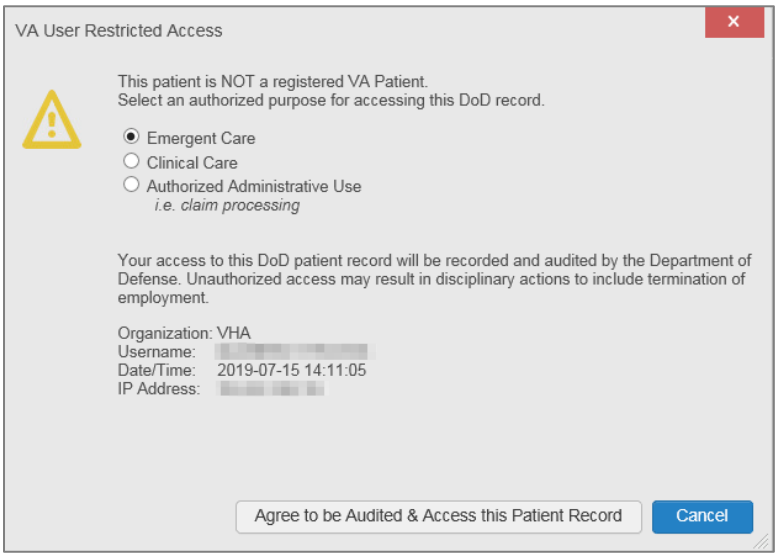

## 3.3. User-Restricted Access to Patient Data

### 3.3.1. VHA Users Viewing DOD-only Patient Data

VHA users can view the records of DOD-only patients, meaning they are not registered in MPI, but 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 33).

Once the purpose for access is selected, clicking **Agree to be Audited & Access this Patient Record** (Figure 33), 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.

**Figure 33: VA User Restricted Access Dialog**



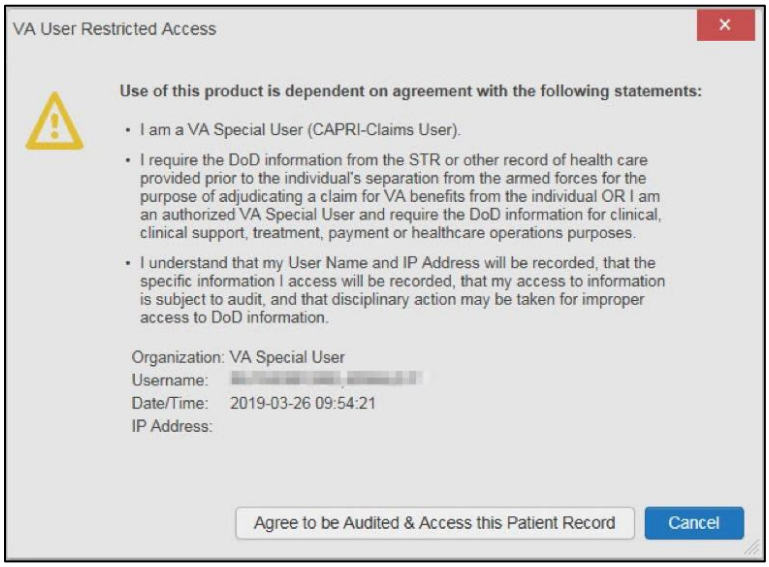
### 3.3.2. CAPRI-Claims Users Viewing Patients with DOD Data

CAPRI-Claims users may see one of two different dialog boxes, depending on whether the patient is registered for care in the VA. If the patient is registered for care in the VA, they are in MPI.

#### 3.3.2.1. Patient Registered in MPI

CAPRI-Claims users are permitted to view the records of a patient who is registered in MPI, but the VA requires that these actions be audited. After performing a patient search and selecting a patient from the search results, a CAPRI-Claims user sees the audit notification (Figure 34) if the patient they selected is registered in MPI. After agreeing to the audit, the CAPRI-Claims user can access the patient's record.

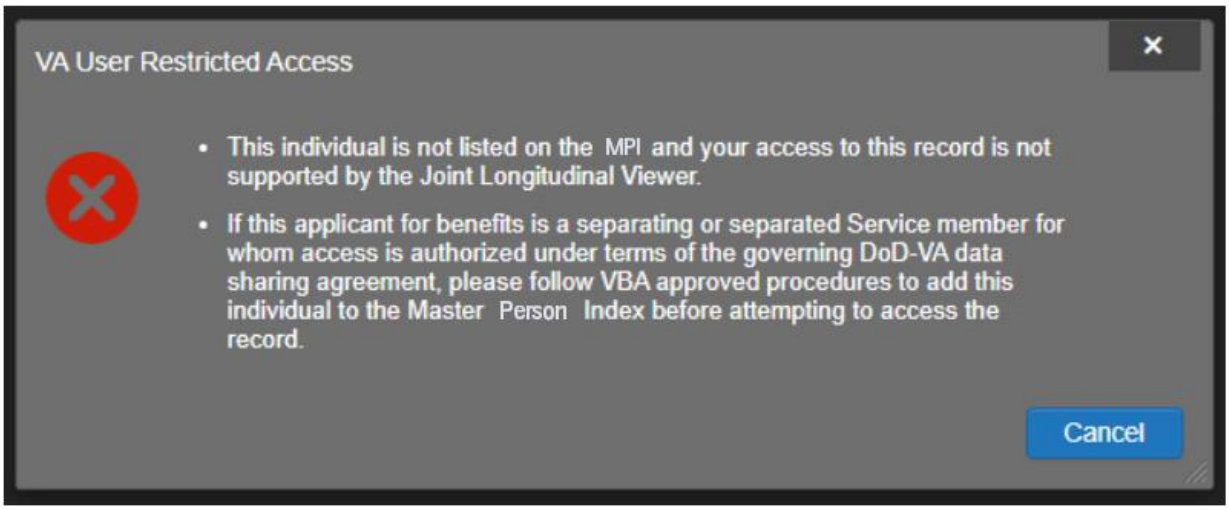
**Figure 34: CAPRI-Claims User Audit Notification**




#### 3.3.2.2. Patient Not Registered in MPI

CAPRI-Claims users are not permitted to access the records of a patient who is not registered in MPI. After performing a patient search and selecting a patient from the search results, a CAPRI-Claims user sees the restricted access notification (Figure 35) if the selected patient is not registered in MPI. Clicking **Cancel** returns the user to the previous screen.

**Figure 35: Restricted Access Notification**



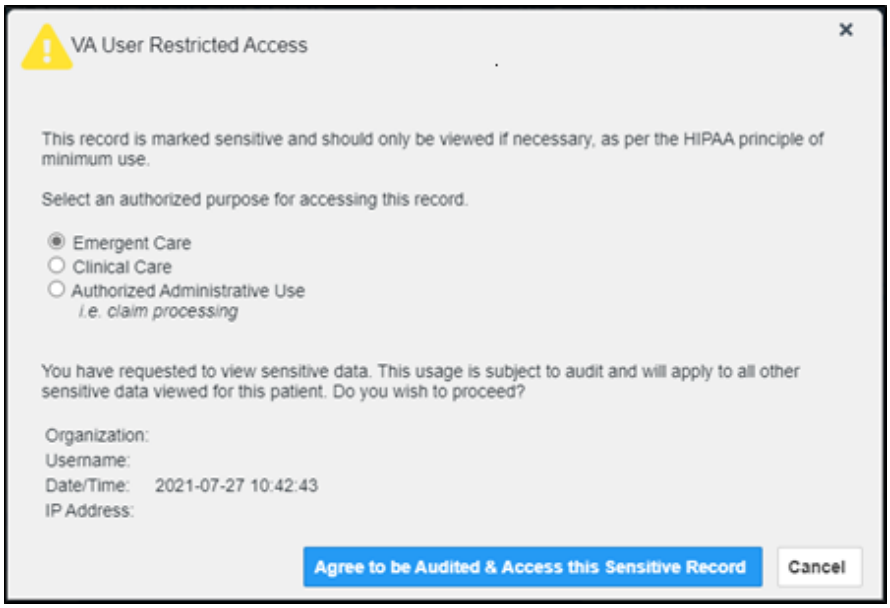

### 3.3.3. Access to DOD Sensitive Records

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

JLV notifies you before you are audited. The message is triggered the first time you click a masked record that is marked **** Sensitive****. Your acknowledgement of the audit notification covers all subsequent DOD sensitive records in any widget during the remainder of the session, and it only expires when you switch patients or log off. An example of a masked record audit notification is depicted in Figure 36.

After you select the purpose for viewing the record and agree to be audited, the sensitive data displays in the **Details** view of the widget.

**Figure 36: DOD Sensitive Record and Audit Dialog Box**




## 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 PDWS for the search (See PDWS Search Rules and Supported Searches for details).
- If the EDIPI or Sponsor SSN fields are empty, JLV utilizes MPI for the search (See MPI 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 the following identifiers: Last Name, First Name, DOB, and Birth Sex.
  - Blanks in any of these four required fields generates 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 Birth Sex (ALL identifiers must be entered)

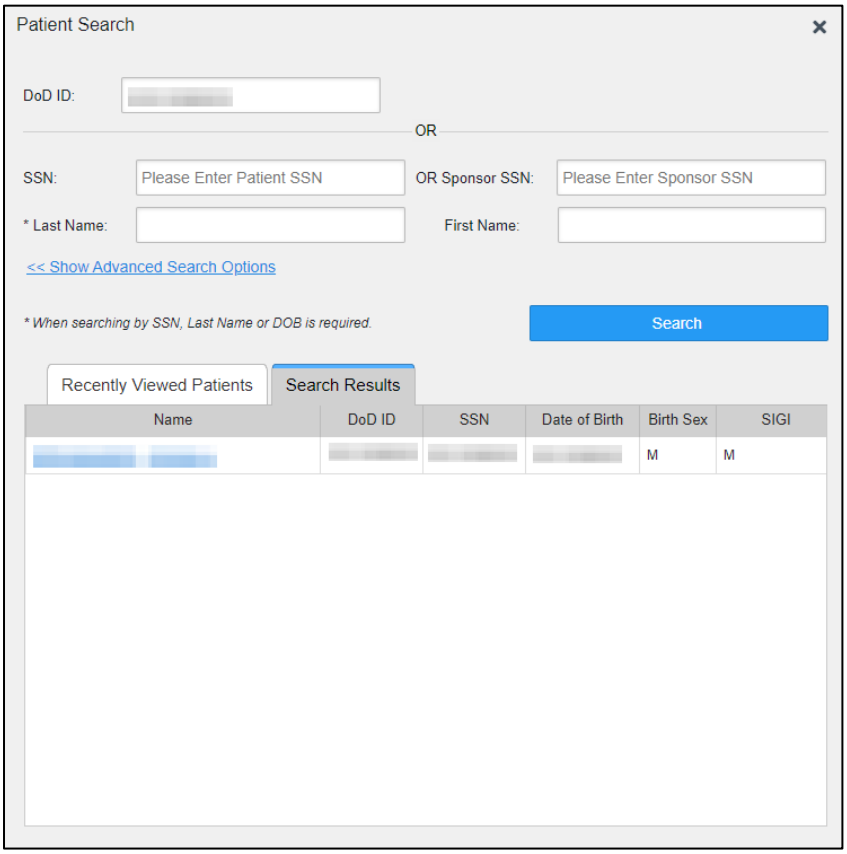
### 3.4.2. MPI Search Guidelines

JLV utilizes MPI for a patient search when the search parameters include the patient's name and SSN. MPI requires the full last name is entered when the patient's SSN is entered. MPI 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

1. Click **Patient Search**.
   a. The **Patient Search** dialog opens.
2. Enter the 10-digit patient DOD ID (EDIPI) in the **DOD ID** field (Figure 37).

**Figure 37: DOD ID (EDIPI) Search**[13]




3. Click **Search**.
   a. The search results display on 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**, **Birth Sex,** and **SIGI** 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.

#### 3.4.3.1. Invalid and Maximum Characters

Text Fields on Patient Search will alert the user if an invalid key is entered into the text box (Figure 38).Text fields will inform the user when they have reached the maximum character length for entry (Figure 39).

[13] Self-Identified Gender Identity (SIGI)

**Figure 38: Invalid Character Entry**

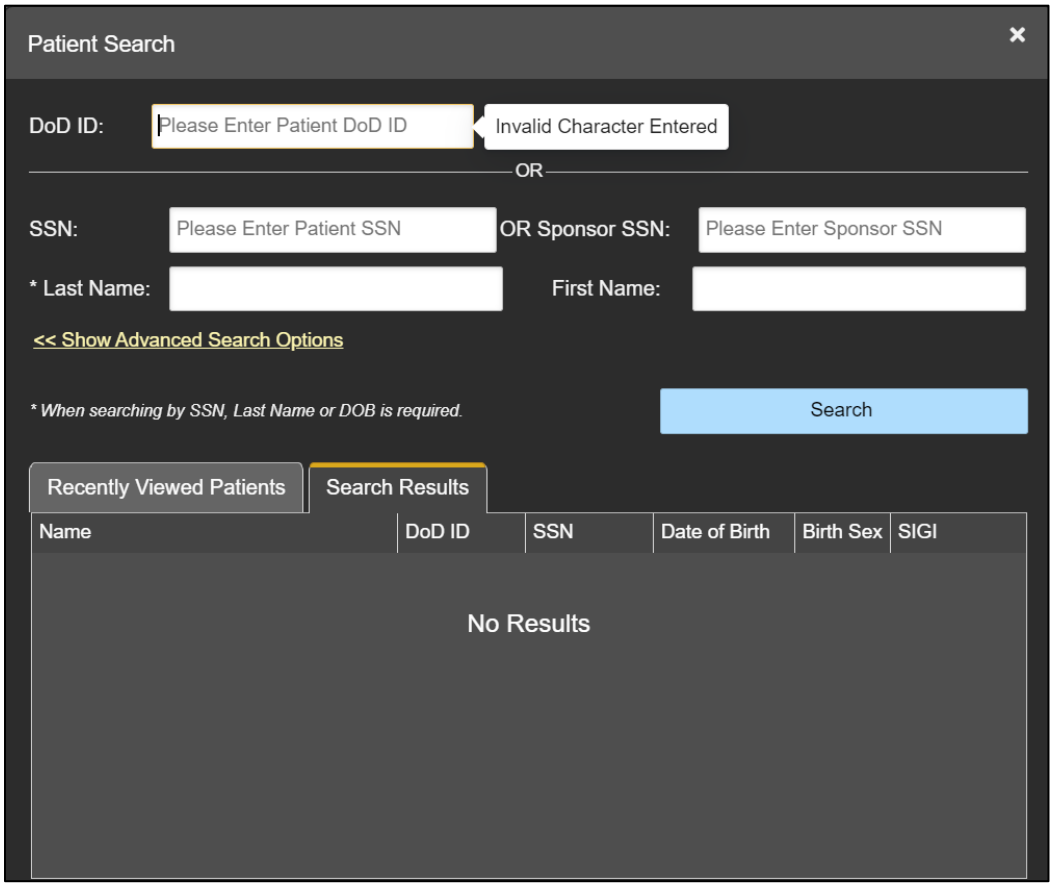
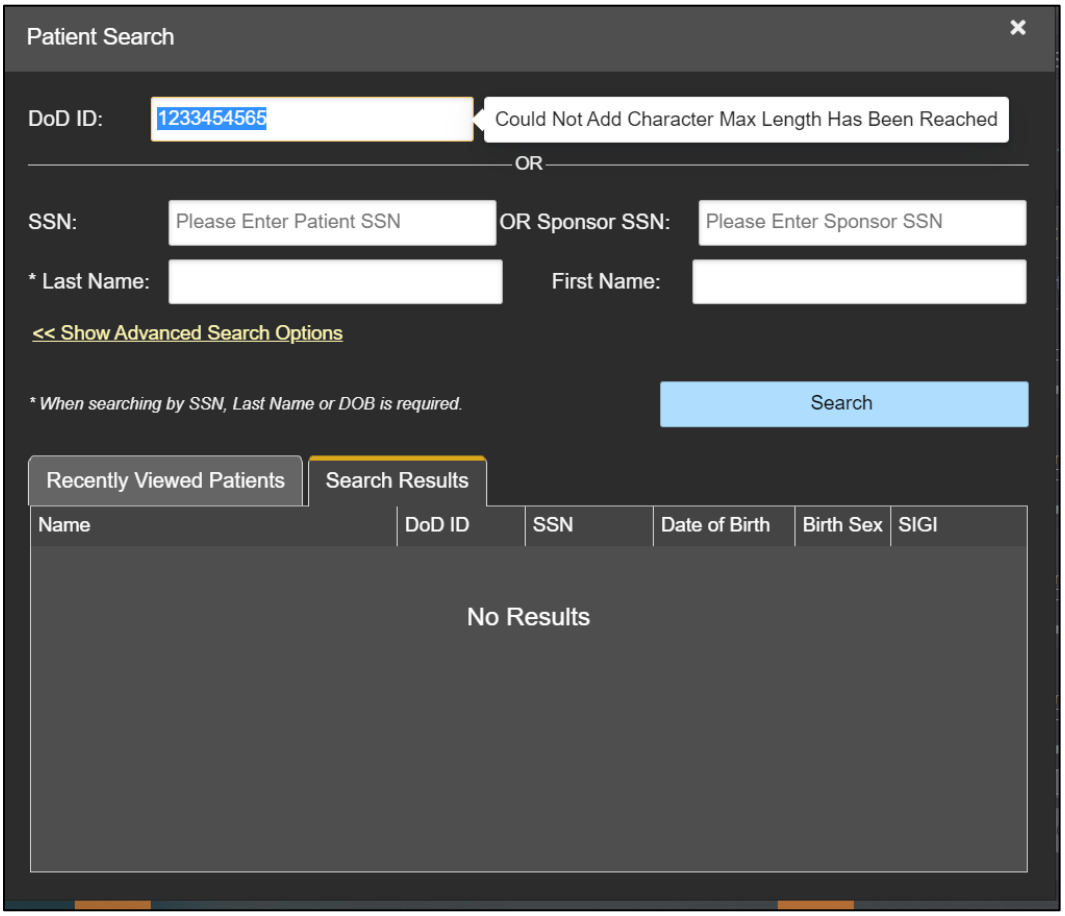


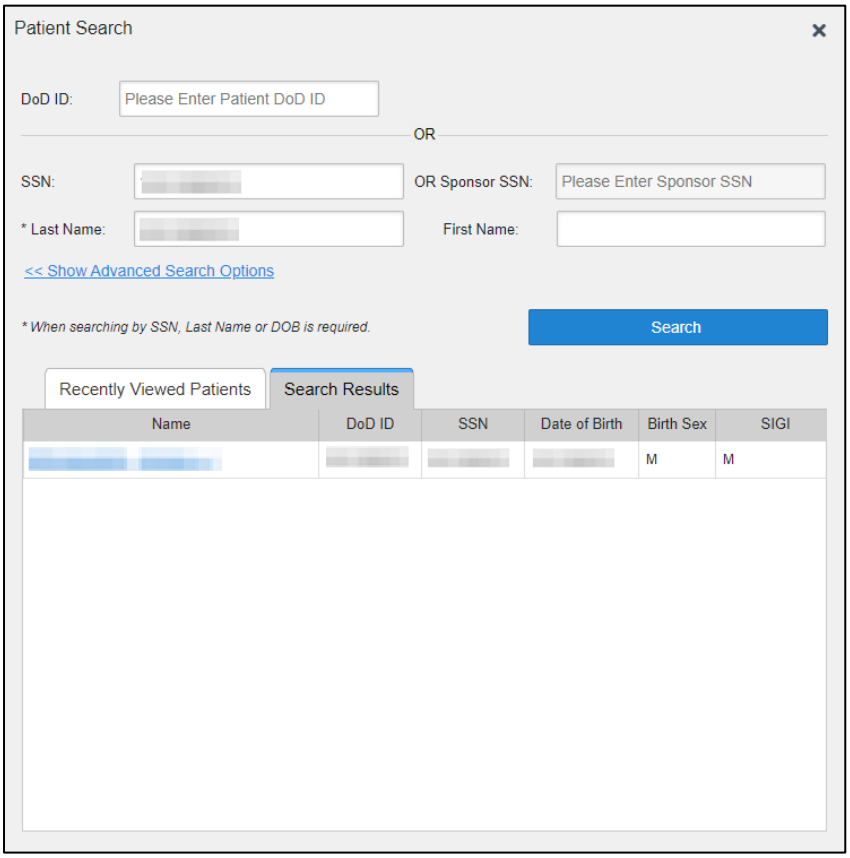
**Figure 39: Maximum Characters Reached**




### 3.4.4. Patient Search Using SSN

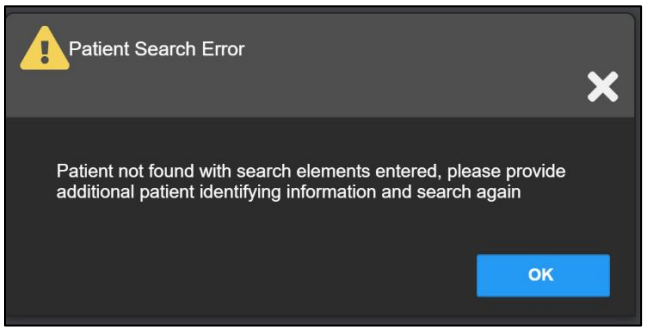
1) Click **Patient Search**.
   a. The **Patient Search** dialog box opens.
6. Enter the patient's full, nine-digit SSN in the **SSN** field (Figure 40).
   a. When searching by SSN, either the last name or the DOB *must* be entered to perform the search.

**Figure 40: SSN Search**




7. 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 41).

**Figure 41: Additional Identifiers Needed**




8. The search results display on the **Search Results** tab.

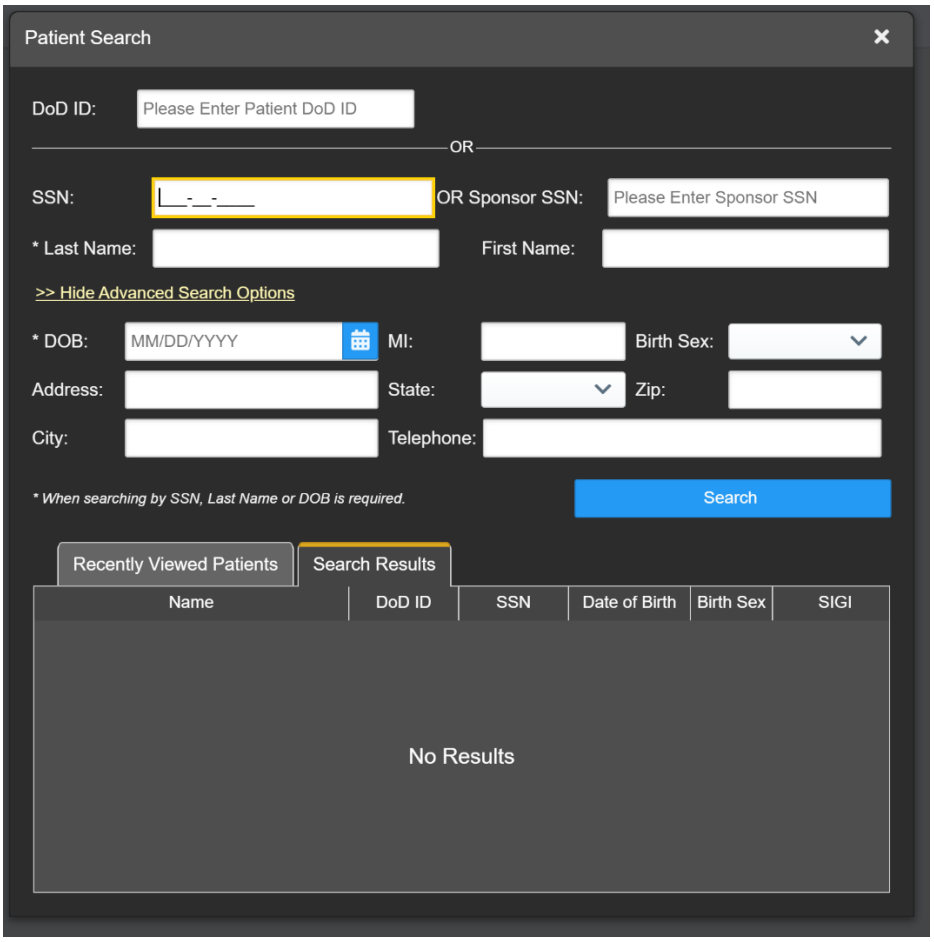
9. Click a patient's name in the search results list to open the associated record.
   a. The **Name**, **SSN**, **DOB**, **Birth Sex,** and **SIGI** columns in the results list provide information to assist with patient identification.
10. After selecting a patient, the Patient portal opens and displays 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.

1. Click **Patient Search**.
   a. The **Patient Search** dialog box opens.
2. Click the **<<Show Advanced Search Options** link under the ***Last Name** field (seen in Figure 40).
3. Enter the patient identifiers in the appropriate search fields, as desired.
   a. Advanced search option fields include ***DOB**, **MI**, **Birth Sex**, **Address**, **State**, **City**, **Zip**, and **Telephone** (seen in Figure 42**).**

**Figure 42: Advanced Search Options**



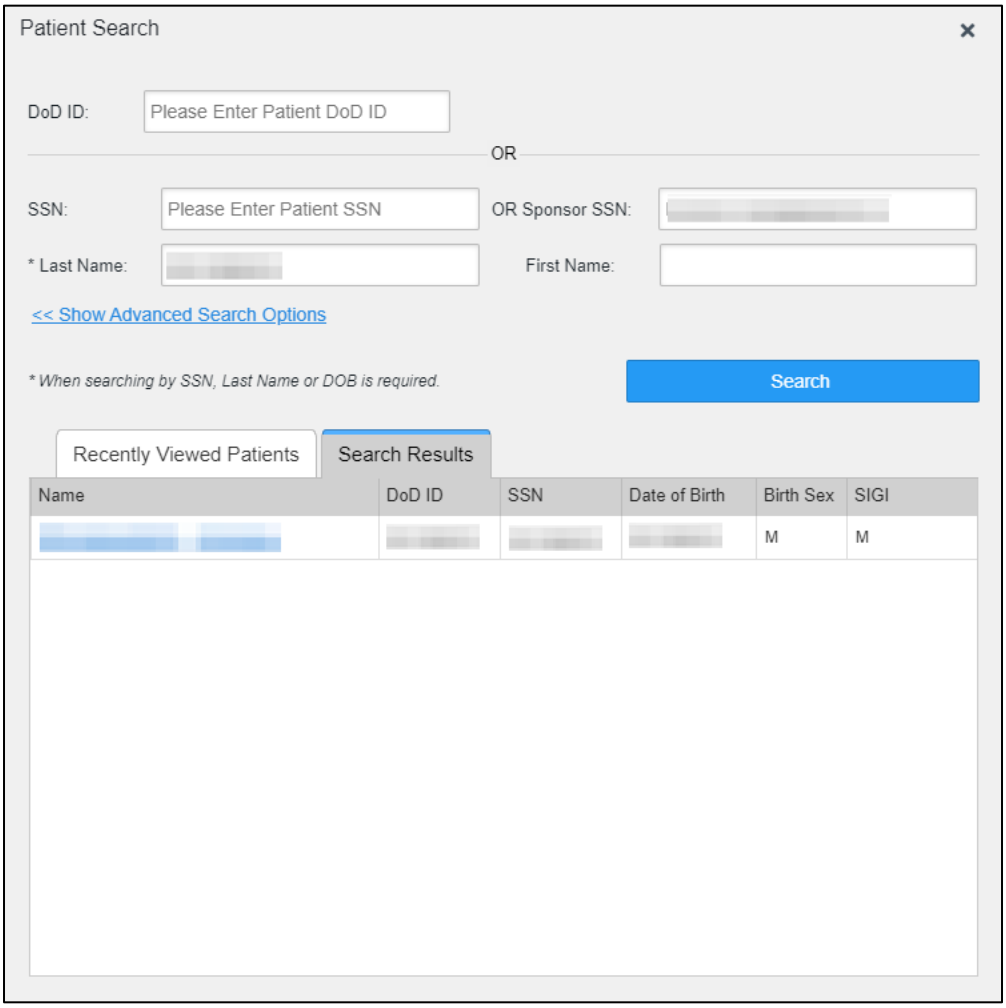
4. Click **Search**
   a. If the required patient identifiers are not provided, hover text appears, indicating the information necessary to complete the patient search.
   b. The search results display on the **Search Results** tab.
5. Click a patient's name in the search results list to open the associated record.
   a. The **Name**, **SSN**, **DOB**, **Birth Sex,** and **SIGI** 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.

### 3.4.6. Family Member Search

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

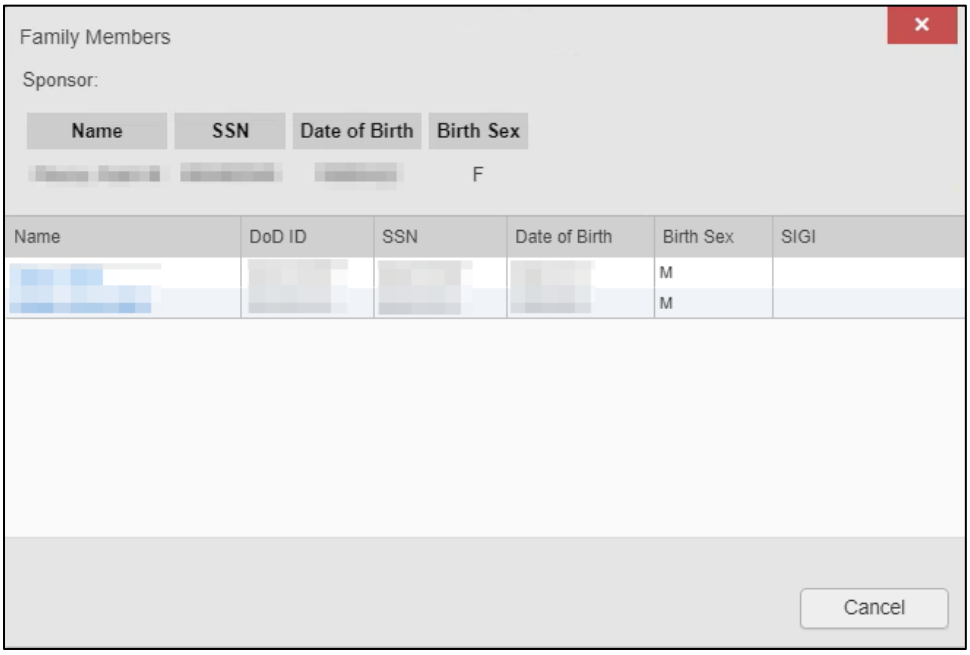
1. Click **Patient Search**.
   a. The **Patient Search** dialog box opens.
2. Enter the SSN in the **Sponsor SSN** field.
   a. The **Last Name** or **DOB** of the patient must also be entered in the appropriate fields (Figure 43).
3. Click **Search**.
   a. If the required patient identifiers are not provided, hover text appears indicating the information necessary to complete the patient search.
   b. The search results display on the **Search Results** tab (Figure 43).

**Figure 43: Sponsor SSN Search**




4. Click a name in the **Search Results** list.
   a. The **Family Members** dialog opens (Figure 44).
   b. The sponsor's identifiers and a list of dependents display in the dialog.
5. Click a name in the list of family members to open the associated record.
6. After selecting a patient, the Patient portal opens and displays the selected patient's data.

**Figure 44: Family Members Dialog Box**



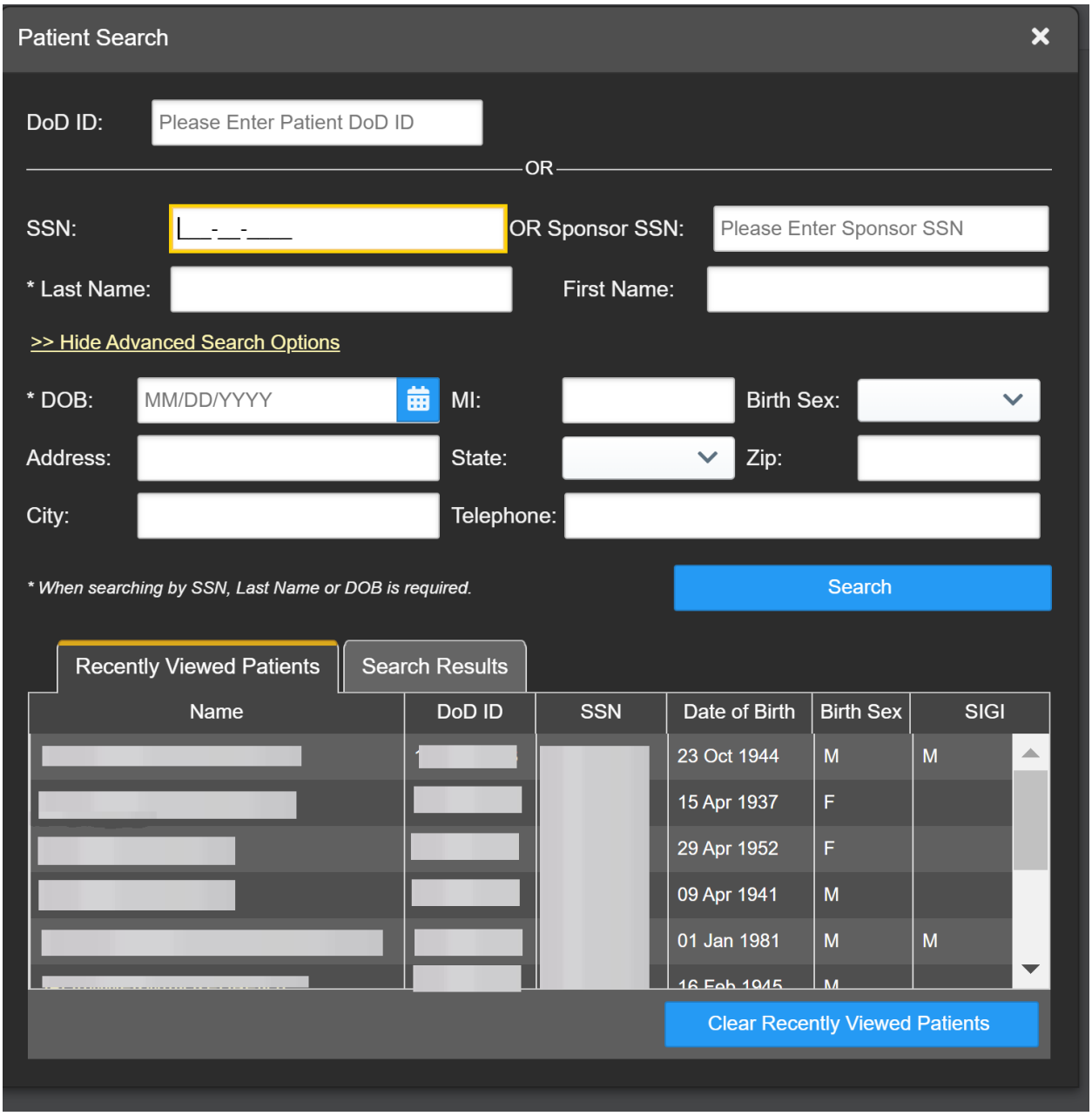

### 3.4.7. Recently Viewed Patients List

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. You can clear this list by selecting the **Clear Recently Viewed Patients** button.

1. Click **Patient Search**.
   a. The **Patient Search** dialog box opens.
2. Click the **Recently Viewed Patients** tab in the **Patient Search** dialog box.
   a. A list of recently viewed patients displays (Figure 45).
   b. The **Name**, **DOD ID**, **SSN**, **DOB**, **Birth Sex,** and **SIGI** columns in the results list provide information to assist with patient identification.
3. Click a patient's name in the **Recently Viewed Patients** list to open the associated record.
4. After selecting a patient, the Patient portal opens and displays the selected patient's data.

**Figure 45: Recently Viewed Patients List**




# 4. Widgets

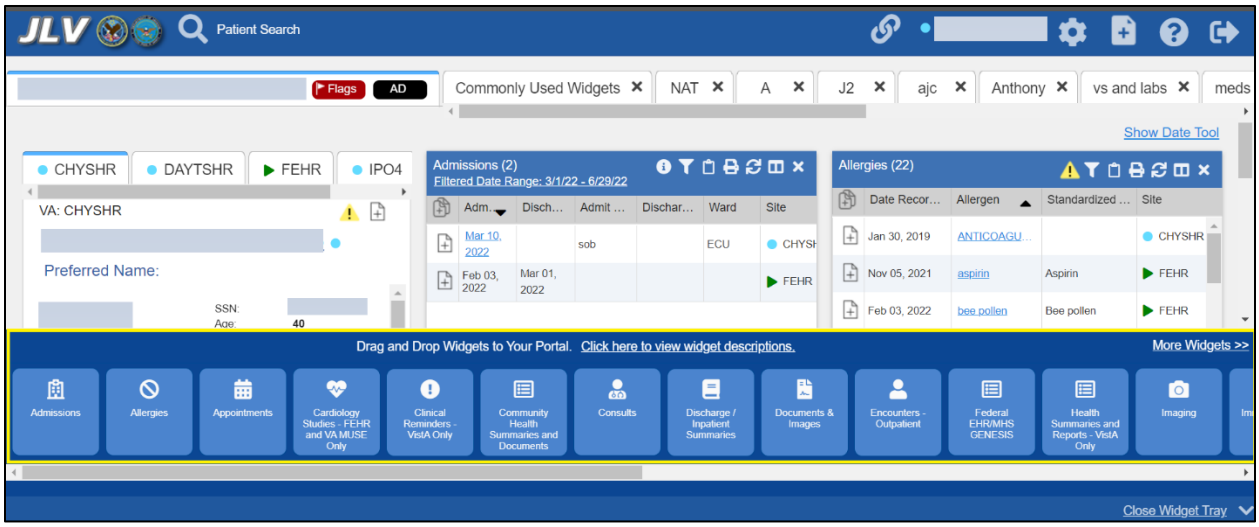
Widgets are elements on the JLV portal page that display data specific to a clinical domain. By default, widgets are displayed in minimized view on the portal page (Figure 20), but they can be expanded to view additional details. Available widgets are listed in and launched from the widget tray.

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

## 4.1. Accessing and Opening Widgets

All available widgets display in the widget tray (Figure 46). Hover over a widget icon to view a description of the widget. Widgets can be opened, rearranged, and closed. JLV can display up to 12 widgets per tab.

**Figure 46: Widget Tray**




1. Open the widget tray by clicking the **Open Widget Tray** link.
2. Use the scroll bar arrows < > at either end of the tray to see all widget choices, or click the **More Widgets >>** link to scroll through the list of widgets.
3. Click and hold a widget icon in the tray, drag it to the portal page, and drop it in the desired location.
   a. The widget is docked on the portal page and opens in minimized view.
4. Close the widget tray by clicking the **Close Widget Tray** link.

> **NOTE:** JLV displays a **Duplicate Widget** notice if you attempt to add another instance of a widget to a tab.

Widgets can be closed (removed from the portal page) by clicking ✕. 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 you to move through, and view, the widget's data. Navigation icons and actions are detailed in Table 8.

**Table 8: Navigation Icons and Actions**

| Navigation Icon | Action | Description |
|---|---|---|
| < | Changes the focus of the widget to the previous group or page of records within the results display. | Go to Previous Page |
| 1 | Changes the focus of the widget to the page number selected. | Jump to Page |
| > | Changes the focus of the widget to the next group or page of records within the results display. | Go to Next Page |
| Expanded View >> | Available in minimized views only. Opens the expanded view of the widget in a secondary window. | Go to Expanded View |
| **1-25 of 55** | Indicates the number of records displayed in that widget page out of the total number of results for that widget. | Record Display Indicator |
| **Show All/ Show Paged** | Click **Show All** to open all records for a given widget in a scrollable window.<br>Click **Show Paged** to return to the display of records grouped by pages. | Display Setting |

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 > or 1 to view 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 on both the minimized and expanded views of each widget and most dialog boxes. Toolbar buttons vary by widget, dialog box, and window. Table 9 describes the functionality of each toolbar button.

**Table 9: Widget Toolbar Icons**

| Icon | Name | Function |
|---|---|---|
| | **Add to Report Builder** | Adds the information displayed in the widget to the Report Builder, including any **Details** or **Notes**. |
| ✕ | **Close** | Removes the widget from the portal screen or closes a dialog box. |
| | **Column Settings** | Configures the columns within the widget. Turn the columns on or off by checking the column names that appear in the pop-up box and clicking **Apply**.<br>**NOTE: Column widths and window sizes are auto saved to user profiles for both the minimized and expanded views.** |

| Icon | Name | Function |
|---|---|---|
| | **Configure Filter** | Filters 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.<br>**NOTE:** After setting a filter, the **Close Filter** option is enabled in the widget. Clicking **Close Filter** restores the full display of records within the widget. |
| | **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. The clipboard is cleared after closing a patient record, selecting a new patient record, and logging off JLV. |
| | **Connection Status** | Both icons provide a status indicator for DOD and VA data sources. indicates all sources are available. indicates one or more data sources are unavailable. Clicking either status icon opens the connection status details in a separate window. |
| | **Print** | Prints the contents of the open window. **Print** is disabled in the widget toolbar after clicking **Show All** within a widget.<br>**NOTE:** It is recommended that you have the latest Adobe Reader installed for the Report Builder and other printing features. |
| | **Graph** | Opens a dialog to configure the display of multiple data of the same type in a graph. |
| | **Refresh** | Refreshes the widget or window display. Only the data within that widget's dataset is updated. |
| | **Copy Active Rx to Clipboard** | Converts the medication data within the widget to text and copies the text to the user's clipboard. This option is available from the **Medications - Outpatient** widget. **NOTE:** Copy Active Rx is disabled when a date range filter is set to less than 120 days. |
| | **Widget Move** | Opens a dialogue box with options to move the widget on the screen or inside the portal. **NOTE:** This is only available in the accessible theme. |
| | **Widget Resize** | Opens a dialogue box with options to resize the widget on the screen or inside the portal. **NOTE:** This is only available in the accessible theme. |

## 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.

**NOTE:** The Cardiology Studies - FEHR and VA MUSE Only, **Community Health Summaries and Documents**, and **Federal EHR/MHS GENESIS** widgets do not have an expanded view. Instead, a record opened from the minimized view of the widget is displayed in a new, separate window.

Click the **Expanded View >>**link in minimized view to launch expanded view and see the additional display and functionality options.

## 4.5. Sort and Filter Options

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

The Filter Indicator (+Filter(s)) in the widget header shows that column or text filters have been applied.

In general, you can:

- Click a column title to sort records according to data in that column.
  - If you sort a column that appears in both minimized and expanded views of the widget, the sort saves in your user profile and persists. Data views persist from minimized to expanded views and expanded to minimized views.
  - 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 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 **Close**.

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. Table 10 lists available filters and their corresponding widgets.

**Table 10: Available Widget Filters**

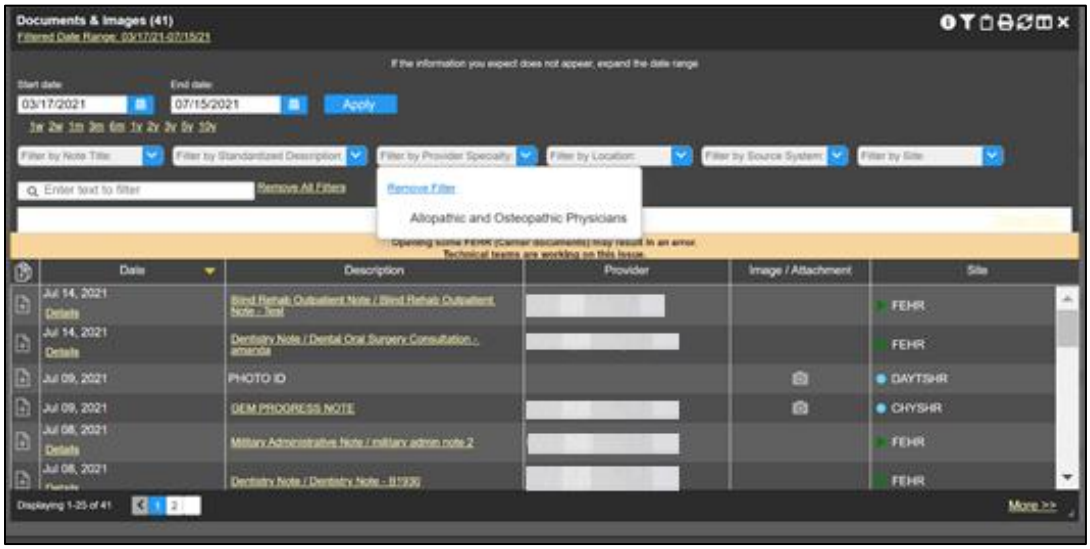
| Filter By | Widgets |
|---|---|
| **Site** | Admissions, Allergies, Appointments, Consults, Documents & Images, Health Summaries and Reports, Medications - Inpatient, Discharge/Inpatient Summaries, Lab Results, Orders, Encounters - Outpatient, Medications - Outpatient, Problem List, Procedures, Progress Notes, Questionnaires, Deployment, Exposure Records, Assessments, Radiology Reports, Surgery/Procedure Reports, Vitals |
| **Site (Reporting)** | Immunizations |
| **Provider** | Discharge/Inpatient Summaries, Progress Notes, Surgery/Procedure Reports |
| **Provider Specialty** | Appointments, Consults, Documents & Images, Discharge/Inpatient Summaries, Orders, Encounters - Outpatient, Procedures, Progress Notes |
| **Clinic** | Appointments, Encounters - Outpatient |
| **Consult Order** | Consults |
| **Description** | Documents & Images |

| Filter By | Widgets |
|---|---|
| **Problem Description** | Problem List |
| **Standardized Description** | Documents & Images, Problem List |
| **Location** | Documents & Images [14], Discharge/Inpatient Summaries |
| **Source System** | Documents & Images |
| **Vaccine Administered Product Type** | Immunizations |
| **Standardized Vaccine Product Type** | Immunizations |
| **Drug Name** | Medications - Inpatient, Medications - Outpatient |
| **Standardized Drug Name** | Medications -Inpatient, Medications -Outpatient |
| **Ordering Health Care Provider (HCP) Specialty** | Medications - Inpatient, Medications - Outpatient |
| **Note Type** | Discharge/Inpatient Summaries |
| **Lab Test** | Lab Results |
| **Type** | Lab Results; Orders; Problem List[15]; Procedures; Social, Family, and other Past Histories; Vitals |
| **Standardized Type** | Orders, Vitals |
| **Status** | Problem List |
| **Document Type/Title** | Progress Notes |
| **Standardized Document Type** | Progress Notes |
| **Exam** | Radiology Reports |
| **Standardized Radiology Exam** | Radiology Reports |
| **Standardized Finding** | Social, Family, and other Past Histories |
| **Note Title** | Surgery/Procedure Reports |
| **Procedure** | Surgery/Procedure Reports |

Filter dropdowns dynamically expand and sometimes have a horizontal scroll bar to display long lines of data by which records can be filtered (Figure 47).

[14] Only available in expanded view
[15] Filter applies to DOD data only

**Figure 47: Dynamically Expanded Filter Dropdown in the Documents & Images Widget**

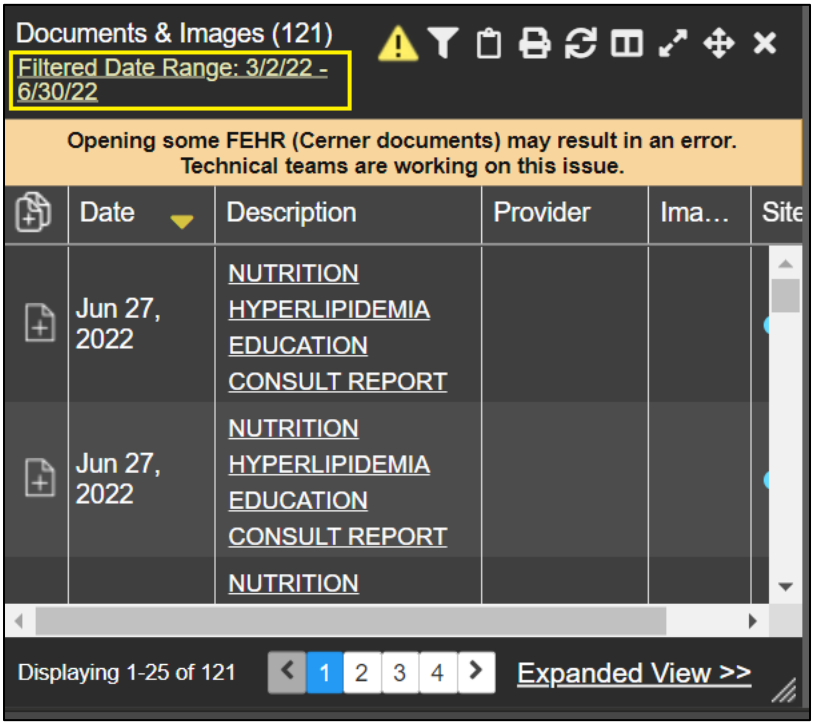



Some widgets also have the capability to configure data to display multiple records of the same type in a graph or table view.

### 4.5.1. Widget 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. Click or the **Filtered Date Range** link on the widget toolbar to change the date range of the data displayed (Figure 48).

**Figure 48: Date Range Filters Applied**



The two ways to filter the date range of data displayed in a widget are 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.

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

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

#### 4.5.1.1. Quick Date Range Filter

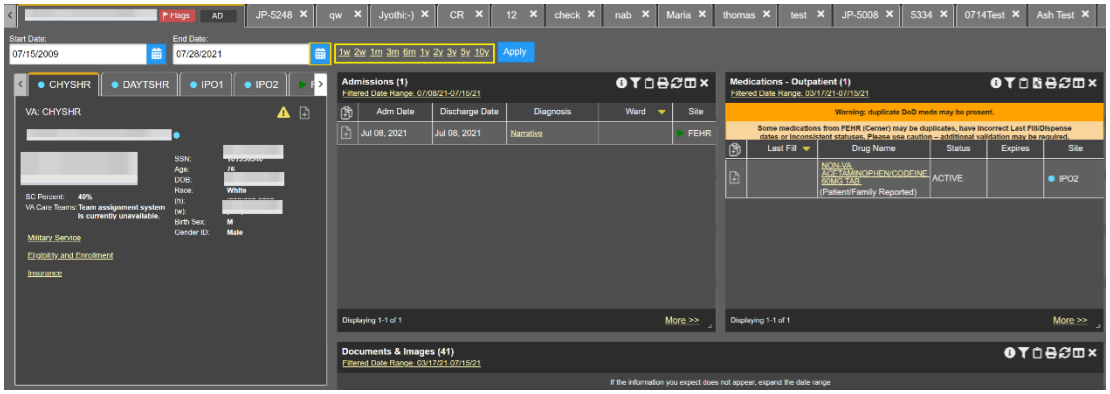
Use the preset, **Quick Date Range** filter to set or limit the display of patient records within a widget. This option is available by clicking the **Filtered Date Range** link or by clicking in a widget on the Patient portal.

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).

**NOTE:** The **Quick Date Range** filter is contextual. If today is February 2, 2021, the preset filter counts backwards using that date. If today is April 16, 2021, the preset filter counts backwards using that date.

Figure 49 highlights the **Quick Date Range** filter options in the expanded view of the **Documents & Images** widget.

**Figure 49: Quick Date Range Filter Options**



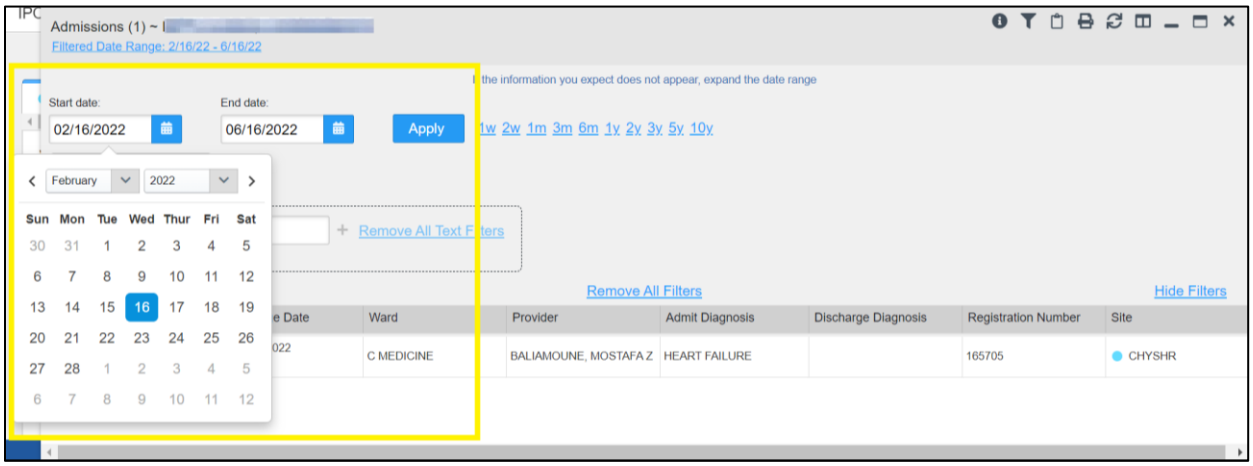
### 4.5.1.2. Start and End Date Filter

Use the **Start Date and End Date** filter to display data for a specific time range. Click the **Filtered Date Range** link or .

> **NOTE:** 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 displays, no matter what today's date is.

Figure 50 provides an example of the start and end date filter fields in the expanded view of the **Admissions** widget.

**Figure 50: Start and End Date Display Filter**




1. Click next to **Start Date**.
2. Select a month, day, and year start date for the display filter.
3. Click 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. (Optional) Click **Cancel** to stop the query.

> **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.

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.

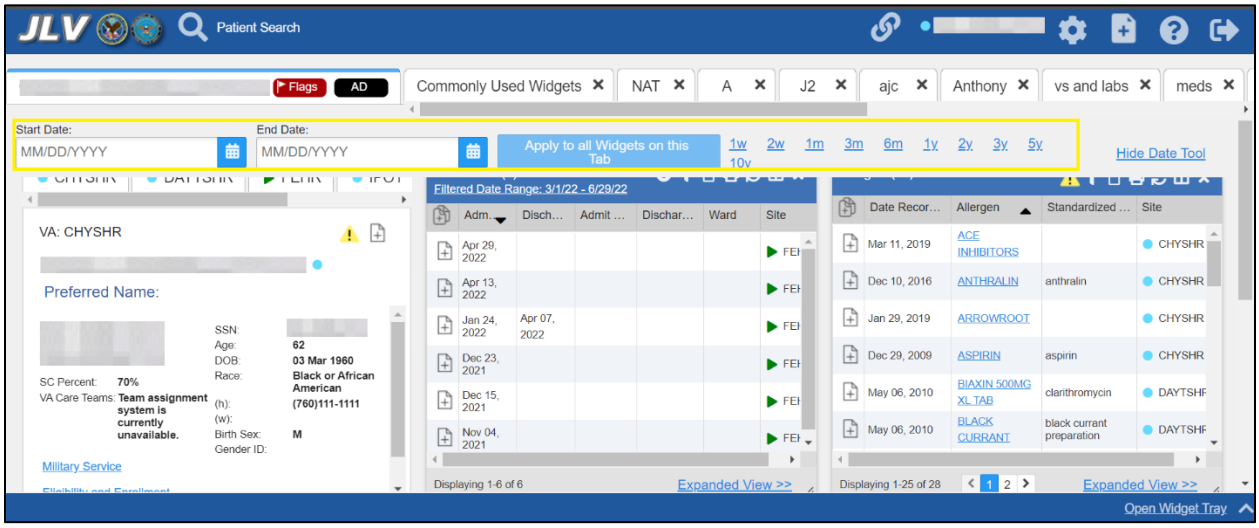
#### 4.5.1.3. Tab Date Range Tool

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.
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 51) 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 51: Tab Date Tool**

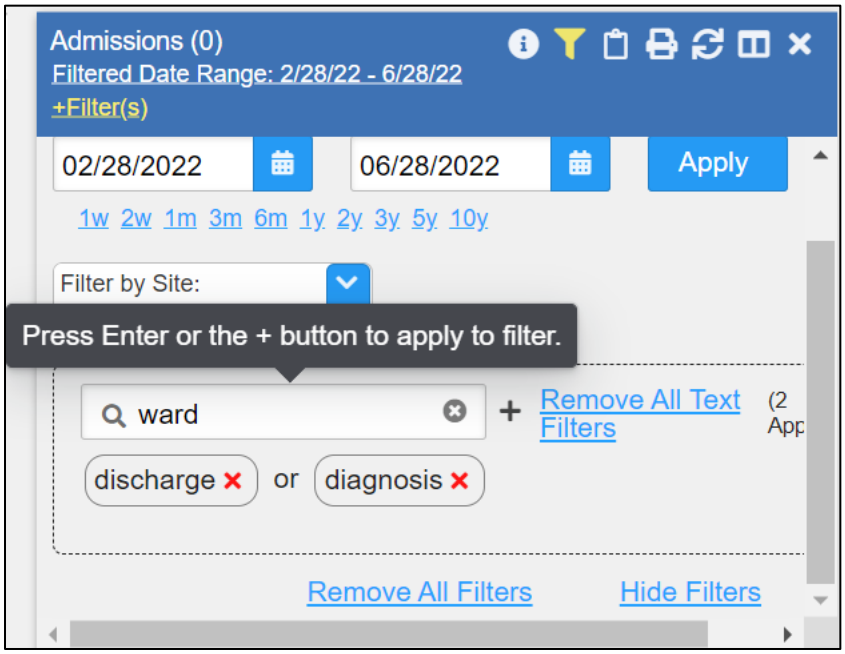



The **Tab Date** tool only filters widgets currently displayed on the active tab that support date range filtering. Widgets that display all data, without a date range, will continue to do so. Filtering only applies to widgets on the tab at the time you apply the **Tab Date** tool and will not affect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

### 4.5.2. Text Filter

Widgets provide a text filter option (Figure 52), allowing you to quickly locate relevant patient data using keywords or characters by applying multiple text filters. 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 52: Admissions Widget Text Filter**




Click 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 also opens the filter options.

- A text filter box is displayed in the widget filter section. When text is entered, a pop-up box displays with "Press Enter or the + button to apply to filter."
- The applied search term is displayed below the text filter box with a red "X" next to it which allows a user to remove it and updates the search results accordingly.
- The funnel shaped icon and the **+Filters** displays with a yellow highlighted color to indicate that a filter has been applied in the widget.
- If another search term is typed in the Text Filter Box and the user clicks "enter" or "+", a second text filter is applied against the ORIGINAL DATA SET. Filtered results from a second text filter search are displayed in addition to the results from the first text filter search.
- If a third text filter is applied against the ORIGINAL DATA SET, filtered results from the first and second text filter searches are displayed in addition to the results from the third text filter search.
- The text filter box is disabled after a total of 10 text filters search terms are applied. Each search term can be up to 20 characters. A highlighted message appears indicating that the maximum text filters have been applied. The Text Filter Box remains disabled until one (or all) search terms are removed. A message displays with instructions that the maximum number of search terms have been applied, and to remove one or all terms to apply a different search term.
- The word "or" will appear between the search bubbles when multiple text filters are used.
- Text filtering applies only within the widget being searched.

- Text is filtered 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. Some widgets have columns that are not shown by default in either the minimized or expanded view.
- Text filters entered in the minimized view of a widget persist when you open the widget in expanded view, except for the Vitals and Lab Results widgets.
- 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.
- JLV 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.

## 4.6. Viewing Connection Status

JLV widgets display the status of their connection to VA and DOD data sources. Connection status information is available for each widget.

> **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 Viewing System Status for more information.

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

- All sources are connected (available).
- One or more sources are not connected (unavailable).

Figure 53 shows in the **Demographics** widget. When the Primary Care Management Module (PCMM) service is unavailable, the primary care fields in the **Demographics** widget display this error message: *"Team assignment system is currently unavailable."*

**Figure 53: Demographics Widget, PCMM Connection Status Unavailable**

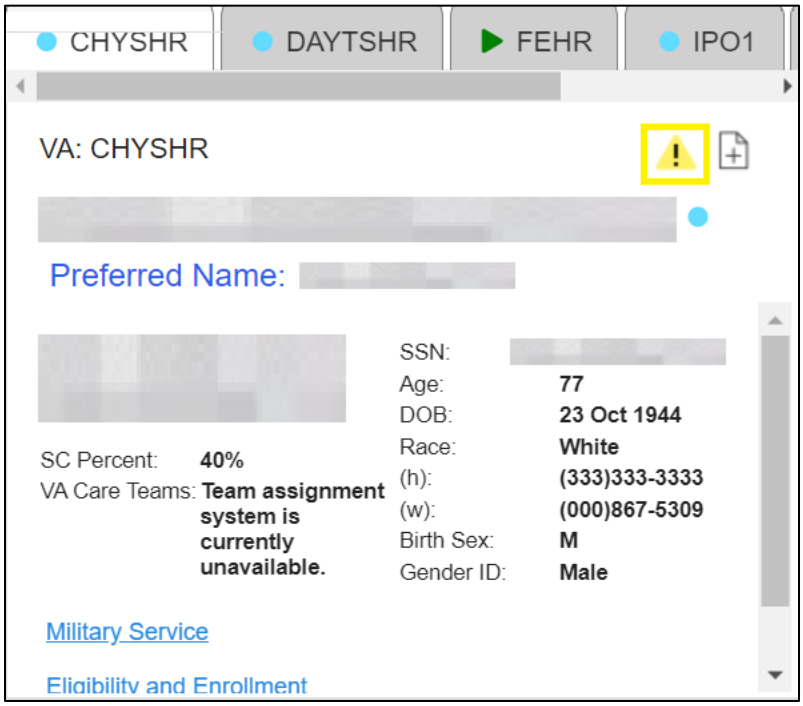
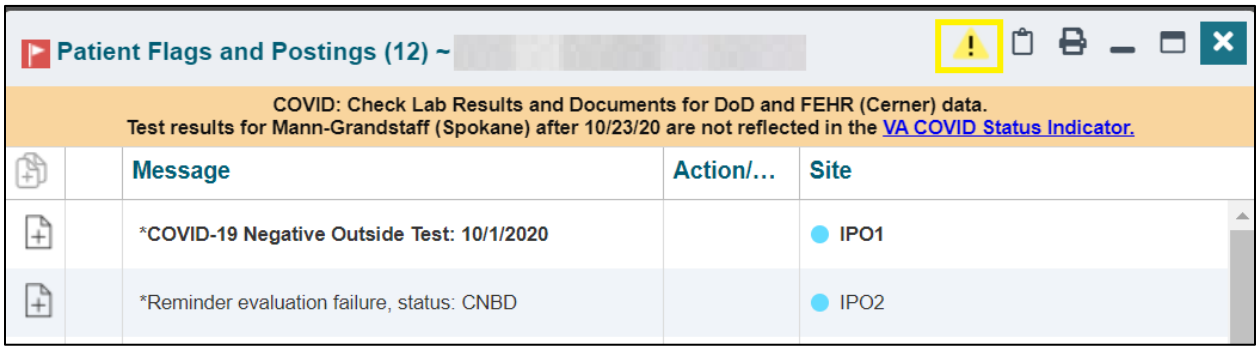


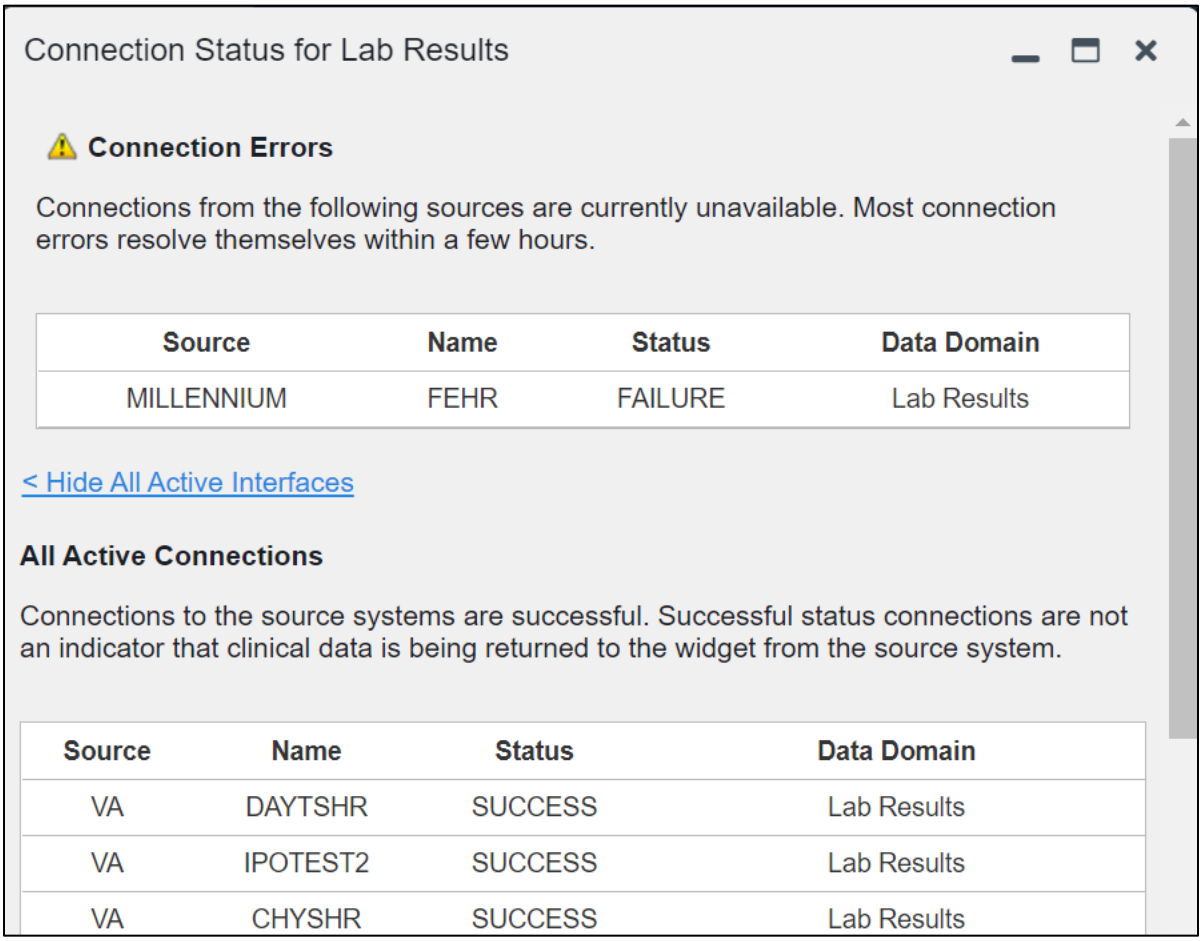

Figure 54 shows a connection status indicator icon displayed on the **Patient Flags and Postings** widget toolbar.

**Figure 54: Connection Status Indicator**



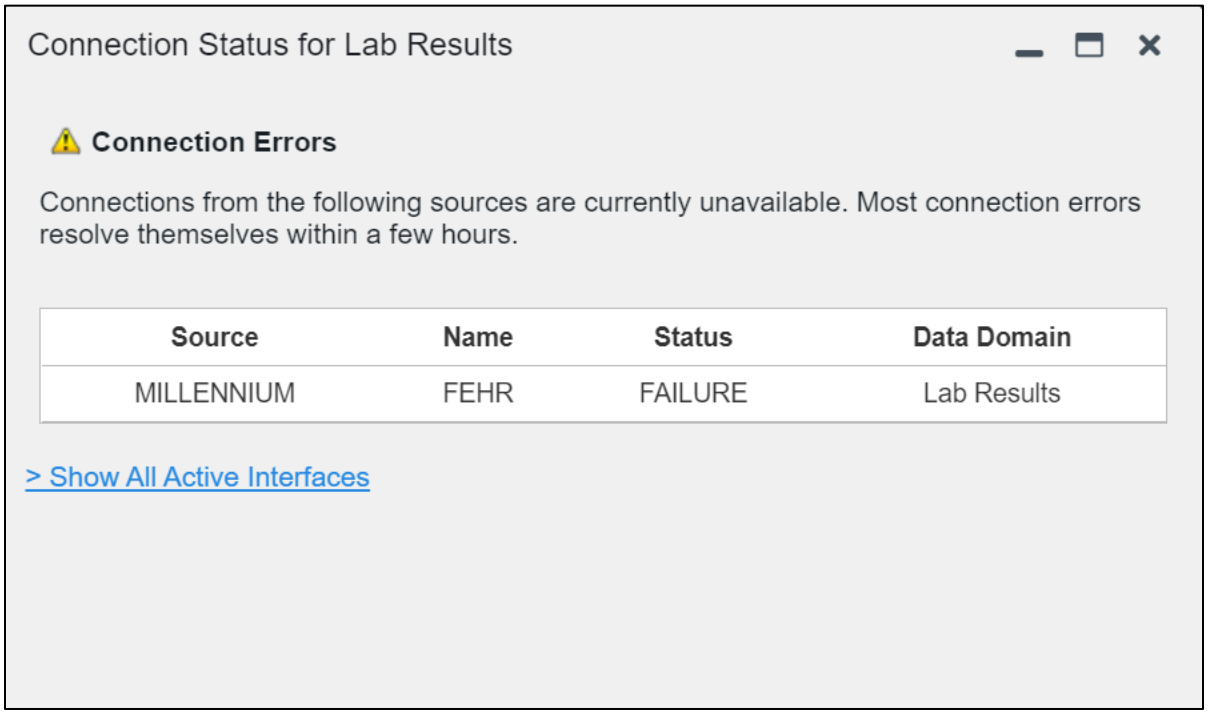

Clicking a **Connection Status** indicator icon (Figure 54) opens a standalone window with information about the connection to data sources. Clicking the **< Hide All Active Interfaces** link (Figure 55) in the **Connection Status** window hides the detailed **All Active Connections** view and displays only the connection errors.

**Figure 55: Connection Status Details**




Clicking the **> Show All Active Interfaces** link in the **Connection Status** window (Figure 56) opens a **Connection Status Details** view (Figure 55).

**Figure 56: Connection Status Window**




## 4.7. 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 your user profile and displayed in future sessions.

1) Click **+** beside the existing tabs on the portal page (Figure 57).
   a. The **Add Tab** dialog box opens (Figure 58).

**Figure 57: Add Custom Tab Icon**

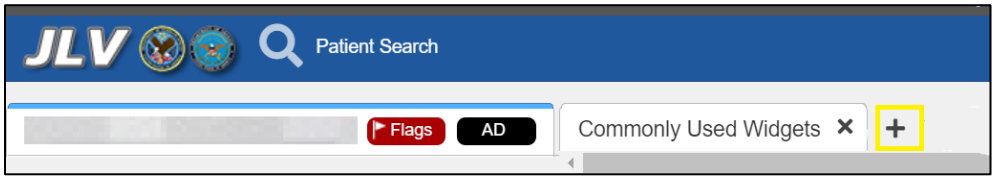
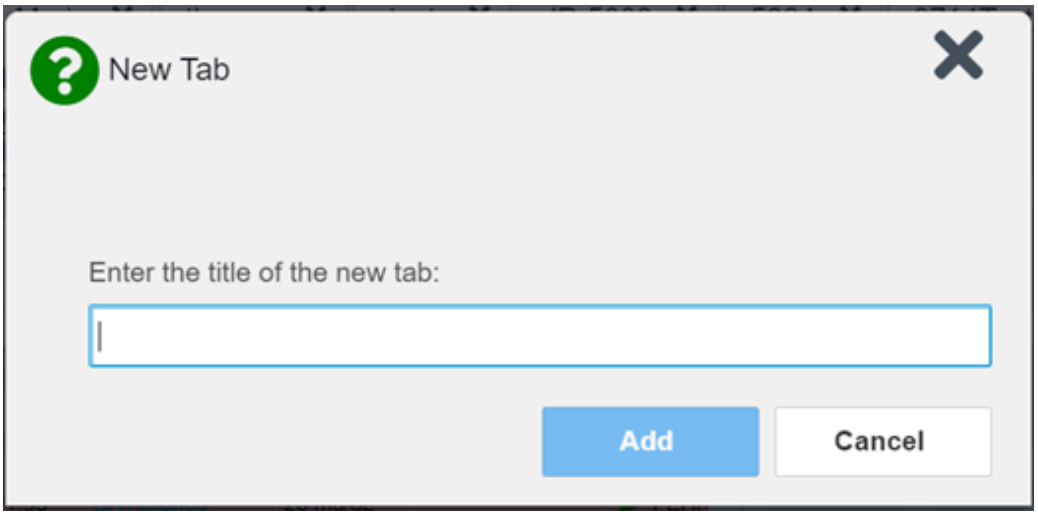


**Figure 58: Add Tab Dialog Box**




7. Type the name of the new tab in the **Add Tab** dialog box, and click **Add**.
   a. The new tab opens with a blank workspace, with instructions on how to add widgets and an open widget tray.
8. Click, hold, and drag each of the desired widgets to the screen (max 12).
9. 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.

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

## 4.8. Refreshing Data in a Widget

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

## 4.9. Terminology Normalization

**Table 11: Terminology Specific to Widgets**

| Normalization Standard | Description | Widgets |
|---|---|---|
| **Centers for Disease Control (CDC) Race Standard** | Code set based on the current Federal standards to classify race and ethnicity | Patient Demographics |

| Normalization Standard | Description | Widgets |
|---|---|---|
| **Current Procedural Terminology (CPT) Standard** | Uniform code to describe medical, surgical, and diagnostic services | Procedures, Radiology Reports[16] |
| **Vaccine Administered (CVX) Standard** | Numeric string that identifies the type of vaccine product used | Immunizations |
| **Logical Observation Identifiers Names and Codes (LOINC) Standard** | Universal standard for identifying health measurements, observations, and documents | Documents & Images, Lab Results, Orders, Progress Notes, Questionnaires, Deployment, Exposure Records, Assessments, Radiology Reports, Vitals |
| **National Uniform Claim Committee (NUCC) Taxonomy Standard** | Unique, 10-character alphanumeric code that identifies a provider grouping, classification, and area of specialization | Admissions, Appointments, Consults, Documents & Images, Medications - Inpatient, Discharge/Inpatient Summaries, Orders, Encounters - Outpatient, Medications - Outpatient, Procedures, Progress Notes |
| **RxNorm Standard** | Standard names given to allergens, clinical drugs, and drug delivery devices in the United States | Allergies, Medications - Inpatient, Orders, Medications - Outpatient |
| **SNOMED CT Standard** | Core, general terminology used in electronic health records | Admissions, Encounters - Outpatient, Problem List |
| **X12 Health Insurance Type Standard** | Defines electronic data interchange standards for health care insurance | Patient Demographics |

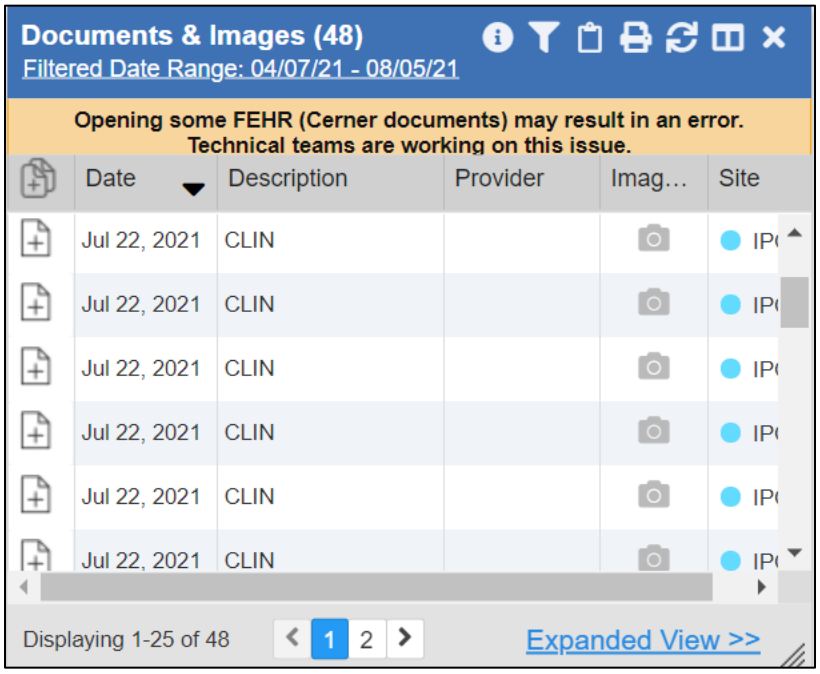
## 4.10. Image Support

JLV integrates access to the VistA Imaging Viewer and MUSE, allowing you access to VA imaging artifacts for supported clinical domains (widgets). Please see the REDACTED[17] for more information regarding the VistA Imaging Viewer.

You can open one or more images associated with a record by selecting the 📷 displayed in the **Image** column (Figure 59) of the **Advanced Directives**, **Cardiology Studies - FEHR and VA MUSE Only, Documents & Images, Imaging, Procedures**, **Progress Notes**, **Radiology Reports**, and **Surgery/Procedure Reports** widgets. Clicking 📷 from the **Image** column opens the image(s) in a standalone window. Like a hyperlink, 📷 changes color after you launch an image so you can track which images you've viewed in the minimized or expanded widget view of the current session. Changing between minimized and expanded view resets the 📷 color.

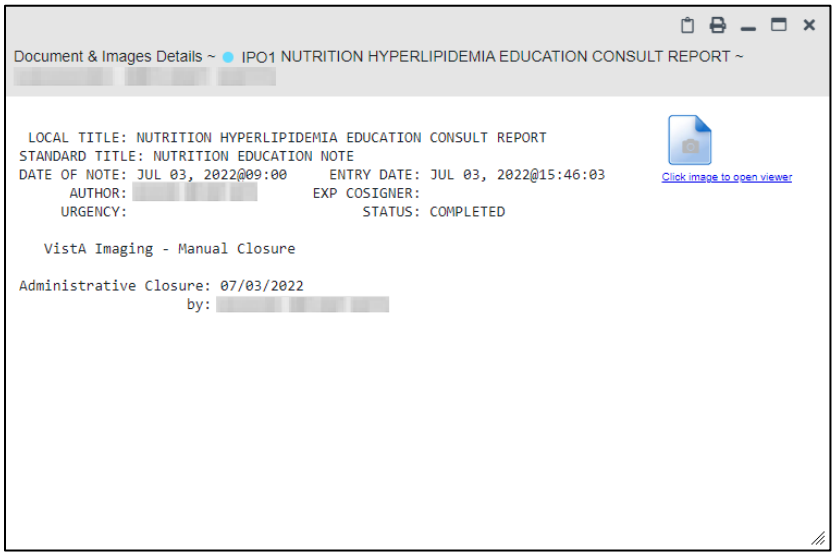
[16] If LOINC mappings are not available for an entry in the Radiology Reports widget, JLV looks for CPT mappings and displays CPT normalization for standardized type and standardized code, if found.
[17] Copy and paste the link directly into a supported browser.

**Figure 59: 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 thumbnail with a **Click image to open viewer** link (Figure 60). Clicking either the thumbnail or the link opens the VistA Imaging Viewer and displays the associated image(s).

**Figure 60: Thumbnail and Link in Details View of the Documents & Images Widget**




## 4.11. Using Report Builder

The **Report Builder** feature is used to create custom PDF 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. You can launch **Report Builder** from the toolbar on the **Patient** portal (highlighted in Figure 61).

**Figure 61: Report Builder Icon**

The **Report Builder** pane is comprised of the **Current Report** tab (Figure 63) and the **Patient Reports** tab (Figure 64). When open, the **Report Builder** appears docked on the right side of the JLV portal. It can be moved and docked anywhere in the portal.

**Figure 62: Report Builder Header Icons**

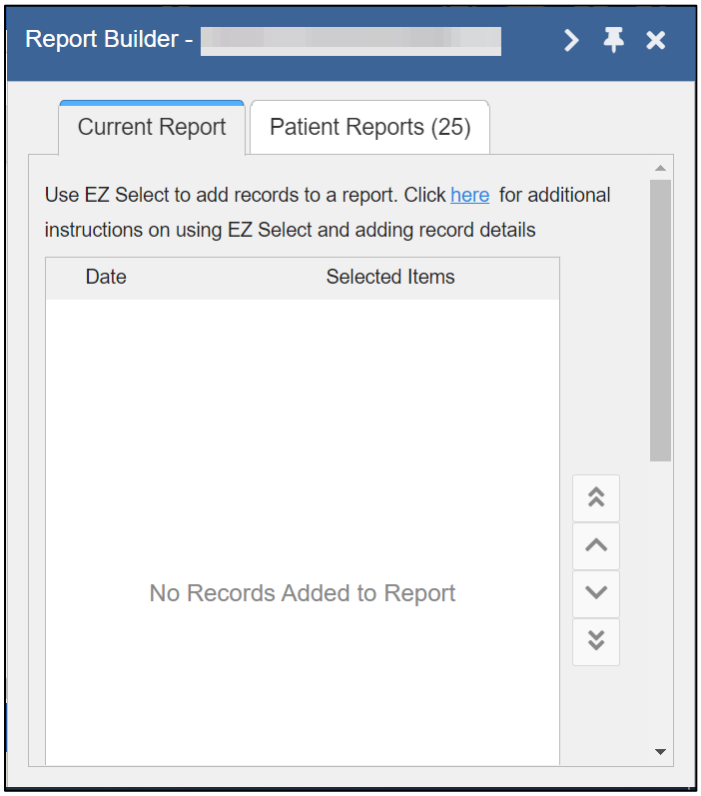
Click the show ( ) or hide icon ( ) to display or hide the **Report Builder**.

Click the Pin icon ( ) to pin or unpin the Report Builder to a location in the interface.

Click the Close icon ( ) to close 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.

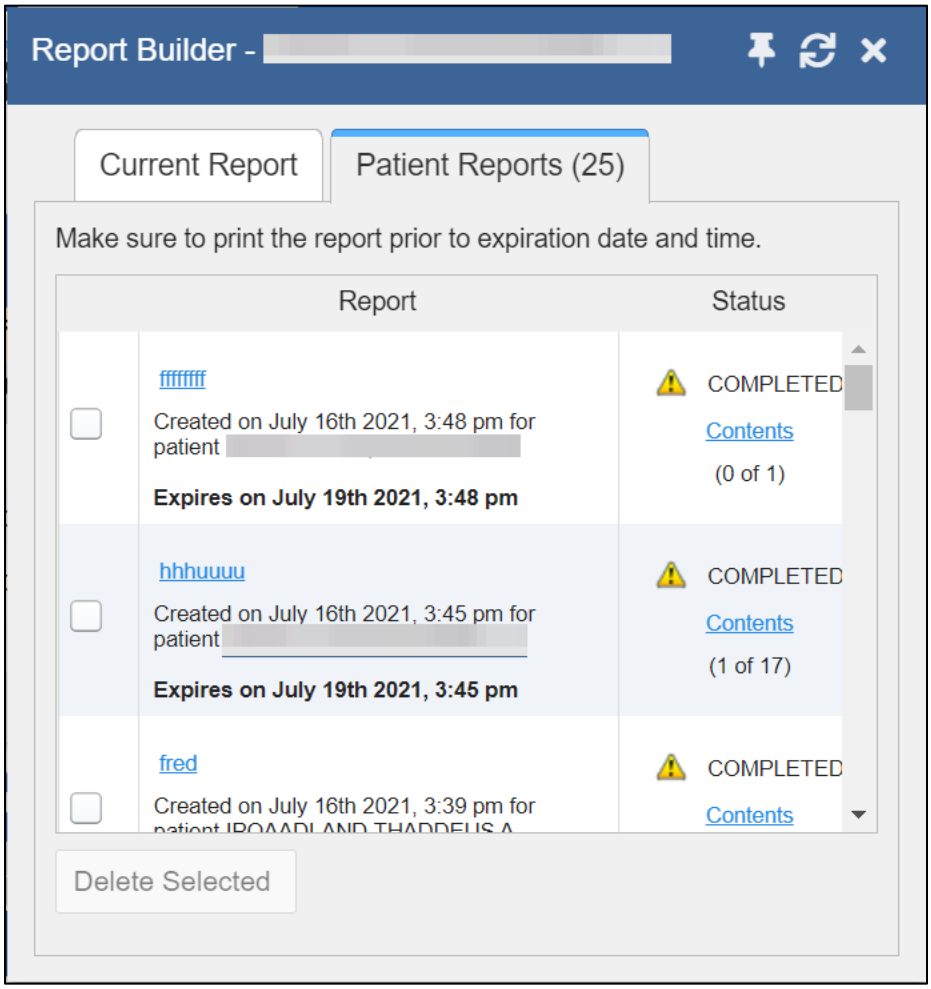
The **Current Report** tab (Figure 63) is used to build the custom report. The patient data and/or records are listed here as you select and add them. The records can be previewed and can be arranged in the desired order for the final report.

**Figure 63: Current Report Tab**




The **Patient Reports** tab (Figure 64) 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.

**Figure 64: Patient Reports Tab**




You can perform actions within widgets to add patient data when the Report Builder is open or closed. JLV enforces a maximum number of 50 records per report. A message appears when this limit is reached.

### 4.11.1. Adding One Record

Click + 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. + in the row changes to RB to confirm the record has been added to the Report Builder (Figure 66). This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box.

**NOTE:** A single site report can now be added to the Report Builder from the Blood Bank Report in the Lab Results widget.

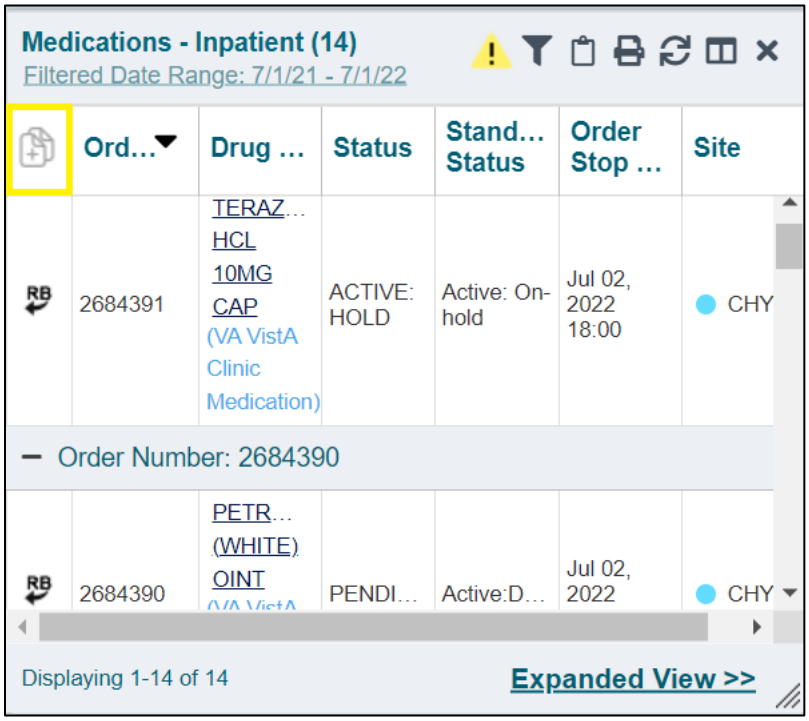
### 4.11.2. Adding Multiple Records with EZ Select

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 (Figure 65) 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.

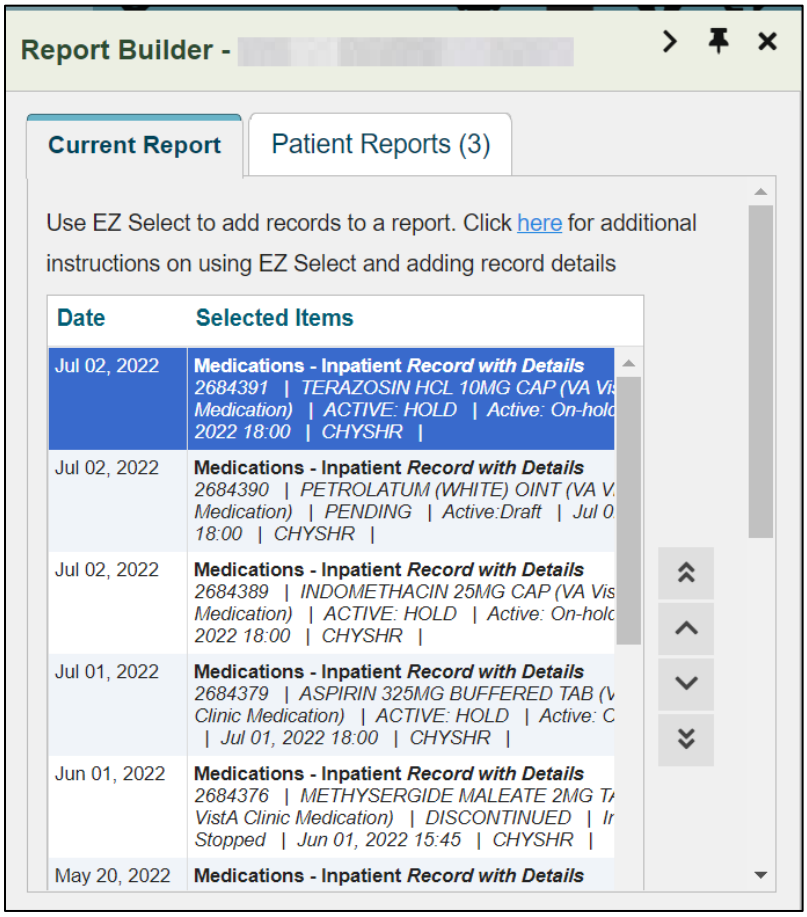
**NOTE:** Sensitive records and Medication Administration History (MAH) / Medication Administration Log (MAL) reports accessed from the **Medications - Inpatient** widget cannot be added using EZ Select. You must add them to a report one at a time, and you can only add MAH/MAL to reports from **Detail** view in the **Medications - Inpatient** widget. However, you can use EZ Select to add MAH/MAL reports to Report Builder from the **Health Summaries and Reports** widget.

**Figure 65: Report Builder EZ Select**




in each row changes to to confirm the record has been added (Figure 66).

**Figure 66: Records Added to Report Builder**

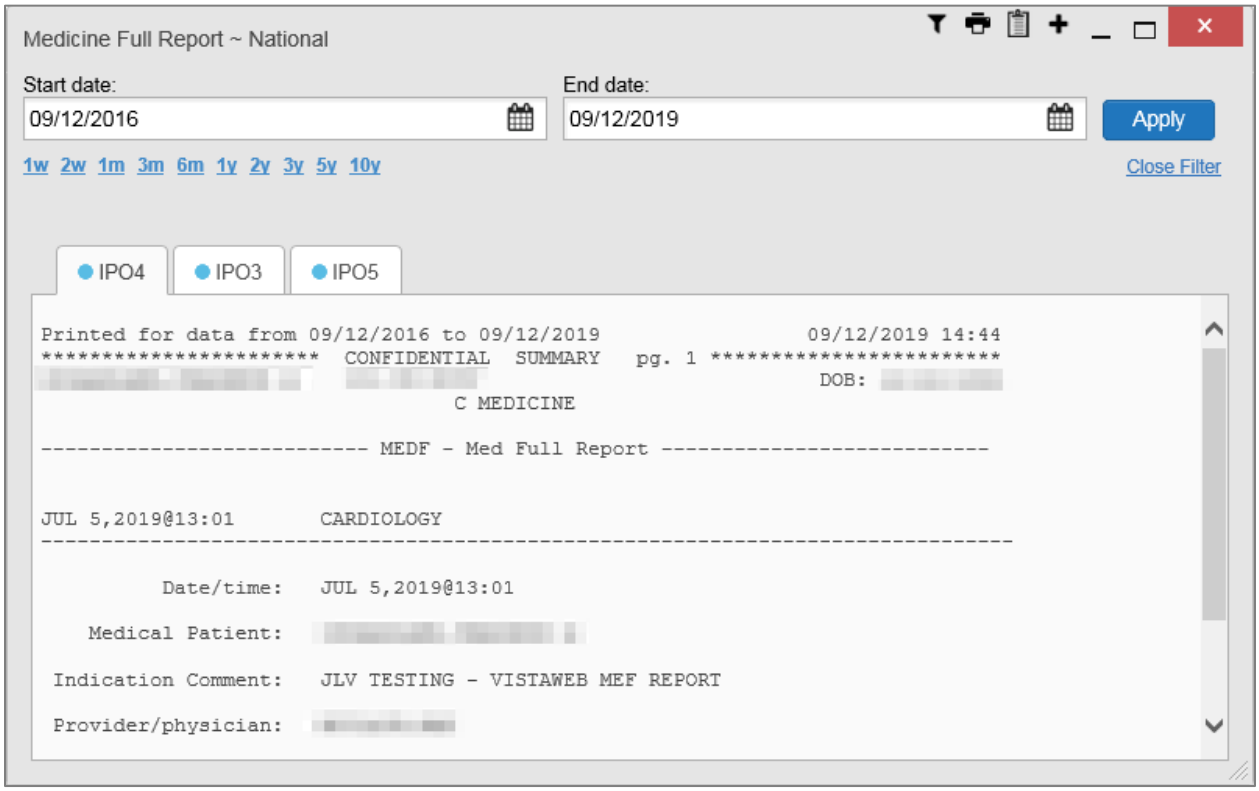



**NOTE:** Records previously added to a report remain in the Report Builder after a widget refresh. Clicking in the widget refreshes the clinical data, refreshes the widget data display, and resets to , even if the record has been added to the Report Builder. Records previously added to a report prior to the refresh remain in the Report Builder after a widget refresh.

### 4.11.3. Adding Details from Multiple Dates

When the **Details** view of a record has a date filter (Figure 67)—as in the **Health Summaries and Reports, Medications - Inpatient**, and **Procedures** widgets— resets to each time you change the date range, allowing you to build date-flexible reports using records from multiple date ranges.

**Figure 67: Adding Date-Flexible Details to Report Builder, Medicine Full Report**




### 4.11.4. Adding Sensitive Records

Sensitive records can be added to the Report Builder by for a sensitive record in the widget. When prompted, click **Agree to be Audited & Access This Sensitive Record** to continue. in the row changes to to confirm the record has been added (Figure 66). Sensitive records must be added to the Report Builder individually; therefore, repeat as necessary for additional sensitive items.

### 4.11.5. Adding Only Record Details or Notes

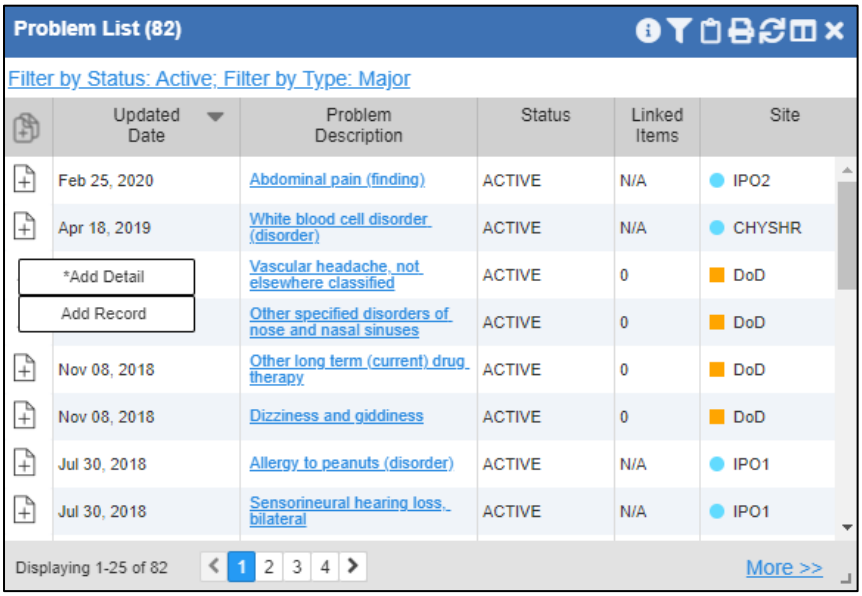
When adding records to a report using or in the widget, JLV by default adds the data displayed in the widget as well as any details and notes associated with the record. This applies to both minimized and expanded widget views and the **Patient Flags and Postings** dialog box. If you would like to add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

2) Select and hold to access these options (Figure 68).

3) Select **Add Detail** or **Add Note** to add the details and/or notes associated with the record as well as the record row data to the Report Builder.

4) 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 68: Report Builder Options**

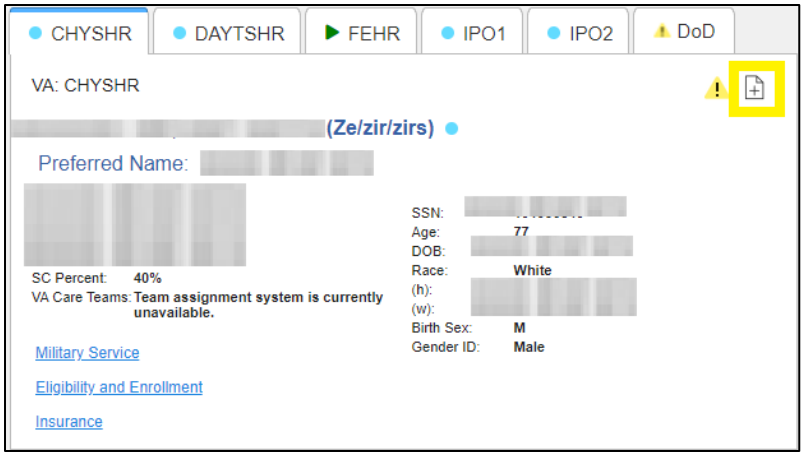



**NOTE:** Once you add a record to Report Builder using either the , **Add Detail/Note,** or **Add Record Row** option, you cannot change the record data included in the report without first clearing the record from the report and adding it again.

### 4.11.6. Adding Patient Demographics

Clicking in the **Demographics** widget (Figure 69) adds the patient's demographics details for that site to the Report Builder. changes to 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 69: Demographics Widget Add to Report Builder Icon**

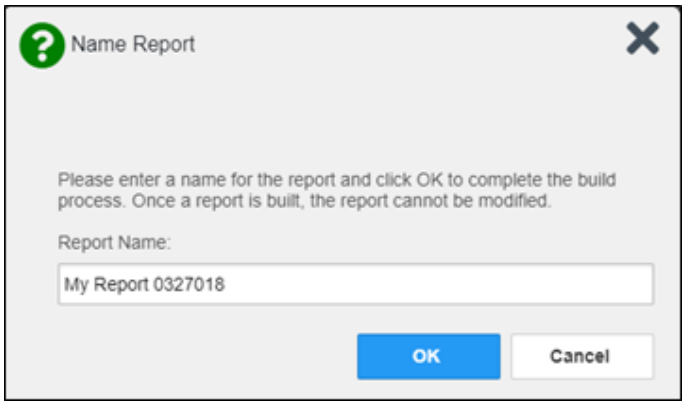


### 4.11.7. Generating a Report

The selected records appear in the **Report Builder** pane (Figure 63).

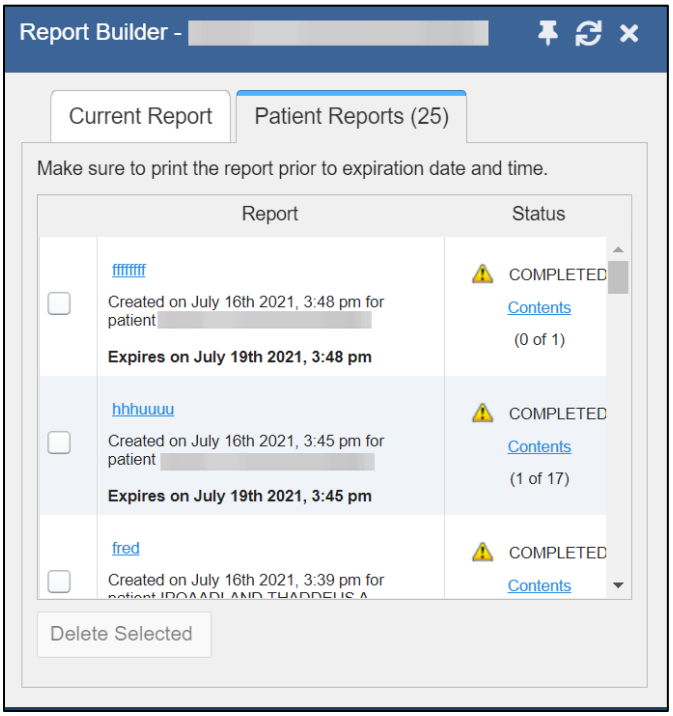
1. Use the navigation arrows to arrange the records in the desired order in the generated report. Records can be removed by clicking **Clear Selected Record** or **Clear All**. When a record is selected for the report, it appears in the **Preview of Record** area of the **Report Builder** pane.
2. Click **Build** to validate the selected records and prepare the report. If a record is added to the report without an error, a **Ready** notation displays next to it in the **Status** column. If a record cannot be added to the report, an **Error** notation appears next to the record.
3. Name the report when prompted, and click **OK** (Figure 70)

**Figure 70: Name Report Dialog Box**



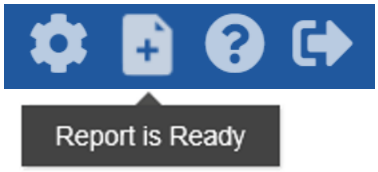

4. The **Patient Reports** tab opens and displays a report processing indicator in the **Status** column.
5. When processing is complete, the **Status** column displays either *COMPLETED* or *ERROR* (Figure 71).
   - An *ERROR* in the **Status** column does not indicate the report failed to build, it is an indicator that one or more records could not be included in the generated report.
   - Both the *COMPLETED* and *ERROR* entries include a **Contents** link (Figure 71), which provides a list of the records that appear in the generated report.

**Figure 71: Patient Reports Tab Report Ready and Delete Option**




6. 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 72).

**Figure 72: Report Ready Message and Indicator**




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

### 4.11.8. Opening a Report

1. Click the report name in the **Report** column of the **Patient Reports** tab (Figure 71) **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 71) **OR -**
3. Click the blue, hyperlinked report name in the **Report Contents** window (Figure 73).

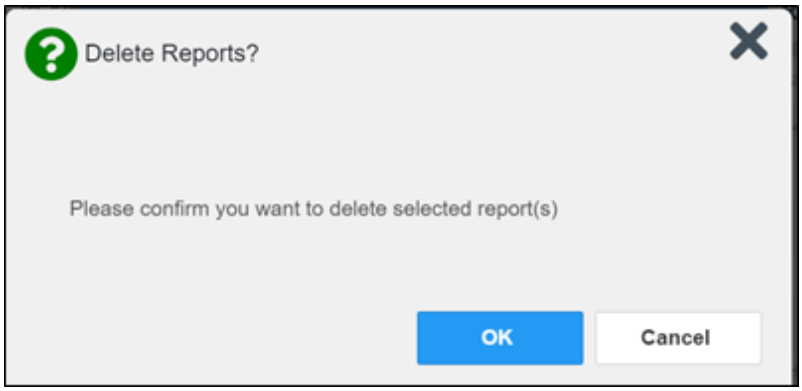
**Figure 73: Report Contents Window**

**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 JLV to utilize the Report Builder and other JLV features.

### 4.11.9. Delete a Report

1. Select the checkbox for the report name on the **Patient Reports** tab (Figure 71).
2. Click the **Delete Selected** button.
3. Click **OK** to confirm deletion (Figure 74).

**Figure 74: Delete Reports Dialog Box**




## 4.12. 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 on the desired widget's toolbar to print the data list of a widget in either minimized or expanded view.

- Click 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**.

> **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.*"

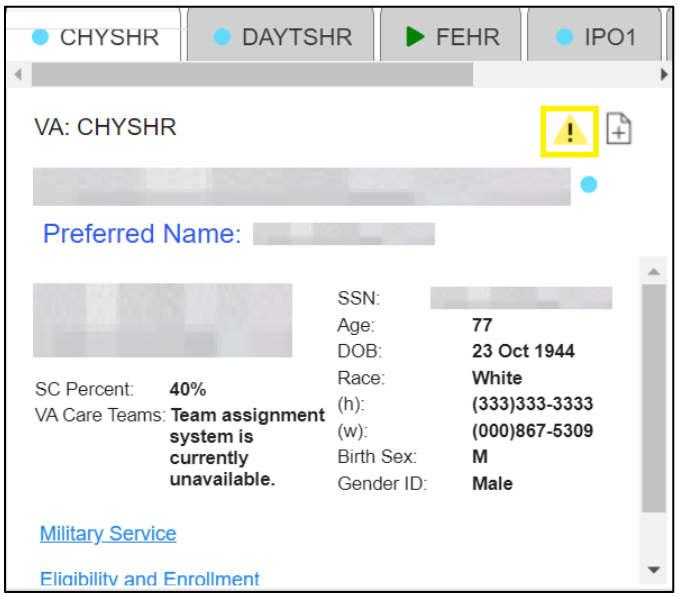
# 5. Widget Functionality

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 nonclinical, personal data on the primary Patient portal tab (Figure 75). The site tabs provide a demographics summary for each site (VA, FEHR, or DOD) the patient has visited.

**Figure 75: Patient Demographics Widget**




Nonclinical, personal data displayed for the patient varies by site and could include site name, patient name, address, SSN, age, DOB, race, phone numbers, birth sex, and gender ID (SIGI). SIGI code values are listed in Table 12.

**Table 12: Gender ID (SIGI) Code Values**

| Code | Description |
|---|---|
| **M** | Male |
| **F** | Female |

| Code | Description |
|---|---|
| **TM** | Transmale/Transman/Female-to-Male |
| **TF** | Transfemale/Transwoman/Male-to-Female |
| **O** | Other |
| **NB** | Nonbinary |
| **Any Other Code** | Unknown |

The **Patient Demographics** widget provides additional functionality:

- Clicking the patient's name opens details in a standalone window, including inpatient providers.
- Clicking or opens the connection status details in a separate window.
- Clicking Flags opens clinical flag details in a new window.
- Clicking AD opens the **Advance Directives** dialog in a new window.

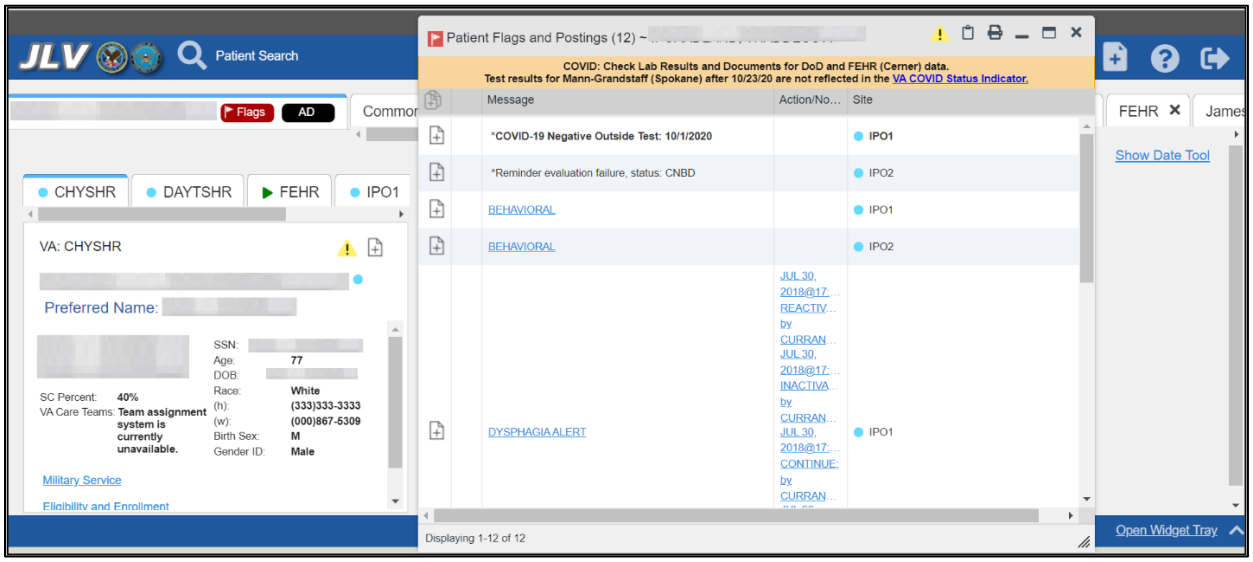
If displays on one or more tabs within the **Demographics** widget, it is an indication that the patient is not registered at that VA site or DOD facility.

### 5.1.1. Patient Flags and Postings

If the patient has one or more clinical warnings, alerts, or flags in their record from VA and DOD sites, Flags displays on the main **Demographics** widget tab of the Patient portal (Figure 76).

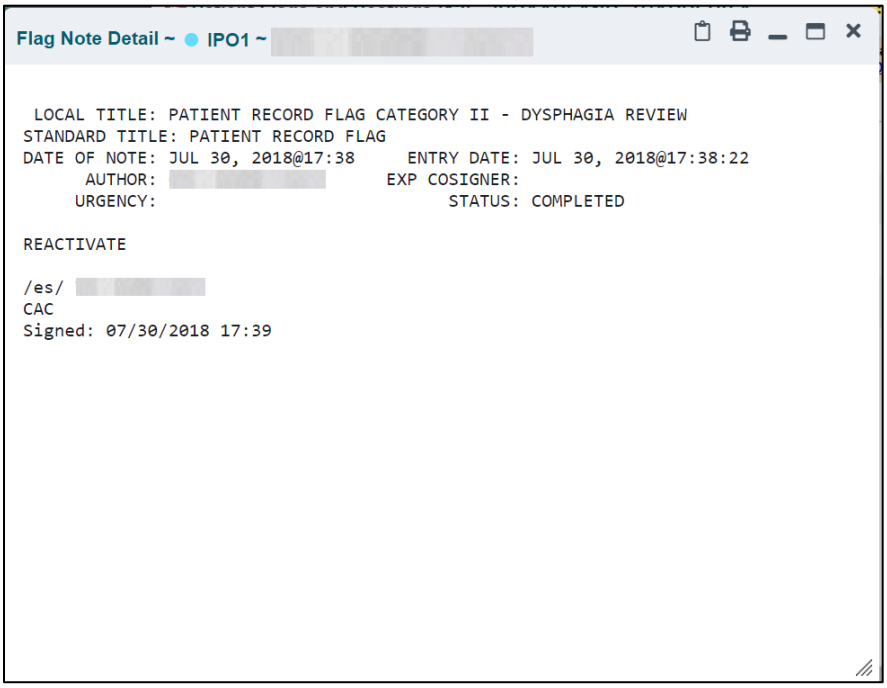
The **Patient Flags and Postings** window opens and displays by default when the Patient portal opens if there are warnings associated with the selected patient.

**Figure 76: Patient Flags Indicator**



Click Flags to open the **Patient Flags and Postings** window (Figure 76). The window displays a list of alerts and flags within the patient's record. Selecting the hyperlinked message for each patient alert opens the **Flag Details** window (Figure 77). Selecting the **Action/Note(s)** link (Figure 76) will open documents pertaining to placement of the flag. If the patient's record does not contain any clinical warnings, Flags is not displayed. Category I Patient flags that are present at multiple sites will be grouped under the owner site.

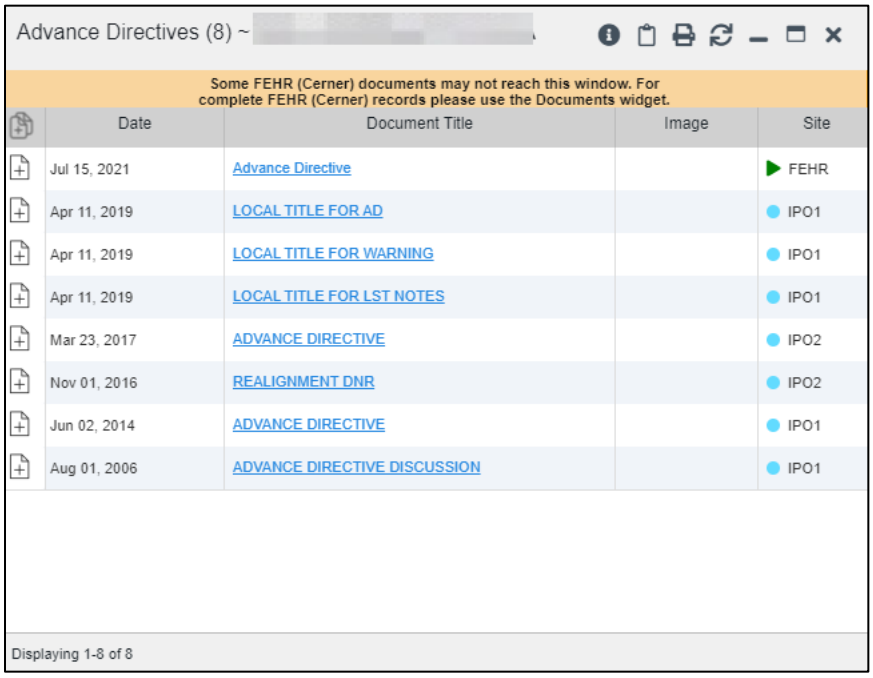
**Figure 77: Patient Flags and Postings Details**




### 5.1.2. Advance Directives

You can view Advance Directives (Figure 78) by selecting AD on **Demographics** widget. Advance Directives are pulled from DOD, VA, and Cerner data sources. AD changes to when loading, and it is greyed out AD if Advance Directives were not found for the patient.

**Figure 78: Advanced Directives Dialog**




### 5.1.3. Viewing Third-Party Insurance Information

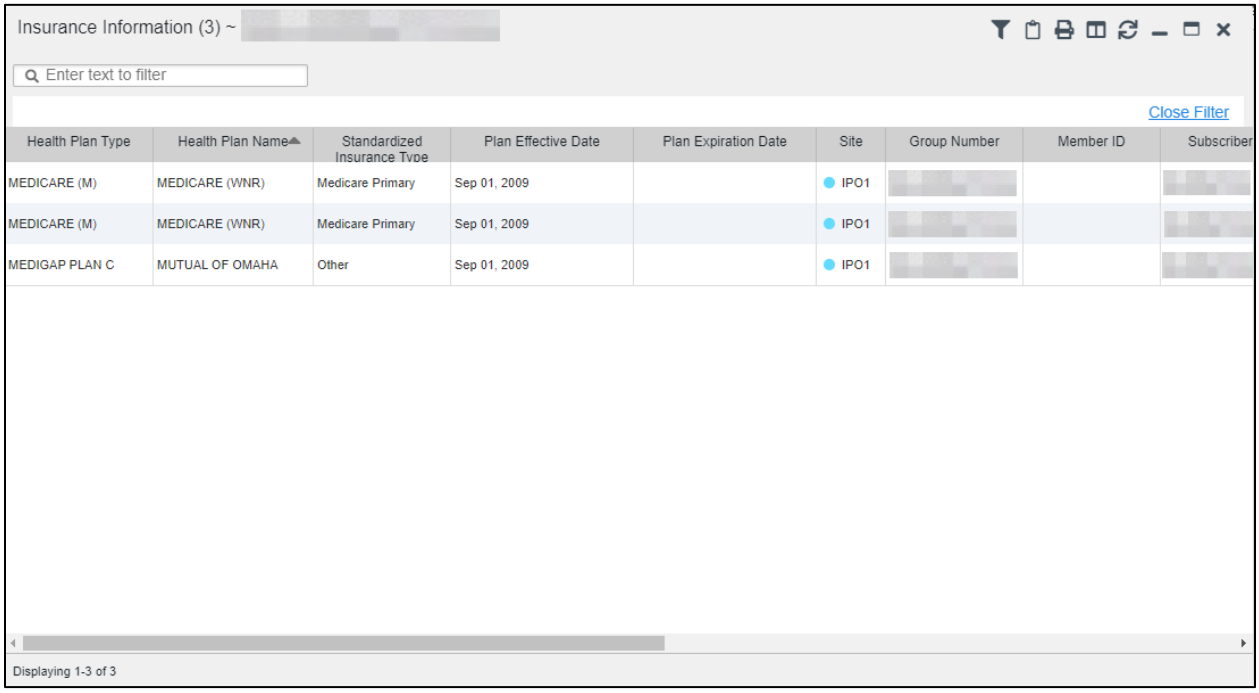
Third-party payers and insurance information is available from the **Patient Demographics** widget. Click the **Insurance** link in the **Demographics** widget.

A new window opens with the following insurance information, some of which is displayed in Figure 79:

- Health Plan Type
- Health Plan Name
- Standardized Insurance Type (See Terminology Normalization for more information.)
- Plan Effective Date
- Plan Expiration Date
- Site
- Group Number
- Member ID
- Subscriber ID
- RxBIN
- RxPCN
- Notes
- Comments
- Subscriber Date of Birth
- Subscriber's Relationship to Insurer

- Health Plan Mailing Address
- Health Plan Contact Information

**Figure 79: Insurance Information**

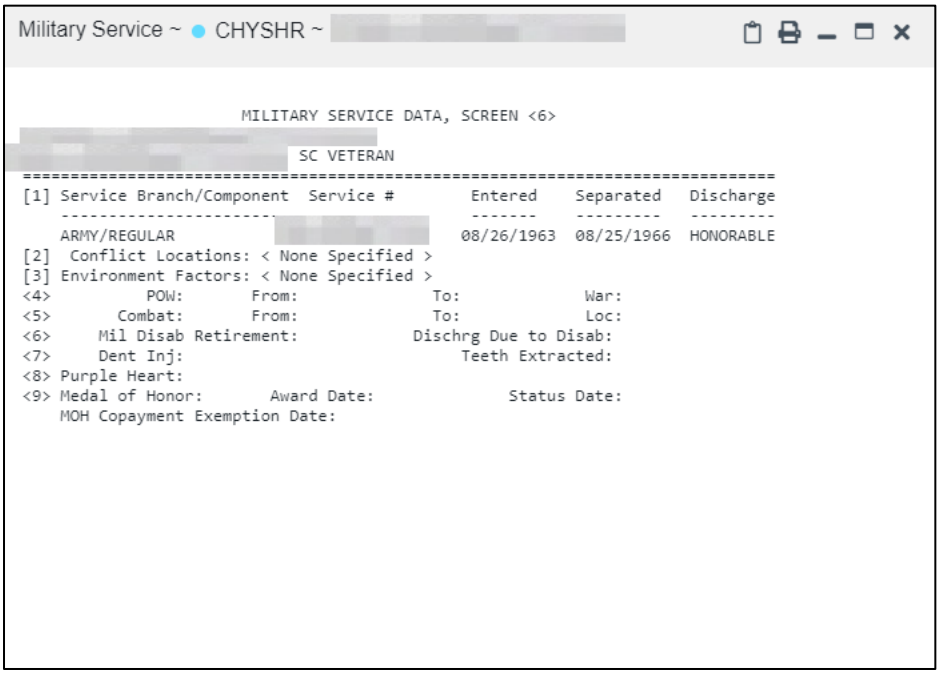



Use the horizontal scroll bar in the window to view the columns not seen within the default window size.

### 5.1.4. Viewing Military Service Data

Military service data (Figure 80) are available from the **Patient Demographics** widget. Click the **Military Service** link in the **Demographics** widget.

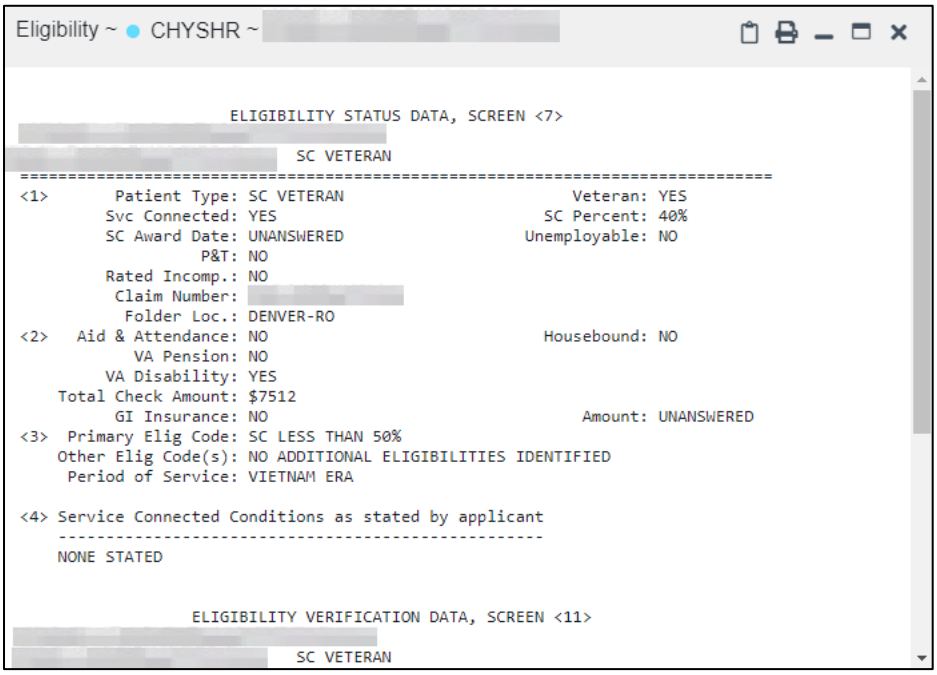
**Figure 80: Military Service Window**




### 5.1.5. Viewing Eligibility and Enrollment Data

Eligibility and enrollment data (Figure 81) are available from the **Patient Demographics** widget. Click the **Eligibility & Enrollment** link in the **Demographics** widget.

**Figure 81: Eligibility and Enrollment Window**



## 5.2. Cardiology Studies - FEHR and VA MUSE Only Widget

The Cardiology Studies - FEHR and VA MUSE Only widget (Figure 82) displays electrocardiograms (EKGs) and cardiology studies with related images from all FEHR and VA MUSE sites and systems. The information displays in reverse chronological order by date with one tab for each site where the patient is registered.

Clicking from the **Image** column opens the image(s) in a standalone window.

Report Builder functionality is not available for this widget.

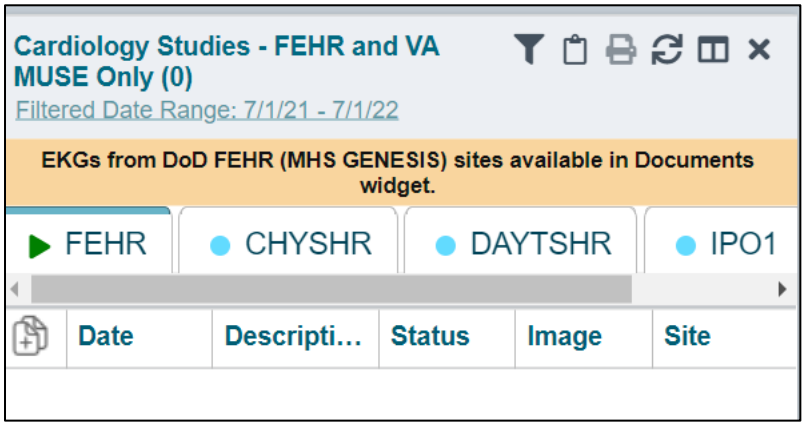
### 5.2.1. Cardiology Studies - FEHR and VA MUSE Only Widget Data

The information in the Cardiology Studies - FEHR and VA MUSE Only widget includes:

- Date
- Description (Test Type)
- Status
- Image
- Site

There is no expanded view for this widget.

**Figure 82: Cardiology Studies - FEHR and VA MUSE Only Widget**




## 5.3. Community Health Summaries and Documents

The **Community Health Summaries and Documents** widget (Figure 83) displays the patient's community partner information, including Continuity of Care Documents (CCDs) in C32 and C62 formats and HL7 Consolidated-Clinical Document Architecture (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 Type/Title** column.

**NOTE:** By default, CAPRI-Claims users cannot see the **Community Health Summaries and Documents** widget. To enable access to this

widget, CAPRI-Claims users must be assigned the security key, "DVBA ALLOW JLV COMM DATA".

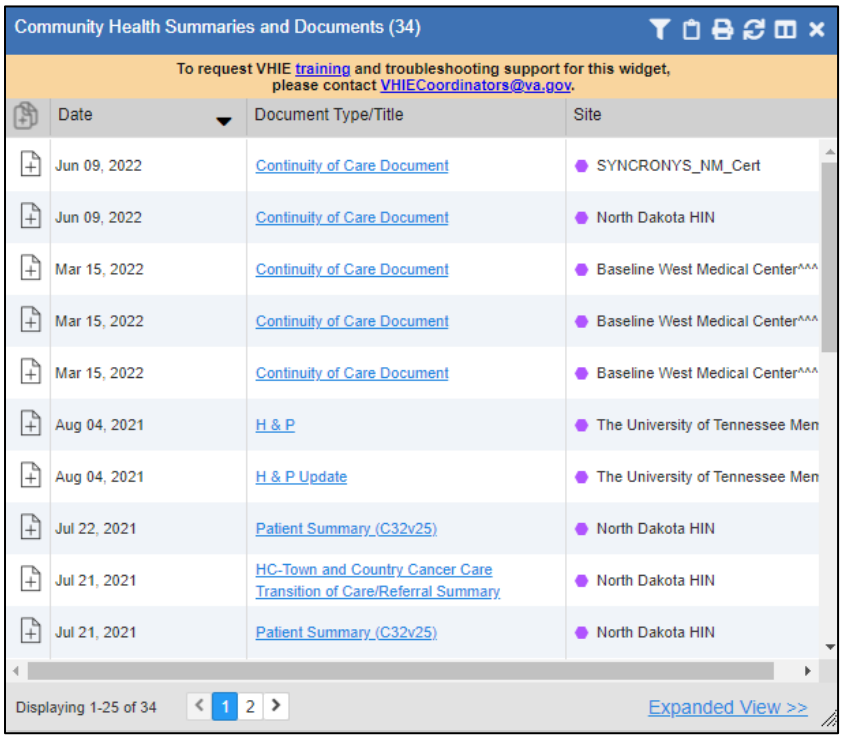
### 5.3.1. Community Health Summaries and Documents Widget Data

Data displayed within the **Community Health Summaries and Documents** widget (Figure 83) in the minimized view includes:

- Date
- Document Type/Title
- Site

The purple hexagon beside entries in the **Site** column denotes the source of the data is outside the VA.

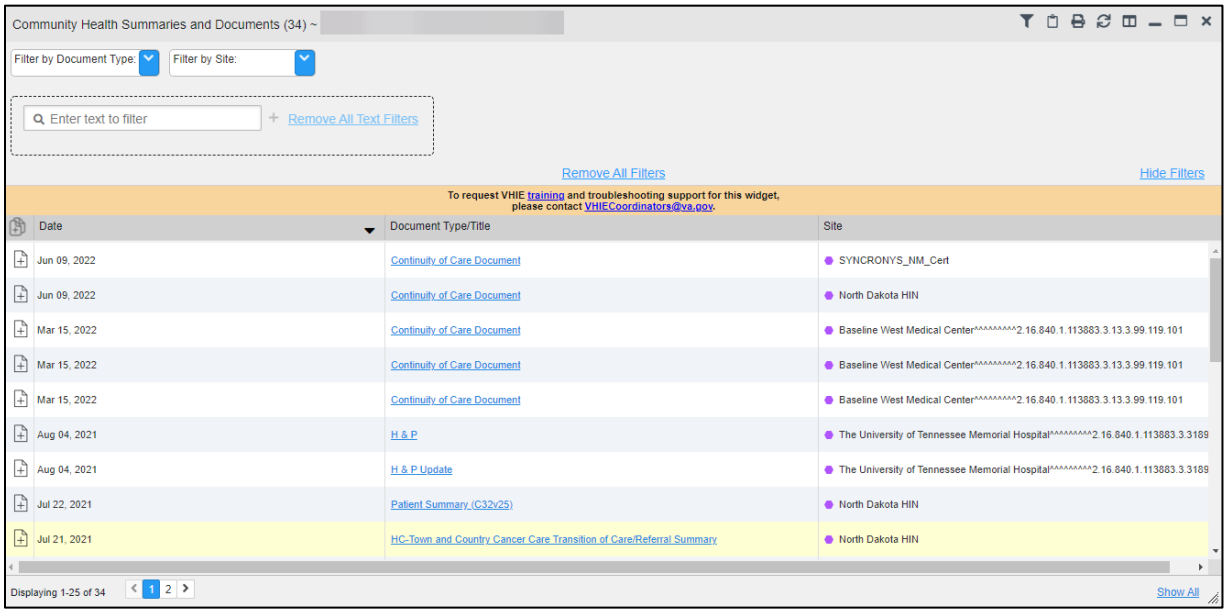
**Figure 83: Community Health Summaries and Documents, Minimized View**




Click **Expanded View >>** in the minimized view of the **Documents & Images** widget to open the expanded view (Figure 84). Information in expanded view includes:

- Date
- Document Type/Title
- Site

**Figure 84: Community Health Summaries and Documents, Expanded View**

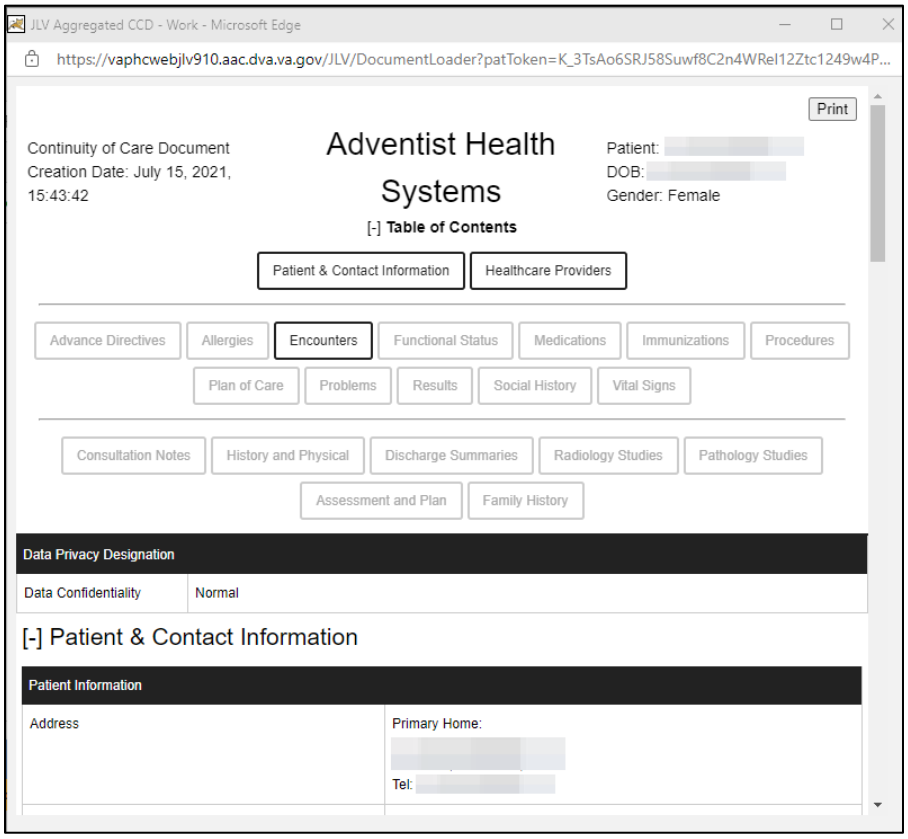



### 5.3.2. Viewing VA Community Health Summary Documents

Click on the hyperlinked entries in the **Document Type/Title** column within the **Community Health Summaries and Documents** widget, to open the documents in a new browser window. (Figure 85).

**NOTE:** Multiple documents can be opened in separate browser tabs for simultaneous viewing and printing.

**Figure 85: Community Health Document**



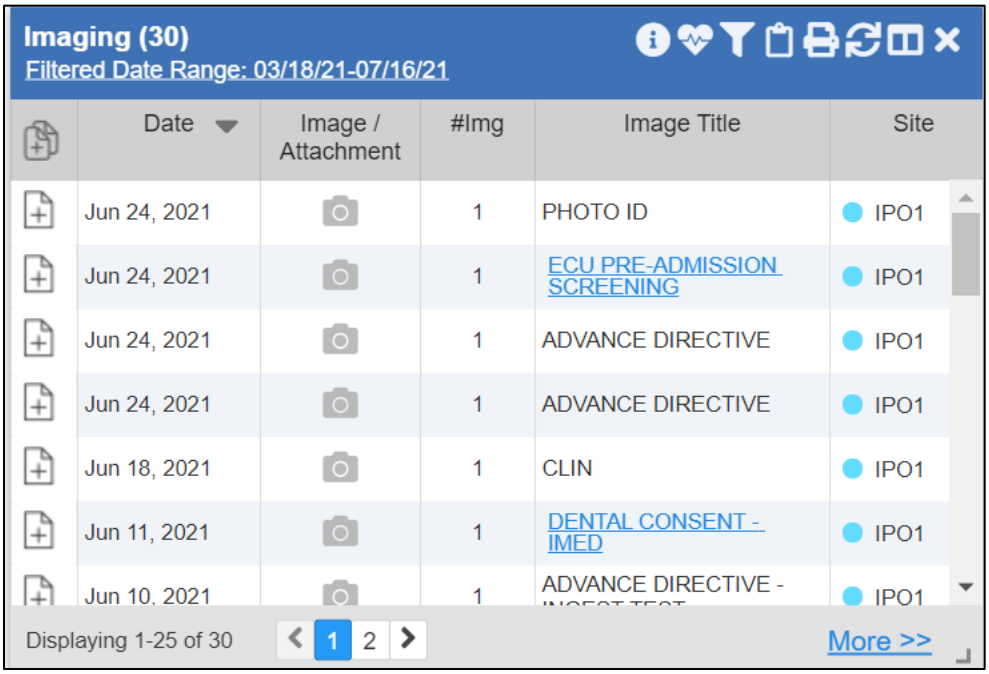

## 5.4. Imaging Widget

The **Imaging** widget (Figure **86**) displays images from multiple sources, including all Vista Imaging, Cerner imaging, DOD Radiology, and HAIMS artifacts. When the widget is displayed, data is sorted by date.

Record data can be added to Report Builder, although images cannot be added.

1. **NOTE:** The **Imaging** widget is only available to VA JLV users. DoD JLV users do not have access to the widget and do not see it in the portal widget tray.

**Figure 86: Imaging Widget, Minimized View**




### 5.4.1. Imaging Widget Data

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

- Date
- Image/Attachment (See Image Support)
- #Img
- Image Title
- Site

Clicking the icon in the toolbar displays the **Cardiology Studies - FEHR and VA MUSE Only** Widget which has electrocardiograms (EKGs) and cardiology studies, and related images from all FEHR and VA MUSE sites and systems.

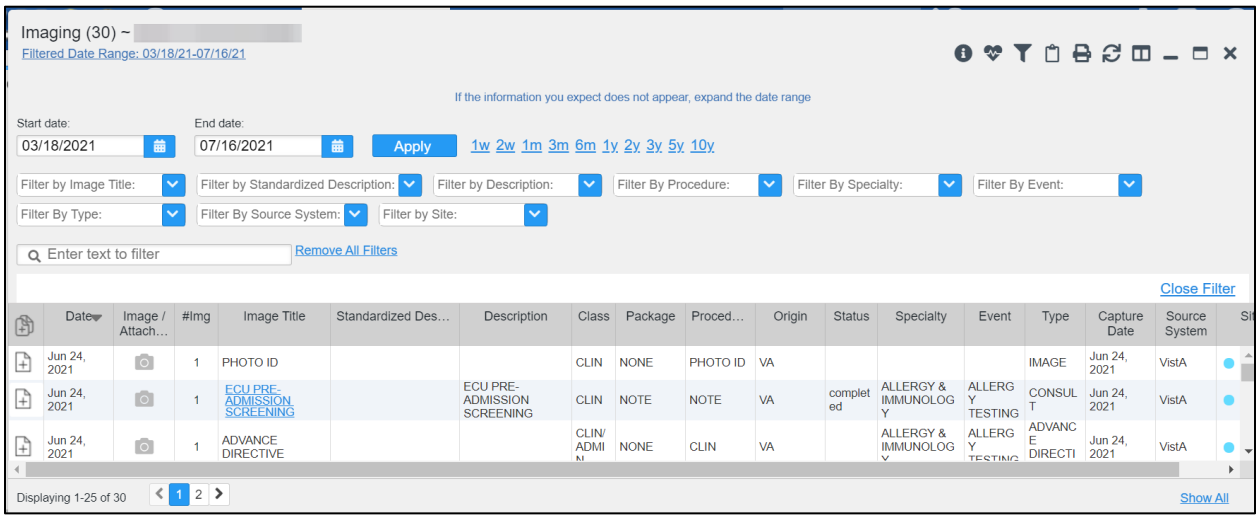
### 5.4.2. Viewing Images

Click **Expanded View** >>in the minimized view of the **Imaging** widget to open the expanded view (Figure 87). Information in expanded view includes:

- Date
- Image/Attachment (See Image Support)
- #Img
- Image Title
- Standardized Description
- Description

- Class
- Package
- Procedure
- Origin
- Status
- Specialty
- Event
- Type
- Capture Date
- Source System
- Site

**Figure 87: Imaging Widget**




Click a hyperlinked entry in the **Image/Attachment** or the **Image Title** column in either the minimized or expanded view of the **Imaging** widget to access additional information for a listed record in text, PDF, graphic, or document format. The additional information will open in a separate browser window when the image source is VistA Imaging. Figure 88and Figure 89 display two types of data accessed through the **Imaging** widget.

**Figure 88: View of an Image**

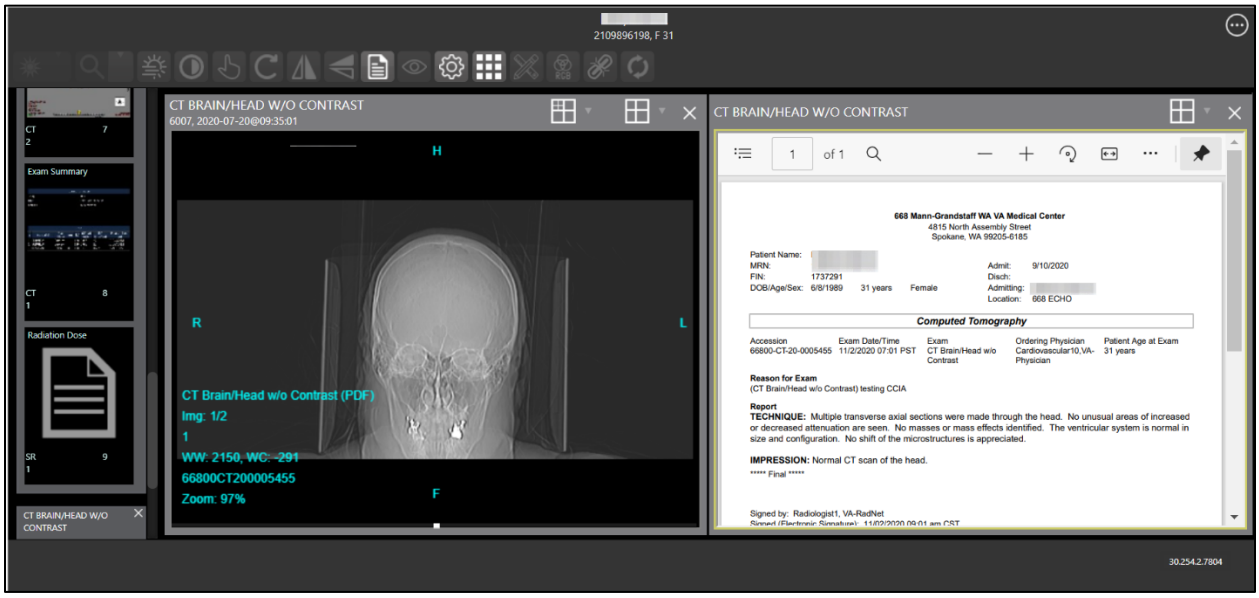
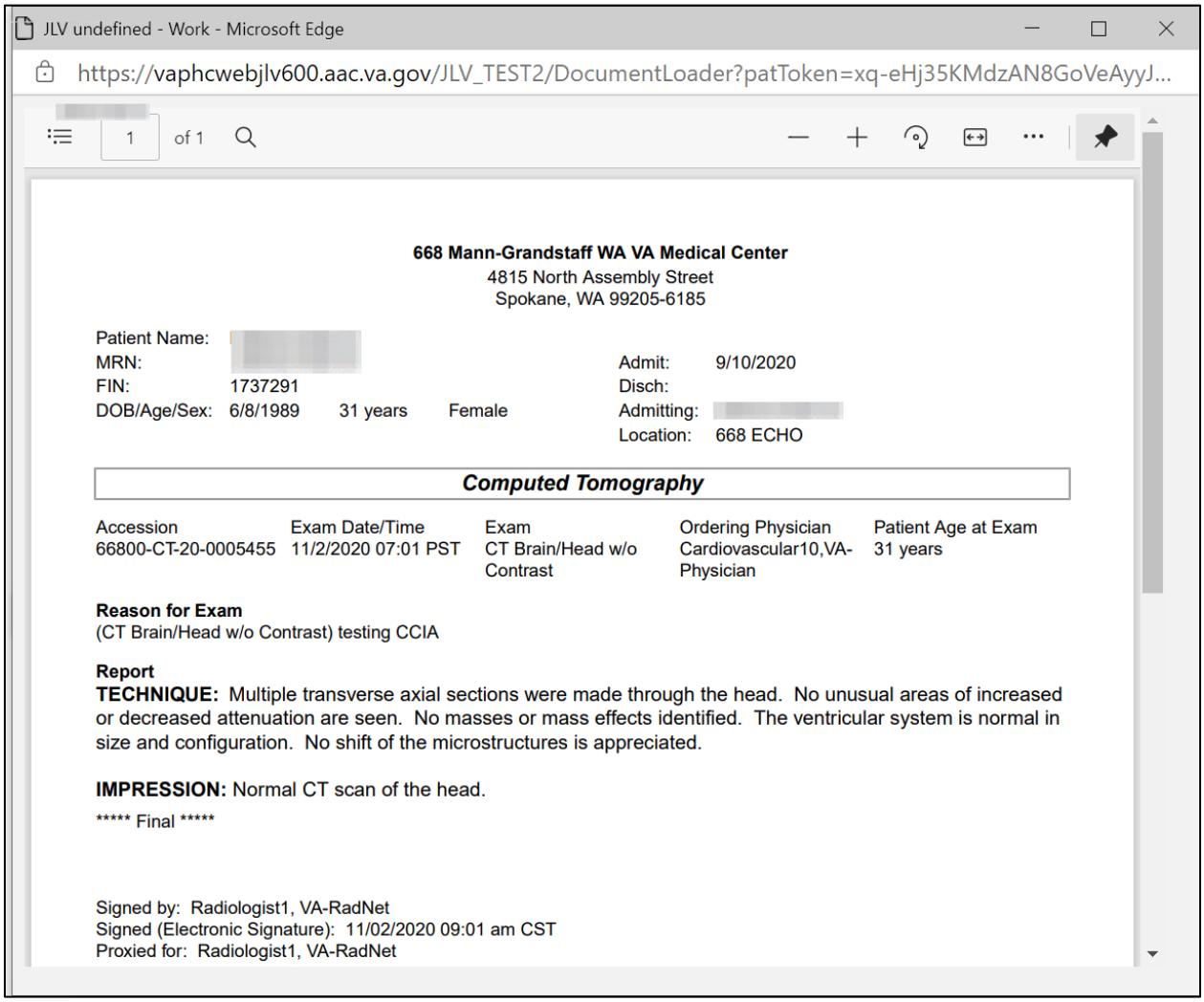


**Figure 89: View of a PDF-formatted Document**



JLV undefined - Work - Microsoft Edge

https://vaphcwebjlv600.aac.va.gov/JLV_TEST2/DocumentLoader?patToken=xq-eHj35KMdzAN8GoVeAyyJ...

1 of 1

**668 Mann-Grandstaff WA VA Medical Center**
4815 North Assembly Street
Spokane, WA 99205-6185

| | | | | | |
|---|---|---|---|---|---|
| Patient Name: | | | | | |
| MRN: | | | | Admit: | 9/10/2020 |
| FIN: | 1737291 | | | Disch: | |
| DOB/Age/Sex: | 6/8/1989 | 31 years | Female | Admitting: | |
| | | | | Location: | 668 ECHO |

***Computed Tomography***

| Accession | Exam Date/Time | Exam | Ordering Physician | Patient Age at Exam |
|---|---|---|---|---|
| 66800-CT-20-0005455 | 11/2/2020 07:01 PST | CT Brain/Head w/o Contrast | Cardiovascular10,VA-Physician | 31 years |

**Reason for Exam**
(CT Brain/Head w/o Contrast) testing CCIA

**Report**
**TECHNIQUE:** Multiple transverse axial sections were made through the head. No unusual areas of increased or decreased attenuation are seen. No masses or mass effects identified. The ventricular system is normal in size and configuration. No shift of the microstructures is appreciated.

**IMPRESSION:** Normal CT scan of the head.

***** Final *****

Signed by: Radiologist1, VA-RadNet
Signed (Electronic Signature): 11/02/2020 09:01 am CST
Proxied for: Radiologist1, VA-RadNet

## 5.5. Documents & Images Widget

The **Documents & Images** widget (Figure 90) includes documents from multiple clinical domains, including radiology reports (exams), progress notes, outpatient encounters, consults, discharge summaries (inpatient notes), questionnaires, and HAIMS records, displayed in reverse chronological order by the document date. HAIMS records retrieved by JLV include scanned paper records, imported paper records, advance directives, scanned non-radiology images, and imported non-radiology images.

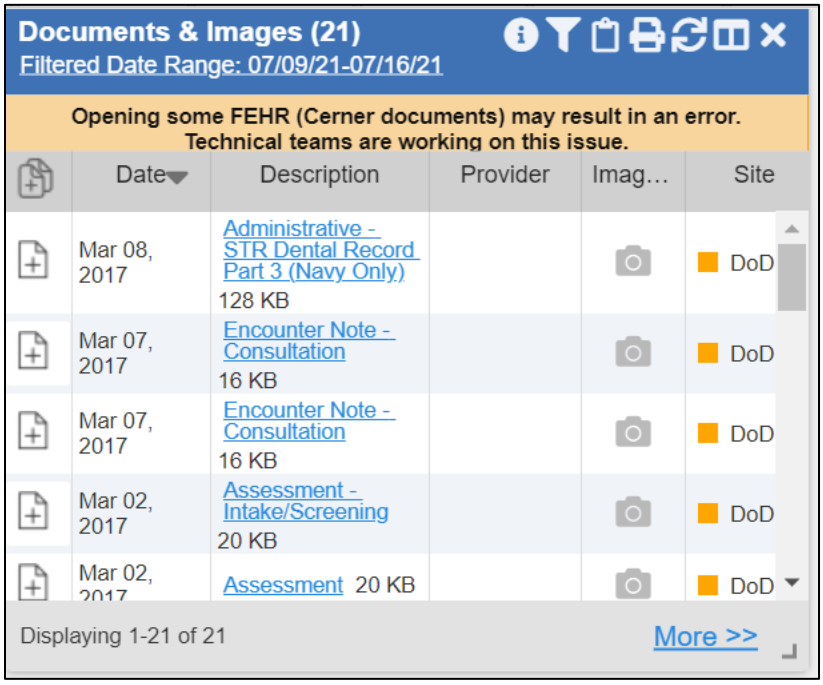
### 5.5.1. Documents & Images Widget Data

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

- Date
- Description
- Provider

- Image/Attachment (See Image Support)
- Site

**Figure 90: Documents & Images Widget, Minimized View**

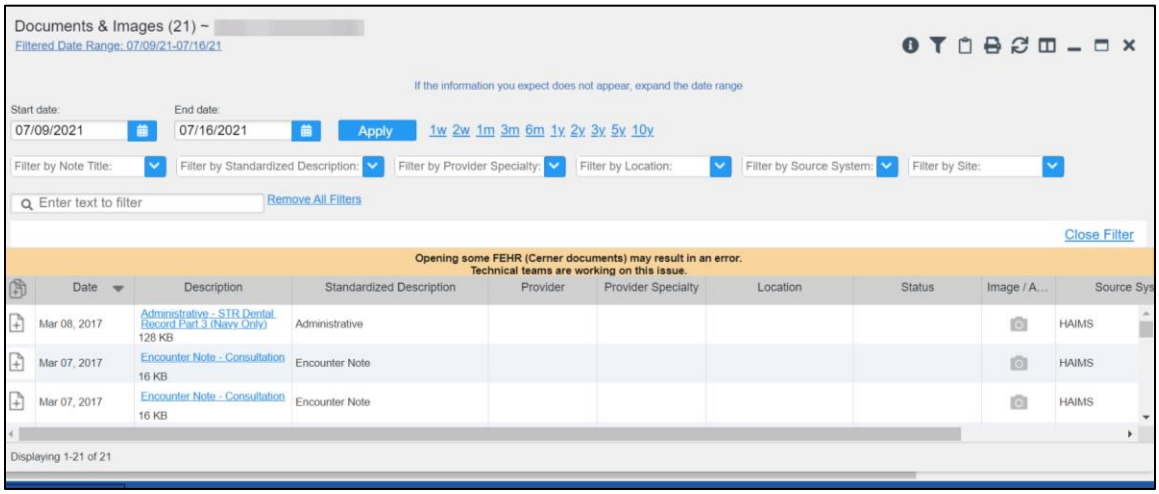



Outpatient encounter records displayed in the **Documents & Images** widget may have a **Details** link enabled in the **Date** column. Where available, click the link to open a **Details** window for records of this type.

Click **Expanded View >>**in the minimized view of the **Documents & Images** widget to open the expanded view (Figure 91). Information in expanded view includes:

- Date
- Description
- Standardized Description
- Provider
- Provider Specialty
- Location
- Status
- Image/Attachment
- Source System
- Site

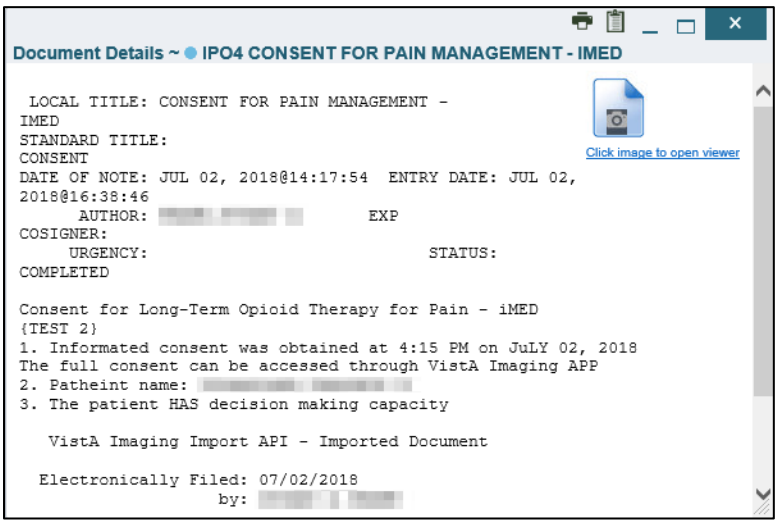
**Figure 91: Documents & Images Widget, Expanded View**




### 5.5.2. Viewing Documents & Images

Click a hyperlinked entry in the **Description** column in either the minimized or expanded view of the **Documents & Images** 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 92 displays outpatient encounters details, accessed through the **Documents & Images** widget.

**Figure 92: Details View of a Document**




## 5.6. Federal EHR/Military Health System (MHS) GENESIS Widget

The **Federal EHR/MHS GENESIS** widget displays DOD patient documents and dental summaries from DOD's MHS GENESIS system and VA's Cerner PowerChart. The information is displayed in reverse chronological order by date.

### 5.6.1. Federal EHR/MHS GENESIS Widget Data

The minimized view of the **Federal EHR/MHS GENESIS** widget includes the following information:

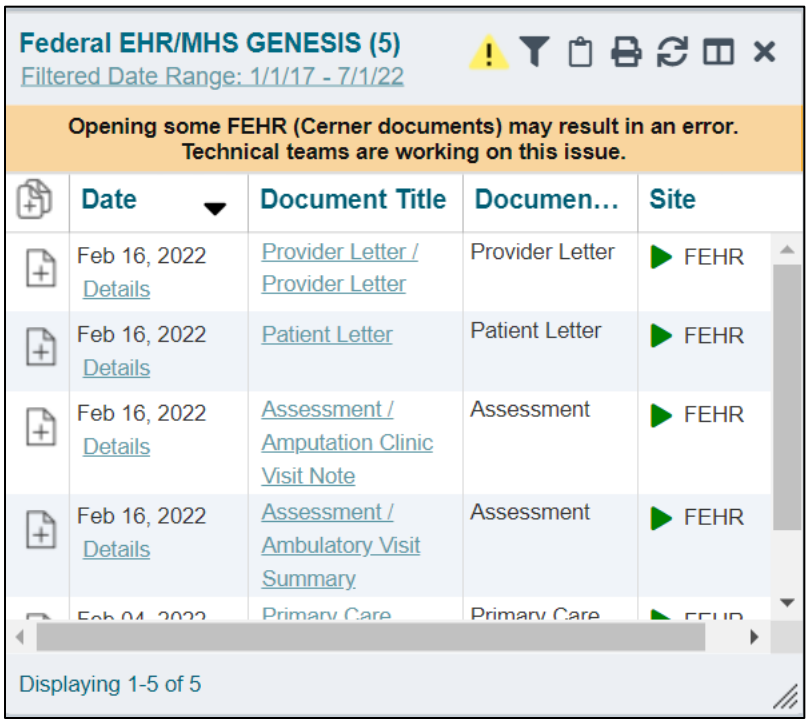
- Date
- Document Title
- Document Type
- Site

Figure 93 highlights the **Federal EHR/MHS GENESIS** widget in minimized view. There is no expanded view for the widget; instead, the C-CDA document selected opens in a new browser window (Figure 94).

**NOTE:** The **Medications - Outpatient** widget displays an orange banner with a warning that reads, *"Duplicate DOD meds may be present"* due to the migration of data into FEHR/MHS GENESIS (Cerner.)

Medical CCDs, Dental CCDs, and aggregate CCDs with blank entries in the **Date** column for the record appear first in the widget by default.

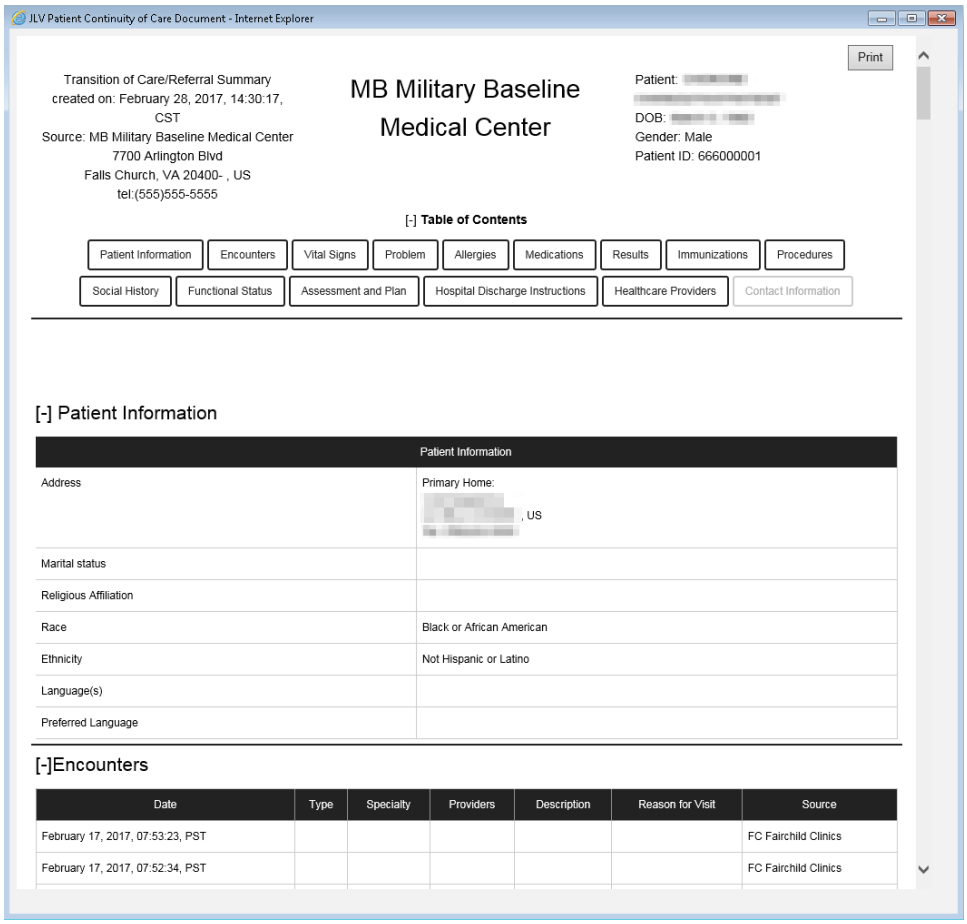
**Figure 93: Federal EHR/MHS GENESIS Widget**




### 5.6.2. Viewing Federal EHR/MHS GENESIS Documents

Click a hyperlink in the **Document Title** column in either view of the **Federal EHR/MHS GENESIS** widget to display a document (Figure 94) in a new browser window.

**Figure 94: C-CDA Document**




## 5.7. Health Summaries and Reports—VistA Only Widget

### 5.7.1. Health Summaries and Reports—VistA Only Widget Data

The **Health Summaries and Reports—VistA Only** widget displays the patient's national and local health summaries from VistA sites where the patient has been registered, including the Autopsy, Blood Bank, Cytopathology, Lab Summary—Cumulative, MAH[18], MAL[19], Medicine Full, Surgical Pathology, Transfers, and Unit Dose reports. This widget is available to VA users only.

JLV sorts records by **Site** by default. If a patient has national health summaries, JLV sorts to display National records first. National records are named in the **Site** column in the minimized view and in the **Type** and **Site** columns in the expanded view.

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

[18] Limited to any 7-day period
[19] Limited to any 14-day period

Information in the minimized view of the **Health Summaries and Reports—VistA Only** widget (Figure 95) includes:

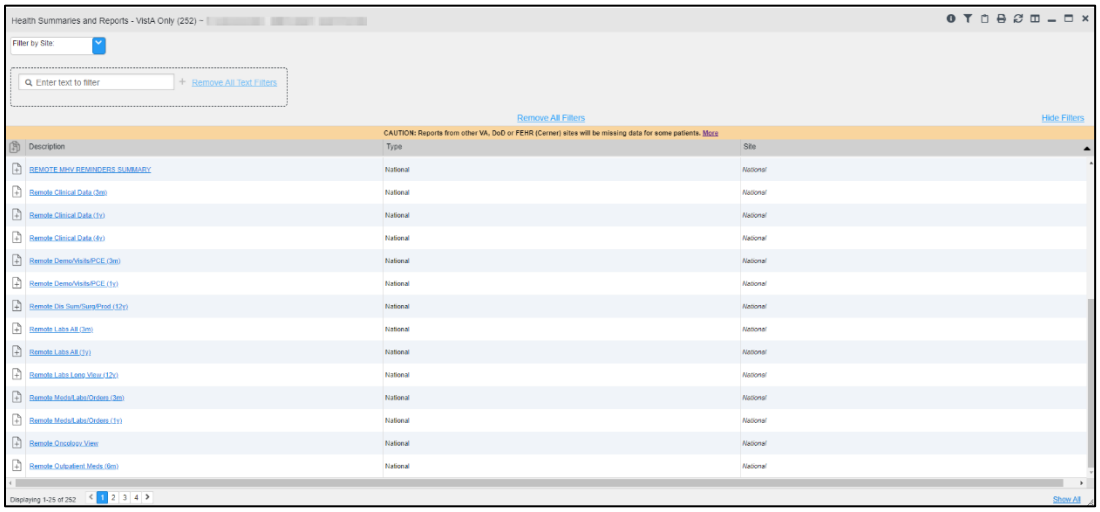
- Description
- Site

**Figure 95: Health Summaries and Reports—VistA Only Widget, Minimized View**

Click **Expanded View >>**from the minimized view of the **Health Summaries and Reports—VistA Only** widget to open an expanded view of the widget. Information in the expanded view (Figure 96) includes:

- Description
- Type
- Site

**Figure 96: Health Summaries and Reports—VistA Only Widget, Expanded View**




## 5.7.2. Viewing Health Summaries

Click a hyperlinked entry in the **Description** column of either the minimized or expanded view of the **Health Summaries and Reports—VistA Only** widget to view additional information for the record. This widget is available to VA users only.

Figure 97 displays a health summary record from a single, local site.

**Figure 97: Health Summary from a Single, Local Site**

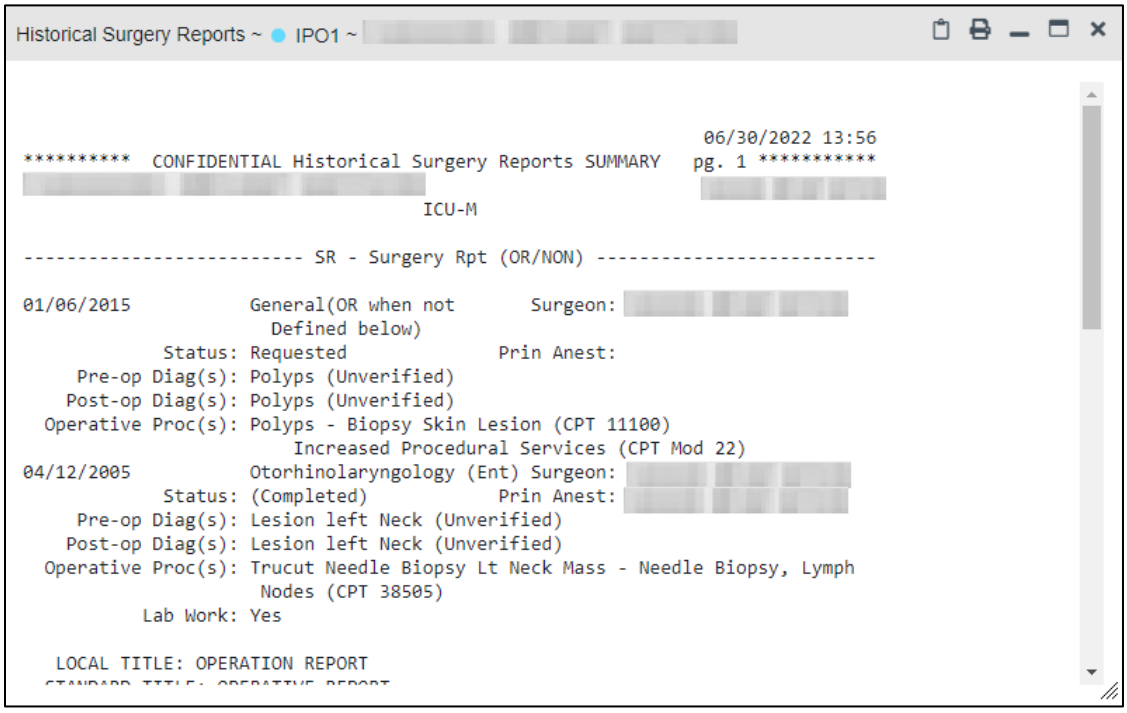
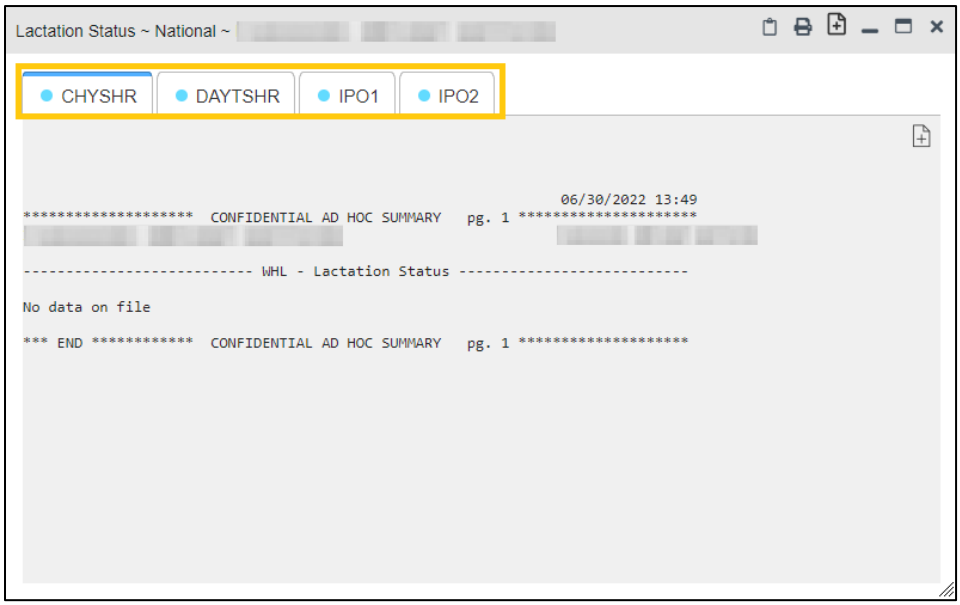


Figure 98 is an example of JLV's display of a national health summary. Within the window, tabs represent the VistA sites where the patient is registered. Click each tab to view patient records for that site.

**Figure 98: National Health Summary, Multiple Sites**




## 5.8. Lab Results Widget

### 5.8.1. Lab Results Widget Data

The **Lab Results** widget displays the patient's lab results information, as well as skin test data and blood transfusion history when available in the patient's record. The information is displayed in reverse chronological order by collection date. Lab data received by DOD sources that include a sensitive flag are masked in the widget views and access to this data is subject to auditing. Additional data may be available in the **Community Health Summaries and Documents** widget.

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

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

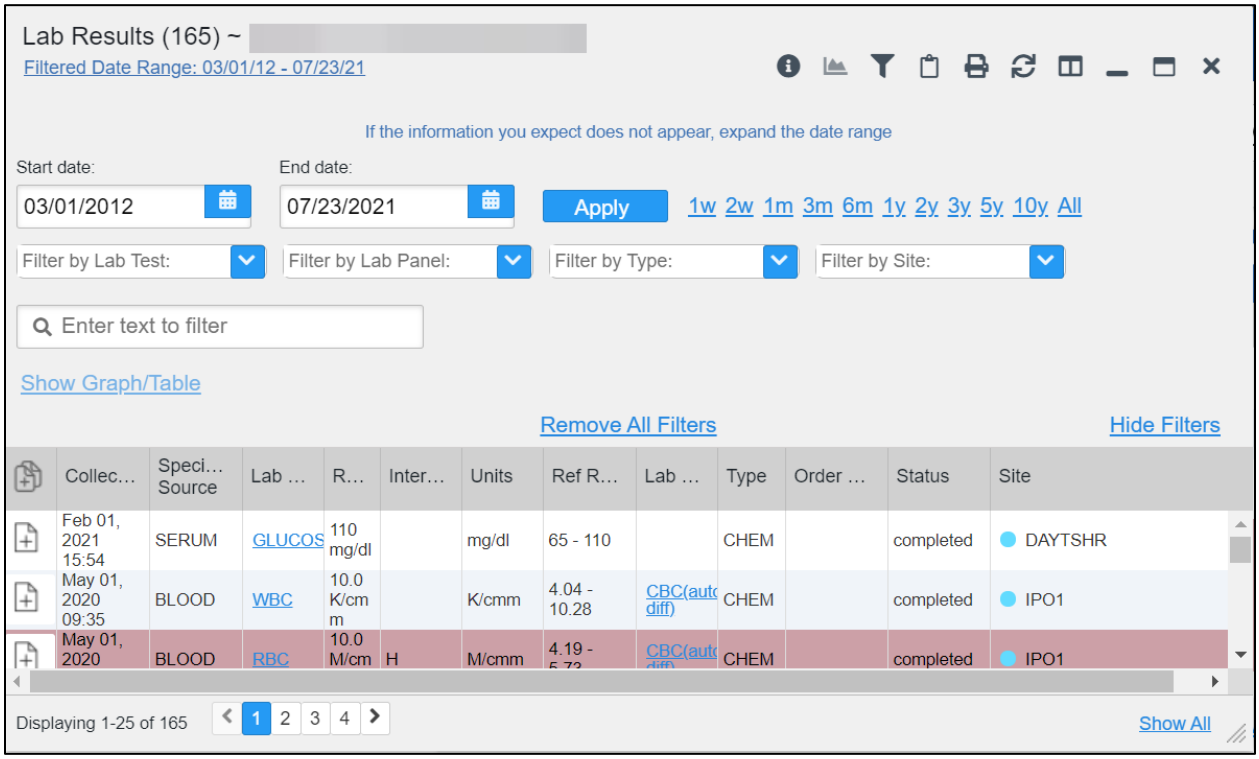
Click **Expanded View >>** from the minimized view of the **Lab Results** widget to open the expanded view (Figure 99). The lab results information in the expanded view includes:

- 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 .

**Figure 99: Lab Results Widget, Expanded View**




The following lab test abbreviations are used in the **Type** column of the expanded view. Hovering over an entry in the **Type** column displays the full lab type name.

- CHEM for CH, COAG, HEM, HE, TOX, RIA, SER, and SEND
- MICRO for MI, MICROBIOLOGY, and BACT
- AP for ANATOMIC PATHOLOGY
- EM for ELECTRON MICROSCOPY
- SP for SURGICAL PATHOLOGY
- ST for SKIN or SKIN TEST
- CY for CYTOLOGY
- AU for AUTOPSY
- BB for BLOOD BANK
- H.I.V for HIV

### 5.8.2. Viewing Lab Results Details

Clicking a hyperlinked entry in the **Lab Test** column of the **Lab Results** widget opens a separate window containing a report of the record (Figure 100).

**Figure 100: Lab Results Details**

Lab Results ~ ▶ FEHR Crossmatch - Ref Lab ~

| | |
|---|---|
| Order Date: | |
| Collection Date: | Apr 01, 2020 22:53 |
| Order Number: | |
| Order Comments: | |
| Accession: | |

| Lab Test | Standardized Lab Test | Specimen Source | Result | Result Date | Units | Interpretation | Reference Range | Certification Date | Performing Lab | Comment |
|---|---|---|---|---|---|---|---|---|---|---|
| Crossmatch - Ref Lab | Standardized Code: | | Compatible | 4/30/20 | | | | Certified: Apr 30, 2020 23:19 | 668 Mann-Grandstaff WA VA Medical Center, 668 Bldg 01, 668 3 South, zzOverflow01, 013 | |

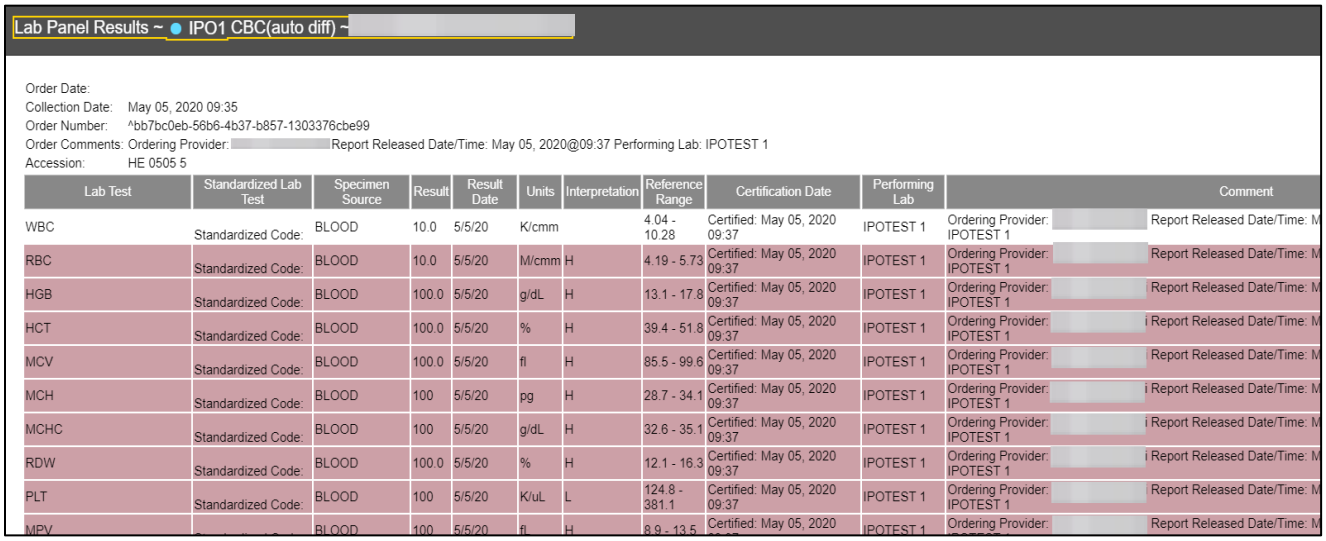
L=Low | H=High | *=Critical | R=Resist | S=Susc | MS=Mod Susc | I=Intermed | []=Uncert /A=Amended | Comments= (O)rder, (I)nterpretations, (R)esult

**NOTE:** A single site report can now be added to the Report Builder from the Blood Bank Report in the Lab Results widget.

### 5.8.3. Viewing Lab Panel Results Details

Clicking a hyperlinked entry in the **Lab Panel** column of the **Lab Results** widget opens a separate window containing a detailed lab panel report (Figure 101).

**Figure 101: Lab Panel Results Detail**



Lab Panel Results ~ IPO1 CBC(auto diff) ~

Order Date:
Collection Date: May 05, 2020 09:35
Order Number: ^bb7bc0eb-56b6-4b37-b857-1303376cbe99
Order Comments: Ordering Provider: Report Released Date/Time: May 05, 2020@09:37 Performing Lab: IPOTEST 1
Accession: HE 0505 5

| Lab Test | Standardized Lab Test | Specimen Source | Result | Result Date | Units | Interpretation | Reference Range | Certification Date | Performing Lab | Comment |
|---|---|---|---|---|---|---|---|---|---|---|
| WBC | Standardized Code: | BLOOD | 10.0 | 5/5/20 | K/cmm | | 4.04 - 10.28 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| RBC | Standardized Code: | BLOOD | 10.0 | 5/5/20 | M/cmm | H | 4.19 - 5.73 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| HGB | Standardized Code: | BLOOD | 100.0 | 5/5/20 | g/dL | H | 13.1 - 17.8 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| HCT | Standardized Code: | BLOOD | 100.0 | 5/5/20 | % | H | 39.4 - 51.8 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| MCV | Standardized Code: | BLOOD | 100.0 | 5/5/20 | fl | H | 85.5 - 99.6 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| MCH | Standardized Code: | BLOOD | 100 | 5/5/20 | pg | H | 28.7 - 34.1 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| MCHC | Standardized Code: | BLOOD | 100 | 5/5/20 | g/dL | H | 32.6 - 35.1 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| RDW | Standardized Code: | BLOOD | 100.0 | 5/5/20 | % | H | 12.1 - 16.3 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| PLT | Standardized Code: | BLOOD | 100 | 5/5/20 | K/uL | L | 124.8 - 381.1 | Certified: May 05, 2020 09:37 | IPOTEST 1 | Ordering Provider: IPOTEST 1 Report Released Date/Time: M |
| MPV | | BLOOD | 100 | 5/5/20 | fL | H | 8.9 - 13.5 | Certified: May 05, 2020 | IPOTEST 1 | Ordering Provider: Report Released Date/Time: M |

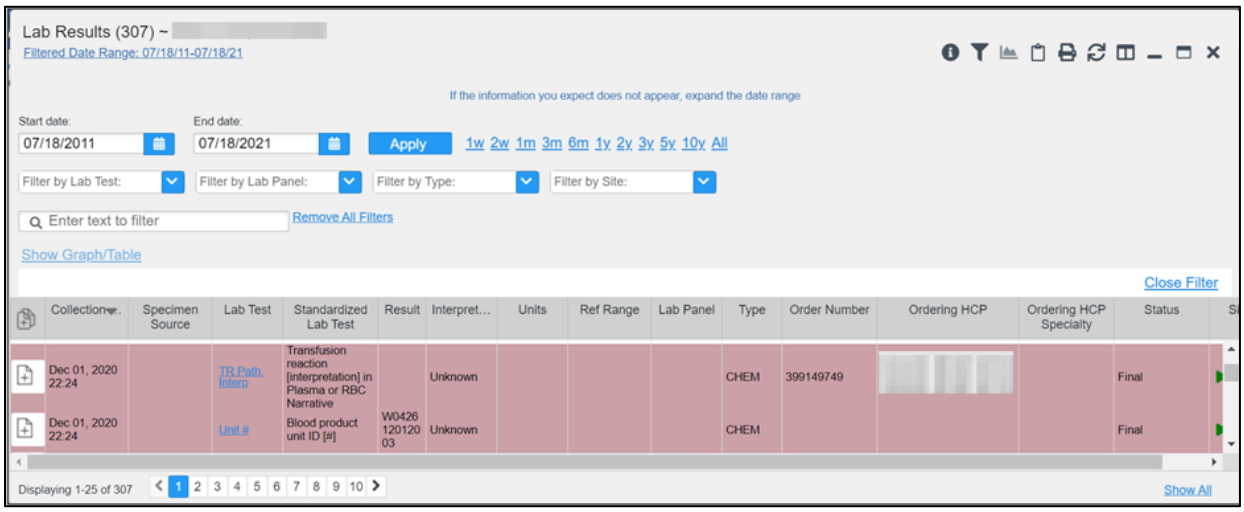
## 5.8.4. Viewing Abnormal Results in the Lab Results Widget

JLV highlights the row for that record in the minimized and expanded views of the widget for records in the **Lab Results** widget where result values fall within a calculated reference range for abnormal.

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

Examples of records with abnormal results are shown in the expanded view of the **Lab Results** widget in Figure 102.

**Figure 102: Lab Results Widget, Abnormal Results in Expanded View**



Lab Results (307) ~
Filtered Date Range: 07/18/11-07/18/21

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

Start date: 07/18/2011 End date: 07/18/2021 Apply 1w 2w 1m 3m 6m 1y 2y 3y 5y 10y All

Filter by Lab Test: Filter by Lab Panel: Filter by Type: Filter by Site:

Enter text to filter Remove All Filters

Show Graph/Table

Close Filter

| Collection | Specimen Source | Lab Test | Standardized Lab Test | Result | Interpret... | Units | Ref Range | Lab Panel | Type | Order Number | Ordering HCP | Ordering HCP Specialty | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Dec 01, 2020 22:24 | | TR Path. Interp | Transfusion reaction [interpretation] in Plasma or RBC Narrative | | Unknown | | | | CHEM | 399149749 | | | Final |
| Dec 01, 2020 22:24 | | Unit # | Blood product unit ID [#] | W0426 12012003 | Unknown | | | | CHEM | | | | Final |

Displaying 1-25 of 307 1 2 3 4 5 6 7 8 9 10 Show All

### 5.8.5. Viewing Results and Interpretations in the Lab Results Widget

JLV displays links in the **Result** and **Interpretation** columns in the expanded views of the widget to indicate additional information is available for records in the **Lab Results** widget where result values and interpretation are available in a record. Figure 103 highlights multiple result and interpretation links within the widget.

**Figure 103: Lab Results Widget, Expanded View, Interpretations Available**

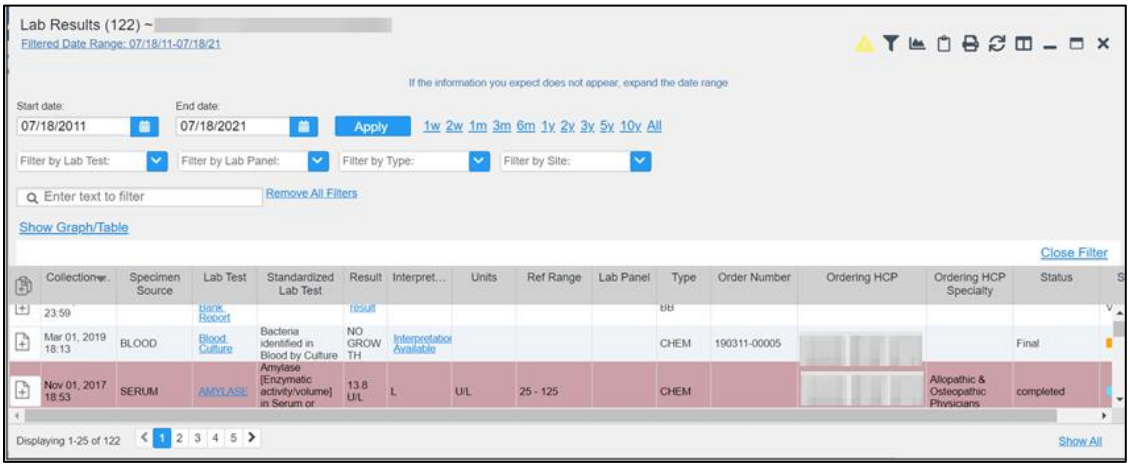
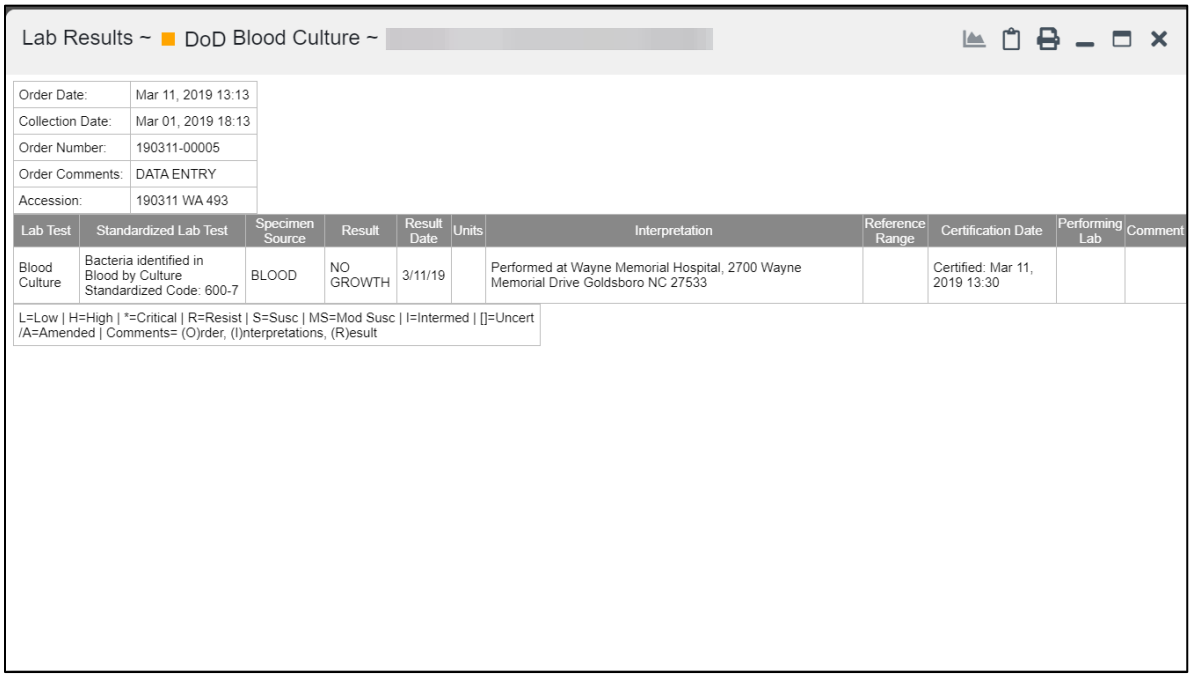



Figure 104 displays an example lab interpretation accessed by clicking a link in the **Interpretation** column. The contents of the window may vary depending on the lab type and what is contained in the patient record.

**Figure 104: Lab Results Interpretation Details**



Lab Results ~ DoD Blood Culture ~

| | |
|---|---|
| Order Date: | Mar 11, 2019 13:13 |
| Collection Date: | Mar 01, 2019 18:13 |
| Order Number: | 190311-00005 |
| Order Comments: | DATA ENTRY |
| Accession: | 190311 WA 493 |

| Lab Test | Standardized Lab Test | Specimen Source | Result | Result Date | Units | Interpretation | Reference Range | Certification Date | Performing Lab | Comment |
|---|---|---|---|---|---|---|---|---|---|---|
| Blood Culture | Bacteria identified in Blood by Culture Standardized Code: 600-7 | BLOOD | NO GROWTH | 3/11/19 | | Performed at Wayne Memorial Hospital, 2700 Wayne Memorial Drive Goldsboro NC 27533 | | Certified: Mar 11, 2019 13:30 | | |

L=Low | H=High | *=Critical | R=Resist | S=Susc | MS=Mod Susc | I=Intermed | []=Uncert /A=Amended | Comments= (O)rder, (I)nterpretations, (R)esult

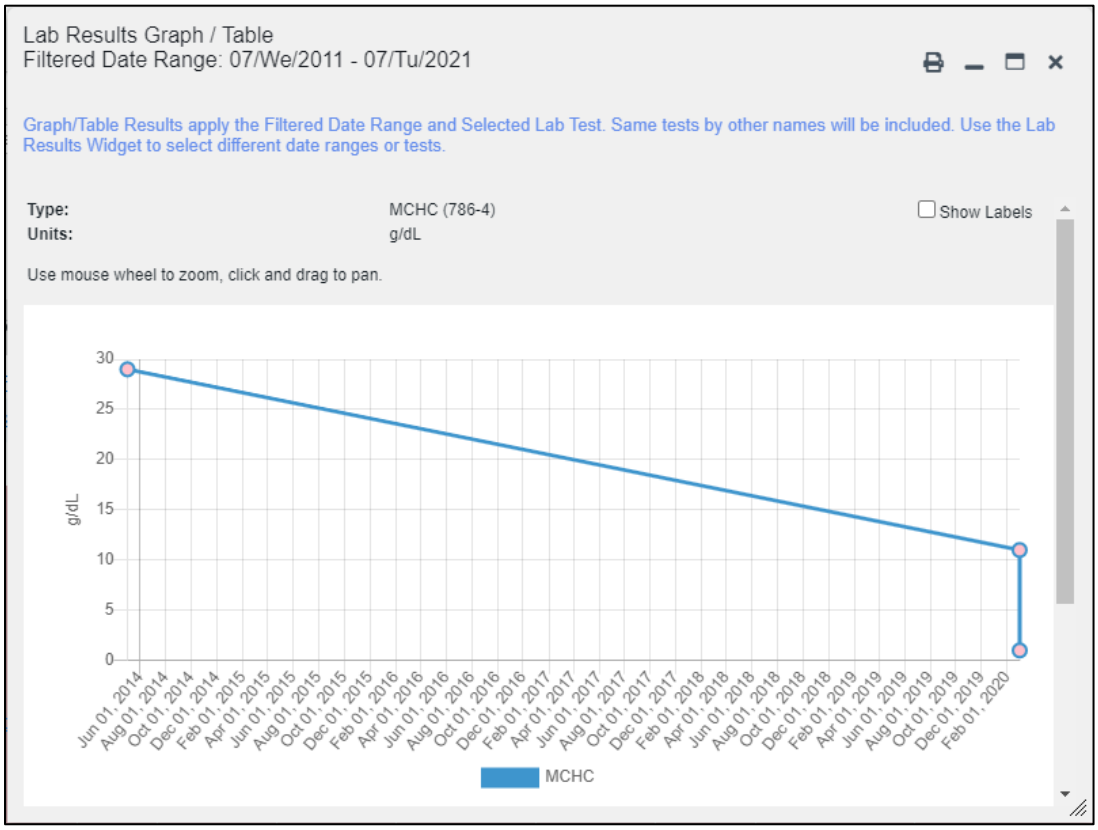
### 5.8.6. Graph/Table View from the Lab Results Widget

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

1) Select from the widget toolbar in either minimized or expanded view **OR -**
2. Click **Expanded View >>** 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 graph data labels on or off.
5. Select ✖ to exit **Graph/Table** view and return to the minimized or expanded view of the **Lab Results** widget.

Figure 105 displays an example **Graph/Table** view of the lab test results.

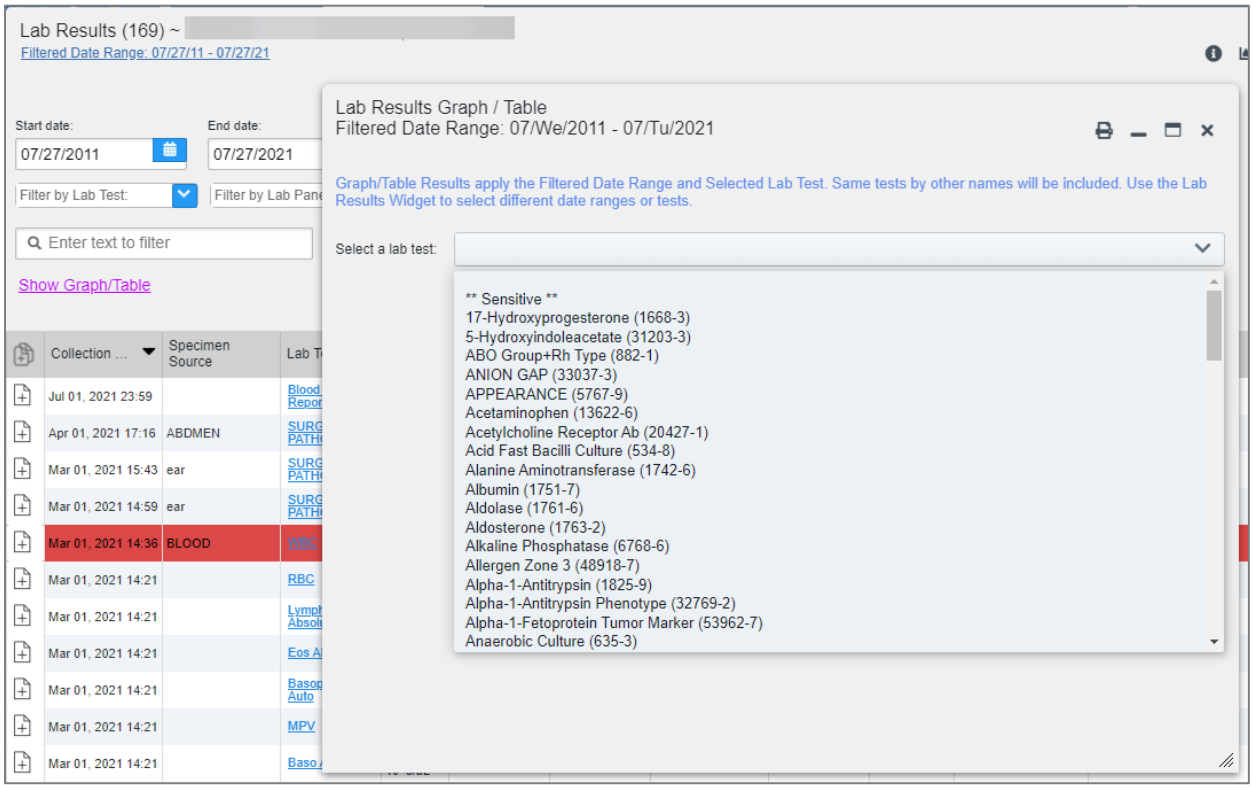
**Figure 105: Lab Results Graph/Table View**




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 those 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 106) once you select either 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 106: Lab Results Graph Table View, Select a Lab Test**




You may also generate a graph for all lab tests with the same LOINC code by selecting from the **Lab Results Details** view (Figure 100).

# 6. Troubleshooting

The following subsections provide information about troubleshooting common errors in JLV.

Please see online help for how-to information within JLV. Please visit REDACTED to see JLV training videos and access additional JLV training materials.

## 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 you against information retrieved from your Smart Card. If you are having trouble logging into JLV, and have used the correct URL for your agency, please review the following before contacting the ESD:

VHA users:

- Have accessed JLV using the JLV URL (REDACTED) or the **JLV** button in CPRS if available
- Have entered their existing CPRS Access and Verify codes correctly in the fields on the JLV **Login** page

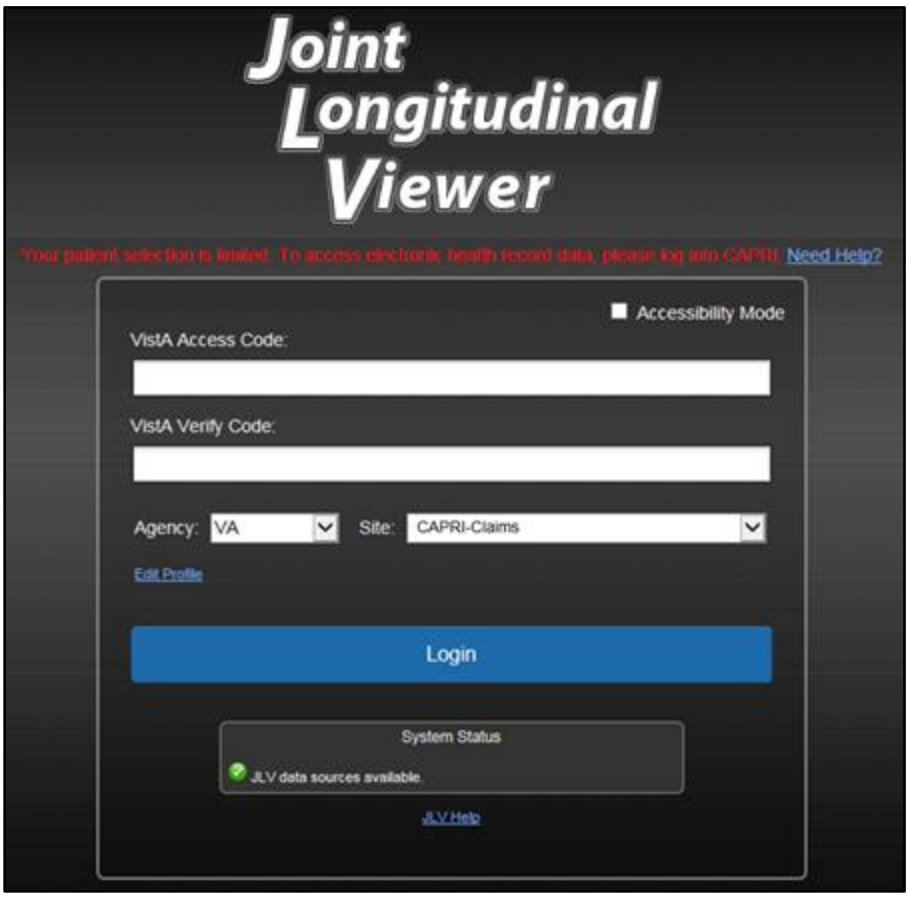
- Have selected a site from the **Site** dropdown list on the JLV **Login** page (Most users must specify the individual facility name or their parent healthcare system name)

CAPRI-Claims users:

- Have accessed JLV using the JLV URL(REDACTED) or the **Joint Longitudinal Viewer** tab in CAPRI
- Have entered their existing CAPRI Access and Verify codes correctly in the fields on the JLV **Login** page
- Have selected CAPRI-Claims from the **Site** dropdown list
- Have connected PIV card to the Claims system in IAM.
- Do not have any CAPRI patient selection restrictions

Users with any CAPRI patient selection restrictions (restricted users) must use the **Joint Longitudinal Viewer** tab in CAPRI to access JLV. Restricted users will see the message shown in Figure 107 on the JLV **Login** page if attempting to access JLV via the JLV URL.

**Figure 107: Login Error—CAPRI Patient Selection Restrictions**



### 6.1.1. Login Page Error Messages

Troubleshooting steps for error messages received at the **Login** page are provided in Table 13.

**Table 13: Error Messages and Resolution Steps**

| Error Message/Behavior | Description/Resolution Steps |
|---|---|
| **No access allowed for this user.** | ***WHY?*** You have not signed into CAPRI or CPRS for 90 days and your account is inactive.<br>***FIX IT:*** Contact the ESD and tell them that either your access to CAPRI or CPRS (whichever you use) has been deactivated. |
| **Access denied. You are not an authorized user.** | ***WHY?*** There is a PIV card processing problem, you selected an invalid security certificate, you may not have the OR CPRS GUI Chart VistA option enabled (VHA), or there may be an issue with your single sign-on account.<br>***FIX IT:***<br>**Reinsert PIV and Choose a Valid Authentication Certificate**<br>1. Close your browser window<br>Reinsert your PIV card and relaunch JLV<br>Select a certificate that is not expired and specifies: *"Issuer: Veterans Affairs User CA B1"*<br>**Confirm Your VistA Account is Linked**<br>1) Go to the REDACTED website<br>Select a certificate that is not expired and specifies: *"Issuer: Veterans Affairs User CA B1"*<br>Select *Link VistA User*<br>Select the VA Medical Center to link<br>Enter your Access/Verify codes<br>Click **Submit**<br>If neither of these methods resolve the error, contact the ESD. |
| **Could not save User Profile.** | ***WHY?*** The error occurred during PIV authentication. It is either a PIV card processing problem, or you chose the wrong security certificate.<br>***FIX IT:***<br>1. Close your browser window<br>Reinsert your PIV card and relaunch JLV<br>Select a certificate that is not expired and specifies: *"Issuer: Veterans Affairs User CA B1"*<br>If unsuccessful, close all open browser windows/tabs, then open the browser and try JLV again |
| **Not a valid ACCESS/VERIFY CODE pair.** | ***WHY?*** JLV could not match your Access and Verify codes to the site selected in the dropdown, or you entered username and password instead of Access/Verify codes.<br>***FIX IT:***<br>1. VHA users must select the parent VistA host site for their facility<br>Reenter your Access and Verify codes (CAPRI codes for CAPRI-Claims users, CPRS codes for VHA users) |

| Error Message/Behavior | Description/Resolution Steps |
|---|---|
| **Page cannot be displayed.** | ***WHY?*** The JLV URL requires certain IE settings.<br>***FIX IT:***<br>1) Click the **Tools** menu (press ALT+X) in IE<br>Select **Internet Options**<br>When the dialog box opens, click the **Advanced** tab<br>Scroll down in the list until you see the Secure Sockets Layer (SSL) 2.0 setting, and ensure it is NOT checked<br>Ensure that the Transport Layer Security (TLS) 1.0, 1.1 and 1.2 settings ARE checked<br>Click **OK** to close the dialog box, then relaunch JLV (The page should load) |
| **Smart Card required.** | ***WHY?*** Your Smart Card was not read by Windows Security and JLV before opening the JLV URL.<br>***FIX IT:***<br>1) Close all browser sessions and browser-based applications<br>Reinsert your PIV card, and relaunch the JLV URL<br>If unsuccessful, close all open IE windows/tabs, then open IE and try JLV again |
| **VERIFY CODE must be changed before continued use.** | ***WHY?*** Your CPRS or CAPRI Verify code has expired.<br>***FIX IT:***<br>1) Open CPRS, VistA, or CAPRI (CAPRI-Claims users)<br>If prompted for a PIV card certificate by CPRS, click **Cancel**<br>You are prompted to create a new Verify code<br>Once your Verify code has been changed for CPRS or CAPRI, relaunch JLV, which recognizes the new code immediately |

### 6.1.2. System Error Messages

Table 14 summarizes system messages that may be presented to JLV users.

**Table 14: System Error Messages**

| Error Message/Behavior | Description/Resolution Steps |
|---|---|
| ***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 page.** | ***WHY?*** You may be using an unsupported browser, or your screen resolution settings do not match the recommended configuration.<br>***FIX IT:***<br>1) Access JLV using IE 11 or Chrome<br>Use a monitor with a minimum screen resolution of 1024 x 768<br>Set the browser zoom feature to 100%<br>If browser display issues continue, log out of JLV, close the browser window, open a new browser window, and log into JLV again |
| **Warning: An error occurred while attempting to retrieve VistA Imaging Viewer URL.** | ***WHY?*** JLV is unable to retrieve the necessary data object to launch a VistA Imaging Viewer instance.<br>***FIX IT:*** Try again later; either VDS or CVIX is offline. |

| Error Message/Behavior | Description/Resolution Steps |
|---|---|
| **MPI Error: Your query yields too many results. Please modify your search parameters to narrow the search.** | ***WHY?*** JLV adheres to VA guidelines and blocks search results when a search request yields more than 10 patients.<br>***FIX IT:*** Modify the information in the **Patient Search** dialog box using additional patient identifiers to reduce the number of results. |
| **MPI Error: There are no patients found using the current parameters.** | ***WHY?*** No patient records were found using the information entered in the **Patient Search** dialog box.<br>***FIX IT:***<br>1. Verify the accuracy of the information<br>Reenter patient identifiers in the **Patient Search** dialog box fields |
| **MPI Error: Application Reject. There was an error attempting to process your query. Please modify your search parameters and try again.** | ***WHY?*** There may be one or more errors in the **Patient Search** dialog fields.<br>***FIX IT:***<br>1) Validate the patient identifiers, and try the search again<br>If problems persist, there may be an error between MPI and the Defense Enrollment Eligibility Reporting System (DEERS) |
| **MPI Error: Patient not found with search elements entered, please provide additional patient identifying information and search again.** | ***WHY?*** No unique patient is found with the identifiers used in the search.<br>***FIX IT:***<br>1) Click **OK** to return to the **Patient Search** dialog<br>Provide additional patient identifiers, like the full first name or DOB |
| **You do not have authorization to view this record. Security regulations prohibit computer access to your own medical record.** | ***WHY?*** VA security regulations prevent you from accessing your own medical records. |
| **You do not have authorization to view this record. Your SSN is missing from the NEW PERSON file. Contact your ADP Coordinator.** | ***WHY?*** Per VA policy, JLV does not allow access to patient records if the JLV user's SSN is not in their VistA profile.<br>***FIX IT:*** Contact your Automated Data Processing Application Coordinator (ADPAC). |
| **An error occurred while attempting to retrieve the document.** | ***WHY?*** This error occurs when something goes wrong when JLV tries to retrieve a selected document.<br>***FIX IT:***<br>1. Try again<br>If the error persists, contact local support or the ESD |
| **An error occurred while attempting to display the document.** | ***WHY?*** This error occurs when JLV tries to retrieve a document but has trouble converting the document to a viewable format.<br>***FIX IT:***<br>1. Try again<br>If the error persists, contact local support or the ESD |
| **Your patient selection is limited. To access electronic health record data, please log into CAPRI.** | ***WHY?*** Some CAPRI-Claims users have patient or site restrictions attached to their profile.<br>***FIX IT:*** Log into CAPRI and select the **Joint Longitudinal Viewer** tab to view patient records. |

# A. Acronyms and Abbreviations

Table 15 lists the acronyms and abbreviations used throughout this document and their descriptions.

**Table 15: Acronyms and Abbreviations**

| Acronym | Description |
|---|---|
| **ADPAC** | Automated Data Processing Application Coordinator |
| **AFB** | Air Force Base |
| **AHLTA** | Armed Forces Health Longitudinal Technology Application |
| **AMC** | Army Medical Center |
| **BMI** | Body Mass Index |
| **BP** | Blood Pressure |
| **BSA** | Body Surface Area |
| **CAPRI** | Compensation and Pension Record Interchange |
| **CCD** | Continuity of Care Document |
| **C-CDA** | Consolidated Clinical Document Architecture |
| **CCOW** | Clinical Context Object Workgroup |
| **CD2** | Critical Decision Point #2 |
| **CDC** | Centers for Disease Control |
| **CDR** | Clinical Data Repository |
| **CHCS** | Composite Health Care System |
| **CPRS** | Computerized Patient Record System |
| **CPT** | Current Procedural Terminology |
| **CVX** | Vaccine Administered |
| **DES** | Data Exchange Service |
| **DEERS** | Defense Enrollment Eligibility Reporting System |
| **DOB** | Date of Birth |
| **DOD** | Department of Defense |
| **EDIPI** | Electronic Data Interchange Personal Identifier |
| **EHR** | Electronic Health Record |
| **EHRM** | Electronic Health Record Modernization |
| **EKG** | Electrocardiogram |
| **ESD** | Enterprise Service Desk |
| **FEHR** | Federal Electronic Health Record |
| **GUI** | Graphical User Interface |
| **HAIMS** | Healthcare Artifact and Image Management Solution |
| **HCP** | Health Care Provider |
| **HCS** | Health Care System |
| **HIE** | Health Information Exchange |
| **HL7** | Health Level Seven International |

| Acronym | Description |
|---|---|
| **IAM** | Identity Access Management |
| **ID** | Identification |
| **IE** | Internet Explorer |
| **IEN** | Internal Entry Number |
| **IP** | Internet Protocol |
| **JB** | Joint Base |
| **JLV** | Joint Longitudinal Viewer |
| **LOINC** | Logical Observation Identifiers Names and Codes |
| **MAH** | Medication Administration History |
| **MAL** | Medication Administration Log |
| **MHS** | Military Health System |
| **MI** | Middle Initial |
| **MPI** | Master Person Index |
| **NUCC** | National Uniform Claim Committee |
| **OIT** | Office of Information and Technology |
| **PACT** | Patient-Aligned Care Team |
| **PCMM** | Primary Care Management Module |
| **PCP** | Primary Care Provider |
| **PDWS** | Patient Discovery Web Service |
| **PIN** | Personal Identification Number |
| **PIV** | Personal Identity Verification |
| **SIGI** | Self-Identified Gender Identity |
| **SSL** | Secure Sockets Layer |
| **SSN** | Social Security Number |
| **SSOi** | Single Sign-On Internal |
| **TLS** | Transport Layer Security |
| **TMDS** | Theater Medical Data Store |
| **UC** | University of California |
| **UI** | User Interface |
| **URL** | Uniform Resource Locator |
| **VA** | Department of Veterans Affairs |
| **VBA** | Veterans Benefits Administration |
| **VDS** | VistA Data Service |
| **VHIE** | Veterans Health Information Exchange |
| **VIP** | Veteran-Focused Integrated Process |
| **VLER** | Virtual Lifetime Electronic Record |
| **VHA** | Veterans Health Administration |
| **VistA** | Veterans Health Information Systems and Technology Architecture |

## B. Patient Portal Widgets, Columns, and Supported Views

Table 16 details each data column within the minimized and expanded views of each widget. Data columns available in each view are ordered from left to right.

- An asterisk (*) next to a column title in the table indicates the data for that record is available in "detail view" from within the widget; clicking a link opens the contents of that record in a standalone window.
- A dagger (†) next to a column title in the table indicates the data in that column is normalized (mapped to standards).
- A double dagger (‡) next to a column title in the table indicates the column is hidden by default and must be added from ◫.

**Table 16: Widget Details**

| Widget | Description | Minimized View | Expanded View |
|---|---|---|---|
| **Admissions** | Displays the patient's inpatient admissions information including VA expanded admission discharge transfer history and detailed discharge diagnosis data | Adm Date* \| Discharge Date \| Admit Diagnosis† \| Discharge Diagnosis \| Ward \| Site | Adm Date* \| Discharge Date \| Ward \| Provider† \| Diagnosis† \| Discharge Diagnosis† \| Registration Number \| Site |
| **Allergies** | Displays the patient's allergy information | Date Recorded \| Allergen*† \| Standardized Allergen† \| Site | Date Recorded \| Allergen*† \| Standardized Allergen† \| Reaction \| Severity \|Comments \| Site |
| **Appointments** | Displays the patient's past and future appointments information | Scheduled Date/Time* \| Clinic \| Provider†[20] \| Site | Scheduled Date/Time* \| Clinic \| Provider†[20] \| Provider Specialty†[20]\| Appointment Status \| Type \| Reason \| Site |
| **Cardiology Studies - FEHR and VA MUSE Only** | Displays EKGs and cardiology studies with related images from all FEHR and VA MUSE sites and systems | Date \| Description (Test Type) \| Status \| Image | N/A |
| **Clinical Reminders—VistA Only** | Displays the patient's clinical reminders information from all VistA sites | Reminder \| Site*[21] | Reminder \| Site*[21] |

[20] Column hover display includes provider address and phone number.
[21] Lists a sortable, filterable reminder column for each site to which the patient is registered. A maximum of three site columns display in minimized view. All site columns display in expanded view.

| Widget | Description | Minimized View | Expanded View |
|---|---|---|---|
| **Community Health Summaries** | Displays the patient's community health documents from VHIE partners including any CCDs, in C32 and C62 formats, and HL7 C-CDA structured documents | Date \| Document* \| Source | N/A |
| **Consults** | Displays the patient's outpatient consult information | Date \| Consult Order* \| Status \| Site | Date \| Consult Order* \| Provider† \| Provider Specialty† \| Status \| Site |
| **Demographics** | Displays the patient's non-clinical or personal data including Patient Inquiry, Demographics, Disabilities, Primary Care assignments, Insurance, Military Service, and Enrollment and Eligibility | The site tabs provide a summary from the site (VA or DOD) where the patient is registered | Click the patient name to open a separate window that provides patient demographic details (VistA patient inquiry for each VA site and DOD DEERS), as well as inpatient and attending providers |
| **Discharge/Inpatient Summaries** | Displays the patient's discharge summaries, history, and physical summaries | Date \| Note Type/Title* \| Site | Date \| Note Type/Title* \| Provider† \| Provider Specialty† \| Location \| Visit/Adm Date \| Status \| Site |
| **Documents & Images** | Displays documents from multiple clinical domains including radiology reports (exams), progress notes, encounters - outpatient, consults, discharge summaries, inpatient notes, questionnaires, and HAIMS and MHS GENESIS records | Date (Note[s]*) \| Description*† \| Provider† \| Image \| Site | Date (Note[s]*) \| Description*† \| Standardized Description† \| Provider† \| Provider Specialty† \| Location \| Status \| Image/Attachment \| Source System \| Site |
| **Encounters—Outpatient** | Displays records of the patient's outpatient encounters | Encounter Date (Details* \| Note*) \| Clinic \| Provider† \| Diagnosis† \| Attachment \| Site | Encounter Date (Details* \| Note*) \| Clinic \| Status \| Type \| Provider† \| Provider Specialty† \| Reason \| Diagnosis† \| Standardized Diagnosis† \| Attachment \| Site |
| **Federal EHR/MHS GENESIS** | Displays patient documents and dental summaries from the MHS GENESIS system | Date \| Document Title* \| Document Type \| Site | N/A |
| **Health Summaries and Reports—VistA Only** | Displays the patient's national and local health summaries and reports from VistA sites where the patient has been registered | Description* \| Site | Description* \| Type \| Site |

| Widget | Description | Minimized View | Expanded View |
|---|---|---|---|
| **Imaging** | Displays images from multiple sources, including all Vista Imaging, Cerner imaging, DOD Radiology, and HAIMS artifacts. | Date \| Image/Attachment \| #image \| Image Title \| Site | Date \| Image/Attachment \| #image \| Image Title \| Description \| Class \| Package \| Procedure \| Origin \| Status \| Specialty \| Event Type \| Capture Date \| Source System \| Site |
| **Immunizations** | Displays the patient's immunization history, including skin test data (where available) in the patient's record | Vaccine Administered Date (Note[s]*) \| Vaccine Administered Product Type*† \| Adverse Vaccine Reaction \| Site (Reporting) | Vaccine Administered Date (Note[s]*) \| Vaccine Administered Product Type*† \| Standardized Vaccine Product Type† \| Series \| Immunization Result \| Adverse Vaccine Reaction \| Exemption/Refusal Reason \| Exemption/Refusal Date \| Site of Admin \| Site (Reporting)[22] |
| **Lab Results** | Displays the patient's lab results information by individual lab test for all test types (i.e., Microbiology, Cytopathology, and Surgical Pathology) as well as skin test data and blood bank (blood type testing and transfusion) history, when available in the patient's record | Collection Date \| Lab Test*† \| Result* \| Lab Panel* \| Site | Collection Date \| Specimen Source \| Lab Test*† \| Standardized Lab Test†‡ \| Result* \| Interpretation* \| Units \| Ref Range \| Lab Panel* \| Type \| Order Number \| Ordering HCP† \| Ordering HCP Specialty†‡ \| Status \| Site |
| **Medications—Inpatient** | Displays a patient's inpatient medications information including inpatient infusions | Order Number \| Drug Name*† \| Status \| Standardized Status † \| Order Stop Date \| Site | Order Number \| Order Start Date \| Order Stop Date \| Drug Name*† \| Standardized Drug Name† \| Status \| Standardized Status † \| Ordering HCP† \| Ordering HCP Specialty† \| Schedule \| MAH/MAL \| Quantity \| Site |
| **Medications—Outpatient** | Displays the patient's outpatient medications information, including those discontinued or expired within the past 120 days | Last Fill \| Drug Name*† \| Status \| Standardized Status † \| Expires \| Site | Last Fill \| Drug Name*† \| Standardized Drug Name† \| Prescription Number \| Sig \| Indication \| Quantity \| Days' Supply \| Refills Left* \| Status \| Standardized Status † \| Ordering HCP† \| Ordering HCP Specialty† \| Expires \| Site |

[22] The **Immunizations** widget differentiates between the reporting site and the site of administration of a vaccine.

| Widget | Description | Minimized View | Expanded View |
|---|---|---|---|
| **Orders** | Displays the patient's medication, consult, radiology, and lab orders | Order Date \| Description*† \| Status/Priority \| Type \| Site | Order Date \| Order Number \| Description*† \| Standardized Description† \| Status/Priority \| Start Date \| Stop Date \| Type \| Provider† \| Provider Specialty† \| Site |
| **Problem List** | Displays the patient's problem list information | Updated Date \| Problem Description*† \| Status \| Linked Items[23] \| Site | Updated Date \| Onset \| Problem Description*† \| Standardized Description† \| ICD Code \| ICD Description \| Severity \| Type \| Status \| Linked Items[23] \| Site |
| **Procedures** | Displays the patient's procedures for all Current Procedural Terminology (CPT) codes | Procedure Date (Medicine Full Reports* \| Note[s]*) \| Location[24] \| Provider† \| Procedure Description† \| Image \| Site[25] | Procedure Date (Medicine Full Reports* \| Note[s])* \| Location[24] \| Provider† \| Provider Specialty† \| CPT Code[26] \| Procedure Description† \| Standardized Procedure Description† \| Image \| Type \| Site[25] |
| **Progress Notes** | Displays the patient's progress notes information as well as advance directives, clinical warnings, and crisis notes | Date \| Document Type/Title*† \| Provider† \| Image \| Site | Date \| Document Type/Title*† \| Standardized Document Type† \| Provider† \| Provider Specialty† \| Clinic \| Image \| Site |
| **Questionnaires, Deployment, Exposure Records (AHLTA Only)** | Displays the patient's history of questionnaires and DOD pre- and post-deployment assessments | Date \| Document Title*†\| Site | Date \| Entered By \| Document Title*†\| Standardized Document Title† \| Site |
| **Radiology Reports** | Displays the patient's radiology exams information | Date \| Exam*†\| Image \| Site | Date \| Exam Number \| Exam*†\| Standardized Radiology Exam† \| CPT Description† \| Status \| Results \| Image \| Site |
| **Social, Family, and Other Past Histories** | Displays the patient's history records from DOD only | Date Reported \| Type \| Findings \| Status \| Site | Date Reported \| Type \| Findings \| Standardized Findings \| Comments \| Status \| Site |
| **Surgery/Procedure Reports** | Displays surgical and operative reports for all dates | Date \| Note Title \| Provider \| Site | Date \| Note Title \| Standardized Title \| Procedure \| Provider \| Image \| Site |

[23] **Linked Item**s contains DOD data only
[24] **Location** represents a ward or clinic within a given DOD or VA facility where the procedure took place.
[25] **Site** represents the source of procedure (i.e., VA or DOD). **Site** is different from **Location** or **Facility**.
[26] **CPT Code** is limited to clinically relevant medical or administrative procedure types.

| Widget | Description | Minimized View | Expanded View |
|---|---|---|---|
| **Vitals** | Displays the patient's vital signs information from inpatient or outpatient settings | Date Taken \| Type*† \| Result[27] \| Converted Result[28] \| Site | Date Taken \| Type*† \| Standardized Type† \| Result[27] \| Converted Result[28] \| Site |

[27] **Result** displays all results received natively as metric, received as imperial and converted to metric, and those values that are neither metric nor imperial.
[28] **Converted Result** displays all results received natively as imperial and all imperial conversions of metric results with the applicable, concatenated unit (height, weight, temperature, etc.), but remains blank for all numeric or text results that are neither metric or imperial and metric results that have no imperial equivalent/conversion (e.g., blood pressure [BP], body mass index [BMI], body surface area [BSA]).